Scottish Wild Venison

Infrastructure and Processing Review

July 2023

Introductions

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- Fergus Younger - SAOS

What are we trying to achieve?

Conflicting demands

Cull, Land Management, Pest Control, Environmental problem

Iconic produce, natural resource, premium protein, fragile industry, environmental credentials

Review current infrastructure and processing of Scottish wild venison

Objective to increase cull levels by c.50,000 deer per year by 2028, and sustain for a further circa 5 years

Option One – drive cull levels as demanded, and find home for material out-with established fragile markets

Option Two – drive & subsidise cull levels as demanded and dispose of material

Option Three – invest in the existing and established industry to create a balanced and sustainable industry

Option Four – combine Options One and Three

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Vision and Context

Vision

SCOTTISH VENISON

"Our ambition for 2030 is to make Scottish Venison the premier choice of consumers and commercial buyers, both here in the UK and in international markets."

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Which is the odd one out?

Scottish icons

The art of the possible!

What if……..?

- Appropriately funded industry body
- An ‘end-end’ quality assurance scheme aligned to the food industry
- A comprehensive industry training programme that ensures consistency throughout supply-chain
- Financial intervention to subsidise relevant and critical points in supply-chain
- Grant support to aid industry infrastructure
- A comprehensive education and marketing programme
- Scottish Wild Venison securing ***PGI status*** (Protected Geographical Indicator-EU & UK)
- Representation at the F&D table
- Multi-tiered strategy (local/regional, National, International)

Observations?

Today

Primary Producer

- Inconsistencies in processing
- **Differing challenges**
- Differing costs to harvest
- **Lack of chilled larder/collection points lowlands**
- Traditional culling seasons
- **Value v Sporting revenue**
- Variable available resource

Secondary Producer

- **Logistics challenges**
- **Seasonality**
- Variable quality goods received
- **Variable interpretation of standards from Primary Producers**
- Poor communication from Primary Producers
- **Burden the cost of policing quality**
- Traditional markets
- Lack of engagement with other F&D producers

Routes to Market

- Traditional markets
- **Local small scale/no support**
- National multiples
- Small scale wholesale channel
- **Focused on supply of 'fresh' product**
- Seasonal 'stop-start'
- International markets decline
- **Lack of accreditation to open new markets**
- Availability issues
- Consistency of product
- Consistency of quality
- **Zero public procurement**

