

QUALITY MEAT SCOTLAND

Annual Review

2025/26



Impact Overview



PROVENANCE

Scotch Beef, Scotch Lamb and Specially Selected Pork brand health measures are at an all time high



88% awareness of Scotch Beef and Scotch Lamb and
58% awareness of **SSP**



76% saying that they will now **seek out Scotch brands** when they shop



When You Know You Know
consumer marketing campaign reached more than
70%
of adults in Scotland



Butchers Marketing Campaign drove
over 6K

visits to the 'Find your local butcher' section of our website in a four-week period



15%
reduction in **Cattle & Sheep Standards**

through streamlining and reduced duplication, whilst maintaining scheme robustness



PRODUCTIVITY & PROFITABILITY

Scotland's red-meat exports:



Reached a record
£173m
up **26% in value**
with volumes
10%
higher



EU markets
accounted for over
99%
of beef and lamb
export revenues, and
98%
of overall export sales



The
top five
markets by value are
France, Netherlands, Germany, Italy and Belgium



Showcased the **very best of Scotland's product** and reinforced why Scotch remains one of the world's most trusted and admired red-meat brands to hundreds of buyers at **Anuga**

QMS's Scotch Beef Club made a trailblazing entry into the Scandinavian market, and we held a launch event in Sweden attended by more than 100 local food service professionals and industry leaders



Monitor Farm Scotland programme reached halfway point - **98% of attendees plan to return** to future Monitor Farm meetings and around **85% planning to make changes** following meeting attendance



PLANET & PLACE

Meating Our Potential



In-house economic modelling highlights **Scottish beef sector growth by 2030** worth around

£300m

to Scotland's economy



Consumer research shows

90%

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



Campaign reached more than

3m

in first year and garners **30 pledge signatories** from key stakeholders, including 11 MSPs/MPs from both the UK and Scottish Governments



Brought **74 key stakeholders** from all major political parties to farms, learning centres and industry facilities across **11 key regions in Scotland**



Combined **community engagement activity** throughout the year **reaching 16k** (more than double compared to the previous year)

250 red meat supply chain attendees to the QMS 'Future Thinking on Red Meat' Conference



PEOPLE

Positive staff engagement with ongoing leadership and management programme:

"the best training in my career!"





Sarah Millar
QMS Chief Executive



Kate Rowell
QMS Chair

Well on our way to making Scotland *the* choice for premium red meat

Chair & Chief Executive Address

2025/26 has been a year of momentum and great progress across every part of our supply chain. This year marked the successful completion of the second delivery year of our five-year strategy to 2028, and we are proud of the meaningful strategic progress in our vision to make Scotland the choice for premium red meat.

From market expansion and on-farm innovation to building confidence and opportunities, our workforce and partners are committed to supporting a collaborative, resilient and sustainable future for Scotland's red meat industry.

We are unapologetic in our quest for profitability across the supply chain and have achieved record performance in growing the visibility and credibility of Scotland's red meat produce at home and abroad.

Our 2025 export survey highlighted record-breaking results for Scottish beef, lamb and fifth-quarter exports at £173million in value (up 26%), with the EU accounting for the majority of this. Our annual presence at leading international food and drink trade shows, such as Anuga in Cologne in 2025, fosters the relationships and builds the reputation of Scotch Beef, Scotch Lamb and Specially Selected Pork which is paramount to this success.

To enable new market entries, a critical focus continues to be building resilience pre and post the farm gate. The current Monitor Farm Scotland programme, funded by Scottish Government and managed by Quality Meat Scotland (QMS), has reached the halfway point and the vast majority (85%) plan to make positive changes following meeting attendance to support business productivity and profitability.

We continue to have extensive exposure to consumers across Scotland, with our established multi-media 'When You Know, You Know' campaign, which runs seasonal bursts throughout the year, reaching 70% of adults in Scotland. The sustained investment and consistent messaging to educate shoppers on the importance of Quality Assurance (QA) and what's behind the blue labels has resulted in Scotch Beef, Scotch Lamb and Specially Selected Pork brand health measures being at an alltime high. Scotch Beef and Scotch Lamb have massive recognition at 88% and 58% now recognise Specially Selected Pork, which is the strongest awareness levels since tracking began in 2022.

Alongside this, we delivered one of the most significant improvement updates to our cattle and sheep assurance standards in recent years, streamlining requirements while maintaining the rigour that underpins PGI status and brand integrity. In addition, we undertook a comprehensive review of the Pig Scheme Standards and have developed improvement proposals to maintain relevance, robustness and credibility ahead of member consultation.

The success of Meating Our Potential, our partnership campaign with the Scottish Red Meat Resilience Group (SRMRG) to highlight the significant economic opportunity



for Scotland's beef sector to industry, decision makers and citizens has been extraordinary. The campaign is rooted in QMS's in-house economic modelling, which unveiled an opportunity to support growing demand worth around £300 million for Scotland. Our stand and presence around Royal Highland Show (RHS) is always a calendar highlight, but 2025 will be one to remember with both the Scottish and UK Governments pledging their support to feeding our growing nation with sustainably produced, local red meat. A firm commitment was also made by Scottish Government at our breakfast briefing that there will be no policy to cut livestock numbers. The campaign broke into national media, making front-page news and reaching more than 3 million with a clear message to back local producers or 'hand away' our opportunity to imports.

