# Corporate Business Plan

2026/27 EDITION

QMS
Quality Meat Scotland

# Contents

1.0

# WELCOME

## from Chair Kate Rowell and Chief Executive Sarah Millar

As we approach the halfway point of our five-year strategy, 2025–26 has been a year of strong delivery, growing confidence and tangible impact for Scotland's red meat sector.

With the right talent in place and a clear strategic direction, Quality Meat Scotland (QMS) has made meaningful progress across our three strategic pillars: provenance, productivity and profitability, and planet and place. Together, these pillars continue to guide our work to make Scotland **the** choice for premium red meat.

Across the past year, our focus has been on turning ambition into action. That progress is reflected not only in record commercial performance, but in the growing visibility, credibility and influence of Scotland's red meat sector at home and abroad. It is also evident in the strength of collaboration across industry, government and key partners, as we work collectively to address shared challenges and unlock future opportunities.

Progress under our productivity and profitability pillar demonstrates how strategic focus is translating into real-world outcomes, from record export growth to improved business confidence and capability at farm level. Scottish red meat exports reached a record value of £164 million in 2025, up 19% in value and 4% in volume, with strong demand across key European markets. International engagement, including our presence at the world's largest and leading food and drink trade fair, Anuga, has strengthened commercial relationships and opened new doors for Scotch Beef, Scotch Lamb and Prime Scottish Pork. At home, the QMS managed Monitor Farm Scotland initiative reached its halfway point, with the programme already demonstrating measurable improvements in farmer knowledge, confidence and decision-making. These outcomes underline the importance of targeted investment in skills, data and practical support to help businesses improve performance and resilience.

Provenance remains at the heart of everything we do, underpinning trust in our brands and reinforcing Scotland's reputation for quality. Our When You Know You Know (WYKYK) campaign has been one of our most impactful to date, delivering high-reach, multi-channel marketing that has significantly increased consumer awareness and understanding of the value of Scotch red meat. 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 Protected Geographical Indication (PGI) status and brand integrity. Innovation in assurance, including the launch of the QMS Traceability Checker, is making it easier than ever for businesses and customers to access trusted information. High-profile engagement, from Royal Highland Show appearances to retail and food service partnerships, has further strengthened the visibility and credibility of our brands.

Through our planet and place pillar, we have continued to demonstrate that Scotland's red meat sector is part of the solution to climate, nature and biodiversity challenges. The first year of the five-year Environmental Baselining Pilot in partnership with Agriculture and Horticulture Development Board (AHDB) has made significant progress, with testing and scanning on the 22 participating Scottish livestock farms to help producers measure and reduce emissions and showcase agriculture's environmental benefits. Alongside this, the launch of the Meating Our Potential campaign in partnership with the Scottish Red Meat Resilience Group has seen significant traction, centred in robust beef sector economic modelling showing the significant opportunity that increased beef production could make to Scotland's economy. The results from the first phase of the campaign highlight significant awareness and support gathering has been achieved, with communications reaching more than three million in Scotland, as well as endorsement from organisations across the Scottish red meat supply chain and both the Scottish and UK Governments. Community engagement to tell the positive red meat story has also gone from strength to strength, with an expanded Make it Scotch Ambassador network, the continued success of the Eat to Compete initiative connecting red meat nutrition with sporting performance, and deeper engagement with young people, communities, educators and influencers across the country.

While there is much to celebrate, we are clear about the challenges facing the sector. Market volatility, global trade uncertainty and fragile producer confidence continue to weigh heavily on decision-making and investment. Livestock numbers remain a critical concern, and without coordinated action, further decline would have serious implications across the entire supply chain. These challenges reinforce the importance of leadership, collaboration and clear evidence to support informed policy and business decisions.

At the same time, the opportunities ahead are significant. Global demand for high-quality, sustainably produced meat continues to grow, and Scotland is well placed to meet that demand. The next phase of our marketing and market development activity will build on strong foundations, while our role in climate change policy discussions, strategic political engagement with partners around the upcoming Holyrood election and wider public sector reform will be critical in ensuring the sector's voice is heard. Continued focus on trade and export opportunities, building consumer trust in our brands, continued and new industry-led programmes, and protecting the reputation of red meat where it matters most will further support confidence, competitiveness and growth.

As we look ahead to the remainder of our strategy period, our commitment is clear. We will continue to support the sector through change, champion its contribution to Scotland's economy, environment and communities, and maximise opportunities for sustainable growth. Everything we do is driven by our shared vision to make Scotland **the** choice for premium red meat, underpinned by quality, integrity and innovation.

Thank you for your continued support and for the vital role you play in the success of our Scotch Beef, Scotch Lamb and Prime Scottish Pork brands in the UK and across our growing export markets. We look forward to continuing this journey together.

**Sarah Millar, Chief Executive at QMS and Kate Rowell, Chair of QMS**

K.A. Rowell

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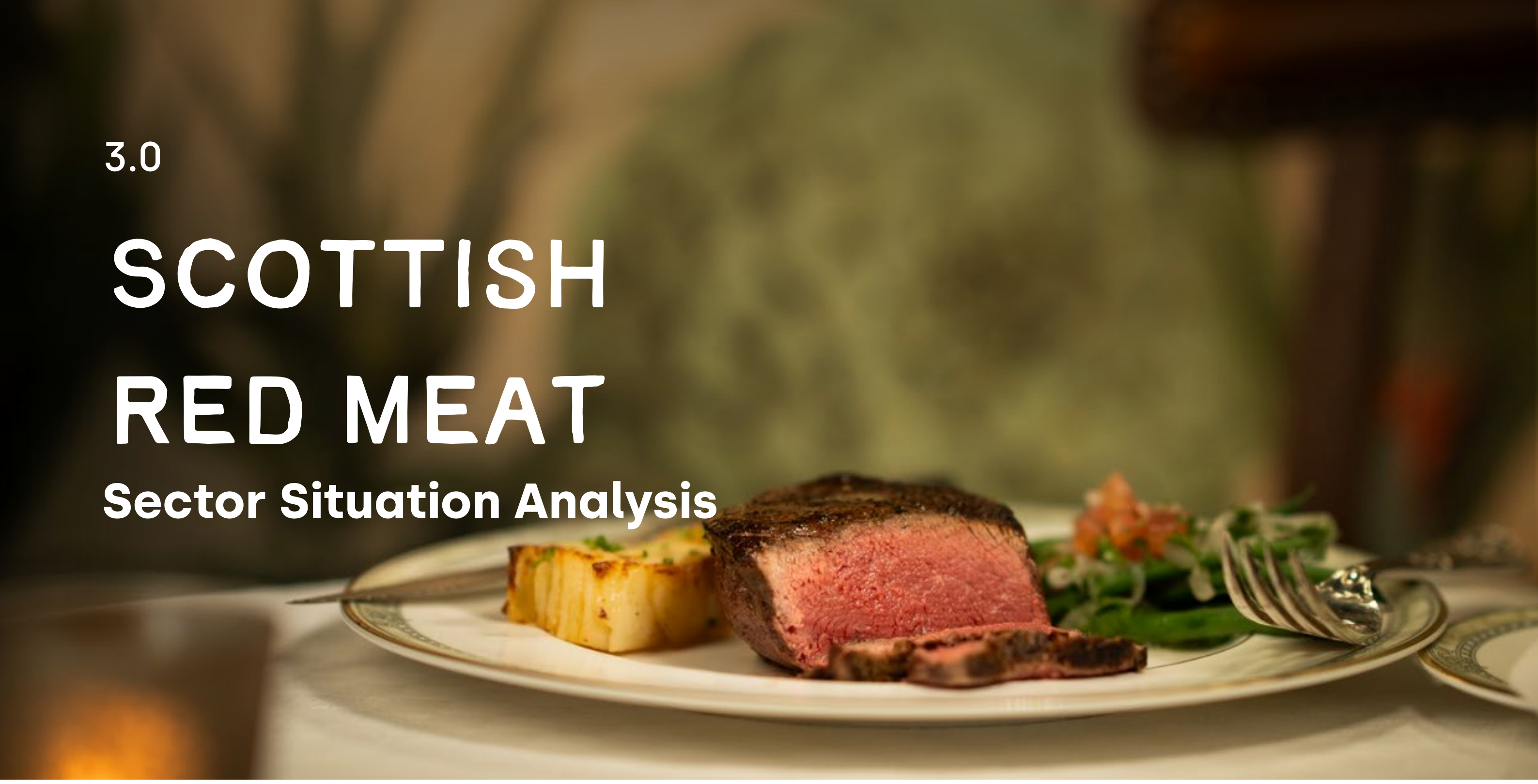
# PURPOSE
## of this Document

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 2026/27. 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.



