

Beyond the Glen



**A strategy for the
Scottish Venison
Sector to 2030**

Scotland
A LAND OF
food and drink



Foreword

In March 2018, Cabinet Secretary, Fergus Ewing MSP hosted a Scottish Venison Summit which brought together representatives from both the wild and farmed sectors, those involved in the wider supply chain and supporting organisations. At this meeting, the sector was challenged to write their own ambition for 2030, bringing together both sectors to capitalise on their strengths and opportunities and set against a challenging economic background where uncertainty is the new norm.

This document outlines that ambition and initial plans and is the beginning of the journey which the Scottish Venison Sector will set out on together to raise the profile, increase supply and ultimately have more consumers across the world eating Scottish Venison which in turn will deliver higher economic benefits to Scotland, the producers and the supply chains involved. The sector is highly innovative and offers a great opportunity for Scotland's agricultural and game sector to become a more important player on the world venison stage as well as supporting the Scottish Agricultural Champions ambitions.

Our thanks to all who have contributed both knowledge and ideas, particularly to the working group and industry organisations who have represented the Scottish Venison sector with great passion and have provided the stimulus for the route ahead. Further acknowledgment and thanks are made to the Scottish Venison Partnership (SVP) who have played a lead role in the sector's development on its journey thus far. We would also like to acknowledge the role SAOS have played in chairing and supporting the working group and to SAC for their input and help.

I am delighted to endorse 'Beyond the Glen', Scotland's first strategy to develop our wild and farmed venison sector. Venison is already one of our premium foods, renowned as a quality, low fat, high protein red meat that is increasingly sought after in domestic and international markets.

There is so much more potential for the sector to develop and grow and this new strategy provides a fantastic platform to do so. When I brought the sector together earlier this year to discuss the growth opportunities I was hugely encouraged by the commitment of all involved to work together with a shared ambition for their own businesses and wider sector.

The practical actions set out in the strategy will help realise that ambition, encouraging increased opportunities for existing and new businesses and markets, raising awareness of the benefits of venison with consumers and farmers, optimising value across the wider supply chain and enhancing the diversity of Scotland's Larder still further.

Deer management and farming can play a significant role in a thriving, sustainable and productive rural economy. This strategy will enable the sector to build on the strong foundations built by the venison pioneers in Scotland and I look forward to continuing to work in partnership with the sector to drive forward these efforts.



Fergus Ewing
The Cabinet Secretary
for the Rural Economy

Industry insight

There are 4 species of wild deer found in Scotland – Roe, Red, Sika and Fallow – Red is the most recognised whilst Roe is the most widely distributed.

Deer management including stalking supports 2,520 FTE paid jobs (PACEC 2016) making a significant contribution to the rural economy as well as being integral to the management of Scotland's biodiversity.

Europe's deer farming industry was started in Scotland in 1969 by Sir Kenneth Blaxter at the Rowett Institute with the first commercial farm in 1973.

There are now 97 deer farm holdings registered in Scotland.

Together the Scottish wild and farmed sectors produce c.3,600 tonnes of deer meat per annum.

Scottish Farmed Venison is sold predominantly in the UK, whilst around one third of wild is exported.

The total UK venison market is estimated at £100m. Venison is a high quality, low fat premium protein and an excellent healthy food and can be found in all types of shops and restaurants in Scotland, the UK and in export markets.

The stag on the hillside is one of the most iconic images of Scotland's food and livestock.



The Scottish Venison Sector in 2030

The Scottish Venison Sector represents an iconic image of Scotland, both in terms of the strong connection to the stunning landscape where deer roam and are farmed to the premium quality of the product associated with the reputation of Scotland as a Land of Food and Drink.

It is unique in its resource being provided through both wild and farmed deer management and production. For many years the sector has been dominated by wild venison, but exciting opportunities now exist to rapidly progress the development of the total sector through farmed venison, offering consumers more choice as well as an increased supply to match demand for this premium, niche and healthy product.