The drumbeat of Meating Our Potential is consistent across our promotional and reputational activities, with key aims to build industry confidence, provide practical support

and tackle barriers to growth. The emotive careers toolkit featuring real case studies of various red meat sector roles tackles critical labour shortages across the red meat supply chain.

We have also continued to demonstrate that Scotland's red meat sector is part of the solution to climate, nature and biodiversity challenges. Strong progress has been made in the first of the five-year Environmental Baseline Pilot in partnership with Agriculture and Horticulture Development Board (AHDB) and Meat Promotion Wales (HCC), with soil and carbon testing and scanning on the 22 participating Scottish livestock farms to help producers measure and reduce emissions and showcase agriculture's environmental benefits.

This is but a snapshot of all that we do to support and develop industry, from ongoing market insights and red meat statistical analysis, to knowledge exchange activities and events such as the return of our QMS Conference, and proactive engagements with political stakeholders in the run up to the Holyrood elections and with schools and communities across Scotland on the benefits of red meat using our robust cohort of Make it Scotch Ambassadors.

QMS and our partners have made great strides amid the challenges of market volatility, global trade uncertainty and fragile producer confidence. Concerns over decline in livestock numbers across all red meat species have not gone away and we will continue to tackle this head on through spearheading the Meating Our Potential campaign targeting industry, decision-makers and citizens in collaboration with the SRMRG.

Demand for nutritious red meat protein is strong and only growing, and Scotland is well placed to meet that demand. We will continue to lead the development of Scotland's red meat sector, driving consumer demand who recognise our brands as a mark of integrity and fostering profitable and innovative supply chains which support jobs and communities across the country.

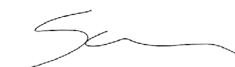
Global demand for nutritious red meat protein is strong and Scotland is well placed to supply into this growing premium market.

CHAIR & CHIEF EXECUTIVE ADDRESS

From global exhibitions to family TV screens, government chambers to school classrooms we will continue to grow opportunities, build brand trust and protect the reputation of red meat to further support confidence, competitiveness and growth.

Our sincere thanks to our talented and passionate team and partners for everything you do to make our vision for Scotland's red meat sector a reality. As we approach the

halfway point in our strategy, we can be confident that we are well on our way to making Scotland the clear choice for premium red meat.



Sarah Millar
QMS Chief Executive



Kate Rowell
QMS Chair





Director Highlights



Emma Heath
Director of Marketing

Provenance Marketing 2025/26

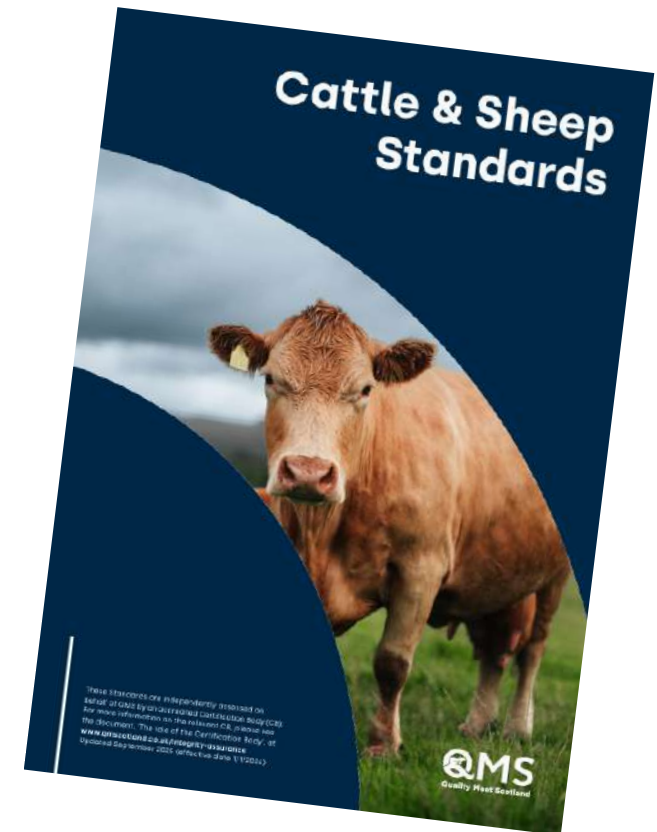
This year, Scotch Beef, Scotch Lamb and Specially Selected Pork brand health measures are at an all time high, reflecting increased awareness, relevance and consumer understanding of what's behind our renowned blue labels.

This success is driven by sustained investment and consistent, insight-led messaging that educates shoppers on quality assurance and the importance of the Scotch Difference.

Our strong performance this year includes the results and benefits of two full years of our integrated marketing team that connects the brand team, insights specialist and the brands integrity function together. Significant progress has been made in strengthening the integrity, visibility and value of Quality Assurance (QA) schemes, alongside delivering insight-led, high impact marketing activity that demonstrably improved brand recognition, trust and understanding among consumers.

Strengthening Standards and Assurance

The updated Cattle & Sheep Standards went live in January and saw a 15% reduction in standards through streamlining and reduced duplication, whilst maintaining scheme robustness. The new format is designed to be easier to read, and the clear 'what's changed and why' document was also well received by members as part of the consultation process and now forms an integral part of the standards review. A comprehensive review of the Pig Scheme Standards progressed well, with benchmarking completed and extensive



stakeholder input gathered and reviewed by the Standards Setting Body. Proposed changes have been developed with a clear focus on maintaining relevance, robustness and credibility, with supporting communications prepared for the forthcoming member consultation. All of this work reinforces confidence in the standards and ensures they continue to meet industry and consumer expectations.