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# SCOTTISH RED MEAT

## Sector Situation Analysis

The following summary details the current situation faced by the Scottish red meat sector as we begin the planning process for financial year 2026/27; however, unpredictable risks and issues tend to arise which we will need to address during the financial year.

### Beef Market

It has been a turbulent year for the beef market in 2025. After a strong finish to 2024, market prices surged higher in the first third of the year, driven by tight supply and firm consumer demand. New record highs were reached, with R4L steers peaking at £7.22/kg at Scottish abattoirs, 28% higher than at the end of 2024 and more than double the level at the onset of the COVID-19 pandemic. After a sharp downturn, prices appeared to find a new balance in the second half of the year, with a seasonal uplift for the festive buying period then unwinding in December. In the early weeks of 2026, there has been some further downwards seasonal pressure on the market as availability for slaughter is around its annual peak and consumer demand has now eased after a stronger Christmas for beef sales than had been anticipated. In the week ending January 24, R4L steers traded at £6.51/kg. This was still 7% higher than in the same week of 2025, 37% above the five-year average, and 84% higher than in 2020.

In recent years, the Scotch premium has tended to peak in the autumn rather than the summer, when it had traditionally been at its highest. However, in 2025, it peaked in the spring and fell back through the autumn. By contrast, wholesale pricing data suggests that the Scotch premium widened significantly in 2025, back to its highest levels since early-2023. It eased slightly in late-autumn, but remains elevated at the start of 2026.

Cow prices followed a similar pattern to prime beef prices throughout most of 2025 but, in the second half, remained slightly closer to their spring peak than prime beef prices, signalling relative strength in the price sensitive manufacturing grade beef market. In the second half of January, this picture showed signs of divergence, with cow prices rising strongly in the same week that prime cattle softened. This could be a sign of market pricing returning to a more normal seasonal pattern in 2026.

Availability of store cattle could be slightly better for yearlings born in spring 2025 during the key spring selling period of 2026 as calf registrations rose slightly in the spring and mortality fell due to good weather. However, younger autumn-born stores are likely to be tighter. Store cattle prices remained elevated at autumn sales and early figures from 2026 are showing a similarly strong picture, suggesting that finishing margins could be undergoing a significant squeeze, given softening finished cattle values.

In theory, a period of positive market returns for store and finished cattle should generate producer confidence and support some recovery in the beef herd. However, ageing demographics, a lack of skilled workers and succession challenges are limiting the potential for rebuilding, along with uncertainty over future agricultural support, and the cattle population data suggests only a limited slowdown in the decline in the suckler herd in 2025, with beef-sired females over 30 months of age still down by 2% year-on-year in October.

Ireland's December 2024 census reported a near-7% decline in males aged one to two years old and a 3.4% reduction in males aged less than 12 months, signalling tight supply in 2025 and 2026, once a surplus of older prime animals had been worked through. A period of expansion in beef production due to growth in the dairy herd has come to an end, with dairy cow numbers coming under pressure from European Union (EU) nitrogen rules, while the suckler herd has continued to contract sharply. After an unsustainably large jump in slaughter in the first third of 2025, the Irish prime cattle kill fell back sharply relative to 2024 levels during the third quarter, down by more than 30% over a four-week period at one point, and producer prices converged on Scottish levels. Looking more widely at Europe, EU beef production fell by 4% in the first ten months of 2025, supporting demand for UK exports. Due to tight domestic and Irish supplies, and the subsequent impact on prices, UK imports from non-EU countries surged further in 2025, more than doubling, and they are expected to exceed 20% of annual imports. These imports are generally of higher end cuts of frozen beef at highly competitive prices for the food service sector, with Australia, New Zealand, Brazil and Uruguay the principal suppliers, although beef from Australia and Uruguay did reach retail shelves in small volumes.

At a global level, a general mismatch between supply and demand in major beef producing and consuming countries has continued to support trade flows. Meanwhile, volatility in United States (US) trade policy at a time of a tightly supplied US beef market have disrupted the flow of beef across the globe, generating uncertainty. A safeguard clause on beef imports introduced by China is set to further disrupt the balance of global trade in 2026 as Brazil and Australia are set to face a considerable jump in tariffs in the second half of the year.

## Beef Supply and Demand

Prime cattle availability on Scottish farms fell back in 2025, reflecting reduced calf registrations in 2023 and 2024. However, after a firm start to the year, prime cattle slaughter fell more sharply at Scottish abattoirs than expected, suggesting that a drop in the volume of consumer demand and squeezed margins due to the pace of price rises limited demand from processors for cattle, while the closure of a large abattoir will have also been a contributor. Nevertheless, a surprisingly large reduction in slaughter relative to expectations points to a reduced slaughter rate.

Moving into 2026, a rebound in slaughter rate could support an increased prime cattle kill of around 1%. Before factoring in the slaughter rate, availability for slaughter is expected to be more stable in 2026 as a decline in older prime cattle is offset by a slight upturn at younger ages. Though, in the longer-term, if the beef herd was to continue declining, and calf to cow ratios were to slip back again after a lift in 2025, prime cattle availability could return to a downwards trajectory.

Research conducted by Numerator by Worldpanel in summer 2025 highlighted that there is a sweet spot for the beef market where modest levels of consumer price increases are compatible with higher sales volumes. However, the speed of retail prices rises this year have led to downwards pressure on sales volumes, with the annual rate of Consumer Prices Index including owner occupiers' housing costs (CPIH) for beef and veal peaking at 27.7% in November. While Numerator by Worldpanel data points to a continuing strong year-on-year uplift in household spending on beef in the final 12 weeks of 2025 (+13%), it has been unable to keep up with the speed of price inflation, with fewer households buying and buying it less often.

In terms of cow beef, a smaller cow herd should translate across to a reduced cow kill in 2026. While improved producer confidence could add to this pressure by resulting in a reduced slaughter rate for cull cows, attractive cull cow prices and a sharp downturn in dairy producer prices could limit the anticipated reduction in slaughter.

## 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 in the coming years. While falling back from its 2022 high, the number of Scottish-born cattle being processed in England and Wales remains elevated. As well as putting another processing site at risk, potentially softening competition for stock, 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. A smaller beef sector also poses wider economic and social risks, given the supply chain's significance in supporting jobs and communities in rural and remote areas.

## Cow Processing

Currently there is a significant outflow of cull cows from Scotland for slaughter in England but plans for a new abattoir in Dumfries and Galloway could ensure that more Scottish-born cows are processed in Scotland, adding value to the Scottish economy and supporting the processor levy paid to QMS.

