

SVA report to ADMG AGM – 23 March 2022

Dick Playfair, Secretary, Scottish Venison Association

I think it has been tough for everyone and, two years to the day that the UK first went into lockdown, we are really only just coming out of the shadow of Covid, but that recovery does at least seem to be happening faster than anticipated. The closure for lengthy periods of the hospitality, restaurant, catering, food service and events sectors through the pandemic was a huge blow. But conversely retail sales have been strong and continued to grow and the inevitable strictures placed on producers by food service market constraints, and the drop in venison price, have encouraged new thinking, entrepreneurial spirit, breaking the mould.

“We always did it this way” for quite a few no longer applies and finding workable, legal alternatives that would not have been considered pre-Covid has brought benefits for those who have taken a leap of faith.

There is also the backdrop of a climate emergency, action to tackle climate change, restore woodlands, restore peatland and strive for an equitable carbon neutral balance across food production. Here venison potentially has a tremendous story to tell because we have to accept, despite the calls from some corners, that our deer species have to be an accepted part of our future biodiversity, our landscape – or at least our native species should be. And those who manage deer and live in our rural communities must be as well – a point that is too often lost in the more radical proposals for change.

The argument for sustainable deer management is incredibly strong, not just when approached from the point of lessening environmental impacts or rising to the climate change challenge, but also in putting natural healthy protein into the food chain and onto the table.

“Eat venison and save the planet” was catchy headline in the food press in 2021. Hyperbole perhaps but we now have a project underway – and ADMG is a lead partner in this - to assess the carbon footprint of wild deer, deer management and venison production. The production of a ‘Statement of Intent’ for the wild venison sector is a good start point to be published very soon and one cannot help but think

that we may already be well on the way and in a far better place than others in the domestic red meat sector for example.

Also, everyone involved in deer management is only too aware now that hunting or culling can assume a much broader mantle of acceptability if healthy food and climate action are consequences of that activity, and that those measures play an important part in supporting a far broader suite of actions to meet global biodiversity targets. Marginalised in some quarters the hunter/deer manager should be increasingly recognised for his or her positive contribution towards tackling climate change.

With regard to the market, the good news area over the last two years has been retail where we have benefitted from research by Kantar and The Knowledge Bank, funded to the tune of £20,000 by the Scottish Government and assessing the position across the whole UK. This has been the first dedicated research commissioned for the venison market in the UK, and in filling the knowledge gaps forms part of the Scottish venison strategy – we need to know what is happening in the market, not just be guessing or relying on anecdotal feedback for that market intelligence.

At the end of 2019 Kantar's research showed that retail sales of venison were up by 20% in volume and 12% in value over the same period the preceding year. Follow-up research nine months' ago by The Knowledge Bank showed retail sales continuing to rise, by 20% in Scotland and 30% in London and SE England against the equivalent period the year before. The Scottish Government after a successful bid by SVA also funded a six-week £60,000 online marketing campaign in spring 2021 to support Scottish producers and processors but which, regardless, will have benefitted the venison sector across the whole UK.

The downside of Covid has been the stop-start of catering and food service after a significant period of shut down. Figures vary but this might account for as much as 60% of total venison outturn in a good year.

And it continues to be a fight to win this back – venison is both premium cost and high risk in terms of menu choice. This uncertainty has been exacerbated by the situation for exports. Brexit has without doubt taken its toll and whilst initial struggles to ship roe and red venison to Europe severely tested processors, and ways through

the mire have now been achieved, more red tape inevitably means higher costs, as does single loads rather than 'groupage'.

The other bonus, if there can be one, from Covid has been that the industry has been forced to think about other markets, local markets, supply to local butchers, setting up stand-alone estate outlets and venison sales, local processing, a return to mail order, winning media coverage, and beefing up presence online. All these have been positive steps for a number of producers. The established route to market from hill or wood to larder to game dealer to customer is now no longer the only accepted way.

Most recently the Scottish Venison Association has been awarded an £80,000 fund from the Scotland Food and Drink Partnership as part of the Covid recovery plan to help a number of local pilot processing projects over the line as demonstration units, harnessing the local stalking resource to supply local chill and processing hubs for marketing of product in their immediate areas and further afield.