Maintaining traceability remained a priority. In partnership with ScotEID, updates were made to the Scotch Potential Eligibility Cattle Checker, ensuring the continued robustness and reliability of cattle traceability systems that underpin scheme integrity.

Supporting Members and Building Engagement

Our Marketing to Members activity continued throughout the year, allowing us to interact with members on a more regular basis. We also increased presence in auction markets through advertising that highlighted the benefits of QA membership, and pop-up Q&A sessions with the Brands Integrity team. We have also seen positive movement in the 2025 member survey vs last year with 'Overall Satisfaction with being a member' 3.6 out of 5 (was 3.2 out of 5). 'I'd recommend being a member' now stands at 3.5 out of 5 (was 2 out of 5).

Delivering High-Impact Consumer Marketing

Now at the end of the second year of our "When You Know, You Know" campaign we've delivered integrated consumer campaigns that have achieved extensive reach across Scotland across Summer, Autumn, Lamb for St Andrew's Day, Festive & Hogmanay and the new year Health & Wellbeing campaign. We have met or exceeded our target of reaching 70% of adults in Scotland with each key campaign phase using a mix of media that includes TV, Video on Demand (e.g. STV Player), paid social, digital, radio, press, outdoor and



tactical partnerships. This was strengthened with year-round PR and influencer activity and a robust social media calendar. One of the highlights was a new TV ad that featured a day in the life on a family farm in Carluke, Lanarkshire, which was really well received by industry and consumers alike. We look forward to continuing to take this key consumer marketing campaign from strength-to-strength.

The full year has seen a set of impressive statistics when it comes to PR activity for Scotch Beef, Scotch Lamb and Specially Selected Pork. A mix of topical stories, stunts, seasonal events, research and recipe content saw 65 pieces of coverage being secured and a total of 63.7M total impressions. This was largely driven by stories appearing in print (37% which included regional press, national press and consumer magazines) followed by online (31%), social media (29%) and broadcast (3%). Our influencer activity also landed well and generated 188 pieces of coverage with 22 influencers reaching over 294K people. We will continue this winning formula into next year.

" This year, Scotch Beef, Scotch Lamb and Specially Selected Pork brand health measures are at an alltime high, reflecting increased awareness, relevance and consumer understanding of what's behind our renowned blue labels.

This success is driven by sustained investment and consistent, insightful messaging that educates shoppers on quality assurance and the importance of the Scotch Difference.



Supporting our stockists

Following some independent research into the motivations and barriers to shopping at a local butcher, we used these insights to develop a new and different Butchers Marketing Campaign which further strengthened visibility of the QMS brands across radio, print, digital and social media platforms with the aim of driving footfall to our Scotch Butchers Club members. This activity has exceeded industry benchmarks of reach and engagement and driven over 6000 visits to the 'Find your local butcher' section of our website in a four-week period – proof that the campaign is working.

We delivered a number of projects with retailer partners including activation at the Royal Highland Show with Aldi and Lidl, outdoor advertising outside key Tesco beef stores,

in-store leaflets with Aldi educating on the Scotch Difference, Farmfoods activity on Specially Selected Pork (SSP), Lamb for St Andrew's Day activity in Lidl, and digital activity to support M&S' Best in Season Lamb initiative.

Insight driven opportunities

We continue to provide specialist insight support on the red meat category and shopper. This has included several cross-levy body projects, regular market reporting, and ongoing tailored support for retailers and processors with everything from ad hoc requests to regular analysis and supporting project work to maximise category opportunities and drive growth. Our relationship with all key insight providers continues to be strong and collaborative, adding value to our work.

Demonstrating Measurable Brand Impact

The bi-annual YouGov Brand Health Study continues to show substantial improvements across all key metrics compared with the January 2024 baseline. Recognition, trust, understanding of QA, perceptions of animal welfare and health benefits all increased significantly across all three proteins. Notably, consumer understanding of why QA products are better than non-assured alternatives rose sharply, demonstrating the effectiveness of campaign messaging and reinforcing the value of the QA proposition and what's behind the label.

Collectively, the activities delivered by the team have strengthened confidence in QA, delivered clear value to members and enhanced consumer understanding and trust - laying strong foundations for future growth and resilience.

Productivity & Profitability

Business Development 2025/26



Flying the flag for Scotland on the global stage

Scotland's red-meat exports reached a record £173 million: up 26% in value with volumes 10% higher. EU markets accounted for over 99% of beef and lamb export revenues, and 98% of overall export sales. The top five markets by value are France, Germany, the Netherlands, Italy, and Belgium. This highlights the resilience of our red meat sector and the continued strength of our relationships with European importers. It also shows that the world increasingly values the standards, welfare and provenance behind Scotch Beef, Scotch Lamb and Specially Selected Pork.

Our attendance at Anuga 2025 in Cologne - one of the biggest events in the international food and drink calendar - played an important role in strengthening these international relationships. Over the five-day trade show, we showcased the very best of Scotland's product and reinforced why Scotch remains one of the world's most trusted and admired red-meat brands to hundreds of buyers.