## Lamb Market

In 2024, the lamb market showed signs of a large upwards demand shock, with farmgate prices jumping higher despite overall market supply rebounding from a low year in 2023. In 2025, this positive demand largely remained, although signs of demand-side strength were more varied during the year, peaking in the summer when supplies were at their highest relative to 2024, while appearing softer in the autumn when imports and domestic production slipped back relative to 2024.

During the autumn of 2025, lambs generally sold for around 5-10% higher than in 2024 at Scottish auctions and were around 25% above the five-year average. However, moving into 2026, prices have opened the year trading around 5% below early 2025 levels. While the lamb crop reported in Scotland was around 1% larger in 2025, finished auction volumes closed 2025 running around 6% behind year-earlier levels, and store lamb auction volumes rose by around 9%, resulting in a large carryover of hoggs. The early weeks of 2026 have been characterised by this large availability of hoggs translating into a significant uplift in auction marketings, pressuring prices. In the week ending January 28, hoggs averaged 320p/kg lwt at Scottish marts. While 2% lower than in late-January 2025, this was still 18% above the five-year average.

Externally, export demand remained strong in 2025, supported by falling EU lamb production and demographic change, and these drivers are set to remain in place in 2026. In the first eleven months of 2025, UK sheepmeat exports rose by 10% year-on-year and accounted for over 32% of domestic production, up from 29% a year earlier.

Imports of sheepmeat to the UK rose by around 2.5% in the first eleven months of 2025, but there was significant volatility during the year. Indeed, after a surge in imports in July, volumes declined from 2024 for four straight months. Over the January to October period, a jump in imports from Australia was partially offset by an 8% reduction from New Zealand. Australia's production has been at the top of a cyclical peak while market access improvements from the 2021 Free Trade Agreement have been taken advantage of. Import prices were significantly higher than in 2024, highlighting firm demand and a tighter global market.

Looking ahead to 2026, despite a larger lamb crop, New Zealand aren't expecting any extra lamb production, as producers look to rebuild flocks, while Australia is expected to have passed its production peak.

## Lamb Supply

Over the past decade, Scotland's ewe flock has trended slightly downwards. In 2024, the declines accelerated, due to limited availability of replacements after a difficult lambing in 2023 plus higher mortality during the extremely wet autumn and winter. More positively, 2025 saw a slight rebound of just under 1%, supported by better weather and increased producer confidence from the record prices of 2024. However, better weather did not translate into a higher lambing rate, as gains to the north and east of the country were offset by challenges in the south west. Looking ahead to 2026, a dry summer in 2025 coupled with a colder wetter winter could limit the prospects for a further rebound in ewe numbers and the lamb crop.

In England, June census results point to a further 3% reduction in breeding ewe numbers in 2025, with a fall in the lambing rate resulting in a 5% smaller lamb crop. Meanwhile, Welsh lamb numbers also reduced. In the short-term, the reduced lamb crop in England and Wales is likely to limit the overall carryover of hoggs at Great Britain (GB) level, offsetting the increased availability of hoggs in Scotland. Looking longer-term, the fundamentally tight supply situation in GB is set to continue into 2026 and beyond. There have been indications that the downwards trend in lambing rates in England may reflect a response to policy changes, with the removal of basic payments encouraging a shift towards lower-cost outdoor lambing systems, while environmental payments may have resulted in lower stocking rates.

## Lamb Processing

At Scottish abattoirs, lamb slaughter fell 28% between 2013 and 2023, with a further 4% reduction in 2024, and QMS misses out on the processor levy on lambs moving to England and Wales. However, there was a slight rebound of 1% in 2025, based on levy returns, suggesting a renewed interest in processing lambs. The annual increase was driven by slaughter during the April to July period, with elevated late-season hogg supply and squeezed margins in beef processing likely to have contributed.

## Pork Market

After a prolonged period of loss-making for pig producers through 2021 and 2022, market conditions had been pointing to a third year of recovery in 2025.

AHDB's cost of production model indicates a return to around breakeven in Q1 2023, followed by positive margins in nine of next ten quarters, with margins widening in Q2 and Q3 2025 after a breakeven first quarter, reflecting lower feed costs. However, things changed in the final quarter, with a period of abattoir disruption resulting in a backlog of pigs on farm. In turn, the share of pigs reaching abattoirs out-of-spec jumped higher, resulting in pricing penalties as well as increased feed costs from delayed slaughter. After signs that the share of out-of-spec carcases was returning to a more normal seasonal pattern in late-2025, there has been a deterioration in early-2026.

In the week ending January 24, the GB Standard Pig Price (SPP) softened to 191.4p/kg dwt. This was 6% lower than in the same week of 2025. At the end of September 2025, prices had been only 1% lower than a year earlier, highlighting the change in market conditions. While heavier carcase weights have helped offset some of the downwards pressure, the average carcase price was still 3% lower than a year earlier in the week ending January 24.

While producer confidence had improved until recent months, the legacy of the crisis of 2021/22 limited any move towards herd rebuilding, with elevated borrowing costs one factor at play. ScotEID data signalled some increase in production in Scotland in 2024, but the number of pigs leaving Scottish farms for slaughter in Scotland and England fell back again in 2025, down more than 3.5% (though the decline had been 1.5% at the end of the third quarter when the backlog started to build).

As well as the challenges in the domestic supply chain that developed in autumn 2025, the pig market has also faced considerable headwinds from a depressed EU market. While import volumes have not risen from the EU, highly competitive EU pig prices will have had an impact on pricing in the supply chain. A range of factors have contributed to the soft EU market. On the production side, the EU breeding pig herd continued to contract in 2025, but higher sow numbers in 2024 and increased productivity meant that production still increased in 2025. Slaughter rose more than 2% in the first ten months, with heavier weights pushing production volumes up by more than 3.5%. Meanwhile, additional tariffs placed on EU pork by China in retaliation to EU antidumping duties on Chinese electric vehicles have hit EU exports. As well as this, the detection of African Swine Fever in the EU's largest pork producer, Spain, in November, resulted in the suspension of exports from Spain to some major Asian markets, including Japan and the Philippines. As a result, this pork now remains on the EU market, adding further to available supplies. By mid-January, the GB premium over EU pig prices approached 50%.

As well as a depressed EU market, the Chinese pork market remains oversupplied, limiting UK export opportunities and returns from this important destination for balancing the carcase.

While there are a number of headwinds being faced by the pork market at the start of 2026, domestic consumption has been one positive. Numerator by Worldpanel data from the 12 weeks to December 28 showed a 4% increase in sales value and 2% lift in volume in GB for fresh and frozen pork. Pork is likely to be benefiting from high beef price inflation with, for example, pork mince being a close substitute for lean beef mince at a much more affordable price point.

## Agricultural Support Policy

Scotland's future agricultural support policy is still under formulation and there is uncertainty over its scope and scale, which continues to affect producer confidence. More positively, continuity of Basic Payment Scheme (BPS) since EU exit has maintained strong levels of support to livestock producing businesses in contrast to the near-removal of Basic Payments in England, and cattle and sheep numbers do appear to have fallen more slowly in Scotland than in either England or Wales in recent years.

The introduction of conditionality to the Scottish Suckler Beef Support Scheme in 2025 may encourage productivity gains, which could help to partially offset the impact of further declines in the suckler herd.

Scottish Parliament elections in May 2026 add uncertainty to the agriculture and wider devolved policy environment. With a large number of sitting MSPs standing down, and an ongoing surge in support for Reform UK, there is likely to be a considerable change in the make-up of Parliament.

## 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. Farms are also struggling to source skilled labour, and this has been one contributor to the decline in Scotland's suckler herd. Butchers have had some success by focusing on training and increased wages.

