

**SCOTLAND
FOOD & DRINK
PARTNERSHIP**

SUSTAINING SCOTLAND. SUPPLYING THE WORLD.

**DELIVERY PLAN
Year two: 2024 - 2025**





Our 2024-25 Delivery Plan outlines the activity we are delivering over the next twelve months to achieve the ambitions we set out in the national food and drink strategy, ‘Sustaining Scotland. Supplying the World.’

This plan connects our long-term objectives with the immediate actions we are taking and is underpinned using market and industry intelligence from our bespoke insights service, The Knowledge Bank. By collaborating across the Scotland Food & Drink Partnership, and with support from the Scottish Government, we will address the challenges and seize the opportunities to become a resilient, sustainable and growing industry.

Our ten-year strategy aims to:

- Build industry resilience by boosting and protecting margins.
- Grow the industry to £20bn by 2028.
- Lead in environmental sustainability and achieve Net Zero by 2045.

OUR STRATEGIC FRAMEWORK

VISION

Scotland is the best place in the world to own, operate, and work for a food and drink business. The country is renowned as a world leader in sustainable production and responsible growth, where resilient businesses across the entire supply chain flourish and prosper.

MARKETS

We will prosper from our businesses competing successfully in our three key markets:

- **Scotland**
- **The rest of the UK**
- **International**

MISSION

Our three missions will sharpen businesses’ competitive edge in these markets, helping them increase resilience and grow in a way that is responsible and profitable.

Resilience

Build a resilient, innovative, and dynamic industry that can better withstand and respond to market volatility, economic shocks, and supply chain disruption.

Growth

Build our brand, capability, and market activity so we can sell more food and drink into the right markets at home and across the world.

Sustainability

Build the capability and credentials of the industry, so it can embrace and benefit from the journey to Net Zero and having world-class environmental credentials.

ENABLERS

- Net Zero and the Environment
- Policy and Regulation
- Supply Chain Security
- People and Skills
- Technology and Digital
- Access to Capital
- Infrastructure
- Brand and Reputation

DELIVERING OUR AMBITIONS

Guided by three strategic missions of resilience, sustainability and growth across our key markets, our work is structured around seven programmes which are aligned with our strategic themes and enablers.



Programme 1: MARKET GROWTH



Programme 2: POLICY & REGULATION



Programme 3: SUPPLY CHAIN SECURITY



Programme 4: INNOVATION & DIGITAL TECHNOLOGY



Programme 5: PEOPLE & ENTREPRENEURIAL SKILLS



Programme 6: NET ZERO & ENVIRONMENT



Programme 7: CAPITAL FOR GROWTH



PROGRAMME SPONSOR:
Scotland Food & Drink

Delivery leads: Scotland Food & Drink and
Scottish Development International

PROGRAMME 1 MARKET GROWTH

Each of our three markets are different and their trends, consumers and competitors constantly evolve. Our group of market experts lead the delivery of our market activation plan for each of our markets – domestically in Scotland and across the UK, and internationally in key export markets. These plans align with our strategic aims yet remain agile enough to incorporate the latest insights and emerging opportunities. The Knowledge Bank plays a critical role in our market development efforts. The insights they commission and produce are central to driving knowledge and helping us achieve a competitive edge.

WE WILL

Support volume and value growth for Scottish food and drink businesses by attracting and developing lucrative commercial opportunities across Scotland, the rest of the UK, and international markets.

KEY ACTIVITY ACROSS OUR MARKET GROWTH PROGRAMME FOR 2024-25

Scotland market

- ✓ Hosting regional Sourcing Scotland events in collaboration with Regional Food Groups to promote local sourcing, with a national event to enhance nationwide sourcing efforts.
- ✓ Initiatives to boost food tourism
- ✓ Funding joint positions with local authorities to support the development and local activity of 18 Regional Food Groups.
- ✓ Working with partners such as the Scottish Wholesale Association and Scottish Grocers Federation to increase sales through wholesale and convenience channels
- ✓ Develop an approach to increase the opportunities around Public Procurement in Scotland.

London and UK market

- ✓ Creating sales opportunities for Scottish producers by participating in various exhibitions throughout the UK.
- ✓ Facilitating learning journeys in London to connect Scottish producers with UK market opportunities, supported by wider promotional activities targeting the London market.
- ✓ Using existing and new relationships with our customers to identify and deliver growth opportunities
- ✓ Placing graduates within buying teams across retail and wholesale to strengthen relationships, boost supplier development and create new sales opportunities in key markets.
- ✓ Support the Scottish Dairy Growth Board to enhance the dairy sector in key markets.
- ✓ Work with our customer base to share their Net Zero ambitions and ensure that our businesses know what they need to do and where they can get help.