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. This is supported by three aims to sustainably maximise the market growth potential for:

- wild venison by ensuring full value from the 3,500 tonnes culled annually and worth £7.25m at first sale
- farmed venison by substantially increasing the farm sector output from 100 tonnes to 850 tonnes, achieved by growing the annual kill from 1.7k to 15k animals and growing the value to the sector from £540k to £4.6m at farm gate
- innovation through collaboration involving both parts of the sector by utilising the unique but complementary strengths of the venison supply chains



To achieve this, we will collaborate to:

- build integrated supply chains in response to new and expanding markets at home and abroad
- drive investment in infrastructure, skills and support
- increase the demand for and the value of venison
- develop a healthy, innovative and efficient sector maximising the expertise that resides within Scotland

The Scottish Venison Strategic Action Plan foundations are embedded within the Scottish Food & Drink Ambition 2030 main pillars of growth – supply chains, innovation and people and skills. It adds to the reputation and opportunity to grow added value and premium sales in Scotland, UK and international markets, but it needs strong commitment from all those involved and who support the sector, to achieve this aim.

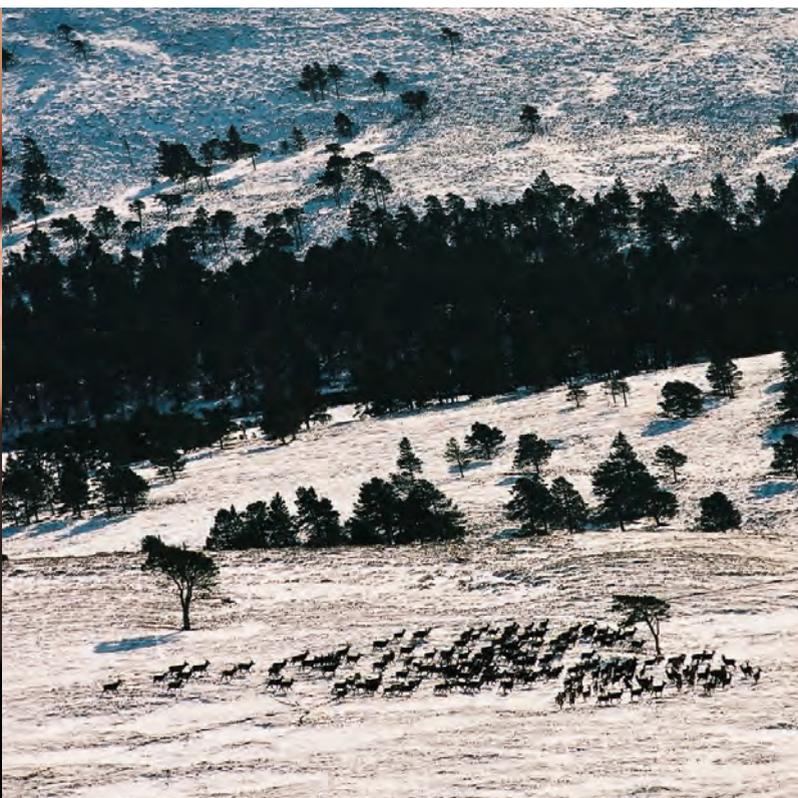
In addition, the sector supports rural jobs and communities in many remote areas and makes a major contribution to supporting the rural economy, maintaining the environment and the Scottish landscape as we and tourists know it, through effective deer management and farming.

The industry has come together to develop this new strategy with a recognition that the sum of the parts is greater than the whole. By using the combined assets of the wild and farmed sectors and expert advice from support organisations, the outcome has been a cohesive plan that seeks to drive substantial growth towards 2030.

