

Areas to Cover

- ☛ Marketing
- ☛ Industry Development
- ☛ Economic Services
- ☛ Communications
- ☛ Corporate Services
- ☛ Strategy & Finance

QMS Update

Uel Morton



Marketing

Head of Marketing

- Responsible for delivering Marketing Objectives
- Manage department (5 members plus 3 agents abroad)
- Managing external funds such as Rural Payments Agency for EU contract for a value of £900k a year - 2 new applications 2009/11
- Liaise with professional bodies such as Consumer Focus Scotland and the Scottish Retailer Consortium
- Specific Topics: PGI, COOL, State Aids issues



Laurent Vernet

Scotch Beef & Scotch Lamb exports

- Promotional campaigns in Belgium in 3 supermarket chains
- Promotional campaigns in France in 1 supermarket chain
- Bocuse d'Or International Culinary event in January 2009 with over 6,000 international chefs from 120 countries
- Export certificates to Third Countries in collaboration with DEFRA, Scottish Development International and British Livestock Genetics.



Marketing



Foodservice

- Scotch Beef Club
- 230 members through the UK
- Annual membership – all new members visited
- 1 Scotch Beef Club assessor - over 100 visits/year
- Dedicated consumer website
- www.scotchbeefclub.org

Scotch Beef/Lamb Academy

- 4 courses p.a for Beef Club members' young chefs
- 6 articles in "Catering in Scotland" magazine
- 4 features in "Restaurant Magazine"



Margaret Stewart
Marketing Manager



Scotch Beef and Scotch Lamb Export

- Promotional campaigns in Italy in 2 key multiple retailers plus selected butchers and 3 major foodservice suppliers
- Promotional campaigns in the Netherlands in leading 2 multiple retailers plus major food service/butcher suppliers

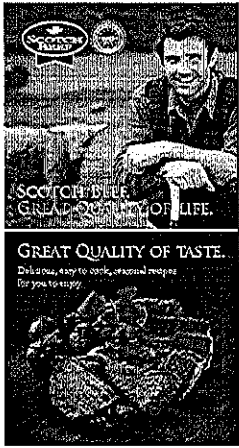
In-Market PR and Inward Missions

- Collaboration with Jeunes Restaurateur IT & NL
- 12 missions completed in 2008. Chefs, Journalists, key opinion formers and Importers

International Fairs

- STAL, Paris 2008 – 8 Scottish exporting companies
- ANUGA, Cologne 2009 – already booked
- Local Fairs - Cibus, Italy 2008 – 2 Scottish exporting companies and 2 Importers





Marketing

Scotch Beef

- Advertising Promotion
 - Greater London
 - Scotland
- **8.5 million** secondary labels for on pack (p.a)
- **6.3 million** consumers exposed to ads in press and magazines (Aug – Nov)
- **2.4 million** consumers exposed to ads on outdoor media (Aug – Nov)
- **1.5 m** bound recipe inserts in mags (Oct – Nov)
- **C 300,000** beef recipe booklets distributed (p.a)
- Circa **400** promotional days with brand ambassadors in store. (p.a)
- Brand present in **7** major multiple retailers.



Suzie Carlew
Marketing
Manager



Scotch Lamb

- Advertising Promotion
 - Focus on Scotland
 - Autumn and Spring
- **3 million** secondary labels for on pack (p.a)
- **1.2 million** consumers exposed to ads in press and magazines (Aug – Oct)
- **C 70,000** lamb recipe booklets distributed (p.a)
- Circa **200** promotional days with brand ambassadors in store. (during campaigns)
- Brand present in **5** multiple retailers.



June Lomax
Independent
Retailers Mgr



Marketing

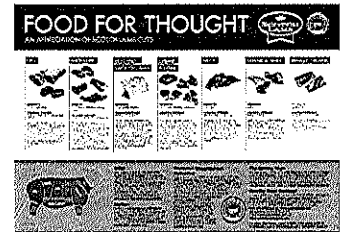
Specially Selected Pork

- Branding in Scottish retailers across fresh and processed categories
- **>4 million** on-pack stickers annually
- Summer '08 campaign featuring radio and press reaching **3.5 million** Scots
- November campaign featuring TV for the first time reaching **1.2 million** Scots
- Promotion of Processed product: bacon, sausages and ham



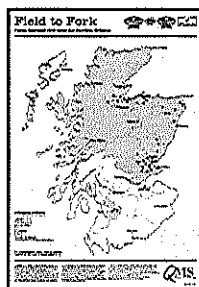
Catering Colleges

- Educational tools for chefs of tomorrow
- Seminars in Scottish catering colleges



