



Annual Report 2026

Working together to shape
the future of farming and food

SAOS Members

More details on www.saos.coop

Aberdeen Grain Storage Ltd

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Angus Growers

01241 877336
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ANM Group Ltd

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Ardler Potato Co-operative Ltd

Argyll Hill Lamb

01852 316220
www.argyllhilllamb.com

Aspatria Farmers

01697 320207
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Ayrshire Country Lamb Ltd

www.farmstock.org.uk

Banff and Moray Grain Marketing Ltd

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BATA Ltd

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Borders Machinery Ring Ltd

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Co Chomunn An Lochdair

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Dalkeith Farmers Ltd

01875 820810

DWP Harvesting Ltd

01339 885335
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East Lothian Potatoes Ltd

01361 883488

East of Scotland Farmers Ltd

01828 627264
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East of Scotland Growers Ltd

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www.eastofscotlandgrowers.co.uk

Edinburgh Farmers Market

www.edinburghfarmersmarket.co.uk

Farm Stock (Scotland) Ltd

01750 723366
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First Milk

0141 887 6111
www.firstmilk.co.uk

Galloway Lamb Ltd

www.farmstock.org.uk

Girvan Early Growers Ltd

01465 715328

Grainco Scotland Ltd

01888 564190
www.grainco.co.uk

Grampian Growers Ltd

01674 830555
www.grampiangrowers.co.uk

Highland Grain Ltd

01463 811435
www.highlandgrain.co.uk

Lewis Crofters Ltd

01851 702350
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Lothian Lamb and Beef Ltd

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Milk Suppliers Association

01988 700240
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North Uist & Benbecula Livestock Marketing

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Oban Livestock Centre Ltd

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Orkney Auction Mart Ltd

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Orkney Business Ring Ltd

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Orkney Cheese Company Ltd

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Perth Farmers' Market

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Rural Services Scotland Ltd

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Saltire Seed Ltd

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Scott Country Lamb Ltd

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Scott Country Potatoes Ltd

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Scottish Agronomy Ltd

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Scottish Organic Producers

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Scottish Pigs Ltd

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Scottish Potato Co-op

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Scottish Quality Crops

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Tayforth Machinery Ring Ltd

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United Farmers Ltd

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United Oilseeds Marketing Ltd

01380 729200
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About SAOS



Last year's Annual Report marked 120 years of SAOS and we reflected on how, despite many of today's workstreams being beyond the wildest imaginings of our forebearers, our core purpose remains the same: enabling and promoting the benefits of co-operation and working co-operatively to help farmers and growers increase their power in their supply chains.



Today we work with food and farming businesses to make them more profitable, competitive, resilient, and sustainable; through innovation, coupling new technology, and data gathering in various ways, as well as in a more collaborative response to climate change and more sustainable future farming and food production. Underpinning all this, we know that getting the right people together and working more effectively towards shared goals is the key to success.

We noted last year too that our membership had risen and fallen over the years - at one stage numbering several hundreds of member co-ops. Indeed, our co-op member numbers have fallen in the past year, as several of our co-op member

businesses have undertaken mergers. Each one has been a strategic step towards a stronger and more competitive business and with a keen eye for the future fitness of the business and their farmer members. Co-op mergers are not uncommon, but this flurry of activity over the last twelve months speaks to wider change in the industry, with each driven by a proactive view for efficiency, to support investment, and to operate more effectively in a marketplace that increasingly demands greater scale to compete.

Agriculture is undoubtedly going through a pivotal time of change, and we believe that co-operation has never been more important. Over half of Scottish farmers and crofters are active in farmer co-ops,

and these co-ops are well placed to help support and deliver the change that is needed. Despite their scale and footprint, agricultural co-ops have generally been excluded from any form of rural support, despite their pivotal place in the sector. In addition to our everyday work promoting and supporting the development of co-operatives, we have spent considerable time and effort in the last year highlighting to the Scottish and the UK governments the power and potential of co-operatives as a solution to many of today's challenges, and indeed those of the future.

We remain passionately focused on #workingtogether to shape the future of farming and food.

SAOS and Co-op Principles

The seven Co-operative Principles are the guidelines for all co-operatives globally, putting their values into practice, and ensuring their democratic structure, and promoting community engagement.