Key recommendations have been developed to help realise the ambition including to:

1. Establish an Industry Leadership Group and a 'go to' Hub for crucial market research and industry technical advice.
2. Improve and establish new supply chains.
3. Continuously enhance quality assurance schemes.
4. Build and strengthen skills for future growth.
5. Tailor support for deer farming.
6. Invest in area-based facilities to maintain wild carcass quality and open new routes to local markets.
7. Develop a consumer driven communications campaign and engage with education in schools.
8. Build on world-class husbandry expertise and R&D to improve productivity in Scotland.
9. Deploy consumer insight to accelerate NPD for both home and international markets.

These and more, are described in detail in the following pages.





The Recommendations – Bringing Words into Action

1. ESTABLISH AN INDUSTRY LEADERSHIP GROUP AND A ‘GO TO’ HUB FOR CRUCIAL MARKET RESEARCH AND INDUSTRY TECHNICAL ADVICE

To achieve the industry ambition will require strong leadership and the creation of an Industry Leadership Group representing both the wild and farmed sectors, as well as other parts of the supply chain and including experts, will be a critical first step. This group will lead the strategy, act as sector champions and ensure the relevant support is available to achieve the ambition.

The Industry Leadership Group will be supported by the creation of the Scottish Venison Hub which will act as the centre point for the industry. SVP have already demonstrated the value that can be generated by bringing the component parts of the sector together and this approach can be enhanced going forward. The ambition is that it will collate and share industry and market data and insight as well as supporting the aim to generate new sales in strategic markets and encourage the creation of new supply chains. It will track interest in the sector and provide support to new entrants. The Hub would also provide technical advice and signposting and help both existing farmers and new entrants access training and infrastructure support. It will take opportunities to work closely with other trade organisations to minimise cost and maximise available expertise in red meat market development. As the centre point for the industry, the Hub would also have responsibility for managing Beyond the Glen.

2. IMPROVE AND CREATE NEW SUPPLY CHAINS

Venison is a premium product in high demand in markets across the world. In the UK demand is currently higher than supply so imports are used to meet shopper demand. Both domestic and export markets offer opportunities for the Scottish Venison Sector to grow.

To capitalise on market opportunities, the farmed sector needs to expand and the wild sector needs to optimise the value return for each animal. We also need to investigate how we can manage the wild cull to improve availability over a longer period and drive further efficiency.

The growth in the farmed sector will be achieved through new entrants and existing herds increasing in numbers. Both will need the right support tailored to the needs of the sector, including funding for new entrants and both being able to access the services of the Hub to help with their day-to-day farming challenges.

For the sector to be successful it will be important to develop strategies and dedicated supply chains that identify market demand in the UK and key export markets. The strategies need to optimise the strength of both the wild and farmed sectors as each has a different product proposition appealing to different customers and consumers – right product, right place, right time. The development of these specific product-focussed commercial supply chains will work in collaboration to build value and volume for the Scottish herd aligned with the availability of supply and the ability to maximise the most effective use of the whole carcass. This will include investing in the abattoir and processing sector as demand grows to ensure capability and capacity exists to exploit new markets and supply chain opportunities.

3. CONTINUOUSLY ENHANCE QUALITY ASSURANCE SCHEMES

Consumers have high expectations and standards for the food that they eat and Scottish Venison is no exception. It is critical that the sector continues to develop its strong quality assurance credentials in tandem with the market development strategies not only to deliver a food that is safe to eat, but also to ensure that Scottish Venison remains a top quality, premium priced product no matter what market or at what table it is being enjoyed.

All parts of the supply chain will continuously improve the quality assurance processes and practices ensuring that Scotland remains a market leading and safe venison producing country.

4. BUILD AND STRENGTHEN SKILLS FOR FUTURE GROWTH

Building a sustainable venison sector will also require the right skills and support in place to help the sector develop – both wild and farming. Identifying the skills needs of the sector will be undertaken by the Hub, working with key organisations in the sector such as LANTRA, Skills Development Scotland, BDFPA, Wild Deer Best Practice and Scotland’s Rural College.