Public Procurement

- Working with Scotland's public sector buyers such as Schools, Care Homes, NHS
- 100% of LEAs including sustainability criteria in food supply contracts
- Speakers at key events
- Highly Commended winners of Sustainability Award Scotland



Marketing



Independent Retailers

- Foodex/Meatex exhibition
- Butcher of the Year competition
- Support of the SFMTA and the Guild of Q Butchers

Scotch Butchers Club

- 383 paying butchers members through the UK with three auditors
- 5 promotions: Beef, BBQ, Sausages, Lamb, Xmas with Point of Sales material and distribution of over 150,000 recipe leaflets
- Dedicated consumer website

National consumer show

- BBC Good Food Show Scotland (Glasgow)



June Lomax
Independent
Retailers Mgr



Consumer Information and Guides



	<ul style="list-style-type: none"> • Retail Trend Information – who buys what, when
	<ul style="list-style-type: none"> • Consumer Perceptions of Quality Assurance • Brand Tracking

Andy McGowan



- ☛ Team Management
- ☛ Adding Value to 5th Quarter Project
- ☛ Meat Skills Development
- ☛ Scotland Food & Drink
- ☛ Funding
- ☛ Labelling Policy
- ☛ Assurance Schemes
 - Processors
 - Contract mgt
- ☛ UK Meat Plant Labelling Audits
- ☛ EU Quality Marks
- ☛ Enforcement Rationalisation



Kathy Peebles



- ☛ Assurance Schemes
 - Cattle & Sheep
 - Haulage
 - Auction Markets
 - Feeds
- ☛ Welfare Issues
- ☛ Sheep Policy
- ☛ Livestock Transport Policy
- ☛ Scottish Sheep Strategy
 - Focus Farms
 - EBV Workshops
 - Grading Workshops
 - Breeder Support
- ☛ Rural Skills Development
- ☛ Beef & Lamb Forum Secretariat



Charlotte Maltin



- ☛ R&D Strategy
 - Eating & Carcass Quality
 - Health & Welfare
 - Nutrition
 - Breeding
 - Production & processing efficiency
 - Resource Utilisation
- ☛ Project Management
- ☛ Student supervision
- ☛ Food safety policy
- ☛ Eating Quality Trials
- ☛ Technical Support for Processors
- ☛ (Part-time)



Peter Beattie



- ☛ Monitor Farms
 - QMS funded MF
 - Scottish MF Programme Mgt
- ☛ Knowledge Transfer Strategy
- ☛ Cattle Policy
- ☛ Environmental Policy
- ☛ R&D Committee Secretariat
- ☛ R&D Annual Report & Conference
- ☛ Animal Health & Biosecurity Policy



Allan Ward



- ☛ Pig Business Networks
- ☛ Wholesome Pigs (Scotland) Abattoir Monitoring
- ☛ ZNCP Salmonella Scheme
- ☛ Pig Health Surveys
- ☛ On-farm Trials
- ☛ Pig Assurance Scheme
- ☛ IPPC Support to Large Producers
- ☛ Slurry & Waste Management Advice
- ☛ Pig Disease Control & Elimination Group
- ☛ Pig Forum Secretariat



Economic Services



Stuart Ashworth
Head of Economic
Services



James Park
Economic Analyst

*To be the first port of call in Scotland for
authoritative information about the red
meat industry*



Activities

- ☛ Industry briefing meetings
 - Academie Culinaire, NBA, NFUS, NSA, SAC, SAMW, SBGA, Scottish Retail Consortium, individual processing companies
- ☛ Industry research
 - Beef intentions survey, Pig industry taskforce, Enterprise Costings, Climate change
- ☛ Events
 - NBA beef event, Scots sheep, Highland Show, Agriscot, Winter Fair



Activities

- ☛ Consultations/discussions with stakeholders on policy issues:
 - CAP healthcheck
 - LFASS review
 - SRDP review
 - EID/sheep industry policy
 - BSE control measures at abattoirs
 - WTO/Mercusor
 - Climate change



Activities

- ☛ Publications
 - Red Meat Industry Profile
 - Enterprise Costings
 - Media articles
- ☛ Web page management of market information
- ☛ Database management:
 - BCMS
 - Prices (AHDB and international)
 - Trade data (HMRC and Eurostat)
 - Production (SG and Defra slaughter stats)



