The Scottish Venison Summit.

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SCOTLAND FOOD & DRINK

Agenda

- "Sustaining Scotland, Supplying the World"
- The importance of provenance to Scottish consumers – newly published research
- Provenance in relation to Venison

Sustaining Scotland. Supplying the World.

A strategy for Scotland's food and drink industry.

SCOTLAND FOOD & DRINK

OUR VISION:
"Scotland is the best place in the world to own, operate, and work for a food and drink business. The country is renowned as a world leader in sustainable production and responsible growth, where resilient businesses across the entire supply chain flourish and prosper."

Our three missions will sharpen businesses' competitive edge in market, helping them increase resilience and grow in a way that is responsible and profitable.

Resilience: Build a resilient, innovative, and dynamic industry that can better withstand and respond to market volatility, economic shocks, and supply chain disruption.

Growth: Build our brand, capability, and market activity so we can sell more food and drink into the right markets at home and across the world

Sustainability: Build the capability and credentials of the industry, so it can embrace and benefit from the journey to Net Zero and having world-class environmental credentials.

OUR MARKETS:

Scotland

Rest of UK

International

OUR ENABLERS:

Programme 1: Market Growth

We will:

Support volume and value growth for Scottish food and drink businesses by attracting and developing lucrative commercial opportunities across Scotland, the rest of the UK, and international markets.

Supporting
Markets: Scotland, UK, International
Missions: Growth, Resilience ¦ **Enablers:** Brand & Reputation

Programme 2: Policy & Regulation

We will:

Make sure the operating environment continues to foster industry growth, while underpinning our global reputation for animal welfare, food safety, health, traceability and quality.

Supporting
Missions: Growth, Resilience, Sustainability
Enablers: Policy & Regulation

Programme 3: Supply Chain Security

We will:

Create the right conditions for businesses to operate successfully and optimise national food security, so we can respond to supply chain shocks and volatility.

Supporting
Missions: Growth, Resilience
Enablers: Supply Chain Security, Infrastructure

Programme 4: Innovation & Digital Technology

We will:

Harness the power of digital innovation and develop operational excellence to make businesses more productive, future-proofed, more competitive, better placed to cut emissions, and less vulnerable to labour shortages.

Supporting
Missions: Growth, Resilience, Sustainability
Enablers: Digital & Technology, People & Skills, Net Zero & Environment, Supply Chain Security

Programme 5: People & Entrepreneurial Skills

We will:

Make the industry a career of choice – attracting the right people with the right skills, in the right numbers and locations. This will boost productivity, while developing the next generation of leaders and entrepreneurial talent to drive growth.

Supporting
Missions: Growth, Resilience
Enablers: People & Skills, Policy & Regulation

Programme 6: Net Zero & Environment

We will:

Put Scotland in the best possible position to be seen as a global leader in sustainable food and drink supply. Drive the industry to meet its Net Zero targets and supporting businesses to capture the commercial benefits and significant market opportunities of climate friendly production.

Supporting
Missions: Growth, Sustainability
Enablers: Net Zero & Environment, Policy & Regulation

Programme 7: Capital for Growth

We will:

Drive solutions that provide businesses with more access to 'patient' working and investment capital – empowering them to seek growth opportunities and invest in the future.

Supporting
Missions: Growth, Resilience, Sustainability
Enablers: Access to Capital, Net Zero & Environment, Digital & Technology

THE KNOWLEDGE BANK

Delivered by
Scotland Food & Drink Partnership

The importance of Scottish Provenance

Provenance – knowing where you come from

THE KNOWLEDGE BANK

Why is provenance important to Scottish people?