After a thorough selection process three projects have been chosen, one in Dumfries and Galloway one in Moray and one in Argyll, for support from this fund which is being administered by SAOS. All are filling a space where current cover is thin and we hope that these three new projects can be of benefit and aid the learning curve for the whole sector as we explore and promote alternative routes to market, which will supplement the service provided by the mainstream processors as volumes once again increase.

I just want to say a little on venison price. Winston Churchill summed it up very succinctly in our latest Newsletter Scope when he said:

"The per kg price paid for a deer carcass was higher 40 years ago than it is today. Why is this? Food prices have been held down by farming efficiency linked to supermarket price capping. At the same time the cost of carcass collection, processing, packaging, waste disposal etc has continued to increase – not to mention ever tightening food processing legislation all of which bring their own costs."

But prices are rising again for SQWV assured to around £1.60 - £1.80 this coming season, and we anticipate they will continue to go up. Despite cold storage bulging

at the seams through the pandemic there is now movement and processors are even looking for quality venison suppliers – can I draw your attention to the advertisement in the latest edition of Scope?

Their preference is to procure it locally rather than import from New Zealand and elsewhere as has been the case in the past (although the new trade agreement with NZ probably makes it very attractive for their deer farmers to ship to the UK if they can access a ready market here). Both Waitrose and M & S incidentally have run down their imported stock and are committed now to buying only British.

The other factor that cannot be glossed over is non-lead, so quality assured, non-lead shot venison should command a premium. That is where the market is going, and if that cannot be supplied then farmed UK, and imported farmed will remain an option.

Also, of note is that Food Standards Scotland has just published the first standalone Wild Game Guide for Scotland. It provides guidance for the Scottish wild game food sector, as well as FSS enforcement officers, on the food hygiene legal requirements which apply to the hunting, processing and supply of wild game into the food chain. The guide was fully reviewed and revised from 2020 - 2021 with the new FSS document published in December 2021. The review of the guide involved a public consultation which closed in December 2020 and which sought views from stakeholders on content and presentation.

It is hoped that the revised guide is more user-friendly than its pan-UK predecessor and brings greater clarity to the legal requirements which apply in the various circumstances in which wild game is hunted and supplied for human consumption including the various supply chains to market.

The guide was developed by FSS in close cooperation with the wild game industry, including ADMG, the Scottish Venison Association, BDS, BASC, SGA and others, so we can't complain if we don't like what is in it.

Just a word on SVA finances. We have successfully pitched for and been awarded £160,000 in Government money in the last two years with additional funding from NatureScot for projects for which we are grateful and a contribution from Highland Game for Forestry and Land Scotland. The Government money is all for specific

activities, none of it actually goes into the SVA bank account or the running of SVA but is managed by SAOS on the Association's behalf.

The 2p/kg levy that we rely on for management, administration and the association's day to day running currently amounts to around £13,000 per annum, although when the cull has been higher it has been higher. I do think it is crazy that whilst there is so much expectation on SVA to represent producers and processors and their interests at all levels from Government downwards – and as we have done since the 2015 E Coli incident and before that – it continues to run on a shoestring. By way of comparison we receive through the levy on average 50p/hind. BGA receives that for a bird. Over the next few months we will be looking at ways to address this as the current funding arrangements which started well 10 years ago are evidently not now sufficient to provide SVA with the resources that it needs to function effectively.

Finally, I would like to say thank you to the members of the Scottish Venison Association Executive Committee and particularly to Bill Bewsher who has chaired our activities for the last six years. Bill has now stepped down and we are delighted that Richard Cooke is now at the helm. Also, a big thank you for the support that we receive from SAOS and have done since the launch of the venison strategy in 2018. This has greatly increased our capacity, and our work load, but also brought us access to research and helped us to secure significant funding for projects that otherwise would have been out of reach.

And to close, venison or chicken, which meat is the healthiest? From last weekend's Times. I'll let you guess the answer.

All things considered, and we all know this, as sustainably produced protein then home-sourced wild venison is probably as good as it gets. We have so much in our favour, so let's not lose the opportunities that current circumstances and times offer – even if they will remain challenging for a while.