

SVA update to the ADMG Regional meeting

A few brief points in this update from the Scottish Venison Association.

First the market.

Data that we received from The Knowledge Bank in their retail report published earlier this year showed that after significant increases in sales volumes in 2019 and 2020 the retail market had slowed but was still positive albeit just +1.3% up as at February this year, although value of sales had dropped by 2%. The latest numbers that we have seen to 2 October 2022 from Kantar do however show further encouraging growth reporting a volume rise of 9.2%. Their report says that of all the fresh primary proteins, only 'Other Red Meat' (eg venison) has managed to grow volume and this could be driven by the cost-of-living crisis as it is one of the most competitively priced proteins at £5.18 per kilo and one of the least inflated proteins with prices growing at 2.0%.

Of course, through the same period trade through other channels, restaurants, catering and food service, events etc came back on stream. These channels had dried to a trickle through the pandemic, but it is reasonable to forecast that the cost of living crisis is bound to have an effect on people eating out, and on events, and an overall drop in red meat sales has been predicted as belts tighten. I wonder if venison will be able to buck that trend.

The Greenhouse gas emissions project

The SVA published a Statement of Intent in July this year, its goal to have net zero emissions by 2035 across the whole wild deer management and venison processing sectors. That statement was launched at Scone and in Scope. It was drawn up by a steering group of ADMG, BASC, LDNS, NatureScot, Scottish Environment LINK, and Highland Game with Ardgay Game also a signatory to the final document.

The next step is commissioning an action plan with clear guidance as to what the sector can do to limit its emissions and take remedial action. We are in talks with SAC Consulting's Food and Footprint division to take this forward. We have around £23K funding, the majority coming from NatureScot for this project.

Meeting with the Minister

We meet regularly with officials from the Scottish Government Food and Industry Growth Team but were also able to piggy-back an ADMG meeting with the Minister Lorna Slater where we managed a few moments to talk to her and her officials about venison and venison marketing.

One of the points raised was about the pilot project to support a network of local chill facilities and collection points. With partial funding secured from Scotland Food & Drink, the scheme was launched in 2021, and three applications (in Moray, Argyll and SW Scotland) were successful. The scheme aims to enable more local processing and venison to be available for local consumption and to establish regional collection points to supply national game dealers and also to demonstrate to others how to develop such facilities.

All three projects are currently re-budgeting and under review as inflation has drastically increased the costs of materials and projected outlays and this has had a knock-on impact on the financial viability of each venture.

The venison supply chain Infrastructure project

We have asked Government for funds to enable a geographically based review of the existing provision of sector infrastructure, AGHEs, collection centres/larders, retail outlets etc to fully understand the existing supply chain and how this might be improved, and importantly what capacity is needed to safely handle future culls.

It was encouraging to see the award to Wild Jura from the Food Processing Marketing Cooperation Grant Scheme of £40K for a venison chill and processing facility on the island. SVA has been pushing this scheme as a source of potential funding for years, but it is competitive, applicants have to be ready when the short application window opens, and the reporting process is thorough. The Jura application should provide a valuable template for others to pitch their projects to the scheme for funding in the future.

Pressure on the supply chain during the rut

Reinforcing our need to know what facilities there are around the regions, their capacity, and their location serious bottlenecks in supply were reported between producer and processor during the rut and, when we asked, we received quite a number of reports to that effect. The closure of one collection centre and a number of other minor factors caused severe supply chain breakdowns with the consequence that culling stopped completely in some locations and, as far as we know, will not restart until there are alternative arrangements for carcase collection in place.

It's a wake-up call and we anticipate that processor capacity might be insufficient to service the requirements of producers in future years. This could result in more venison being butchered and traded illegally; or interruptions to culling pending sufficient capacity for raw produce to enter the processor chain; or for carcasses to be culled but left on the hills or in woods.

Butchery skills

We have been asked whether a butchery skills course could be made available for stalkers. There is a NOS course available already through Scottish Craft Butchers/Craft Skills Scotland and, following discussion with these organisations, we hope to roll courses out across Scotland to a number of locations next year.

Finally, to the SVA review

We have commissioned SAOS to undertake a review of SVA, its structure and governance, its role and remit, and its funding and the SVA Board has met to discuss their draft report. Also, on the table is whether it might be possible to merge SQWV and SVA. What is evident is that we have a developing sector that is significantly underfunded and if it is to make progress in delivering the ambitions of the Scottish Venison Strategy then change is needed.

After a number of years of decline the levy dropped significantly in 2021/22 to its lowest level ever last year albeit we have unlocked around £180K of Government and agency funding for the sector but we cannot expect that level of government support to continue indefinitely.

We are basically trying to deliver a wide-reaching programme on a budget of around £15,000 which is well-nigh impossible, and it is disappointing to hear that quite a number of producers have opted out of supporting SVA through the 2p/kg levy. There are new threats too, not least venison from England which is becoming more organised and which could easily, as it becomes better structured and resourced, challenge established and valuable markets particularly in London and SE England.

In conclusion, SVA continues to make progress on the sector's behalf but disappointingly we are doing this against a backdrop of reducing income, a situation that we urgently need to address if it is felt that there is a requirement for SVA to continue to represent the interests of the wild venison sector.