Supporting the economy has been #1 since 2021

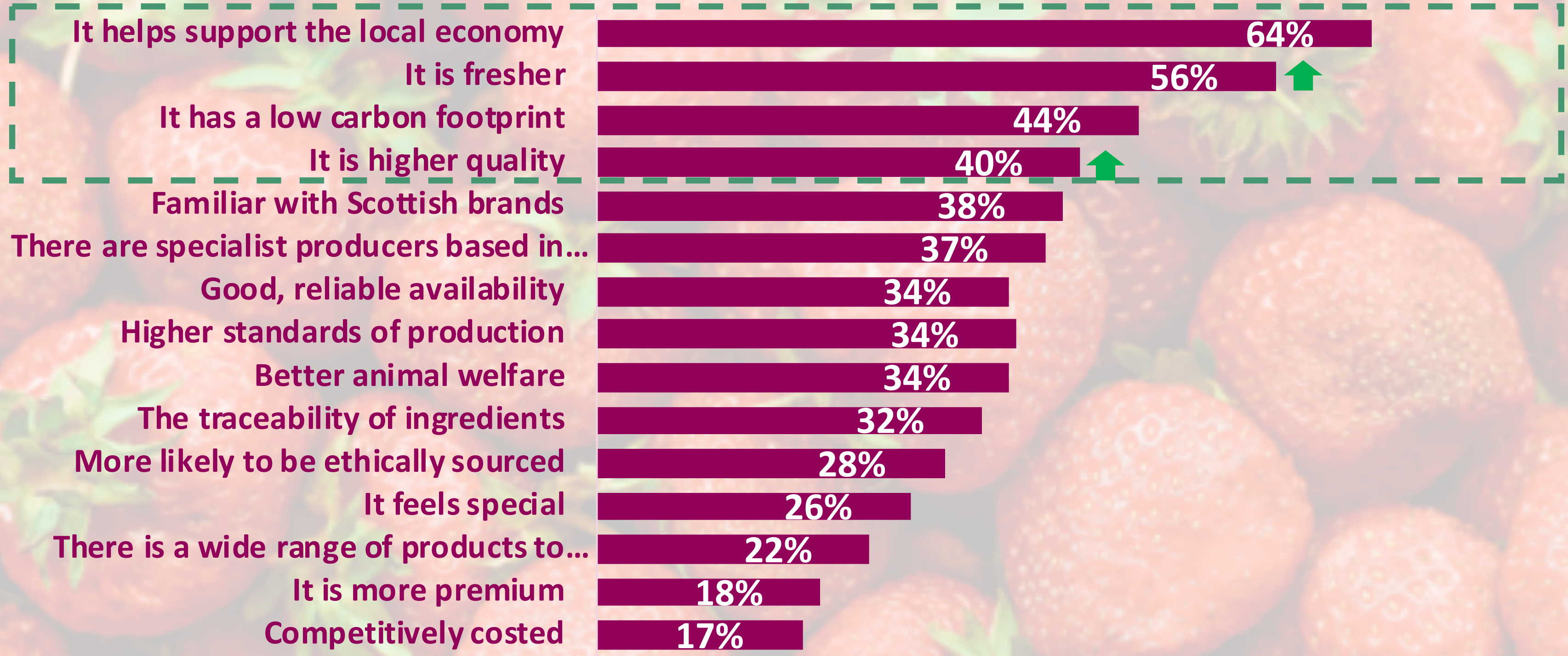
Assurance of quality on the rise

Local is a mental shortcut for sustainable

Q21 What if anything do you see as the benefits of buying food and drink which is produced in Scotland?

Over half of Scots agree that food and drink produced in Scotland is better than food produced elsewhere

Benefits of buying food and drink produced in Scotland over food and drink produced elsewhere



Q22 The following list of possible benefits of buying food and drink produced in Scotland have been given by others. Please select any of these which you feel are the benefits of buying Scottish produce, over food and drink produced elsewhere.