There is also the need to expose the next generation of farmers to the opportunities that exist within the sector offering an innovative farming opportunity as well as considering how information about the venison sector could be better integrated into skills information delivered in schools.

Sharing information and best practice will remain important for the sector’s development and growth and collaborative and regionally based groups will help deliver this.

Monitor farms and regional-based knowledge transfer groups and specialist advisers will have an important role to play in sharing and transferring skills in the farmed sector whilst in the wild, there is continuous work needed to educate deer managers about food safety and wider best practice and to inform independent butchers about opportunities from venison and upskill them.

5. TAILOR SUPPORT FOR DEER FARMING

There are high levels of investment needed to become a deer farmer such as fencing and access to finance is key in attracting new entrants which are needed to help the sector grow. There is also a growing number of existing farmers converting or diversifying into deer farming who will help build the strength of the supply chain and the attractiveness of the industry. All of these would benefit from financial support to lessen their initial risk whilst herds are being built and new supply chains being developed.

In the short term some immediate work is required to attract more new entrants that are important if the sector’s ambition is to be realised. This work needs to be motivating and confident and build the reputation of the sector as an innovative, forward thinking and dynamic entity.

The Hub will play a critical role in providing advice and signposting as well as making the process around entry to the sector easier which will in the medium to longer term help accelerate development. We must be able to manage and measure their contribution to the market supply and support them in their development and the Hub will help in this respect too.

Monitor farms and regional knowledge transfer groups will have a key role to play in the development of the sector, supporting peer to peer education and collaboration opportunities, developing innovative farms and farming methods and sharing data and its associated insight.

6. INVEST IN AREA-BASED FACILITIES TO MAINTAIN WILD CARCASS QUALITY AND OPEN NEW ROUTES TO LOCAL MARKETS

It is important that the wild sector is also supported to ensure that carcass quality and returns can be optimised. A key development will be working with deer groups in the lowlands to implement a scheme around co-operatively owned and operated chillers/larders to meet the needs of this market, based on geography and to support initiatives to increase supply from trained hunter direct to local butcher and consumer.



7. DEVELOP A CONSUMER DRIVEN COMMUNICATIONS CAMPAIGN AND ENGAGE WITH EDUCATION IN SCHOOLS

Venison is a high value protein, low fat food that has a high awareness with 'foodies' and chefs and who could already be considered a captive audience.

As we develop new supply chains it will become increasingly important to talk to consumers and shoppers about the benefits of eating venison and how best to cook it and we must do this in a way that is engaging and relevant for today's market.

In both domestic and overseas markets, it is also important to highlight the authenticity and provenance of Scottish Venison as these are important features for customers as well as consumers.

More locally there is a need to educate the next generation of Scotland's consumers about venison, its qualities, how it can be cooked as well as encouraging trial.

8. BUILD ON WORLD CLASS HUSBANDRY EXPERTISE AND R&D TO IMPROVE PRODUCTIVITY IN SCOTLAND

Scotland has been world leading in deer research. The sector needs a strong supply of healthy animals and our continuing research agenda is critically important as is the need to understand more about practical on farm work such as animal welfare and farming methods including grassland management, fencing and fodder management, all important contributors to productivity and efficiency on farm, as well as making accessible the extensive bank of research that has already been undertaken over the last 40 years.

The sector also has an opportunity to take leadership around developing deer specific medicines and drugs as none currently exist in the UK. TB testing is critical for the sector if it is to continue to remain disease free and realise its growth ambitions. The required testing regime is already used elsewhere and it is a priority for more accurate testing to be used in Scotland.