End-Users

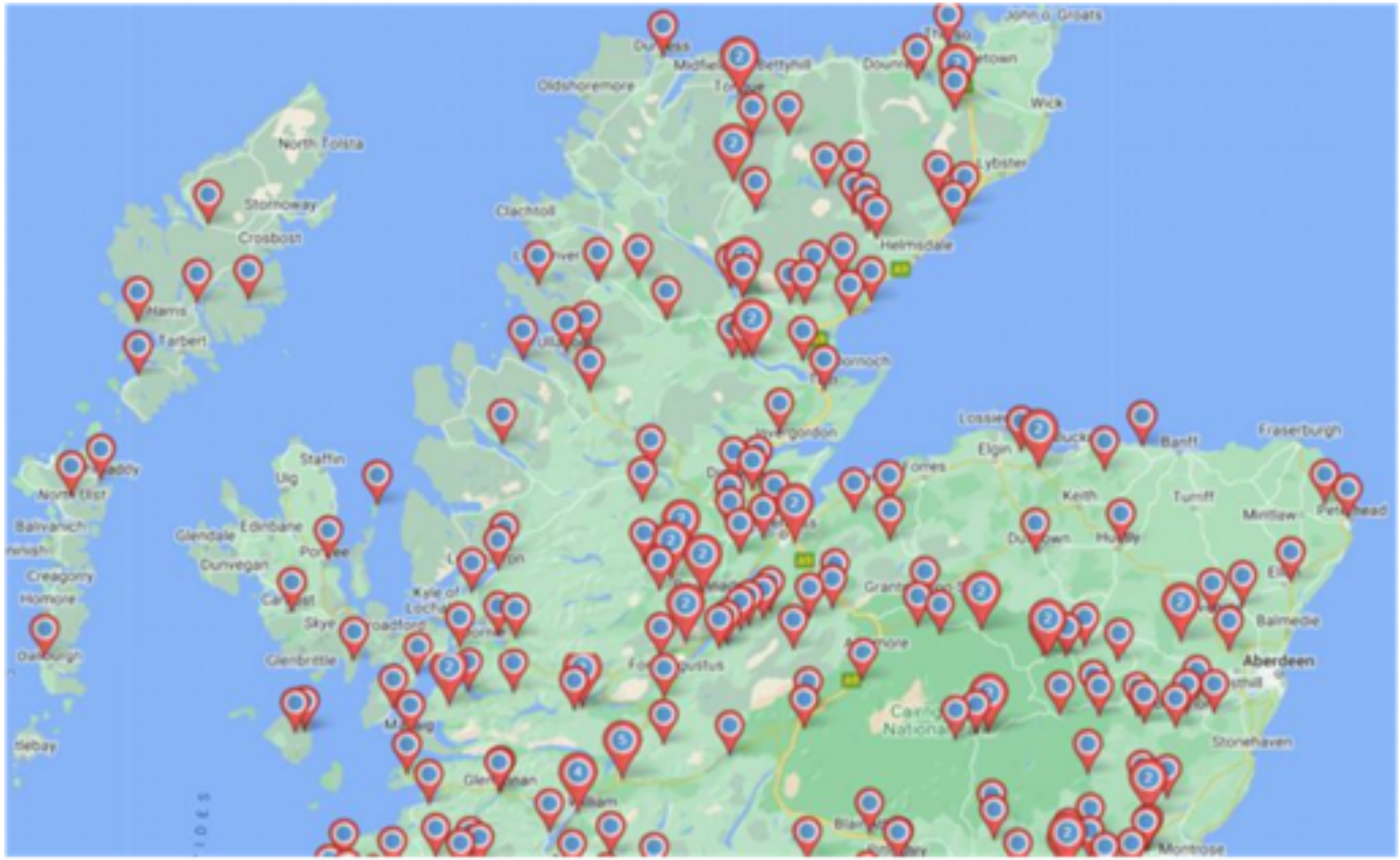
- **Poor access to product**
- **Lack/mis-understanding of product**
- Lack of knowledge on cooking
- Can be expensive option
- **Price gap between other proteins**
- Variable quality
- Variable consistency
- **Highly seasonal**

Consumer

- *Poor access to product*
- *Lack/mis-understanding of product*
- *Lack of knowledge on cooking*
- *Can be expensive option*
- *Price gap between other proteins*
- *Variable quality*
- *Variable consistency*
- *Highly seasonal*
- **Minimal marketing investment**
- **Confusion over environmental messages**