How SAOS embodies these:

Voluntary and open membership



- Owned by 54 members of various co-op types and sizes (from 3 to 5000+ members) operating in a wide range of farming sectors in the mainland and islands of Scotland and parts of England
- Affordable affiliation fees linked to co-op size and membership throughput
- We've welcomed Edinburgh Farmers Market as a new member and have had several mergers between members

Democratic member control



- Sixteen elected co-op members participate in the SAOS Council, with three meetings each year focusing on relevant topics such as member-derived insight on future SAOS Training and Development strategy, and opportunities and threats within the food and drink supply chain
- SAOS Board is member-focused, comprising between 8 and 12 Directors
- Our culture is that of open and approachable access between Board Directors and the SAOS team

Member economic participation



- Payment of annual affiliation fees
- Engaging SAOS to provide professional governance services
- Contracting SAOS to undertake Company Secretary role
- Paid attendance at SAOS training and events

Autonomy and independence



- SAOS, a federal co-operative, retains operational independence by undertaking relevant consultancy and development work, and through the strategic establishment of income-generating subsidiaries

Education, training, and information



- SAOS's varied training courses for members include governance matters, business operations, and leadership development through Growing Tomorrow's Leaders
- Broader knowledge exchange is developed via our C2Network, and events such as our Annual Conference
- Member forums are a much-valued knowledge exchange opportunity – we hosted one forum for chairpersons, two for managers, and one for staff
- Circulating member briefing notes on relevant industry topics
- Circulating quarterly SAOS Update with news from and for members

Co-operation amongst co-ops



- Meetings and liaison with Co-ops UK, ICOS and ICA
- Multi-member collaborative projects
- Close liaison with the co-operative academic world such as Dundee Business School and St Mary's University, Nova Scotia

Concern for community



- Partnerships with agricultural support charity, RSABI, and farmer wellbeing programme, Farmstrong Scotland
- Governance support for Farmstrong Scotland
- Sponsorship of Lantra Scotland's ALBAS awards

Chairman's Report

Rory Christie

It seems almost unbelievable as we reflect on another year that the list of challenges has grown yet again. The consequences of the situation in the Middle East have impacted farmers more than most, and while bulk purchasing of fuel and fertiliser ensures co-ops and Machinery Rings can help members as much as possible, an uncertain future is impacting everyone as returns continue to fall and costs to rise.

Faced with these challenges, SAOS's ethos of working together effectively, and the value of co-operation, feel more relevant than ever.

SAOS's involvement in a wide and varied range of projects is touched on in this report. The detail in that work, and in that ethos of helping co-ops and those in food and farming to build stronger more resilient businesses, is a much bigger story. The talented team has grown again this year and shares a belief that, together, and with a can-do attitude, we can do better, and we can get things done. Through

co-operation we can continue to find new ways to become more profitable, competitive, and sustainable.

In that vein, it has been a year for realising the potential in the wider SAOS group, with the younger businesses showing real results and developing wider opportunities and benefits. For several years ScotEID has been a world-leading asset for Scotland, showing how great things can be achieved working in partnership, with Scottish farmers, industry, and government. This year, FIA has expanded into new areas, developing and enhancing



into the process of quality assurance, and helping underpin the best of 'Scotland the brand'. And SmartRural has continued to evolve to find more ways to provide value and bring wider benefits to rural communities through data management. This is meaningful progress, enabling SAOS to do more for our co-op members. My thanks go to Tim and all the teams for their hard work.

Chief Executive's Statement

Tim Bailey

The latest events in the Middle East herald a further extension of the 'perma-crisis' state we seem to have endured since Covid struck in 2020. Yet, despite the endless lurching from one event to another, one undisputable fact remains - the world's population continues to grow and must be fed.

For over 120 years, SAOS has provided leadership and helped find the way forward, often in challenging times. Through our can-do culture, strategic mindset, and extensive co-operative, networks, we have been able to support our members and the wider agricultural community to navigate a way through change and crisis.

Some events and change cannot be predicted. Our objective is to build stronger, more resilient foundations to enable our sector to better weather the economic, geopolitical, and meteorological storms we face.

In the last year we have learned a great deal driving the supply chain resilience

work as part of the Scotland Food & Drink Partnership strategy. We will be extending this work and the learnings into our membership over the coming year, including assessing co-op business performance, managing people, systems, markets, and sustainability.