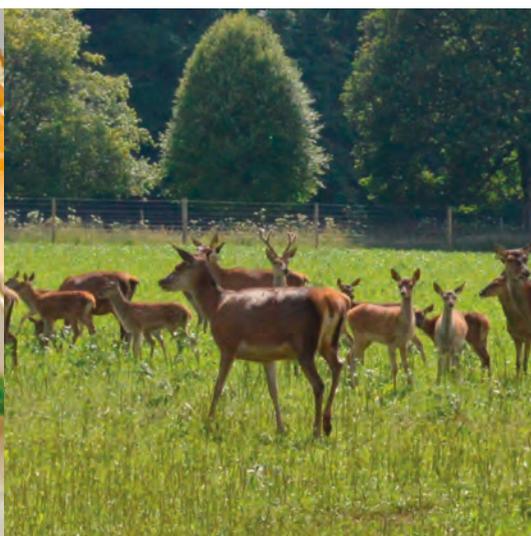
There will be a need for investment in ongoing research into genetics, breeding and eating quality to ensure Scotland's Venison Sector remains one of the world's leading countries.

Research and expertise in wild deer management is required to continue to safeguard the environment, productivity and health of the deer that roam our countryside, forests and hills.

9. DEPLOY CONSUMER INSIGHT TO ACCELERATE NPD FOR BOTH HOME AND INTERNATIONAL MARKETS

It is critically important that Scottish Venison continues to innovate whilst taking into consideration shopper, consumer and market trends. To do this we need to access market insight about shopping, cooking and eating trends. This innovation must support the supply chain developments and help create new commercial opportunities for the sector both at home and in export markets.

At an added value level, there is more work that needs to be done with the wild cull to determine new recipes and ready meal opportunities, helping to widen the consumer's palate as well as utilising the carcass.



SUMMARY OF ACTIONS

NO.	ACTION	RESPONSIBLE	PRIORITY
1	Establish an Industry Leadership Group and a 'go to' Hub for crucial market research and industry technical advice	Sector Steering Group, SVP	High
2	Improve and establish new supply chains <ul style="list-style-type: none"> Use market insight to identify new market opportunities and build supply chains to realise these Utilise collaboration to improve and drive efficiency into existing supply chains 	Venison Hub, SAOS	High
3	Continuously enhance quality assurance schemes <ul style="list-style-type: none"> Work with partners to develop future proof quality assurance schemes for both sectors 	Venison Hub, SQWV, BDFPA	Medium
4	Build and strengthen skills for future growth <ul style="list-style-type: none"> Build a gap analysis on skills and work with partners to ensure that adequate training provision is available Undertake knowledge transfer activities to ensure best practice is disseminated throughout the sector including learning from other venison producing countries 	Venison Hub, LANTRA, SDS, BDFPA	Medium
5	Tailor support for deer farming <ul style="list-style-type: none"> Launch a New Entrant and Expansion fund to offer funding support for new farms and expanding farms Launch a Monitor Farm Programme to provide peer-to-peer learning and a platform to share best practice 	ILG/Venison Hub	High
6	Invest in area-based facilities to maintain wild carcass quality and build supply of local product <ul style="list-style-type: none"> Implement a geography-based scheme to implement co-operatively owned and operated chillers/larders to meet the needs of this market 	SNH, SAOS	Medium
7	Develop a consumer driven communications campaign and engage with education in schools <ul style="list-style-type: none"> Develop a relevant marketing campaign targeting key user groups with relevant messaging 	Venison Hub	Medium
8	Build on world-class husbandry expertise and R&D to improve productivity in Scotland <ul style="list-style-type: none"> Develop on farm research, technical tests and best practice use of medicines to drive productivity and to overcome seasonality issues <ul style="list-style-type: none"> Introduce the ELISA TB test Explore the use of EID as a means of recording, tracing and monitoring essential animal and carcass information 	Venison Hub, Moredun RI, JHI, SRUC, SAOS	High
9	Deploy consumer insight to accelerate NPD for both home and international markets <ul style="list-style-type: none"> Develop an NPD programme to develop new recipes, add value and initiate new products Use in market knowledge and specialists to identify new product opportunities 	Venison Hub, SF&D, SDI	High





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