With the end to free movement making recruitment from the EU more challenging, processing businesses have had to introduce significant numbers of non-EU workers to maintain operations. This has been extremely expensive due to tighter UK immigration rules on minimum salary requirements and the need to supply accommodation, often higher than £15,000 per worker.

A concern for the sector is the potential for a further tightening in UK immigration rules due to the current political environment, particularly in England. Immigration, asylum and visas are reserved.

Signs of a softening UK labour market in 2025 could result in a slightly improved availability of labour in 2026.

## Cost of production

Although commodity prices generally softened further in 2024 and 2025, filtering through to reduced input costs, the UK agricultural inputs index was still 31% higher than in 2019 in October 2025. One positive is that energy market prices appear to have been much less sensitive to conflict in the Middle East than anticipated, and changes to US trade policy have resulted in a significantly weaker US dollar since the spring of 2025. Meanwhile, feed costs declined further in 2025 as global arable crop markets appeared well-supplied for a third year, while early prospects for 2026 point to another good global harvest. Closer to home, there was an increased availability of feed barley in 2025 at attractive prices.

The UK labour market is no longer as tight as in recent years, with labour supply growing slightly faster than employment, but earnings growth still averaged 4.7% in autumn 2025, placing wages 37% higher than at the end of 2019. In addition, changes to employer national insurance contributions in April 2025 added significantly to employment costs for businesses with more than a handful of staff. However, it should be noted that for very small farm and butchery businesses, a higher threshold for employer national insurance contributions will have eased some of the upwards pressure on costs.

Though interest rates have fallen from their peak, the Bank of England has signalled a very cautious path of downwards adjustment, ensuring that the cost of capital is set to remain much higher than in the period between the global financial crisis of 2007/8 and the global inflationary shock of the early 2020s.

## Rising cost of living and consumer confidence

UK households have seen little respite from a rising cost of living. After nearly three years of above-target inflation, it only fell back to the Bank of England's 2% target for a handful of months in mid-2024. In 2025, the Office for National Statistics (ONS) favoured measure (CPIH) of inflation averaged 3.9%, up from 3.3% in 2024. Based on this index, the cost of living in December 2025 was 29% higher than at the end of 2019. Up to late-2019, it had taken 12 years to rise by the same degree. Nevertheless, wage growth managed to hold slightly above inflation, extending the period of recovery in real wages to 31 months. Although consumer sentiment remains negative overall, this is driven by pessimism over the general economic environment and there is a more balanced view on personal finances.

## Consumer demand

Data from Numerator by Worldpanel indicates that consumer spending has continued to grow strongly on red meat. However, the pass-through of a surge in farmgate beef prices to retail prices has squeezed the volume of demand. It has also changed the composition of demand, with consumers trading down from expensive steak cuts and roasts towards mince. Meanwhile, lamb, pork and poultry retail prices have also risen, likely as a way of retailers spreading some of the beef category inflation more widely, partly aimed at limiting the degree of substitution and ensuring that other markets do not overheat.

## 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. An sanitary and phytosanitary (SPS) agreement with the EU is set to remove the requirement for an export health certificate and ensure that mince and sausages can be exported to the EU again. It is understood that this agreement is aimed to be put in place by the start of 2027, meaning that existing barriers remain in place. In the short-term, EU border controls have been tightened since late 2025, causing some extra difficulty and uncertainty for GB exporters.

More positively for exporters, implementation of the EU regulation on deforestation-free products, has been delayed for another year until the end of December 2026, while the rules have also been simplified. 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. The delay gives extra time to ensure that traceability systems are in place and working well.

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.

Free Trade Agreements with Australia and New Zealand which entered force in 2023 remain a long-term market risk for the domestic beef and lamb sectors, although a downwards trend in both domestic and EU production limit the potential for a significant downside impact on market prices. Beef imports have grown rapidly from both countries from a very low base, while sheepmeat imports have jumped from Australia.

## Animal Disease Risk

Ongoing cases of African Swine Fever (ASF) in the EU highlight the continuing risk of its incursion to the UK pig farming sector through contaminated pork products, most likely in the luggage of a tourist or worker. The detection of ASF in the UK would likely lead to the suspension of pork exports to several key export markets. Pig producer prices fell by 25% in Spain between mid-November and mid-January following the detection of ASF in wild boar.

Bluetongue became a more prominent subject in 2025, with restrictions imposed on live animal movements within Great Britain during the warmer part of the year, and calls for animals to be vaccinated before moving.

## Sustainability

QMS and AHDB have funded a pioneering carbon baselining project which is measuring the emissions and sequestration capacity of farms, including Scottish livestock producers. The aim is to understand how much carbon is already stored on farms, identify which farming practices align with high carbon stocks, and estimate the potential benefits if such practices were more widely adopted. The first year of this five-year project has been completed with initial high-level results from carbon audits and LiDAR scans expected in the coming months.

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# QMS STRATEGY

## 2024–2028/29

QMS developed a new five-year strategy in 2023, launching it at the 2023 Royal Highland Show, for implementation from April 1st, 2024.

This corporate business plan for 2026/27 and for year three of our five-year strategy 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 Scotland's 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 its people and supports individuals throughout the industry.

## Strategic Pillars

### Provenance

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

### Productivity and 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 and 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 Prime Scottish Pork brand<br>1.2 Consumer brand awareness, brand perception and likelihood to purchase<br>1.3 An increased proportion of lamb reared in Scotland will be processed in Scotland<br>1.4 Increase in % of total livestock population covered by Quality Assurance (QA) |
| **2. Productivity and Profitability** | 2.1 A greater proportion of output going to export markets<br>2.2 Increase in partnership projects/aligned marketing projects with multiple retailers<br>2.3 Increase in total output sold to independent retail<br>2.4 Increased output from breeding herds and flock<br>2.5 Increased engagement with on farm initiatives such as monitor farm/MTM<br>2.6 Increase in partnership projects with processors |
| **3. Planet and Place** | 3.1 Every QA member engaged with an emissions reduction programme<br>3.2 Environmental progress is articulated and visible through our brands<br>3.3 Scottish public perception is favourable towards the Scottish red meat sector |
| **4. People** | 4.1 Positive perception of QMS amongst stakeholders<br>4.2 Positive perception of QMS amongst levy payers<br>4.3 QMS is viewed by employees as a great place to work<br>4.4 Positive perception of QMS amongst decision makers |

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# IMPLEMENTATION PLANS

## Per Department

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

- Business Development
- Marketing
- Communications and 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** | 1. Increase productivity across the supply chain<br>2. Facilitate new export market opportunities for Scottish and Scotch/Prime Scottish Pork (PSP) proteins<br>3. Support the use of Scotch Beef, Scotch Lamb and Prime Scottish Pork across all channels (butcher/wholesale/food service)<br>4. Support work with processors and multiple retailers to increase brand visibility<br>5. Support the supply chain to meet its net zero obligations<br>6. Increase the quality of Beef, Lamb and Pork produced in Scotland |
| **Work Packages** | 1. Market Building<br>2. Developing Skills<br>3. Climate and Nature<br>4. Monitor Farm<br>5. Health and Welfare<br>6. Productivity<br>7. Profitability<br>8. Industry Engagement<br>9. Driving Innovation |