Other changes are more easily seen, many of which have been 'coming down the track' for a while. We know already about less labour availability, a need for different skills, an increasing demand for more climate and nature positive farming, a requirement for adoption of more agri-technology, and an increasing demand for more sustainable food. SAOS has already been driving forward exploration in these areas with the development and delivery



of our Growing Tomorrow's Leaders programme, deployment of our Cultivating Collaboration Network (C2N), digital initiatives with SmartRural, and agrifood brand verification with Food Integrity Assurance.

In these increasingly uncertain times, leadership is not an option, it is a necessity, and I am both sure and very proud that the entire SAOS team will always rise to the challenge.

Our Impact

SAOS Group Impact

Since 1905, the core business of SAOS has been to provide vision, leadership, and value to the rural co-operative sector in Scotland.

Over the past few decades, the SAOS team has identified several areas where a more co-operative approach was essential, providing coherent, joined up solutions to overcoming challenges. This led to the development of new workstreams and initiatives and, in turn, the creation of SAOS's subsidiary businesses.

This year we've changed the reporting of Our Impact, aligning the 'edited highlights' snapshots of our work with the themes in this SAOS Group diagram to give a better idea of how our workstreams and businesses overlap.



Our Impact

Co-operation and Partnerships

The last year has seen a significant amount of representative work to embed the legislative 'co-op wins' following the passing of the Agriculture and Rural Communities Act. This has included working with fellow stakeholders within the Scottish Government Agriculture Reform Industry Oversight Board, and bilateral discussions with Ministers and officials.

This advocacy has included proposals for, not only new co-op specific schemes and programmes within Tier 3 and 4 of the Agriculture Reform Programme, but also calling for change to allow co-ops to be eligible for existing programmes such as the Future Farming Investment Scheme and the Small Producers Pilot Fund.

SAOS actively contributed to both the UK Mutual and Co-operative Sector Business Council report and the Batters' Farm Profitability Review, with SAOS's role and the impact of our member co-ops showcased in both.

SAOS continued to support our members with various aspects of their business

operations, including undertaking strategic reviews, director training, company secretarial support, merger and restructuring advice, risk register reviews, and organising Chair, Manager, and Staff Forum meetings. Our governance services work has been re-launched as the Blueprint Programme, emphasising good governance as a pre-requisite for clear leadership and better business.

SAOS organised several 'Meet the Co-op' events, one in collaboration with the UK Agri Tech Centre, where various co-ops participated, profiling the diversity of their work and showcasing the impacts for their members and the wider sector.



Meet the Co-ops Day at Grampian Growers

We played a pivotal role in supporting the four UK Dairy Producer Organisations to establish an Association (ADPO) which is legally recognised to function as an umbrella body to represent its members' interests within the UK dairy sector. Closer to home, SAOS continued to play an active role within the Scotland Food & Drink Partnership, providing the Food and Agriculture Stakeholders Taskforce (FAST) with company secretarial support services and helped to re-establish the Seed Potato Liaison Group.

Our Impact

Net Zero and Sustainability

The scale and range of SAOS's environment-related work continues to grow with various innovative new projects. This included working with a group of farmers and the Fife Coast and Countryside Trust (FCCT) in the Dreel Burn catchment area in East Fife to establish a natural capital farmers' co-operative. The primary purpose is to work together to sequester carbon, restore nature, and provide an entity that can access natural capital finance.

We have been working in a project partnership with the James Hutton Institute and the Energy Systems Catapult, having secured Discovery Phase funding for a proposal led by Scottish and Southern Energy Networks (SSEN). The driver for the project was SSEN's need to create a Distributed Future Energy Scenario to forecast agricultural energy requirements until 2050. The project involved data mapping and gap analysis to understand whether there is reliable baseline information on how much energy farms currently demand; from what energy sources; whether they are reliant on the grid or

using own power generation; where they are located; and what disruptions may change this.

SAOS was commissioned by NatureScot to undertake a Farm Biodiversity Audit Review to review the competitive landscape of digital tools which support farmers to record and monitor sustainability practices, as well as the assurance frameworks and demands from the supply chain which help to drive change. Findings from this work will help to shape future developments on NatureScot's Farm Biodiversity application.