Fergus Younger

Mapping infrastructure

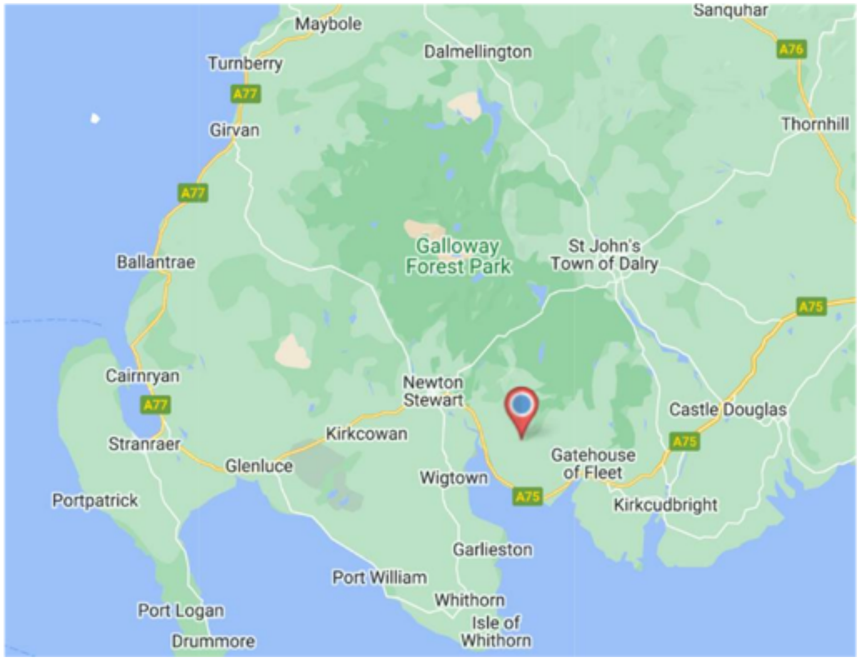


Regional variations

Highland Council

versus

D&G Council



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KEY TAKEAWAYS

- Incomplete data held by all councils
- Councils don’t typically distinguish between deer larders and processing facilities
- Environmental Health typically didn’t know where information was stored
- 347 facilities located across Scotland
- The Highlands have the best overall capacity
- Argyll & Bute Council: noticeable decline in re-registered deer larders over the past 12 months

John Forteith

Defining the food Supply Chain

Who is the customer?

Primary Producer

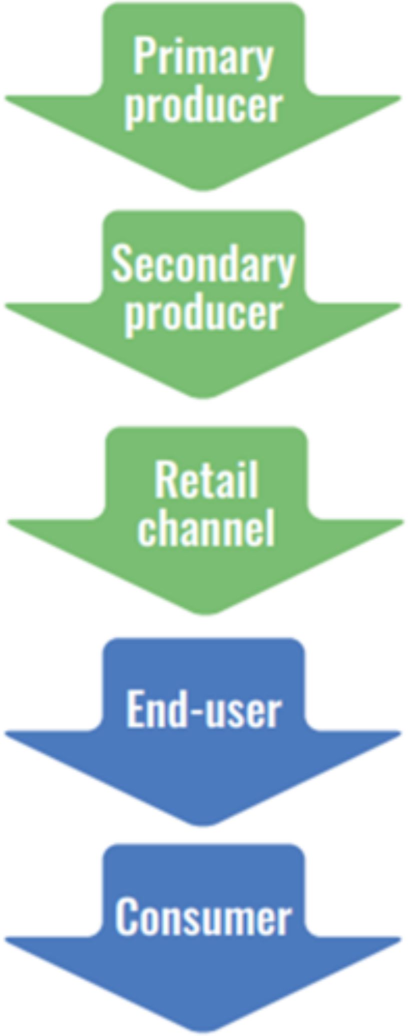
Partnership

Channel

Consumer

Secondary Producer

<u>Basic Supply-chain</u>



Procurement of raw material – Landowner/Stalker

Adding value to basic material - Processor

Routes to market solutions – Retail, Wholesale, D2B, D2C

Consumers point of contact – Caterers or retailers

You and me!

Unlike any other food produce…………?

- We're different!
- It's a 'dirty' process
- Data suggests declining demand
- Cull terminology
- Land management
- Pest control
- Everyone wants it 'fresh'
- It's a seasonal product
- It's expensive in comparison to other meats
- No one wants material from the rutting season

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Market overview

Is there a demand for Scottish Wild Venison?

- **Data & Data** – implies decline in sales – Knowledge Bank taken from small/narrow market.
- **Brand pre-requisites'**:
    - Quality
    - Consistency
    - Availability
- **Frozen** 'de-risks' a high value product

A marketeers dream product!