| Marketing | What We Will Do |
|---|---|
| **Department Aim** | To deliver and promote authentic, trusted brands, underpinned by robust quality assurance, which gives Scottish red meat a competitive advantage. |
| **Department Objectives** | 1. To build a brand plan rooted in market and consumer insights that drives our activities and that increases the chances of success.<br>2. 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 and appreciate the benefits of it.<br>3. 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.<br>4. To build a meaningful understanding of the Scotch difference/what's behind the label.<br>5. To encourage frequency of consumption of Scotch Beef, Scotch Lamb and Prime Scottish Pork through product versatility, availability and recipe inspiration.<br>6. To increase key brand health measures, most notably positive shifts in consumer brand awareness, perception and propensity to purchase.<br>7. To aspire to reach a minimum of 70% of the Scottish adult population with each key brand campaign.<br>8. To protect retail listings and increase the space on shelf and demand for red meat sold as Scotch.<br>9. Continually review and update the QMS standards to maintain their integrity without adding to the audit burden on levy payers, ensuring the standards are fit for the future.<br>10. Regularly and authentically engage with members to inform and educate them on our standards and the benefits of being quality assured.<br>11. Foster and develop a strong working relationship and collaborative partnership approach with Food Integrity Assurance (FIA) and assessors.<br>12. Provide support, signposting and general advice to ensure scheme compliance, governance, best practice and high levels of scheme member satisfaction.<br>13. Become a centre of insight excellence for understanding red meat consumer trends and behaviours, generating market insight and provide customer/stakeholder support with a specific focus on Scotland. |
| **Work Packages** | 1. Operational Delivery of QA Schemes<br>2. Monitor and Protect Brand Integrity<br>3. Strategic Development of QA Schemes<br>4. Added Value QA<br>5. Stakeholder Engagement<br>6. Brand Strategy<br>7. Marketing Campaigns<br>8. Insight<br>9. Point of Sale<br>10. Consumer Events<br>11. Digital<br>12. Agency Management<br>13. Community Engagement |

| Communications and External Affairs | What We Will Do |
|---|---|
| **Department Aim** | To build Scotland a global reputation for sustainable red meat production, which enhances the environment, place and people from which it comes. |
| **Department Objectives** | 1. Inform and engage with members and levy payers – support a modern, highly performing and confident red meat sector by providing accessible and engaging information and advice on current and changing standards and new practices across the supply chain in the right way, at the right time, as well as the work QMS undertakes on behalf of the industry.<br>2. Tell the positive red meat story – take a proactive and evidence-informed approach to building and protecting the reputation of Scotland's sustainable red meat, which supports our society, economy, environment and health to policymakers, educators, influencers, young people and wider citizens.<br>3. Master our craft – build our red meat evidence centre for internal and external stakeholders and develop specialist in-house team to support excellent promotional and reputational servicing across our organisational priorities (inspiring ambition, creativity, staying on top of the latest trends, best practice and continuously improving).<br>4. Inspire our people – use best practice internal communications to motivate and maximise colleague performance, ensuring awareness and understanding of organisational priorities as well as the important role individuals and teams play in supporting the red meat vision. |
| **Work Packages** | 1. Market Intelligence<br>2. Public Affairs<br>3. Industry Strategy<br>4. Corporate Communications<br>5. Industry Reputation |

| 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** | 1. Compliance with all levels of governance<br>2. Corporate Budget Management including current and future budgets<br>3. Ensure a robust Human Resources (HR) function to support all staff<br>4. Provide a professional administration service to all staff, Board and key stakeholders<br>5. Continual development of Customer Relationship Management and project reporting system<br>6. Continual development of the QMS People strategy |
| **Work Packages** | 1. Finance<br>2. Governance<br>3. Human Resources<br>4. Information Technology (IT) and Management |

6.0

# 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: -

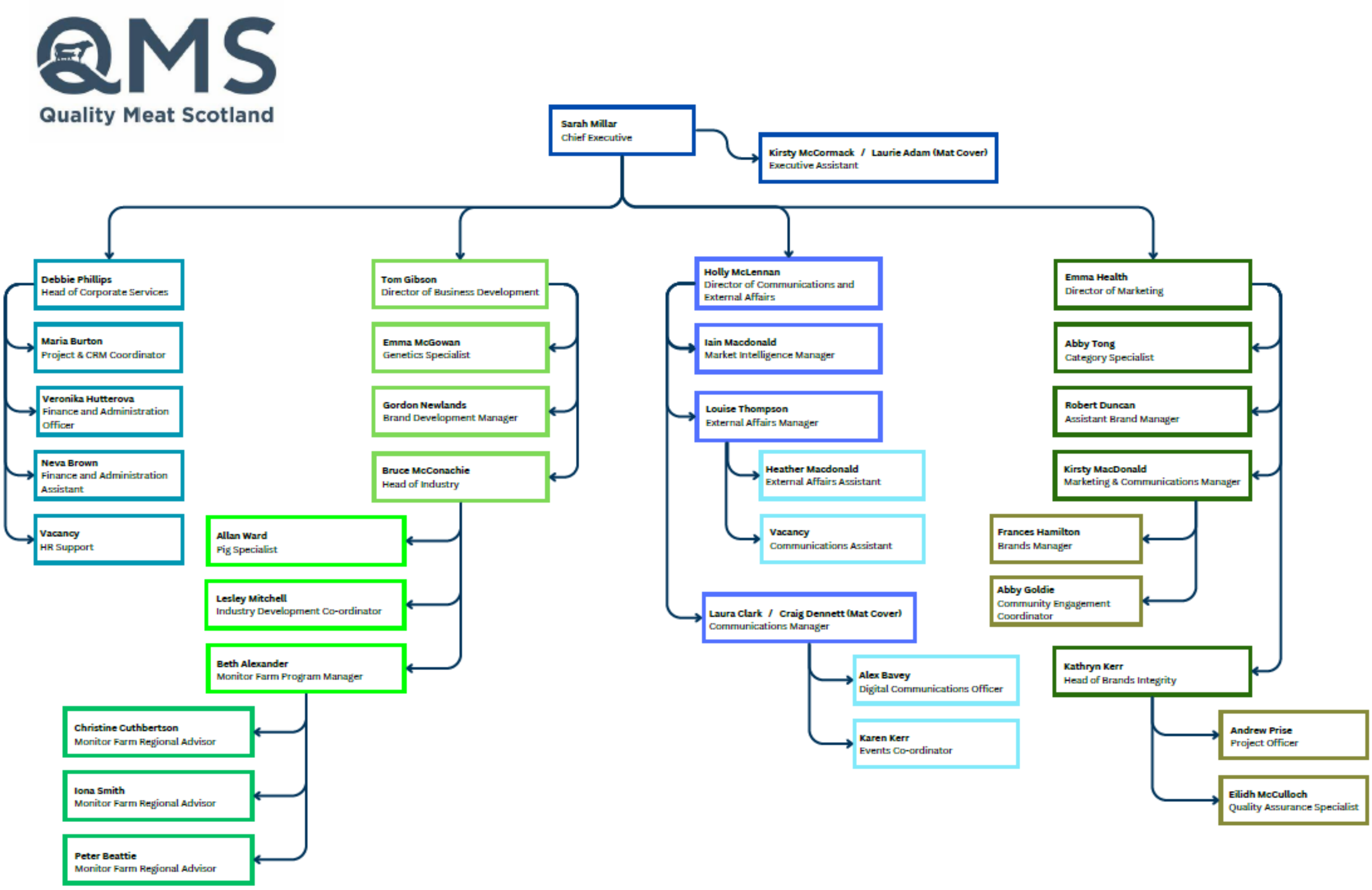
| Department | Budget 2026/27 (£) | % of total 2026/27 |
|---|---|---|
| Corporate Services | £978,495 | 12.33% |
| Business Development | £1,810,797 | 22.83% |
| Marketing | £4,178,111 | 52.68% |
| Communications and External Affairs | £964,368 | 12.16% |
| **Total** | **£7,931,771** | **100%** |

7.0

# 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 organisational chart below reflects the staffing structure that underpins this business plan.

For this financial year we are proposing to add a new HR Support role to the Corporate Services team, and a Fixed Term Contract (FTC) for a Communications Assistant to support the work of the team.