Scotch Butchers Club and Scotch Beef Club

QMS's Scotch Beef Club made a trailblazing entry into the Scandinavian market, and we held a launch event in Sweden attended by more than 100 local food service professionals and industry leaders. On Scottish soil, we've had some world-class additions including Turnberry Resort in Ayrshire and acclaimed Edinburgh-based Contini Restaurant Group, further



Tom Gibson

Director of Business Development

“ At home and abroad, it's been a great year for Business Development with record exports, and strong engagement with initiatives, skills development and innovation across the supply chain.

cementing commitments to sourcing and serving the very best Scottish produce.

The Scotch Butchers Club continues to support local, independent butchers selling high-quality, traceable Scottish red meat through value-added events, knowledge-transfer days and butchery demonstrations. Some highlights include supporting the Scottish Young Chef of the Year's placement at The Ritz, with visits to kitchens at Claridge's and The Dorchester, as well as an inward mission with 12 independent butchers.

Monitor Farm Scotland

There is ongoing momentum across the 'farmer-led, farmer-driven' Monitor Farm Scotland programme sponsored by the

Scottish Government. This includes around 30 open meetings bringing together around 1000 attendees. Management groups have selected topics which matter most to producers at pivotal points throughout the year, identifying appropriate speakers which reflect local priorities. A particular focus has been reporting on innovation project progress, and a comprehensive innovation project overview was published to provide farmers with data, practical tools and proven approaches to support informed decision-making and sustainable progress. One example is the four Monitor Farms trialling innovative virtual fencing technology, who are already seeing positive environmental and cattle management benefits.

Feedback has been positive from meetings and events, with 98% of attendees planning to return to future Monitor Farm



meetings and around 85% of respondents planning to make changes following meeting attendance. Some proposed actions include improvements in nutrition planning, grazing management, body condition scoring and financial planning. The supportive peer-to-peer social networking element of the programme also remains a significant benefit.

Climate & Nature

Year one of the five-year Environmental Baseline Pilot, in partnership with AHDB and HCC aiming to redefine farmer recognition for delivering both food and environmental goods and supporting industry progress towards net zero, is complete.

This includes initial on-farm measurement of carbon stocks – both above-ground in the trees and hedges and below-ground in the roots and soil. This has been carried out using aerial light detection and ranging (LiDAR) scanning, as well as mapping water and nutrient run-off risks. In addition, all farms are having carbon audits.

The data analysis of the initial results across the 35 Scottish farms (22 of which are livestock farms) is almost complete and should be shared in a report in the coming months.

Wider supply chain engagement

We engage with processors throughout the year and were able to have a special focus on private kill processors through Scottish Government small producers group funding. We

have also supported global market opportunities from China to Holland with exporting processors and other partner organisations.

Skills development for producers is another focus and our Meat the Market events across Scotland have been well attended, sharing information and facilitating discussion on carcass grading, market requirements, and how to boost profitability. Our Building Better Beef & Lamb workshops expand to help producers understand the entire supply chain and how on-farm management decisions directly impact returns. We have also focussed on developing pig producer skills, identifying training priorities such as movement and handling and biosecurity training, and rolling them out across the year.

Health and welfare is another critical work area and our long-standing Scottish Pig Health Scheme initiative continues to monitor and improve the health status of the national pig herd. Schemes which have been renewed this year include a national PRRS control and biosecurity programme as well as the salmonella scheme to mitigate the economic impact of the respective virus and disease.

As part of our pre- and post-farm gate engagements we also exhibit, showcase initiatives and deliver seminars at industry events such as AgriScot.



Holly McLennan
Director of Communications
& External Affairs

“Our holistic C&EA team worked across our key disciplines with external partners to deliver an extraordinary year of success; engaging the Scottish red meat supply chain, political decision makers and wider citizens to support a sustainable future.”

Planet & Place

Communications and External Affairs (C&EA) 2025/26

Meating Our Potential

QMS, in collaboration with the Scottish Red Meat Resilience Group (SRMRG), spearheaded a campaign to showcase the significant Scottish beef sector opportunity to critical audiences, which has become familiar amongst industry.

'Meating Our Potential' is rooted in in-house economic modelling which forecasts growing demand for beef but lack of supply up to 2030 which, if met, could generate £281 million in output and £76 million in GVA for Scotland's economy.

A communications plan brought this data to life, with various tactics to resonate with producers (and the wider supply chain), political decision makers and wider citizens.



Contextualising the opportunity through 'headline grabbers' such as 'a couple more cows per herd is all it would take to meet our potential' and 'home grown or handed away' landed the campaign on front page industry and national news. We also conducted consumer research for another 'hook' that resonated with families revealing '90% of people in Scotland said they would prefer to buy Scottish beef, pork and lamb, even if imports from elsewhere were 30% cheaper'. The earned media activity had a combined reach of more than 3 million.

Government briefings alongside a pledge with the slogan 'feed our growing nation with locally produced sustainable red meat' was central to the Public Affairs activity. We achieved 30 pledge signatories from key stakeholders, including 11 MSPs/MPs from both UK and Scottish Government. On the back of this, at our Royal Highland Show industry breakfast, the Cabinet Secretary for Rural Affairs, Land Reform and Islands announced the firm commitment from Scottish Government that there will be no policy to cut livestock numbers.

Cutting Edge Roles in Red Meat

Stemming from Meating Our Potential is a sister campaign, launched during Scottish Apprenticeship Week 2026, to tackle critical labour challenges across the Scottish red meat supply chain.

