SVA report to ADMG Autumn meeting - 18 November 2020

I will report to cover the following headings:

- Managing the cull – surveys and evidence gathering
- The venison market
- Alternative routes to market
- Government support, and the venison recovery campaign
- PR for the venison sector and amplifying the message
- Scottish deer health survey
- Wild Game Guide Consultation

<u>Surveys</u>
ADMG with SVA has undertaken two surveys, April and September to assess in broad numbers the damage from Covid to deer stalking businesses; gain feedback on loss of income from cancellations (both stalking and accommodation); outlook for stag and hind culls; and, information on carcase collection and price.

We reported on the first survey at the online ADMG AGM earlier in the year

The second survey concluded from a much smaller sample of 34 businesses that the losses from 29 of these was £1.1 million; the majority reported a forecast loss of < £20,000 – but some considerably more, excluding lost income from the venison price drop.

The venison price paid to producers is now between .98p and £1.30, a drop from £2.00 - £2.30 in 2019.

There were no reported problems with carcase collection; however, this was only in relation to stags with hinds at the time of Survey 2 yet to get underway.

<u>Venison market</u>
Retail/grocery sales of venison holding up and continuing to grow. Kantar reported in work for SVA funded by Scottish Government sales increasing through 2019 in value +11% and volume +20%. That upward curve continues although easing. Kantar September figures (year to September 2020) showed value +7% and volume +10% although price paid by the consumer down slightly.

Retail and grocery sales are met by UK farmed, imported and a significant proportion of wild through Highland Game.

Elsewhere the market has suffered, Covid impacting on restaurant, catering, food service, hospitality and events sectors. Sporadic opening for restaurants means impossible forward planning and no events/hospitality sector at all.

Some movement upwards on local sales and mail order – not easy to track except anecdotally.

<u>Alternative routes to market</u>
Emerging interest in alternative routes to market other than through major processors. A number of smaller 'collective' projects are in discussion. Some individual estates already adopting an 'independent' approach.

The short supply chain from producer to local butcher promoted in September - joint project with Scottish Craft Butchers and NatureScot.

Covid and the price drop has forced thinking. Processors remain crucial in reaching the volume markets and have been under exceptional pressure to maintain operations and safeguard businesses and jobs. Smaller alternatives are an important consideration also.

Government support

Since April SVA has been in discussion with the Scottish Government for support to help pull the sector through the Covid crisis, and we are hopeful that extensive dialogue has been successful. The result, later than planned, should be an online campaign targeting London and SE, and Scotland from December through to February next year.

It's no a silver bullet. It's generic across all areas - wild, farmed, supermarket and grocery, butchers, restaurants, foodservice, mail order.

The sector must commit too in terms of winning 'free' exposure, PR, social media etc, concerted amplification of messaging, wider and louder 'noise'.

Scottish Deer Health Survey

Final report now published. Generally, this shows the wild venison sector to be in a good place, in terms minimal levels of both harmful E-coli O157 being naturally present in wild deer, or through process of getting raw material to market. Deer managers and processors applauded for cooperation in facilitating the research. However, vigilance and proper care and attention needed at all stages in supplying food for human consumption and highest standards must be maintained. No room for complacency. Survey report online on FSS website https://www.foodstandards.gov.scot/downloads/The_risk_of_STEC_in_venison.pdf

Wild Game Guide Consultation

This important FSS consultation closes on 24 December. SVA will be making a submission but important that individual practitioners do too. This marks the departure from the joint guide with England and will be a standalone guide for Scotland, so views are important.
https://consult.foodstandards.gov.scot/regulatory-policy/consultation-on-the-draft-revised-fss-wild-game-gu/

Other points to note

There is a move south of the border to formalise input into venison policy, planning and promotion and a Wild Venison Working Group has been set up for England and Wales led foremost by Forestry Commission England to develop a 'brand', a QA scheme, and routes to market. Early discussions with SQWV and potential inclusion under the 'Grown in Britain' marque. SVA not involved with this but watching with interest.

Lead free remains a real issue, and everyone should continue to focus on and work towards transition from lead to non-lead. This will ultimately be driven by the market, and regulation, so be prepared. There will be both legal pressure (albeit EU but likely that UK will follow suit), and pressure from the market where anything containing lead residue to the point that unless it can be guaranteed to have been shot using non-lead ammunition will not have a market.

Thanks to SAOS for continuing support which gives SVA considerable additional capacity and vital in our discussions with Government over support funding.