8.0

# KEY DELIVERY PARTNERS

In 2019 Quality Meat Scotland formed its own stakeholder partnership 'The Scottish Red Meat Industry Resilience Group' comprising of the key stakeholder organisations from across the Scottish red meat supply chain. The group meet for a minimum four times a year to consider response to key challenges and opportunities, to help ensure that we speak cohesively as one voice where possible.

Over the course of 2024 we also reformed the committees that underpin our Board, with species specific leadership groups being formed with representatives from businesses across the supply chain, helping to ensure delivery and evaluation is considered across the whole supply chain.

In addition to its own partnership building activities, QMS is part of the private and public-sector collaboration of Scotland Food & Drink and represented on the Partnership Board as well as other key delivery groups through Scotland Food & Drink.

QMS 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.

9.0

# 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.

10.0

# 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 'Sustaining Scotland Supplying The World'.

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 & 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 & 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.

Through the reformation of the Sheep, Beef, Pork and Climate and Nature Leadership groups, key objectives are in the process of being set for each of the species, aligning to the wider QMS strategy and strategic needs of each species in the long term.

11.0

# QMS AND PROGRAMME for Government Themes

QMS remains highly engaged with a wide range of stakeholders, and our knowledge transfer/exchange activity will continue to develop during the 2026/27 financial year. Marketing campaigns regularly utilise social media and other digital channels, creating opportunities for increasing numbers of consumers to engage directly with the Scotch Beef, Scotch Lamb and Prime Scottish Pork brands.

The most recent Programme for Government, published in 2025 as the final programme of the current parliamentary session, set out the Scottish Government's priorities ahead of the Scottish Parliament election scheduled for May 2026. The Programme for Government outlined a focus on economic growth, tackling inequality, climate and nature outcomes, and sustaining high-quality public services, under the leadership of John Swinney.

Within this context, the Scottish Government has continued to signal the importance of sustainable food production, supporting rural businesses and communities, and encouraging climate and nature positive land use while maintaining domestic food production capacity.

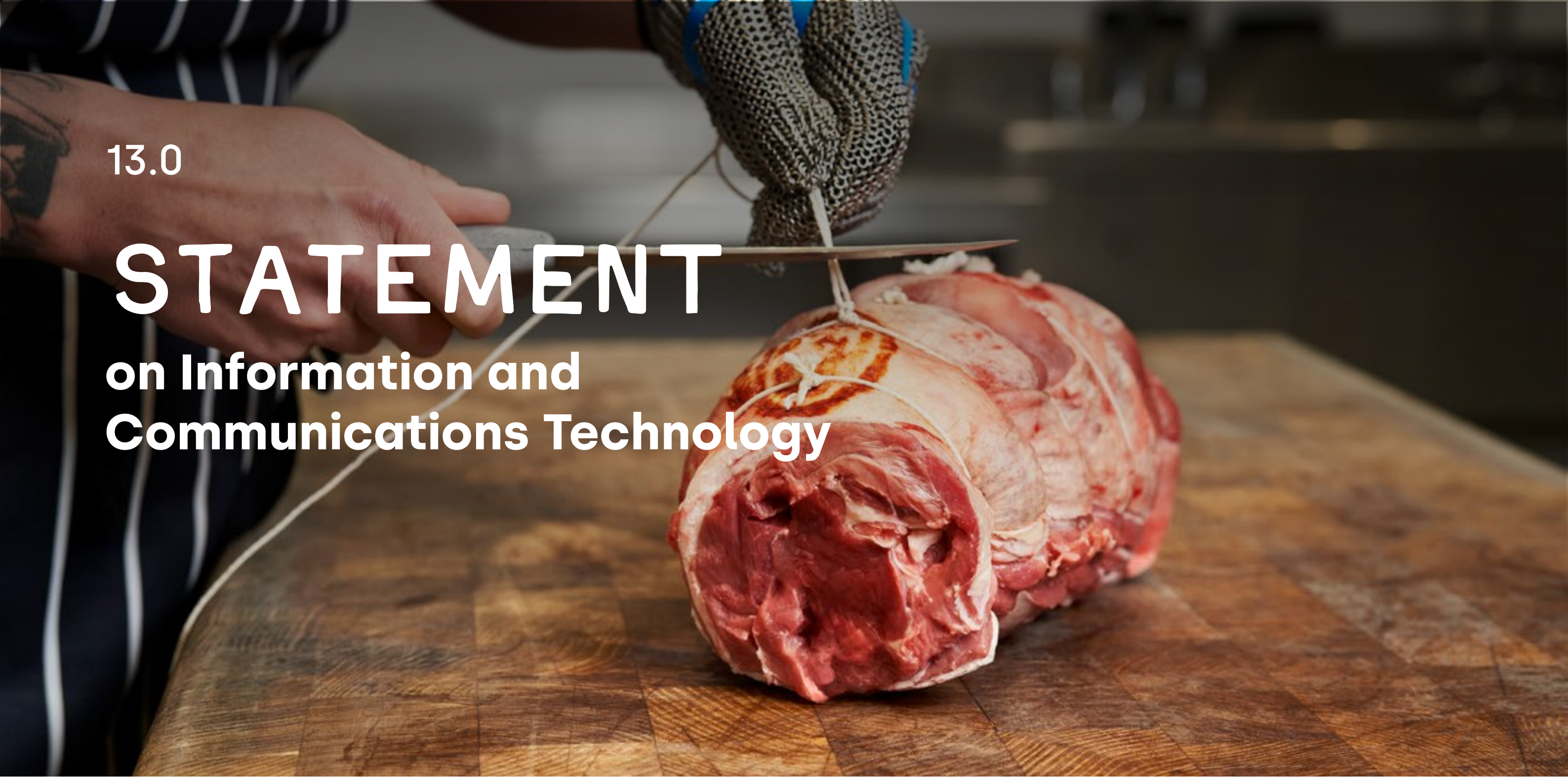
As Scotland approaches a parliamentary election and the establishment of a new Parliament in 2026, there is increased emphasis on evidence-based policy, value for public investment and demonstrable outcomes. This reinforces the importance of QMS's statutory role in providing impartial evidence, industry insight and continuity of engagement across government and parliamentary cycles.

12.0

# 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 Business Plan.



13.0

# STATEMENT

## on Information and Communications Technology

QMS is a knowledge-based organisation and is focused 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.

14.0

# 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.

An internal working group set up in 2024 has been considering how best to engage wider members of the QMS team in key areas of reduction, including reducing car mileage by car sharing or the use of public transport, using digital assets in place of printed and reducing waste where possible. Our shared office includes energy saving measures such as motion censored lights and is accessible by multiple forms of public transport. Through the course of 2026/27 we will continue to review and embed sustainable ways of working, using the QMS values of lead, support and trust to ensure buy in from the wider QMS team.

15.0

# 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 age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race (including colour, nationality, and ethnic or national origins), religion or belief, sex, or sexual orientation. We also do not discriminate on additional grounds such as responsibility for dependants and HIV status.