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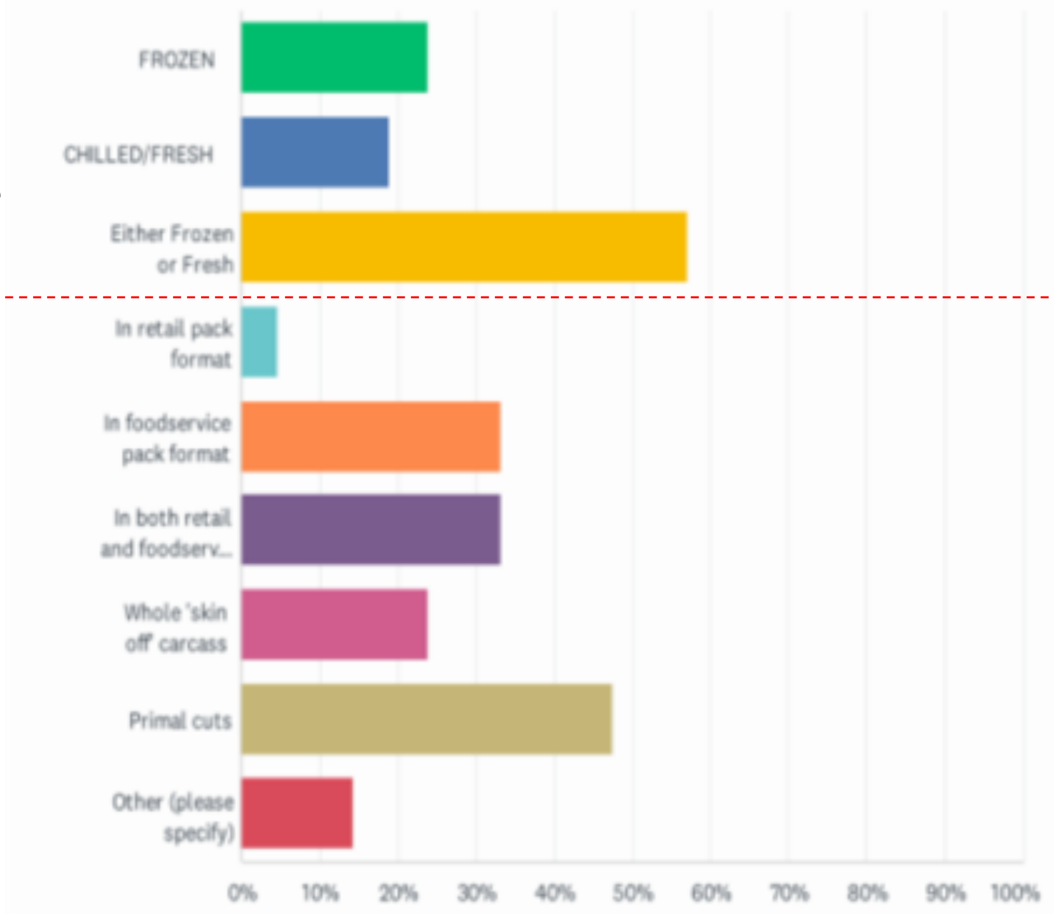
SCOTTISH WHOLESALE ASSOCIATION
The voice of the Scottish Food, Drink and Allied Trades

If you were looking to supply Scottish Wild Venison products would you need them as-

