

SCOTLAND: THE CHOICE FOR PREMIUM RED MEAT

5 YEAR STRATEGY
FROM 2024 - 2028



NOT ALL MEAT IS CREATED EQUAL.
BORN, REARED & PROCESSED IN SCOTLAND,
SCOTCH IS MEAT WITH INTEGRITY.





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vision

Scotland: **the** choice for premium red meat.

This is our vision for the future. Ambitious, bold, it reflects both the passion we have for the red meat supply chain we work on behalf of and our belief in its potential.

Our industry, like so many others, has gone through a period of unprecedented volatility. A global pandemic, a constitutional upheaval from leaving the European Union and a war on our Continent have all erupted in the last three years. Added to that, there is the ongoing climate emergency which is challenging the way the world lives, works and consumes. Food security pressures are growing and, closer to home, wholesale change to agriculture policy is on the horizon. The foundation upon which our industry sits is shifting. It is time to show leadership and collectively respond.



Recent years have shown again that, when tested, our industry has the resilience required to navigate storms and continue to deliver world class products onto shop shelves and dinner tables across Scotland, the UK and beyond. Far from denting confidence, recent times have only amplified my belief in the potential of our red meat sector.

However, we need to change the scale of our ambition and commercial focus to unlock our full potential and take control of the changes coming our way. Be in no doubt, around the world I see red meat producers gearing up to compete. More than ever, they are embracing innovation,

transforming supply chains and building their brands to give themselves a competitive edge.

We too need to be fit to compete in this global marketplace. And there is no place in the world I would rather see red meat produced than in Scotland. As the debate over the role of red meat in a climate emergency intensifies, what an extraordinary opportunity we have to position Scotland as the home of sustainably-produced beef, lamb and pork. As consumers become ever more conscious of their own health, we can use this as a platform to celebrate and promote the natural, nutritional

values of what we produce. As our economy in Scotland transforms, we must grasp the opportunity to ensure farming and the whole supply chain thrives and continues to underpin jobs across rural Scotland. We are an engine room of one of Scotland's great economic assets; our food and drink sector.

So, as we embark on a new five-year strategy, we need to be crystal clear on the scale of challenge we must navigate but, more importantly, the scale of opportunity in front of us. It will require collective leadership and action, but the journey to make Scotland **the** choice for premium red meat has begun.

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.



SARAH MILLAR Chief Executive, QMS

We will foster profitable and innovative supply chains which support jobs and communities across the country; all delivered by a creative, ambitious organisation that harnesses the talent of its people and supports individuals throughout the industry.

This is our mission. This is how Quality Meat Scotland will build its organisation and workplan to deliver over the next five years. This is how we realise our vision to make Scotland **the** choice for premium red meat.

Like all organisations, focus is critical. Perhaps this is particularly true for QMS, where limited resources mean that if we are to act as a catalyst for success in the market, we need to be arrow-focussed on where we can make the most difference.

We must be ruthless and commercial in our focus. We know what success looks like. It will be an industry with greater confidence, with profitability and productivity at its heart, delivering a product high in demand, viewed by our key customers – here and overseas – as their first choice. Three pillars of work will define QMS activity over the next five years: provenance; productivity & profitability; and planet & place.

OUR 3 STRATEGIC PILLARS...

PROVENANCE
PRODUCTIVITY
& PROFITABILITY
PLANET & PLACE



PROVENANCE

is the vehicle by which we separate ourselves from the pack. It is the story that underpins our industry and must be told through our brands. Just as Scotland pioneered farm assurance for the world in the late 1990s, so we must be at the forefront of its evolution now.

Quality assurance isn't about standards for the sake of standards. It is about providing assurance to our customers on what matters to them.

That said, the care by which we develop our quality assurance is critical. The acid test is clear: will a standard strengthen our position in the marketplace and help separate ourselves from the pack? If the answer is yes, it will strengthen our integrity and provide the platform for adding value.

PRODUCTIVITY & PROFITABILITY

is essential to ensure the sustainability of our supply chain. The scale of transformation in technology, science and food production systems over the next decade may be greater than anything seen since the industrial revolution. We need to ensure that our red meat supply chain can make the most of this change. We should be utterly unapologetic on our pursuit of profitability. It is the bedrock of a sustainable future.

Our commitment to world class production and the environment and communities within which we live and work are hollow without also securing economically sustainable businesses. Our work with research, innovation and practical demonstration will be shaped around this pursuit of productivity to boost profitability.

PLANET & PLACE

reflects our sector's unique role in environmental protection and in underpinning communities across the country. We have an integral role in enhancing biodiversity and the richness of our soils. It also means responding to a climate emergency by being at the forefront of sustainable red meat production globally. Perhaps more than anything, our industry's future rests on our leadership on these issues. And we have all the tools at our disposal to make our environmental credentials the platform from which we chart our forward path.

We will be passionate advocates for our sector; fuelling a story of sustainable red meat production that can be promoted in classrooms and council chambers and can be heard by consumers the world over. Our success will be rooted in businesses that embrace sustainable change, adopt new practices and standards that put low carbon production at the heart of what we do. By doing so, our integral role in underpinning communities across Scotland will be recognised and enhanced yet further. From fragile rural areas to manufacturing jobs in our cities, our reach is wide and supports tens of thousands of livelihoods.