KEY ACTIVITY ACROSS OUR MARKET GROWTH PROGRAMME FOR 2024-25

International market

- ✓ Providing funds for in-market promotions to support market development and boost international sales in key markets, in collaboration with our in-market specialists.
- ✓ To further develop the role and actions of the Agri-Export Hub.
- ✓ Deliver peer to peer opportunities to build knowledge, ambition and capability for exporting.
- ✓ Work within the Export Partnership to deliver the Export Market Activation plan.

Building capability

- ✓ Supporting businesses with SALSA Go! and BRC certification to improve market access.
- ✓ Offering a bespoke training programme through The Academy and The Knowledge Bank to build business capabilities, commercial and insights skills.

Building brand and reputation

- ✓ Roll out of the newly developed Naturally Scottish brand in key market activities, including utilising the branding for trade marketing activities.
- ✓ Further develop the seafood market strategy and plan through industry wide engagement building further value and reputation internationally.

PROGRAMME SPONSOR:
Scotch Whisky Association

Delivery lead: Scotland Food & Drink

PROGRAMME 2 POLICY AND REGULATION

The nature of this programme calls for flexibility. We need to react quickly to address challenges and opportunities as they emerge, and where Partnership interventions might be required. So this plan is far from set in stone – we'll keep it under constant review to make sure we're always doing the right thing for Scotland's food and drink businesses.

WE WILL

Make sure the operating environment continues to foster industry growth, while underpinning our global reputation for animal welfare, food safety, health, traceability and quality.

KEY ACTIVITY ACROSS POLICY AND REGULATION PROGRAMME FOR 2024-25

- Continued leadership and management of the SF&D Partnership Policy Group, our cross-partner working group looking at the challenges and opportunities in the food and drink sector and providing a unified voice for our policy advocacy.
- Ensuring the food and drink industry is recognised in policy and regulation development.
- Working to ensure that the economic importance of our industry and its sectors is recognised and known with our key stakeholders.
- Facilitating deeper engagement with industry, gathering business evidence and understanding industry opinions on existing and forthcoming policies.

PROGRAMME SPONSOR:
SAOS

Delivery lead: SAOS

PROGRAMME 3 SUPPLY CHAIN

Taking the best Scottish produce from farm to fork needs a lot of planning. It's everything from collaborative, efficient and secure supply chains to short-term interventions. We know that food security is of national importance. And with greater activity happening in the market, we're placing a programme to develop resilient supply chains high on our agenda.

WE WILL

Create the right conditions for businesses to operate successfully and optimise national food security, so we can respond to supply chain shocks and volatility.

KEY ACTIVITY ACROSS OUR SUPPLY CHAIN SECURITY PROGRAMME FOR 2024-25

- ✓ Updating surveillance and mapping for over 20 supply chains and establishing a continuous monitoring process for a supply chain risk register.
- ✓ Designing and developing a business resilience audit programme for individual businesses and exploring the establishment of a troubleshooting network for business resilience issues.
- ✓ Launching an initiative to substitute imports with local products, aiming to reduce carbon emissions, enhance supply security, and create new business opportunities.
- ✓ Promoting and supporting the adoption of Geographical Indication schemes to protect and market region-specific products.
- ✓ Conducting research and feasibility studies on alternative pooled cooperative investments, focusing on areas like processing infrastructure, sustainability initiatives, and improving supply chain efficiencies.



PROGRAMME SPONSOR:

Interface

PROGRAMME 4

INNOVATION AND DIGITAL TECHNOLOGY

Access to technology and the expertise to optimise its use is crucial for growth. Without this, our businesses won't be able to benefit from innovation, and will struggle to develop or reformulate products, or enter new markets. Scotland is home to some of the world's most technologically advanced companies and world-leading academics and researchers – our programme will unlock this support for the food and drink sector.

WE WILL

By harnessing the power of innovation and digital technology we will develop businesses to make them more competitive and more competitive, leading to future-proofed businesses.

KEY ACTIVITY ACROSS OUR INNOVATION & DIGITAL TECHNOLOGY PROGRAMME FOR 2024-25

- ✓ Providing grants to support businesses in reformulating products to capitalise on the growing health trend.
- ✓ Development of a Co-op Innovation Support Service designed to assist agricultural co-operatives in researching and developing potential innovations to boost agricultural efficiency, productivity and sustainability.
- ✓ Support new product development capacity and capability in our businesses.
- ✓ Work with the innovation support landscape in Scotland to ensure that food and drink businesses can access the support they need to be innovative.