16.0

# LEVY RATES

## for 2026/27

| Species | Producer levy/head | Processor levy/head |
|---|---|---|
| Cattle | £4.82 | £1.50 |
| Calves (up to 68kg) | £0.07 | £0.08 |
| Sheep | £0.69 | £0.23 |
| Pigs | £1.17 | £0.28 |

17.0

# INCOME AND EXPENDITURE

## Budget 2026/2027

| Income | £ |
|---|---|
| Levy | 5,625,537 |
| Assurance Schemes | 1,625,622 |
| Grants | 650,000 |
| Other income | 18,000 |
| Bank Interest | 12,000 |
| | **7,931,160** |
| | |
| **Expenditure** | |
| Marketing | 4,178,111 |
| Business Development | 1,810,797 |
| Communications and External Affairs | 964,368 |
| Corporate Services | 978,495 |
| | **7,931,771** |
| **Net surplus / (Deficit)** | **(611)** |

18.0

# BALANCE SHEET BUDGET

## 2026/2027

| Fixed Assets | |
|---|---|
| Tangible Assets | 30,301 |
| Intangible Assets | 12,674 |
| Right of Use Assets | 104,697 |
| | |
| **Total fixed assets** | **147,672** |

| Current assets | |
|---|---|
| Trade Debtors | 375,000 |
| Prepayments | 85,000 |
| Accrued Levy | 542,847 |
| Accrued Grants | 225,000 |
| Accrued Assurance Scheme Income | 26,000 |
| VAT | 225,000 |
| Cash at bank and in hand | 748,695 |
| | |
| **Total current assets** | **2,227,542** |
| | |
| **Total assets** | **2,375,214** |
| **Current liabilities** | |
| Trade Creditors | 320,000 |
| Accruals | 250,000 |
| VAT | 0 |
| Payroll creditors | 61,600 |
| Levy security deposits | 161,618 |
| | |
| **Total current liabilities** | **901,735** |
| | |
| **Non current liabilities** | |
| Deferred income | 0 |
| Lease liabilities | 108,517 |
| | |
| **Total non current liabilities** | **108,517** |
| | |
| **Assets less liabilities** | **1,325,807** |
| | |
| **Reserves** | |
| General reserve | 1,474,090 |

19.0

# 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 and Risk Management Committee (ARC) 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.

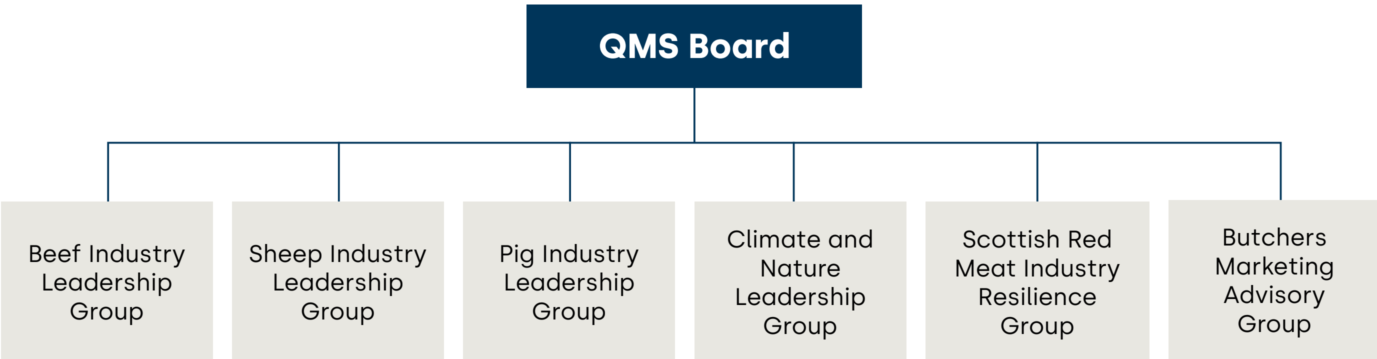
All Board members are non-executive and appointed by Scottish Ministers for a term not exceeding four years. Board Members may be reappointed a second term of up to four years but may not exceed two terms. The appointments are made in line with the Code of Practice issued by the Commissioner for Ethical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

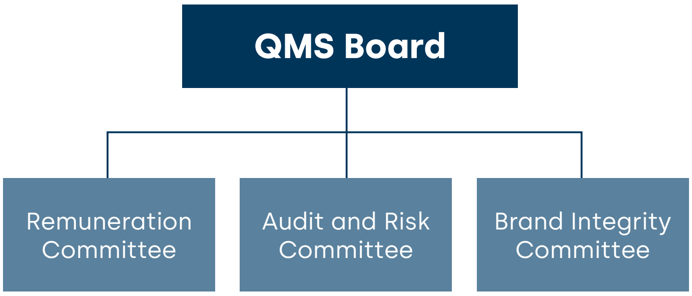
- Focusing on the organisation's purpose and on outcomes for levy payers specifically and others generally.
- Performing effectively in clearly defined functions and roles.
- Providing effective corporate governance for the whole organisation and ensuring principles of value for money are embedded into 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 2024/25 these committees were restructured into species specific leadership groups, chaired by members of the QMS Board, to better reflect the needs of both the organisation and best use of time for industry members contributing. The new structure of the leadership groups is presented below:




In addition, QMS also operates a number of internal committees to help support the governance of the organisation. These committees are detailed below and are also chaired by a Board member.




| **QMS Board** | **QMS Audit and Risk Management Committee** | **Scottish Red Meat Industry Resilience Group** |
|---|---|---|
| | Isla Roebuck | QMS Board - Chair |
| Emma Buckby | Ann Irvine | Agricultural Industries Confederation (AIC) Scotland |
| Jilly Duncan Grant | Adrian Ivory | Institute of Auctioneers and Appraisers in Scotland (IAAS) |
| Ann Irvine | Gordon Wallace | National Farmers Union of Scotland (NFUS) |
| Adrian Ivory | Niall Jeffrey | National Sheep Association Scotland (NSA Scotland) |
| Niall Jeffrey | Carrie Ruxton | Pig Industry Leadership Group |
| Andy McGowan | | Scottish Association of Meat Wholesalers (SAMW) |
| Kate Rowell | **QMS Remuneration Committee** | Scottish Association of Young Farmers Clubs (SAYFC) |
| Carrie Ruxton | Adrian Ivory | Scottish Beef Association (SBA) |
| Gordon Wallace | Kate Rowell | Scottish Crofting Federation |
| Gareth Scott | Jilly Duncan-Grant | Scottish Craft Butchers |
| Isla Roebuck | Frank Ross | National Beef Association (NBA) |
| Frank Ross | | |

| QMS Beef Industry Leadership Group | QMS Sheep Industry Leadership Group | QMS Pig Industry Leadership Group |
|---|---|---|
| Adrian Ivory | Kate Rowell | Andy McGowan |
| Jilly Duncan-Grant | Emma Buckby | Gordon Wallace |
| Emma Heath | Tom Gibson | Sarah Millar |
| John Wildman | Emma Coghill | Jamie Wyllie |
| John McCulloch | Donna Smith | Harriet Lowe |
| John McMaster | Peter Kennedy | Marion MacCormick |
| Sion Williams | Joe Baker | Roderic Bruce |
| Michael Denholm | Douglas Pate | Wayne Godfrey |
| Gareth Scott | Jill Hunter | William de Klein |
| Robert Gilchrist | Kirsten Williams | Grace Webster |
| Gavin Hill | Tim Geraghty | Gregor Christie |
| James Young | Callum McDiarmid | Sandy Howie |
| Bill MacKinnon | Frank Clark | Jill Thomson |
| Robert Playfair-Hannay | Clive Phillips | Alastair Lane |
| Hazel McNee | Ross Campbell | Fraser Shaw |
| Peter Moss | Faye Bryce | |
| Alex Stephen | | |
| Hugh Fraser | | |
| David Murdoch | | |
| Chris Scott | | |
| Elena O'Callaghan | | |
| Megan Powell | | |
| Scott Donaldson | | |