Communications

- ☛ Coverage in Scottish, UK, Intl and trade press and media - 80 news releases since last B&L Forum
- ☛ Industry supplements in Meat Trades Journal & The Grocer
- ☛ Joint stakeholder activity: Scotland Food and Drink, Homecoming, NFUS, Seafood Scotland
- ☛ Corporate Communications
 - MLC Annual Report
 - SG Food Policy Consultation
 - Annual Report & Corporate Plan
- ☛ High profile initiatives
 - Champions in Schools
 - Developing Healthy Meat Products



Louise Welsh
Director of
Communications



Website

- ☛ qmScotland.co.uk now receives more than 22,000 visitors a month.
- ☛ Getting the Balance Right is our most popular download.
- ☛ 2,500 people subscribe to our e-newsletter for weekly market updates.
- ☛ Glen is now on facebook offering his fans recipes and updates on where he is appearing.



Events

- ✦ Busy Highland Show. More than 1,000 levy payers received hospitality in our 'levy lounge', even more consumers watched our cooking demonstrations.
- ✦ Beef Expo, Scotsheep, AgriScot and Winter Fair and Fifth Quarter conference saw hundreds hear about the latest economic and industry developments.
- ✦ High profile presence at consumer events such as BBC Good Food Show and Taste of Grampian, as well as industry events such as SIAL.



Stephen Doran
Comms & Events
Manager



Health & Education Activities

- ✦ New Health & Education Coordinator appointed in July 2008
Registered Dietitian – Jennifer Robertson
- ✦ School workshops and cooking demonstrations remain popular
QMS £100 Meat Voucher Scheme – 100 High Schools participating this year
- ✦ Scottish Education Awards
 - Sponsorship of Health & Wellbeing category
- ✦ Campaigns
 - Quick & Easy
 - Feel Good About Meat
- ✦ Health Connections
 - Presented at National Childhood Obesity Conference
 - Participation at British Nutrition Foundation Teachers Conference



Corporate Services

Sylvia Shepherd
Corporate Services Manager

- ✦ External Audit
- ✦ Internal Audit
- ✦ ICT Development
- ✦ State Aid Notifications
- ✦ Budget Monitoring
- ✦ Grant Claims
- ✦ Pay Policy/Payroll
- ✦ Office Facilities Management



Corporate Services

Debbie Kerr
Finance Assistant

- ✦ Sales Ledger
 - Levy Collection
 - Assurance Scheme Income
 - Credit Control
- ✦ Purchase Ledger
 - Purchase Order System Maintenance
 - Payment Runs
 - Remittance Advices
- ✦ Bank Reconciliations and Inter-account Transfers
- ✦ Admin Support



Corporate Services



Office Assistant

- ✦ Telephone/Reception
- ✦ Stock Management of Leaflets & Brochures
- ✦ Database Administration
 - Scotch Butchers Club
 - Scotch Beef Club
- ✦ Admin Support for all Staff
- ✦ Management of off-site storage
- ✦ Operational Reviews
 - Courier
 - Postal Equipment



Corporate Services



Susan
Kinniburgh
Executive
Assistant

- ✦ Board Liaison
- ✦ Chairman and Chief Executive admin support
- ✦ Co-ordination of Board papers
- ✦ HR Support
 - Employee Handbook
 - Procedures & Policies
 - Job Descriptions – all updated
 - Contracts of Employment
- ✦ Health & Safety – developing policy
- ✦ NDPB – support on transfer issues
- ✦ Consultations See over



Consultations

- ☛ SG – SAC designated higher education institution – Jan 08
- ☛ SG – Animal Health & Welfare Scotland Act 2006 – Feb 08
- ☛ Defra – Application to register PGI for NI Beef, NI Lamb and Traditional Cumberland Sausage as PGI– Mar 08
- ☛ SG – Choosing the Right Ingredients – The Future for Food in Scotland – Apr 08
- ☛ FSA – EC directive on Nutrition Labelling – Apr 08
- ☛ Defra – Policy review of Protected Food Names – Apr 08
- ☛ SG – TSE Cost Sharing Proposals – Apr 08
- ☛ FSA – Provision of Food Information to Consumers – May 08
- ☛ FSA – Agency approach to Sustainable Development in Policy Making – Jun 08