Map of the Dreel Burn Catchment area in East Fife

SAOS continued developing the 'Making Sustainable Progress' project, helping to underpin the sustainability foundations of the overarching Scotland Food & Drink brand. It highlights various key food and drink sustainability credentials, including benchmarking against the Global Farm Metric sustainability framework. Additional research was undertaken to determine the impact of similar initiatives in other countries (such as Ireland's Origin Green and New Zealand's Fernmark) to benchmark Scotland's positioning against competitor brands.

Our Impact

Provenance and Traceability

Teams across the wider SAOS business continue to provide strategic support to various clients and partners with respect to the provenance of Scotland's food and drink products.

One area of focus within our Scotland Food & Drink Partnership strategy work is supporting the uptake of Geographical Indication schemes. This involved engaging with UK representatives of the GI Smart programme and exploring industry's reticence and barriers to engaging with the UK GI scheme. Interest remains in a range of products including Aberdeen butteries, Scotch pies, Scottish wild venison, Perry cider, Heather honey, Scottish tea, and Scottish berries.

SAOS and colleagues within Food Integrity Assurance (FIA) finalised the development and pilot work with the Scottish seafood sector, enabling the launch of the Scottish Quality Langoustine (SQL) scheme at the Seafood Expo Global event in Barcelona.

The SQL standard is verified as a group certification scheme involving the five fishing Producer Organisations, and focused around assessing the food safety, quality, and traceability aspects of the Scottish langoustine catch.

FIA continues to work closely with key clients, Quality Meat Scotland (QMS) and Scottish Quality Crops (SQC), on delivering and developing high quality assessment and certification services to underpin brand credentials such as Scotch Beef and Lamb, Specially Selected Pork, and Scotch Whisky and Oats. FIA secured the certification work for Scottish Quality Wild Venison (SQWV) and supported the development and launch of a new SQWV brand licensing scheme.



Launch of the Scottish Quality Langoustine Scheme

ScotEID currently provides industry checkers to QMS and SQC. QMS checkers include the Scotch Potential Eligibility Cattle Checker (SPECC) which demonstrates the provenance of cattle that have been born, reared, and slaughtered in Scotland. The QMS Traceability Checker verifies those cattle and sheep holdings which are assured and, similarly, the SQC checker allows authorised users and buyers to access the quality assurance status of cereals grown in Scotland.

Our Impact

Software and Data

The strategic role of data, and the requirement for software to underpin this, has continued to gain momentum in the last year.

ScotEID continued to collaborate with the Scottish Government and industry to develop and launch a Bluetongue Vaccination recording tool. This provided a new web service to allow keepers to record Bluetongue vaccinations and provide reports to the Animal Plant and Health Agency (APHA), allowing them to monitor the number of animals moving into Scotland from England. The ScotEID team also made system updates to provide data reporting for the Rural Payments and Inspection Directorate (RPID) to allow them to validate applications for calf headage payments for the new Scottish Suckler Beef Support Scheme. A new development was initiated to allow APHA to record

holdings used within pig businesses enabling the clear identification of biosecurity 'pyramids' (vertically integrated structures minimising disease spread). The pyramid identities and status are automatically pulled through to a mapping system with any breach initiating a standstill and additional alerts.

SmartRural successfully completed a feasibility study into development of a data management platform that could form the basis of an innovative, farmer-owned, data co-op. The technology platform will enable various data sources in different formats to be ingested, sorted, and stored within a database. This will then allow farmers to decide who can



MyHerdStats - helping improve herd health and productivity across Scotland

receive their data, what data they can receive, and when. This would help to support farmer data ownership and trust, enable responsible data sharing, and reduce duplication and administrative burden across supply chains.

FIA has been working with certification clients, SQC and SQL, to pilot the use of 'auditee portals' enabling FIA and scheme participants to share, archive, and communicate scheme-related information to reduce duplication and minimise ongoing audit burdens.

Our Impact

Supply Chains and Markets

In the last 12 months, SAOS has further extended the supply chain surveillance programme to more than 20 different supply chain maps, with additional versions in development for hemp and seaweed.

We were contracted to work with Scotland Food & Drink and the Soil Association on a new Organic Supply Chain Development Programme as part of the revised Scottish Organic Action Plan. The main aims of the programme are: to strengthen existing supply chains and routes to market; to deliver growth and development plans for priority areas of the Scottish organic food and drink sector; and to identify and explore opportunities to encourage the formation of more organic producer co-operatives and producer groups across all sectors of food production.