PEOPLE

To work in this way, QMS must be an organisation that is creative as well as ambitious. It is easy to say we will be people-driven, but what does this mean? It will be an organisation that attracts and builds talent; that embraces a mission that means something and will have positive impact on individuals and families in all corners of Scotland.

This culture will define not only how we work with the talent inside QMS, but also how we work with all those outside our organisation, across rural Scotland. The people that make our industry tick.

We need industry to shape our work and we want all the organisations representing vital parts of the red meat supply chain to feel they are in a close, successful partnership with us. This kind of shared working and ambition will be integral to shared success.

This strategy means QMS will look, feel and act differently moving forward. We will be clear in our vision, ruthless in our mission, commercial in outlook and arrow-focussed on delivering impact across our supply chain.

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 support 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.

PROVENANCE

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

PRODUCTIVITY & PROFITABILITY

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

PLANET & PLACE

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

PEOPLE

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

strategy

Make Scotland **the** choice for premium red meat.



TURNING STRATEGY INTO ACTION – HOW WE WILL MAKE THE DIFFERENCE

Strategies are not judged by the boldness of their vision, but by whether that vision is achieved and the endeavours that go into making it a reality. Our strategy will be no different. Beneath our ambitious intent must lie the real graft; the work that will go in day-to-day by QMS, with partners through the supply chain, to make Scotland **the** choice for premium red meat.

The ambition we have for Scotland to compete in the global marketplace means we need to be crystal clear on the areas where we can make the most difference. That must translate into bold choices about what the organisation does and doesn't do. Our funding – the majority via levy – is precious and limited.

That means we have to maximise its impact, looking at every turn to where we can extract the maximum value, ensuring activity makes a difference and contributes to our vision. There are two complementary themes which will characterise QMS work over the next five years: evolution and transformation.

Our evolution will come from a deepening of core activity; being sharper in our focus, smarter in our approach and efficient in our delivery. We will be clear on what we will do, how we will do it and how we will measure impact. Transformation will come from game-changing projects to drive a step-change in the red meat sector's performance and our position in the market.

people

Our commitment to people underpins everything we do.



DEEPENING OUR CORE ACTIVITY

We will nurture and get the best of the talent both inside our organisation, and outwith. Building deep relationships across our stakeholder footprint: farmers, crofters, auctioneers, hauliers, processors, butchers, chefs, vets, feed merchants, and retailers.

We want to ignite the power of people to shape our work and crucially be the allies, advocates and ambassadors for red meat from Scotland.

Beyond this, three themes will now shape QMS delivery work for the next five years: Provenance; Productivity & Profitability; and Planet & Place. To match the scale of ambition we have and to reflect our more commercial focus on market success, QMS's critical, core activity must now evolve.

PROVENANCE:

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



HOW WE WILL DO IT

We need to get fit to compete. Around the world, our competitors are gearing up, building their brands and their stories. Lets be clear, they want our spot on shop shelves and restaurant menus. So we need to be smarter, insight-driven to carve out our competitive advantage.

Central to that are our brands. And they can't stand still. They must evolve, harnessing all the credentials of our sector. They must be underpinned by quality assurance that stitches integrity all the way through our supply chain.

- Our brands will evolve to project our environmental credentials.
- We will use new technology to give customers the traceability they want.
- We will set out a new future for quality assurance, ensuring its development has a crystal clear focus on separating ourselves from the pack.
- Our marketing campaigns will be targeted in message and audience, both at home and overseas.

HOW WE WILL MEASURE IMPACT

- Less red meat farmed and processed in Scotland will be sold as 'British'.
- Consumer awareness of – and trust in – our brands will strengthen.
- An increased proportion of lamb reared in Scotland will be sold with Scottish provenance.



PRODUCTIVITY & PROFITABILITY:

We will **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.



HOW WE WILL DO IT

Recent years have been characterised by spiraling costs. This means that extracting every pound in added value from Scotland's livestock is mission critical. We will accelerate our trade development work, taking a world class product to markets and customers both within UK shores and internationally.

We will embrace an unashamed quest for profitability. Profit means reinvestment. It means the protection of jobs and communities in the four corners of Scotland. It means food security. In practice, it must translate into two key activities: driving a premium, competitive advantage in the market place; and exploring every avenue of margin gain on-farm and through the supply chain.

Innovation has been a hallmark of Scotland's red meat supply chain history. Our genetics have conquered the world and we pioneered farm assurance. Our research, development and innovation work may be more important now than at any time before, from maximising the biological efficiency and fertility of our stock to ensuring every drop of energy is extracted from valuable inputs.

- We will foster our relationships with multiple retailers but reduce our reliance upon them.
- We will deepen other UK market channels, from independent butchers to the diverse, premium, out-of-home eating market, working with our processors as critical partners.
- We will target premium markets in North America, Europe, the Middle East and Asia.
- We will build knowledge transfer activity that is relevant and drives productivity, environmental care and social equality across the supply chain.