We commissioned research which showed the Scottish public are favourable towards careers in the red meat sector, which only increased when they receive more information (70% up from 49% initially), but there are barriers to entry.



A toolkit containing 25 video case studies of real people working in the sector was developed to attract job seekers and career changers as well as support employers with recruitment. Through our campaigning and partner sharing across the supply chain, we have reached around 1m within the first month.

Political engagements

Throughout the year, we have held 25 political meetings and visits, engaging a variety of key stakeholders including MSPs, MPs, councillors and candidates in the run up to the Holyrood election.

In collaboration with the SRMRG, we brought 74 of these stakeholders from all major political parties to farms, learning centres and industry facilities across 11 key regions in Scotland. These visits showcased the value of the red meat sector and its importance in both rural and urban locations.

Reputation

Underpinned by a newly developed Reputation Strategy, our storytelling continued across communities in Scotland, and combined activities across cookery demonstrations, talks, Eat to Compete sessions, Farm to Fork days and careers events reached a combined 16k. This is more than double the reach compared to the previous year.

Critical to this success has been building a cohort of around 40 Make it Scotch Ambassadors; a group of passionate individuals from across the red meat, food and drink and education sectors equipped to share the benefits of premium red meat from Scotland in their local areas.

Eat to Compete – the initiative connecting sporting performance with red meat nutrition – has undergone expansion into new sports, such as football as well as rugby, with a special focus on engaging girls and young women. This is particularly important as research shows insufficient intake of key nutrients such as iron and vitamin B12 amongst these groups.

QMS Conference

Towards the end of the 2025/26 year, the QMS Conference returned with the focus of 'Future Thinking on Red Meat'.

250 attendees, including industry leaders and political decision makers, gathered at Murrayfield for a rich speaker programme covering key challenges and opportunities for the Scottish red meat sector, from the shared livestock supply shortage to the red meat market and future opportunities.

"Fantastic QMS Conference! Some brilliant speakers and great insights to the future of the red meat sector"
– Scottish Craft Butchers

Fantastic QMS Conference! Some brilliant speakers and great insights to the future of the red meat sector

– Scottish Craft Butchers

Other key delivery

Our broad in-house team continues to provide ongoing services and activities for our members and levy payers, just some highlights are:

- The annual Red Meat Industry Profile, the key red meat statistical publication for businesses and decision makers
- Proactively sharing the positive evidence we have on red meat with key political influencers, such as the briefing to Edinburgh City Council on the negative impacts of plant-based catering, strong rebuttal following the Climate Change Committee's carbon budget advice for Scotland to reduce livestock numbers and around 20 Scottish, UK and European consultation responses
- Investing in new science and research to help showcase the importance of red meat across health, wealth and environment, such as the ongoing co-funded Nutritional Life Cycle Analysis to link red meat's environmental impact with nutritional value
- Facilitating our restructured, strategic action-focussed Industry Leadership Groups across key sectors – Beef, Sheep, Pig and Climate and Nature, with clear priorities and projects to take forward into the new year
- Useful industry communications such as the weekly QMS newsletter with market updates, key news and information, which now has around 8k subscribers and a monthly QMS podcast, which has a global listenership and more than 30k downloads.



People Corporate Services 2025/26

Employee engagement has remained strong throughout the year, with positive and constructive feedback from our staff survey and continued progress in developing our People Strategy.

This work has focused on investing in our existing workforce, strengthening leadership capability, supporting individual development and fostering effective team building across QMS. A critical focus has been shaping our culture, influencing organisational behaviour and unlocking high performance through tailored workshops, which have been described by colleagues as the best training they've done in their careers.

We also completed our transition to a fully cloudbased operating environment, improving accessibility, collaboration and resilience across the organisation. In addition, we are aiming to improve stakeholder management through a transition to a customer relationship management (CRM) system in the coming months.



Debbie Phillips
Head of Corporate Services

“ This year marked a pivotal shift for QMS, with a strong focus on developing our People Strategy. We are laying the foundations for supporting, engaging and strengthening our team, ensuring our people remain central to QMS’s continued success.

QMS Strategic Impact Indicators 2025/26

These indicators have been designed to measure the effectiveness of our initiatives, assess the impact of our work and track our progress towards the goals outlined in our five-year strategic plan. This year marks the second year of the strategy and progress from our first year, which was the baseline to evaluate our performance.

Key	
	= positive
	= neutral position
	= downward trend
Baseline	= no prior years' data

Strategic Pillar 1 - Provenance	No.	Impact indicator	2025/26 results
	1.1	The % of total Scotch beef, lamb and pork were marketed under the Scotch and Specially Selected Pork brand.	 Scotch Beef - 55.5% coverage in Scotland (+3.7% YoY)  Scotch Lamb - 26.6% coverage in Scotland (-3.3% YoY)  Specially Selected Pork - 8.7% coverage in Scotland (+5.4% YoY).
	1.2	Consumer brand awareness, brand perception and propensity to purchase.	 Driven by ongoing consumer marketing activity, we saw positive increases across our independently tracked brand health measures vs January 2025 for Scotch Beef, Scotch Lamb and Specially Selected Pork. This includes highest recorded recognition of our brands (88% Scotch Beef and Scotch Lamb and 58% SSP) and 76% saying that they will now seek out Scotch brands when they shop (up from 64%).
	1.3	Increased proportion of lamb reared in Scotland will be processed in Scotland.	 Maintained more than 36% from 2024/25 (which was up from 35% in 2023/24)
	1.4	Increase in % of total livestock population covered by Quality Assurance.	 Data from Scottish auctions shows that 95.1% of prime cattle and 91.9% of prime lambs and hogs sold in 2025 were quality assured (reduction of around 2% for prime cattle and marginal decline for prime lambs). Full pig scheme numbers are subject to the completion of audits – estimating high level of the national herd quality assured, similar to cattle and lambs.