SAOS was tasked with facilitating a review of the Scottish venison strategy and manage a new pilot fund to support low ground deer managers in Scotland.

This project, delivered in partnership with NatureScot, aims to enhance deer carcass handling infrastructure by part-funding small and micro-scale chillers and related equipment. This initiative supports best practice standards, increases processing capacity, and facilitates access to larger venison markets.

SAOS continued to host the Scottish Agri Export Hub and organised Scottish industry attendance at PotatoEurope 2025 in The Netherlands with a large contingent of seed potato exporters. PotatoEurope is a major annual event for the potato industry, showcasing the 'farm to fork' value chain, from potato cultivation and machinery, to processing and innovation.



The Low Ground Venison Supply Chain Project helps upgrade larder facilities

SAOS was commissioned by the Scottish Government to undertake an Abattoir Infrastructure Review in the Highlands and Islands area, with an emphasis on private kill abattoirs and processors.

We also continued to provide our strategic support to the Scottish Dairy Growth Board, including supporting them to develop a business prospectus and investment case for an added-value milk processing facility in the south of Scotland.

Our Impact

Food Security and Resilience

SAOS continued to lead the Scotland Food & Drink (SF&D) Supply Chain Security strategic workstream. This has seen the previous Supply Chain Risk Register evolve into a Sector Insight Summary which is reviewed and published every six months. The purpose of the document is to keep interested parties up to date with current and emerging issues that might impact on food and drink supply chains in Scotland.

Supply chain resilience work has seen development and refinement for both the Sector Resilience Assessment Tracker and Business Resilience audit tool. Second year scoring of the Sector Resilience tracker was undertaken by trade organisations and experts with a report on findings from the year, and benchmarking against 2024 scores, circulated around the SF&D Partnership.

Funding was secured to start the process of digitising the Business Resilience audit process in partnership with Edinburgh College. This will provide the scope

to increase participation numbers in the project significantly and provide opportunities for business-to-business benchmarking.

The Import Substitution work continues to assess prospects within each sector and their capacity to respond, with potential opportunities currently totalling £2.5bn for Scottish supply chains. The Sourcing for Growth programme was launched to raise further awareness of SAOS's work in this field. There has been associated communications activity, including social media, and a dedicated



SAOS's Allene Bruce presented at The Economist's 'Future of Food Summit'

website section signposting opportunities for buyers and suppliers. Various enquiries have now been progressed with businesses involving butter, oats, bakery, eggs, organic chicken, and grains for feed and flour production. In addition, there is emerging interest in hemp and pulses as an alternative protein source to soya, particularly in animal feed. This is a developing market with interest from growers, and the SAOS team is working with both sectors to identify a collaborative solution to enable suitable product processing to fulfil market potential.

Our Impact

Technology and Innovation

The ScotEID team continued to work closely with industry and the Scottish Government preparing for implementation of Ultra-High Frequency (UHF) electronic identification with the Scottish cattle sector. This included technical updates to applications including weigh-scales and readers at markets and abattoirs. Pilot farm and market support was ongoing and included further testing of UHF tags from various eligible suppliers.

SmartRural concluded the Aberdeenshire City Regional Deal-funded Huntly 5G project at the end of March 2026. This resulted in the installation of improved 5G and wireless connectivity infrastructure, enabling remote sensing of farm and environmental data; successful trialling of high-speed Tarana wireless broadband; piloting remote environmental monitoring of rural housing; and the software build of the minimal viable product for co-operative data collection and management.

SAOS was a partner in the innovative GeoCrop earth observation project. The three-month feasibility study focused on developing the software for a risk

management tool using satellite weather data and historical farm weather data to support optimal decision-making by horticulture farmers for early season premium crops. In addition, we led a European Space Agency-funded project with environmental consultancy, Terrabotics, assessing the technical and business case for biodiversity monitoring in farming, integrating information from acoustic sensors and satellite data through their HabiTracker service.

We have been working with South of Scotland Enterprise (SOSE) to assess the collaborative economic opportunity for hemp growers and primary processing for supply of fibreboard for sustainable



Potato haulms potentially have a bright future as demand for solanesol increases

housing construction in the Scottish Borders Region.