PROGRAMME SPONSOR:

Seafood Scotland

Delivery lead: Food & Drink Federation Scotland

PROGRAMME 5

PEOPLE AND ENTREPRENEURIAL SKILLS

We know that people will be key to achieving our ambitions. Getting the right skills into the sector, in the right numbers and locations will boost productivity, build resilience, and drive growth. Our programme will showcase the diverse range of jobs and careers in the industry.

WE WILL

Make the industry a career of choice – attracting the right people with the right skills, in the right numbers and locations. This will boost productivity, while developing the next generation of skilled talent to drive growth.

KEY ACTIVITY ACROSS OUR PEOPLE AND ENTREPRENEURIAL SKILLS PROGRAMME FOR 2024-25

- ✓ Showcasing the diverse and rewarding career paths in the industry by collaborating with educational partners and career influencers such as Developing Young Workforce.
- ✓ Inspiring new talent to choose a career in food and drink by building our networks of industry ambassadors who can promote the sector and share their experiences, connecting employers with potential employees.
- ✓ Ongoing communications campaign through Feeding Workforce Skills to support businesses to recruit and retain the talent businesses need to grow and succeed.
- ✓ Building a more skilled workforce by signposting and engaging companies to utilise resources and existing programmes that can develop their leadership, and support their employees gain new skills or improve existing ones.

PROGRAMME SPONSOR:

Food & Drink Federation Scotland

Delivery leads: Food & Drink Federation Scotland and SAOS

PROGRAMME 6

NET ZERO AND ENVIRONMENT

We're fully committed to our Net Zero journey. We must maintain our high environmental standards and address emerging challenges and opportunities throughout the food and drink supply chain. Our Net Zero Commitment will be key and is already helping businesses understand what Net Zero means for them and how to get there.

WE WILL

Put Scotland in the best possible position to be seen as a global leader in sustainable food and drink supply, driving the industry to meet its Net Zero targets and supporting businesses to capture the commercial benefits and significant market opportunities.

KEY ACTIVITY ACROSS OUR NET ZERO AND ENVIRONMENT PROGRAMME FOR 2024-25

- ✓ Continue our leadership and management of the Net Zero Commitment programme and five commitments, providing cohesive coordination and strategic oversight of Net Zero activities.
- ✓ Identify and deliver collaborative projects with key Delivery Partners.
- ✓ Deepen understanding of business challenges to provide tailored support and deliver additional carbon literacy training to business and industry stakeholders.
- ✓ Continue the development of an industry net zero roadmap using SEFARI Scientific Advisory Group to lead on sub-sector emissions analysis.
- ✓ Develop a comprehensive sustainability delivery plan for Scottish agriculture and a benchmarking exercise across all agricultural co-ops to support the development of a Sustainability Roadmap.

PROGRAMME SPONSOR:

Opportunity North East

Delivery leads: Opportunity North East and Scotland Food & Drink

PROGRAMME 7

CAPITAL FOR GROWTH

We're looking to the future and encouraging people to think big. This programme will look to address the capital issues experienced by the sector, and ensure that it is firmly on the radar for potential investors.

WE WILL

Drive solutions that provide businesses with more access to investment capital – empowering them to raise ambition and seek growth opportunities and invest in the future.

KEY ACTIVITY FOR OUR CAPITAL FOR GROWTH PROGRAMME FOR 2024-25

- ✓ Inspire and educate businesses about the routes to securing investment, and work with key partners to provide support and guidance on how to attract and prepare for potential investment.
- ✓ Pilot a curated event to match businesses with a range of potential investment partners at a meet the investor showcase.
- ✓ Promoting Scotland's food and drink businesses as credible and worthy investments, building relationships with key influential contacts

HOW WE'LL DEVELOP OUR PLANS, NOW AND FOR FUTURE YEARS

Our aim is always to enhance the business support landscape in Scotland and make sure the support, and our interventions, serve the whole food and drink industry and our strategic ambitions. Collaboration is at the heart of this process. We will strengthen our existing networks and work together as a partnership to develop best practice and deliver the right activity at the right time.

This ambitious delivery plan is made possible thanks to the commitment of the Scotland Food & Drink Partnership.



Many hands. One voice.



SCOTLAND FOOD & DRINK PARTNERSHIP



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