Strategic Pillar 2 - Productivity & Profitability	No.	Impact indicator	2025/26 results
	2.1	A greater proportion of output going to export market.	↑ Beef, lamb and fifth quarter exports reached £173m in 2024/25 (26% higher than 2023/24).
	2.2	Increase in partnership projects/ aligned marketing projects with multiple retailers.	↔ Eight partnership projects with quality over quantity approach.
	2.3	Increase in total output sold to independent retail.	↑ 8.3% (2025) 7.7% (2024).
	2.4	Increased output from breeding herds and flock.	↑ 2025 calving rates have continued to trend higher (+ 4% over 5 years). Lambing rates also edged higher in June 2025 (+1.1% over five years).
	2.5	Increased engagement with on farm initiatives, such as Monitor Farm & Meat the Market.	↔ Strong turnout and engagement have been maintained at meetings. 98% of attendees plan to return to future meetings and 85% plan to make changes following meeting attendance.
	2.6	Increase in partnership projects with processors.	↑ 76 projects confirmed in 2025/2026 (56 in 2024/25).

Strategic Pillar 3 – Planet & Place	No.	Impact indicator	2025/26 results
	3.1	Every Quality Assurance member engaged with an emissions reduction programme.	Baseline - Basic Payment Scheme (BPS) data shows 43% have claimed a carbon audit (will be mandatory for every farmer and crofter who wants to claim any agricultural support by 2028).
	3.2	Environmental progress is articulated and visible through our brands.	Baseline – high-level year one environmental baselining results show strong carbon stocks in soil and some farms beyond net zero (report due in summer 2026).
	3.3	The Scottish public perception is favourable towards the Scottish red meat sector.	↑ Perception remains positive as shown in 1.2 - brand recognition, trust, Scottish provenance, quality, sustainability and an understanding of QA and Welfare is all high.

Strategic Pillar 4 - People	No.	Impact indicator	2025/26 results
	4.1	Positive perception of QMS among stakeholders.	 Stakeholder audiences continue to grow (newsletter – 8k (+2k); combined social media followers approx. 40k (+1k); QMS podcast downloads more than 30k (+3k). 250 industry attendees for QMS's 'Future Thinking on Red Meat' Conference - 50% rated experience as 'excellent' and 45% 'very good'.
	4.2	Positive perception of QMS among levy payers.	 Brands Integrity survey 'Overall Satisfaction with being a member' 3.6 out of 5 (was 3.2 out of 5 in 2024). 'I'd recommend being a member' 3.5 out of 5 (was 2 out of 5 in 2024).
	4.3	QMS is viewed by employees as a great place to work.	 Positive engagement with ongoing leadership and management programme. People Strategy being developed.
	4.4	Positive perception of QMS among decision makers.	 Pre-election strategic engagement programme delivered in collaboration with the SRMRG: 11 regional events, bringing 74 MSPs, MPs, councillors and prospective candidates from all major political parties to farms, learning centres and industry facilities across Scotland.

Impact summary

April-September 2025

Quality Meat Scotland Impact
Summary April-September 2025



Impact summary



When You Know You Know consumer marketing campaign reaching more than **70%** of adults in Scotland



New Butchers Marketing campaign heard **13.6m times** in four-weeks

Highest recorded consumer awareness of our premium brands:

Scotch Beef and Scotch Lamb



88%

and Specially Selected Pork



58%

October 2025-March 2026

PILLAR	INDICATOR	IMPACT IN ACTION
Provenance	% of total beef, lamb and pork on shelves under the Scotch or Specially Selected Pork brand	Quality Assurance Activity: - Latest review of the Pig Scheme Standards is underway with benchmarking completed, stakeholder input and proposed standard changes reviewed by the Standard Setting Body. - QMS have been working with ScotEID to update our Scotch Potential Eligibility Cattle Checker (SPECC) to ensure traceability remains robust. - The new tender for the Quality Assurance contract as part of Non-Departmental Public Body (NDPB) procurement requirements is underway. - Marketing to members activity has continued with the design, production and placement of physical and digital advertisements in auction markets across Scotland, which aim to highlight the benefits of QA membership. We have also developed a 'What it means to be a member' brochure, video and social media assets.
	Consumer brand awareness, brand perception and propensity to purchase	
	An increased proportion of lamb reared in Scotland will be processed in Scotland	
	% of total livestock population covered by Quality Assurance	
		Marketing Activity: - Festive & Hogmanay Campaign – reaching 79% of adults in Scotland: STV Channel Sponsorship; STV, STV Player and Sky Regional TV advert; premium digital articles and ads on the Times online and the Scottish Sun online supported with social media activity - Health & Wellbeing Campaign – reaching 76% of adults in Scotland and in total campaign was seen or heard over 46 million times: Scott Baptie TV advert across STV, STV Player and Sky Regional; digital audio; gym advertisements & tactical billboards during Hyrox competition; social media ads; Blue Monday pop up in Glasgow; Valentine's Day radio competition and premium digital article on the Times online - NEW Butchers Marketing Campaign seen across radio, print, digital, Facebook, Instagram & TikTok. Across the whole campaign that ran for just under four weeks, advertising encouraging footfall to local Scotch Butchers Club members was seen or heard 13.6 million times, driving over 6,000 visits to the Find a Butcher page on makeitscotch.com.
		YouGov Brand Health Check performance versus Jan 24 benchmark: - Scotch Beef and Scotch Lamb are brands that I recognise 88% (Jan 24: 78%) / SSP is a brand that I recognise 58% (Jan 24: 35%) - These products are produced under strict quality control measures that are independently assessed – SB/SL: 72% (Jan 24: 58%) SSP: 55% (Jan 24: 41%) - Are brands that I trust – SB/SL: 84% (Jan 24: 75%) SSP: 62% (Jan 24: 14%) - I understand why the brands are better than meat that is not quality assured – SB/SL: 70% (Jan 24: 60%) SSP: 63% (Jan 24: 19%) - The brands are associated with better animal welfare – SB/SL: 72% (Jan 24: 64%) SSP: 58% (Jan 24: 45%) - The brands are healthy products – SB/SL: 78% (Jan 24: 68%) SSP: 61% (Jan 24: 17%)

PILLAR	INDICATOR	IMPACT IN ACTION
Productivity & Profitability	A greater proportion of output going to export markets	Events Anuga 2025 - Showcased premium red meat to hundreds of buyers over five-days at one of the world's largest food and beverage trade shows in Cologne AgriScot - exhibiting and showcasing key industry initiatives; supporting interactive live beef demonstration focussing on beef from the dairy herd; supporting Scotch Beef and Scottish Sheep Farm of the Year awards; supporting seminar on Scottish Antimicrobial Use Pilot LiveScot - Scotch Beef Club, run by QMS, championing quality alongside John Scott Meat
	Increase in partnership projects/aligned marketing projects with multiple retailers	Genetics Progress - Three case studies showing genetic gain in carcass output, composition and efficiency. Case studies communicated in farming press, STV, and a scientific conference at the end of the year. Genetic communications also showed increased output in the beef herd with a 4% decrease in overall environmental output across 20 years. A package of 12+ publications highlighting the impact of genetic selection to encourage farmers to utilise selection tools to optimise their herds and flocks. 44 engagements / projects with processors
	Increase in total output sold to independent retail	
	Increased output from breeding herds and flock	Scotch Beef Club - Acclaimed Edinburgh-based Contini Restaurant Group joining Scotch Beef Club, further cementing its commitment to sourcing and serving the very best Scottish produce - Launch of Scotch Beef Club in Sweden in January, marking the initiative's first entry into the Scandinavian market. Event attended by more than 100 foodservice professionals and industry leaders from across Sweden
	Increased engagement with on farm initiatives such as Monitor Farm / Meat the Market	Meat the Market Activity in Orkney - Meeting attended by over 90 people - Supply chain video produced has been viewed over 1,000 times - Two Building Better Beef & Lamb workshops to help producers understand the entire supply chain and how on-farm management decisions directly impact returns.
	acclaimed	Monitor Farm Scotland Programme Four Monitor Farms trialling innovative virtual fencing technology (already seeing positive environmental and cattle management benefits) For quarter Four: - Seven open meetings, covering topics such as succession, profitability, financial tips and disease management 37 social media posts this quarter 76 YouTube videos with over 39k views and over 1,800 hours watched 121 press articles to date

Scotch Beef Club entered the **Scandinavian market** for the first time



Flying the flag for Scotland's premium red meat on a global stage at **Anuga 2025**

Several well-attended

Monitor Farm



meetings covering topics which **matter most to farmers**

Around **40k views** of Monitor Farm **knowledge exchange videos**



25 case study
videos produced
showcasing the variety of
roles and real people working
across the red meat sector



Around 40
Make it Scotch
Ambassadors across
key regions in Scotland



300
Meat Vouchers used
across Scottish schools



Reaching more than
3000 people
in Scotland through
community engagement
activities