Temperature

Pack format



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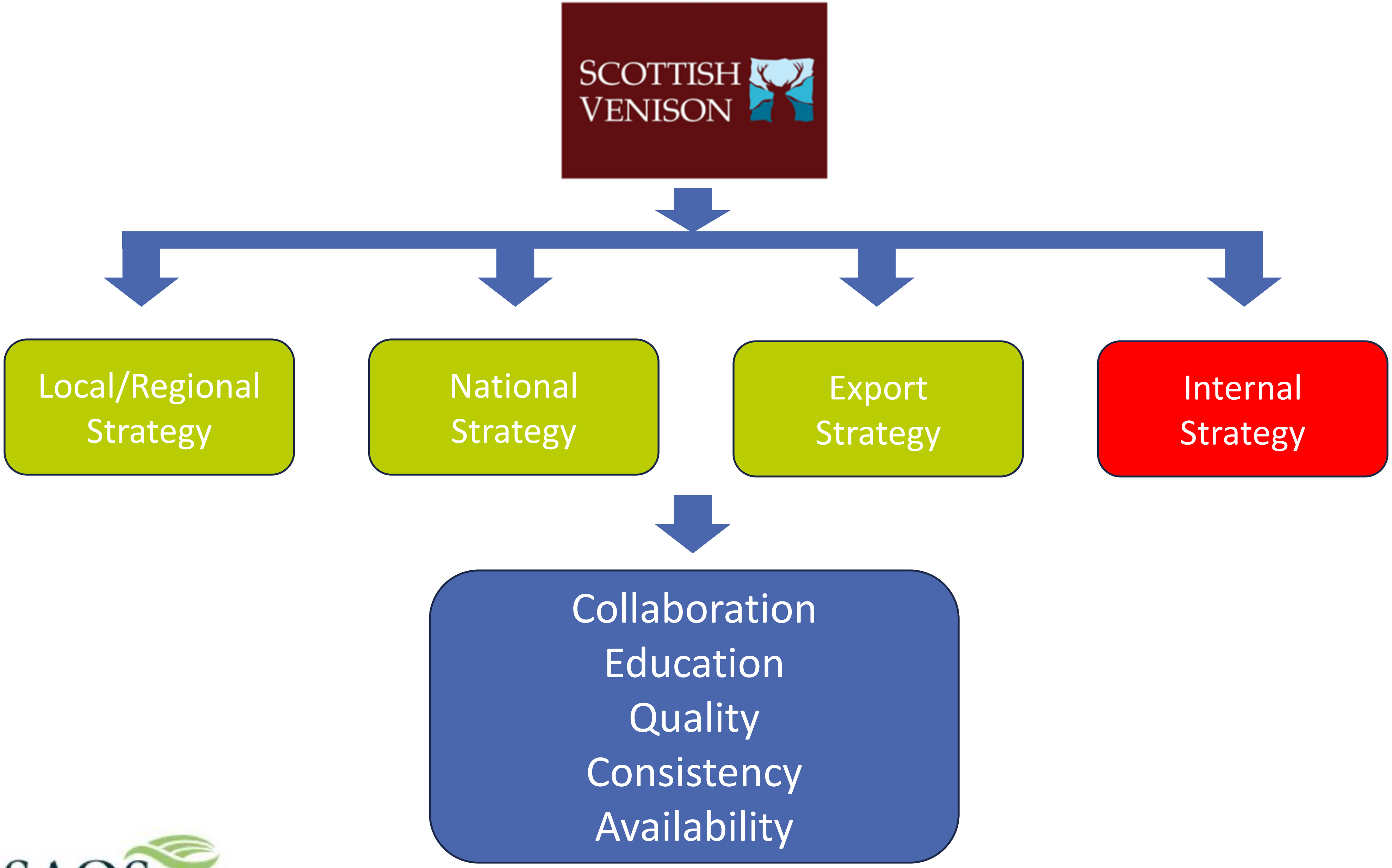
The Challenges

Challenges

Primary Producer	Secondary Producer	Routes to Market	End-Users	Consumer
• Standardise protocols • **Introduce DMC expiration/renewal requirement** • Toolkit to support processes and marketing • **Investment in larder/collection points lowlands** • Widen harvest seasons • **Financial support in areas of concern** • **A fair and unbiased grant scheme**	• **Flattening of Seasonality** • Increased availability • Variable quality goods received • **Greater clarity on interpretation of standards required** • Improved communication with Primary Producers • **Reduce burden of policing quality** • Exploit traditional markets • Develop new markets • **increased engagement with other F&D producers**	• **Investment in toolkit for Local/small scale operators** • **National 'industry led' marketing campaign** • Support and partnerships with wholesale channel • **Develop 'de-risked' offer.** • Increased availability to mitigate 'stop-start' process • **Re-ignite International markets** • Invest in suitable accreditations to address inconsistencies • **Public procurement commitment**	• Improve access to product • **Education of End-users and messaging around product** • Improve knowledge on cooking • Cost examples and menu/pack options for all budgets • Messaging around Price gap between other proteins • **Improved quality** • **Improved consistency** • **Availability throughout the year**	• ***Improved access to product*** • ***Education via media and education sector*** • *Improved knowledge on cooking* • *Cost examples/dishes v other proteins* • *Affordability education between other proteins* • *Improved quality* • *Improved consistency* • **Marketing investment across multiple channels** • **Media campaign around environmental credentials**

The opportunities

We’ve already started!!