**QMS Climate and Nature Industry Leadership Group**

Emma Buckby
Carrie Ruxton
Holly McLennan
Gary Christie
Ben McClymont
Alec Telfer
Lucas Dalglish
Mo Mands
Stuart Shaw
Andrew Barbour
Iain Clunie
Cora Cooper
Doug Bell
Alistair Davidson
Daye Walker
Andrew Hodge
Jakob Euson
Gill Higgins
Patrick Stephen
Peter Douglas
Iain MacDougall
Eann Munro
John Gilliland
Sarah Duley

**QMS Butchers Marketing Advisory Group**

Tom Gibson
Gordon Wallace
Chris Leg
Steven Strachan
John Saunderson
Laura Black
Louise Forsyth
Nicola Strachan
Rona MacDonald
Karl Hearton
Shona Marshall
Tom Grierson

**QMS Cattle and Sheep Assurance Standards Setting Body**

Niall Jeffrey
Ann Irvine
Emma Buckby
Johnnie Balfour
Gary Christie
Finlay McIntyre
Suzie England
British Veterinary Association Rep
SBA Rep
Katie McIntyre
Elena McWatt
NSA Scotland Rep
Yvonne White
Simon Williams
Neil Wilson
Hugh Fraser
Lucy McGillivray

**QMS Auction Market Assurance Standards Setting Body**

Kate Rowell
Emma Buckby
Jilly Duncan Grant
Katie McIntyre
John Thomson
Jennifer Cursiter
Luke Holmes
John Smith
Alan Hutcheon
Hugh Fraser
Mick Park
Neil Wilson
Donald Young
Brian Ross

**QMS Pig Assurance Standards Setting Body**

Andy McGowan
Carrie Ruxton
Iain Lyle
Adam Marshall Jr
Danny Skinner
Grace Webster
Roderic Bruce
Bridget Frowd
Jamie Wyllie
Kathleen Smurthwaite
Penny Middleton

**QMS Haulage Assurance Standards Setting Body**

Adrian Ivory
Andy McGowan
Derek Armstrong
Ronald Davidson
John McMaster
Sandy Taylor
Richard White
Iain MacEachen
Martin Bell
Oliver Shearman
Gordon McKen
Katie McIntyre

<table>
<tr><td>QMS Processor Assurance Standards Setting Body<br>Isla Roebuck<br>John McMaster<br>Bridget Frowd<br>Katie McIntyre<br>Attilla Morvat<br>Bozena Thaniotis<br>Suzie England<br>Alex Seguino</td><td>QMS Feeds Assurance Standards Setting Body<br>Adrian Ivory<br>Simon Williams</td><td>Standards Coordinating Standards Setting Body<br><br>Adrian Ivory<br>Kate Rowell<br>Niall Jeffrey<br>Andy McGowan<br>Isla Roebuck</td></tr>
<tr><td>QMS Brands Integrity Advisory Group<br>Carrie Ruxton<br>Ann Irvine<br>Niall Jeffrey</td><td>Membership Rules Appeals Panel<br>Amy Jackson<br>Dennis Overton (Chair)<br>Freda Scott-Park</td><td></td></tr>
</table>

20.0

# APPENDIX B

## Strategic Management Team

QMS Strategic Management Team:

| | |
|---|---|
| Sarah Millar | Chief Executive |
| Laurie Adam | Executive Assistant (Maternity Cover) |
| 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 and External Affairs |

21.0

# APPENDIX C

## QMS and the Scottish Government's National Performance Framework

This links to QMS's current framework document. At the time of development this is currently under review by QMS and Scottish Government. https://s3.eu-west-2.amazonaws.com/quality-meat-scotland/documents/Board-Minutes-and-Papers/NDPB-Model-Framework-Document-QMS-2022-Final.pdf

### 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 across the Scottish Government's Strategic Objectives, as set out in the National Performance Framework. QMS's primary contribution is to the Wealthier and Fairer, Smarter and Greener objectives, with additional activity supporting the Healthier and Safer and Stronger objectives.

- Wealthier and Fairer – The core objective of QMS is to support the development of a sustainable, professional, resilient and profitable Scottish red meat industry. This includes contributing to the wider success of Scotland's food and drink sector, including progress towards the sector-wide ambition of growing its value to £30 billion by 2030, through improved productivity, market development, skills and reputation.
- Smarter – QMS develops and manages a range of industry programmes designed to support knowledge transfer, skills development and the uptake of new ideas and innovation. This activity supports continuous improvement in efficiency, decision-making and competitiveness across the red meat supply chain.
- Greener – QMS works with government, industry and delivery partners to support improvements in the environmental sustainability of red meat production. This includes engagement on climate change, nature and biodiversity, and the use of evidence to inform balanced, proportionate and outcomes-focused policy development.
- Healthier – QMS contributes to the Scottish Government's objective of a healthier Scotland by providing evidence-based information on the role of red meat as part of a healthy, balanced diet. This includes supporting informed public discussion and contributing, where appropriate, to relevant policy frameworks such as work aligned with the Obesity Route Map.

- Safer and Stronger – Through its work in supporting a sustainable, professional and resilient red meat industry, QMS contributes to long-term food security in Scotland and to the resilience of rural communities and supply chains.

## 3 National Performance Framework National Outcomes

The National Performance Framework sets out 11 National Outcomes, supported by a suite of National Indicators, which describe the kind of Scotland we want to create. QMS activity contributes, either directly or indirectly, to a number of these outcomes through its statutory functions, industry development activity, knowledge exchange, market development and provision of impartial evidence.

The 11 National Outcomes are as follows:

1. We are healthy and active.
2. We live in communities that are inclusive, empowered, resilient and safe.
3. We grow up loved, safe and respected so that we realise our full potential.
4. We are well educated, skilled and able to contribute to society.
5. We have thriving and innovative businesses, with quality jobs and fair work for everyone.
6. We are open, connected and make a positive contribution internationally.
7. We value, enjoy, protect and enhance our environment.
8. We tackle poverty by sharing opportunities, wealth and power more equally.
9. We respect, protect and fulfil human rights and live free from discrimination.
10. We are creative and our vibrant and diverse cultures are expressed and enjoyed widely.
11. We have a globally competitive, entrepreneurial, inclusive and sustainable economy.

## 4 QMS's Contribution to the National Outcomes

QMS, through its stakeholders, contributes to six of the 11 National Outcomes.

*We have a globally competitive, entrepreneurial, inclusive and sustainable economy.* (National Outcome 11). Farming and primary processing of red meat contribute approximately £3.5bn of output and £1bn of gross value added to Scotland's economy annually. QMS brands of Scotch Beef PGI, Scotch Lamb PGI and Prime Scottish 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. QMS has also identified the opportunity to increase this contribution by £281m in output and £76m in Gross value added by 2030.

*We are well educated, skilled and able to contribute to society. We have thriving and innovative businesses, with quality jobs and fair work for everyone* (National Outcome 4 and 5). 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 Farm programme.

*We are healthy and active* (National Outcome 1). 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, enjoy, protect and enhance our environment.* (National Outcome 7). Our farmer stakeholders understand the land and act as custodians of the countryside significantly enhancing its biodiversity and encouraging visits to the outdoors. The AHDB and QMS baselining project; expected to deliver its first set of results in 2026/27 helps to deliver a solid evidence base on the contribution of red meat production to Scotland's natural environment. 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.

*We are open, connected and make a positive contribution internationally* (National Outcome 6). For example, QMS engages in several activities designed to deliver continuous improvement in the red meat production chain, including working to enhance and derisk export opportunities taking the form of trade show attendance and inward and outward trade missions to key export destinations including France, Germany, Holland and Dubai.

QMS
Quality Meat Scotland

Quality Meat Scotland
4 Redheughs Rigg,
Westpoint, South Gyle
Edinburgh, EH12 9DQ

0131 510 7920 info@
qmscotland.co.uk

**www.qmscotland.co.uk**