PILLAR	INDICATOR	IMPACT IN ACTION
Planet & Place	Every Quality Assurance member engaged with an emissions reduction programme	Cutting Edge Roles in Red Meat campaign - Sister campaign to Meating Our Potential in collaboration with the Scottish Red Meat Resilience Group (SRMRG) to tackle critical labour challenges across the red meat supply chain - Commissioned research (Essencemediacom) into career perceptions across the red meat sector; highlighted 70% held a positive view of working in the industry after receiving more information, up from 49% initially - Developed employer and job seeker toolkit to support recruitment and attraction, including 25 case study videos of real people working in the sector - Communications campaign, launched on Scottish Apprenticeship Week, reached more than 1m people in first month Community Engagement - Combined reach of community outreach activities between Autumn and Winter engaged more than 3000 young people, educators, parents and carers across Scotland. This included cookery and butchery demonstrations, Food & Farming talks, Eat to Compete sessions and careers events - Eat to Compete has focussed engagement on girls and young women with two special days: (1) Glasgow City FC (GCFC) girl's day - 44 young players from GCFC Academy experienced four sessions and were joined by GCFC first team players (2) Boroughmuir Rugby Club girls' day – with Bethany Ferguson and special guest Nika van der Merwe who has 24.5k social media followers. - Around 40 Make it Scotch Ambassadors across key regions in Scotland to deliver these activities, each passionate about premium red meat in Scotland 300 Meat Vouchers used across schools in Scotland, enabling students to cook with, learn about and understand the nutrition benefits of high-quality, sustainable red meat Reputation - Refreshed 'positive red meat conversations' January toolkit - Confirmed Scottish research partner for Nutritional Life Cycle Analysis alongside Meat Industry Association NZ, Australian Meat Processor Corporation, and Meat Institute US, which aims to calculate the 'true' climate impact of red meat compared to plant-based diets Market Intelligence - QMS delegation at World Meat Congress in Brazil, delivering presentations on red meat economics and nutrition and sharing thought leadership on global production in agriculture trade press - Ongoing services including weekly and monthly market reporting and commentaries on key numbers and movements across the three proteins and their associated supply chains.
	Environmental progress is articulated and visible through our brands.	
	Scottish public perception is favourable towards the Scottish red meat sector	

PILLAR	INDICATOR	IMPACT IN ACTION
People	Positive perception of QMS amongst stakeholders	Nationwide pre-election political engagement programme In collaboration with the SRMRG, across 11 regional events, brought 74 MSPs, MPs, councillors and prospective candidates from all major political parties to farms, learning centres and industry facilities across Scotland to showcase the value of the red meat sector
	Positive perception of QMS amongst levy payers	QMS 'Future Thinking on Red Meat' Conference 2026 250 attendees across the red meat supply chain, including industry leaders and political decision makers - Six industry sponsors (Institute of Auctioneers & Appraisers in Scotland (IAAS) – Gold, Scotland Food & Drink, Virgin Money and National Beef Association – Silver, Scotch Beef and Scotch Lamb sponsored by ABP and Kepak) - Keynote address from Scottish Government's Cabinet Secretary for Rural Affairs, Land Reform and Islands - Strong programme across topics which matter most to the sector including the shared livestock supply shortage challenge, red meat market and future opportunities - Rich calibre of eight external speakers including: Dr Phil Hadley, Secretary General of the International Meat Secretariat; Lesley Ann Gray, Strategic Insight Director Scotland, Kantar; Richard Wood, Category Director Meat, Fish, Poultry & Eggs, Tesco; David Millar, Scottish Chef of the Year 2025 and Executive Chef at Carlowrie Castle; Neil Wilson, Food and Agriculture Stakeholders Taskforce (FAST) Chair and Executive Director IAAS; Dr Carrie Ruxton, award-winning dietitian; Nicola Wordie, Livestock FarmHER; and Anna Jones, Freelance Journalist and Broadcaster and Founder of Just Farmers 50% of Conference attendees rated the overall conference experience as 'excellent' and 45% rated it 'very good' "Fantastic QMS conference! Some brilliant speakers and great insights to the future of the red meat sector." – Scottish Craft Butchers "A great showcase of the work undertaken by QMS, always inspired by the energy." – Dave Walker, Chief Agriculture Officer, SCI "This was an excellent opportunity to meet so many people from our supply chain" – Peter Myles, NSA
	QMS is viewed by employees as a great place to work	
	Positive perception of QMS amongst decision makers	

QMS

'Future Thinking on Red Meat' Conference



Attended by **250 attendees** across the red meat supply chain



50% of attendees rated **'excellent'** and 45% rated **'very good'**



"Fantastic QMS conference! Some brilliant speakers and great insights to the future of the red meat sector."

– Scottish Craft Butchers

11 regional events



bringing **74 political stakeholders** from all major parties to farms, learning centres and industry facilities across Scotland

PILLAR	INDICATOR	IMPACT IN ACTION
People continued	Positive perception of QMS amongst stakeholders	Corporate Communications - Facilitating a successful visit of HRH The Princess Royal, President of the Scotch Chef's Club to Corskie Farm (Scotch Beef Farm of the Year Award winners 2024) to learn about the farm's pedigree cattle enterprises and its approach to grassland management and calving - Lamb for St Andrew's Day (LFSAD) - school events; Holyrood canteen event attended by a record number of MSPs; press; social media and special LSAD QMS podcast 1000 new social media followers and excellent average engagement rate of 6% in 6-month period - Ongoing industry services such as weekly newsletter reaching around 8k and monthly podcast achieving more than 30k downloads. Public Affairs 10 UK, Scottish and European consultation responses across 6-month period. This included key topics such as on-farm animal welfare, Draft Climate Change Plan, and Good Food Nation - Engaging local authorities, industry and decision makers at events such as the COLSA Conference in St Andrews and Scotland Food & Drink's Showcase at Scottish Parliament - Annual Public Affairs newsletter for MSPs, MPs, councillors and policymakers, tailored across eight key regions Industry Strategy - Each of the four restructured Industry Leadership Groups met three times throughout the year, with a key focus on refining objectives and priority projects for these strategic action-focussed groups
	Positive perception of QMS amongst levy payers	
	QMS is viewed by employees as a great place to work	
	Positive perception of QMS amongst decision makers	



Financials

The full Annual Report & Accounts for the financial year ended 31 March 2026 will be available via the following link by December 2026: [here](#)

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