HOW WE WILL MEASURE IMPACT

- A greater proportion of output will go to export markets.
- More of our total output will be sold through independent retailers and premium hospitality outlets; to complement our sales with the major supermarkets.
- Livestock numbers boosted by improved fertility, calving, rearing.
- More farmers are engaged with monitor farms and other mechanisms of business development.
- Joint projects with processors to drive new markets and embed new technology.

PLANET & PLACE:

We will **build** Scotland's **global reputation** for **sustainable red meat** production, which **enhances** the **environment** and place from which it comes.



HOW WE WILL DO IT

A climate and nature emergency has been declared. Every industry is being scrutinised on how it either contributes to the problem or presents a solution. We are the latter; an industry that can lead the world on sustainable red meat production. We know this, but the word must be spread. We shouldn't be defensive or wait for meat production to be criticised. We must be proactive; armed with an extraordinary and strengthening story to tell – underpinned by evidence and data.

We will expand our work to build awareness amongst policy-makers and the public of Scottish red meat's role in delivering world class, nutritional food which enhances the environment from which it is produced. What we do must be underpinned by data, by science and, crucially, by action on farm and through the supply chain to continually improve performance.

It is our action in a climate emergency and a global biodiversity crisis that will give us the public support and social licence to do what we do. In a world with billions of meat-eaters, we face a rare opportunity to position Scotland as the home of planet-friendly red meat production; utilising our natural resources without depleting them, building jobs and communities from the land all whilst enriching it.

- We will arm all those working in our sector with the information they need to be our strongest advocates; to engage with everyone from policy-makers to pupils and parents.
- We will lead the dialogue with government and its agencies on red meat's positive contribution to our diet and climate.
- We will work with scientists and researchers to utilise data to demonstrate and strengthen our environmental credentials.
- We will advance work on genomics to maximise biological efficiency of livestock.

HOW WE WILL MEASURE IMPACT

- Every quality assurance member will be engaged in an emissions reduction programme.
- Environmental progress is articulated and visible through our brands.
- Public perception is favourable towards the Scottish red meat sector in the context of climate, communities and diet.

future

Three major initiatives will have a single, sole focus in mind: to make Scotland **the** choice for premium red meat.



Transformation: our game-changing projects

The scale of global competition in red meat markets, twinned with our ambition and desire to compete, means just evolving activity is not enough. We need a transformation in critical areas of the industry's development, not just to push boundaries but to completely recast them.

Three major initiatives will have a single, sole focus in mind: to make Scotland **the** choice for premium red meat.

They will make a game-changing contribution to our work across all three critical delivery pillars: **Provenance; Productivity & Profitability; and Planet & Place.**

THE BRAND MARK FOR SUSTAINABLE RED MEAT

Over the next five years, the Scotch and Specially Selected brands will move to embrace new sustainability criteria. That will shape not only what we communicate on pack but the whole integrity story in our marketing campaigns.

For Scotch Lamb, a new approach is required to ensure the longevity of a distinct Scottish provenance mark in a sheep sector for which Scotland is famous. We will need to review the current brand architecture to consider options to build the volumes the brand can carry.

The purpose of this work is clear: to set Scotland's red meat brands apart.

SCOTCH QUALITY VERIFIED

We will design, test and secure funding to build a world-leading verification system for eating quality of the Scottish red meat proteins.

SCOTCH PERFORMANCE AND GENETIC TRACEABILITY

Systems to advance on-farm performance and drive industry-wide progress on productivity and sustainability will need data at their heart. We will work with partners to fund and develop a Scotland-wide genomic database to fuel the right breeding decisions. There is another prize though; establishing full DNA traceability to Scotch beef. That will provide world-leading assurance to customers and cement integrity into the brand's future.

OUR INDUSTRY, OUR CHOICES, OUR FUTURE.

Food production globally and meat production specifically has reached a crossroads moment. The forces of increased customer scrutiny, planet-protecting policy and food security will either present an unscalable challenge for industry or a new era of opportunity.

Scotland's story is one of opportunity. But at this crossroads we face a stark choice. One road is to accept where we are. An industry with a rich heritage but an uncertain future, divided by differing views on how the future should shape up.

We must choose another road. It is one where we work collectively to be proud of what we have, to be ambassadors for a world class red meat system, to be relentless in driving improvement and to unite behind a new vision.

This is Scotland's time to step up; all of us. Our vision is not ambition for ambition's sake. It a statement of the possible, the desirable and, with collective action, the probable.

This strategy marks a step change in how QMS will think and what we will do. Join us and we can make Scotland **the** choice for premium red meat.

JOIN US AND WE CAN MAKE SCOTLAND THE CHOICE FOR PREMIUM RED MEAT.

OUR VALUES



LEAD

- Take responsibility
- Clear expectations
- Vision, drive and determination
- Be the best you can be



SUPPORT

- Confidence in people's ability
- Invest in ourselves and our teams
- Keep stakeholders front of mind
- Have empathy



TRUST

- Being honest
- Showing respect
- Integrity
- We are accountable



SCAN. DISCOVER.






For more information about
Scotch Beef PGI, Scotch Lamb PGI
and Specially Selected Pork,
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