SAOS has been supporting member co-op, Grampian Growers, with their Innovate UK-funded project on solanesol extraction. This innovative initiative involves assessing the feasibility and market potential of transforming potato haulms (foliage) into high value bio-derived ingredients for cosmeceutical, nutraceutical and pharmaceutical applications. This could help to fulfil increasing global demand and provide an alternative to the existing supply, derived from tobacco leaves.

SAOS Board and Council

In addition to our Board, SAOS also has a Council, comprising co-op members from all sectors, and other key industry bodies. This gives us another level of governance, keeping us in tune with member business needs and wider industry issues, and helping to shape our future work.

SAOS Council comprises our Board (below) together with:

Michael Bayne
Borders Machinery Ring

Richard Butterworth
BATA Ltd

Sarah Millar
QMS

TBC
Tarff Valley Ltd

Penny Montgomery
SAYFC

John Davidson
NFU Scotland

Joe Hind
Scotland Food & Drink

Graham Bruce
Ringlink

TBC
Lantra Scotland

TBC
WWF

TBC
Next Generation

Scott Calderwood
First Milk

Angela Porchez
Angus Growers

Patrick Hughes
SAOS

Teresa Dougall
Scottish Quality Crops

Russell Brown
Scottish Potato Co-op

Steven MacPhail
Lewis Crofters

Jonny Williams
Farm Stock Scotland Ltd

The success of SAOS, like every co-op, depends on how well its directors carry out their roles and responsibilities, and we are delighted that SAOS's Board has a wealth of knowledge and experience supported by skills training and development, as well as an ambitious vision for our future.

SAOS Board Members



Tim Bailey
Chief Executive



Rory Christie
SAOS Chair
(Milk Suppliers Association)



Andy McGowan
SAOS Vice Chair
(Scottish Pigs)



Rob Mitchell
Scottish Shellfish



Tom Pate
Independent Director



David Kilshaw
Senior Independent Director



Murray Forsyth
Aberdeen Grain



Marion MacCormick
Independent Director



Ewan Warnock
Oban Livestock Centre

SAOS, like all co-ops, is bound by a set of Rules that govern how our co-op is run. Find out more at www.saos.coop

SAOS Staff Team



Tim Bailey
Chief Executive

Our Council feeds into the Board, who then shape our focus and direction of travel with CEO Tim. He and the Senior Management Team then manage how #workingtogether we can best use our resources to strengthen the profitability and effectiveness of Scotland's food, farming, and rural co-ops and businesses.

SAOS's greatest asset is our team. Every individual member is valued and empowered, and each has a unique skill set and wide networks, enabling them to add benefit in many different ways across multiple sectors and workstreams as required.



Patrick Hughes
Strategic Services Director



Allene Bruce
Head of Supply Chain Development



Jennifer Thompson
Communications and PR Manager



Fergus Younger
Project Manager



Jim Booth
Co-op Development Director



Helen Glass
Head of Supply Chain Innovation



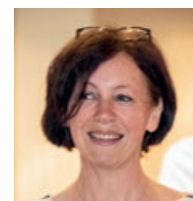
Robert Logan
Head of Co-op Development



Leanne Paveling
Finance and HR Admin Manager



Douglas Bowden-Smith
Project Manager



Allison Watson
Project Support Manager



George Noble
General Manager, SmartRural



David Caskie
Financial Controller



Abbie Robertson
MyHerdStats Programme Manager



Hamish Walls
Project Manager



Mikaela Linden
Supply Chain Project Manager



Stephen Sanderson
General Manager, FIA



Scott McDowell
General Manager, ScotEID



Claire Dyce
Co-op Development Manager



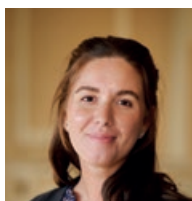
Adam Forrest
Co-op Development Manager



Josie Forth
ScotEID Office Manager



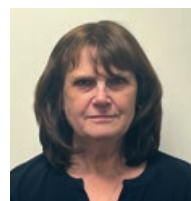
Emma Patterson Taylor
SAOS/ScotEID Project Manager



Paty Rojas Bonzi
Project Manager



Lucy Burborough
Finance Assistant



Beth Pringle
FIA Finance Assistant



Emma Koubayssi
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Find more, including our Annual Accounts, at
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