Consultations

- ☛ EC – Review of the less favoured area scheme – Jun 08
- ☛ FSA – Fat levels in mince – Jul 08
- ☛ John Scott, MSP – Food Security Taskforce – Jun 08
- ☛ SG – Implementation of the CAP in Scotland – Sep 08
- ☛ FSA – Revision of voluntary salt reduction targets – Oct 08
- ☛ Scottish Commission on Devolution – Contributing to the future of Scottish Devolution– Sep 08
- ☛ AHDB – Food supply chain quality schemes and branding – Oct 08
- ☛ Defra – Future of the Veterinary Medicines Directorate – Nov 08
- ☛ SG – High level control strategy for BSE in sheep or goats – Nov 08



Chief Executive



- ☛ Designated as Accountable Officer
- ☛ Look two ways:
 - Government
 - Levy payers
- ☛ Specific responsibility for:
 - planning, performance management & monitoring
 - advising the Board
 - managing risk and resources
 - accounting for QMS' activities



Chief Executive



- ☛ New Board
- ☛ Strategy Development Process
 - review of the overall objective
 - review of the business environment
 - identification of enablers and blockers
 - development of strategic objectives
 - development of team plans and activities
 - allocation of resources
- ☛ Robust methodology

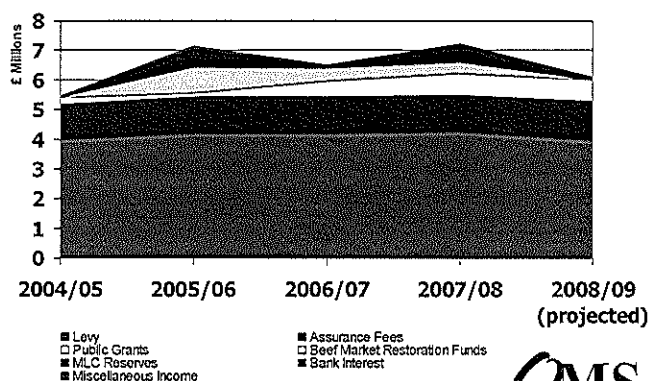


QMS Finances

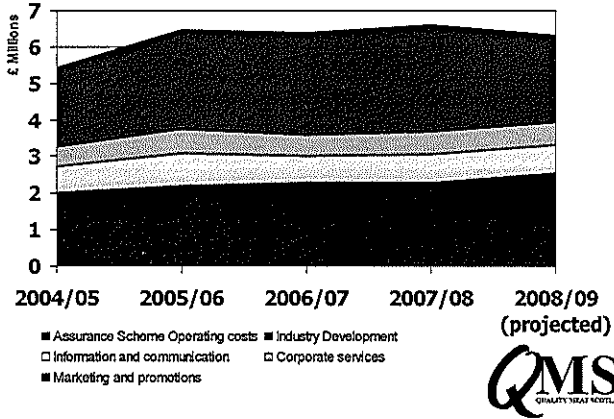
- ☛ Projected levy shortfall:
 - fire at Woodheads
 - decreased kill of English cattle due to Bluetongue restrictions
- ☛ Decision in June to maintain spend at budgeted level
 - finance shortfall from reserves
 - deficit on P&L at 31 March 09
- ☛ Beef market restoration funds (Section 15 Money)
 - £1.6m over three years
 - final payment y/e 31 March 08
 - marketing budget stretched for 08-09
- ☛ EU co-financing
 - £350k a year for three years
 - expires April 09
 - application submitted for next round at similar level



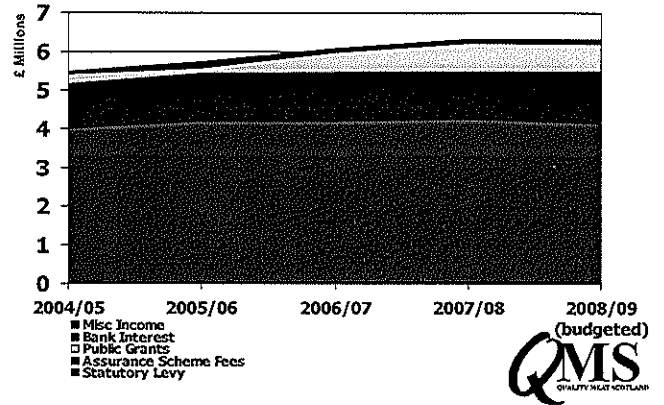
QMS Income



QMS Expenditure



QMS Income



In Conclusion

- ☛ QMS is your organisation
- ☛ Deliver a range of activities on your behalf
- ☛ Overall objective: "To shape a sustainable and prosperous Scottish red meat industry."
- ☛ This Forum is important
 - feedback on existing activity
 - ideas for future activity

Questions and Discussion



gap between
production and
consumption
only 80% self
sufficient in
Beef

Plenty of D
why?