SCOTTISH VENISON
Local/Regional Strategy
National Strategy
Export Strategy
Internal Strategy
Collaboration
Education
Quality
Consistency
Availability

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Conclusions

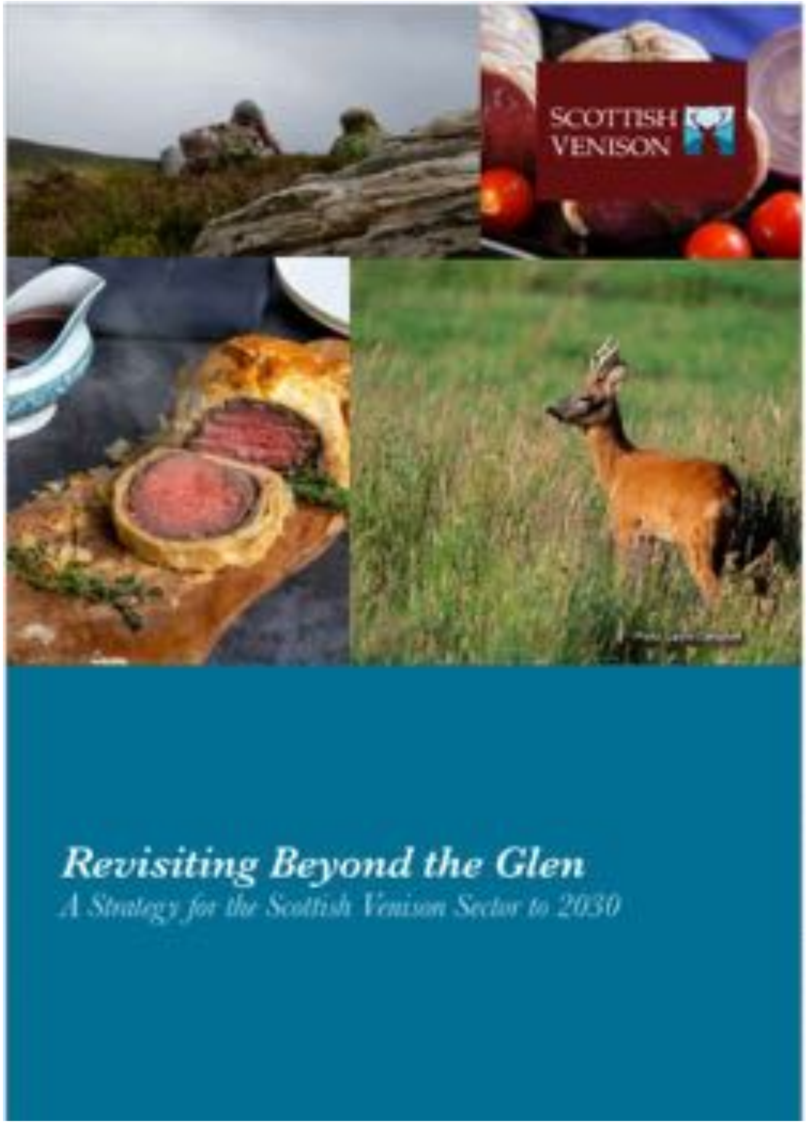
There's no single magic bullet!

But there are multiple targets

- Education in the field
- Education and standards in handling and logistics
- Stronger relations and understanding across supply-chain
- Improved end-to-end quality and consistency
- Increased availability
- Industry led marketing campaign
- New markets developed
- Investment in prioritised infrastructure

Creating an aligned industry

- Opening doors with c.£3bn Scottish Wholesale market
- Protect and grow existing fragile markets
- Invest in 'end-to-end' Quality Assurance and build consistency and customer/consumer confidence
- Marketing and media activity to raise awareness
- Local/regional pilot schemes to create templates
- Larder/collection solution for challenged areas
- An 'unbiased' grant scheme to support objectives
- Financial intervention to mitigate losses where necessary
- Education plan (schools, consumer, public sector, industry)
- Increase market data to support decisions process
- Securing of PGI status and marketing of 'the brand'



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Q&A