

ADMG Inverness Meeting – 24 November 2021

Dick Playfair, Secretary, Scottish Venison Association

It would be fair to say that venison has taken a battering through the covid pandemic, but we are now emerging from that crisis although remain anxious that progress made might yet be stopped in its tracks by further restrictions, or indeed once again put into reverse.

The main issue as everyone will have been aware, from a national perspective, has been the closure of all restaurant, food service, catering and events outlets for the best part of 18 months. Now gradually reopening those in that supply chain are working hard to get venison back onto menus, and also back into the minds of the consumer.

The one area that did not overly suffer through the pandemic was retail. Just before shut-down the SVA commissioned research from Kantar at a cost of £20,000 on retail venison sales in both Scotland and London and SE England, historically Scottish venison's strongest markets. That research showed that such sales had increased (this is pre-pandemic) by 20% per annum in volume, and in value by 12% over the same period.

Further research undertaken by The Knowledge Bank in May this year showed that retail sales continued to rise, by 20% in Scotland and 30% in London and SE England, with value of sales increasing also.

That growth has now slowed as food service has come back on stream, but venison continues to perform well.

But with everything apart from retail, possibly around 60%+ of total venison output in limbo for virtually two years, and consequently with a lot of raw product in storage, these rosy figures belie a far less favourable picture overall.

Add to this Brexit which put paid to the European export market for one season although we are a little more optimistic that now, following a number of reported trial runs and increased costs and red tape, exports into Europe are once again underway.

The Scottish Venison Association has been working hard to help.

From March to mid-May this year we ran an online promotional campaign to keep venison well in the public eye, again targeted at London, SE England and Scotland. The cost of this was £60,000 and the ad agency managed to extend the campaign by 6 weeks by accessing a lot of 'free' opportunities.

But sales through this period were of course only possible through retail, local butchers and farm shops and mail order. Processors supplying retail pushed hard with discounting, new product lines and winning new outlets and credit must go to them for their effort and investment in keeping supply chains moving. The farmed deer sector also has made great inroads particularly through supply into Dovecote Park and onward to Waitrose and Marks & Spencer, both of which are committed to only selling UK produced venison going forward. And our consumer campaign will have helped keep some stock moving.

Last year SVA also produced three short films with Scottish Craft Butchers and NatureScot, launched in September 2020, to promote the short supply chain from stalker to butcher. In addition to that a short-term working group was set up at the request of the Scottish Government to look further at local supply chains and their constraints, additional opportunities for local processing and local sales, smaller initiatives closer to the source of supply, and routes to market.

That group reported in March this year; its report is on the Scottish Venison website. The project has now secured a further £80,000 of funding to assist two to three local chill/processor projects to get up and running. The panel for assessing applications and awarding funding met last month to take the scheme forward and the deadline for applications has now passed. We should expect to see an announcement before Christmas.

In addition, BASC Scotland launched a new initiative *Community Integrated Deer Management in Scotland* at the Scottish Game Fair in September. This project aims to unlock opportunities for using the recreational stalking resource to manage deer on public land, coupled with training, and deer larder facilities – again a pilot project is the first step.

There has been a lot more happening under the Scottish Venison Banner over the period. Internally the SVA has seen a change at the top and Bill Bewsher, our chairman of almost seven years has decided to retire and Richard Cooke has kindly stepped up agreed to fill that position. I'm very much looking forward to working with Richard as we continue to take the Scottish Venison sector forward. A big thank you is due to Bill for everything that he has done during his time in the chair.

Tom has mentioned the Deer, Venison and GHG Emissions project. The steering group for this has met once and is due to meet again in December to finalise a brief and funding. The project's intention is to establish scientific proof around deer and methane emissions particularly as well as to help deer management and venison production plot their way towards net zero.

Incidentally we heard last week that there is as yet no firm an agreed scientific method for establishing methane emissions from deer, or indeed any other grazing stock although several stabs in the dark have been made (along the lines of one deer equals two sheep and emissions from a sheep are estimated to be $X + Y$). So, this latest GHG work in which ADMG is closely involved may focus more on mitigation rather than attempting to produce a baseline figure for emissions if such a calculation is unsustainable science-wise. We will leave that to the commissioned academic or institution who will be briefed to look at deer and deer management and venison production separately.

Non-lead must be mentioned. We are all aware of pressure from retail particularly to want product with no risk of lead residue. The days of "may contain lead" on packaging are rapidly coming to a close and we expect the start of the 2022 season to come with much tighter, albeit voluntary at this stage, demands from processors for non-lead. The direction of travel is unavoidable.

Just a quick word on funding. I have mentioned three significant figures of £20K for market research, £60K for the consumer campaign, and £80K for the local chills and processing pilot project, £160K in total, all from the Scottish Government in the space of two years.

In addition, NatureScot has provided funding for projects for the butchery films last year and to get the Deer and Greenhouse Gas Emissions project rolling, and SVA has benefitted from significant additional capacity from SAOS for which we are extremely grateful.

My question to the sector in general then is “is what you are putting in enough?”

Income from private sector deer management in the last two years through the levy collected by Ardgay Game and Highland Game totals around £30K. Many of you are contributing to that, maybe without realising it, but many are not, and I maybe sense a bit of a wake-up call being needed – and a reminder that without investment we cannot maximise on market opportunities and do much of what we want to do.

And what opportunities there are. The restaurant, food service, catering and events market is coming back. And, notwithstanding COP26, the market is recognising anyway that wild venison is surely the most sustainable red meat that there is available, for a whole range of reasons. I read a headline earlier this year *Eat Venison and save the planet* – a little exaggerated maybe, but it does have a ring of truth about it. As I wrote in SCOPE “*the arguments in favour of sustainable, responsible collaborative deer management resulting not just in environmental benefit but good, healthy food are exceptionally strong.*”

There has probably never been a time when those arguments have been more relevant and those credentials more valid - and no better time for the Scottish Venison Association, processors, and you as producers, to be making them known.