When asked to rank a list of factors linked to provenance, consumers rate knowing country of origin as most important

1. Knowing the Country of Origin

2. It has been produced with love and care

3. The product/brand has an authentic story

4. Is it produced in Scotland

5. It is produced in a way that minimized damage to the environment

6. It is produced locally

Production

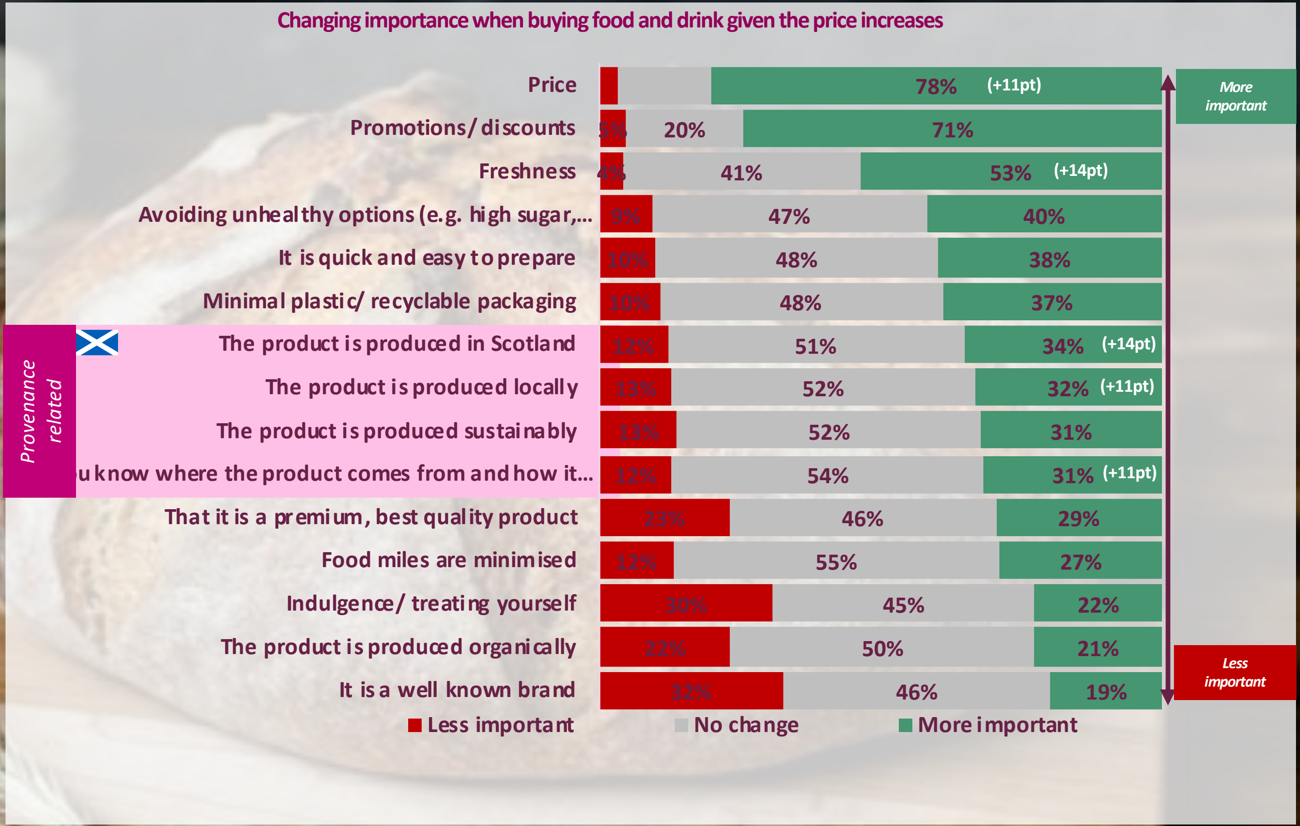
Environment

Geography

Source: Scotland Food & Drink, The Knowledge Bank Provenance research, Aug 2022 | Scottish Consumers

Price is top of the list of considerations in the current environment, but Provenance is key

34% of shoppers have told us that provenance is **more important** given the general price increase

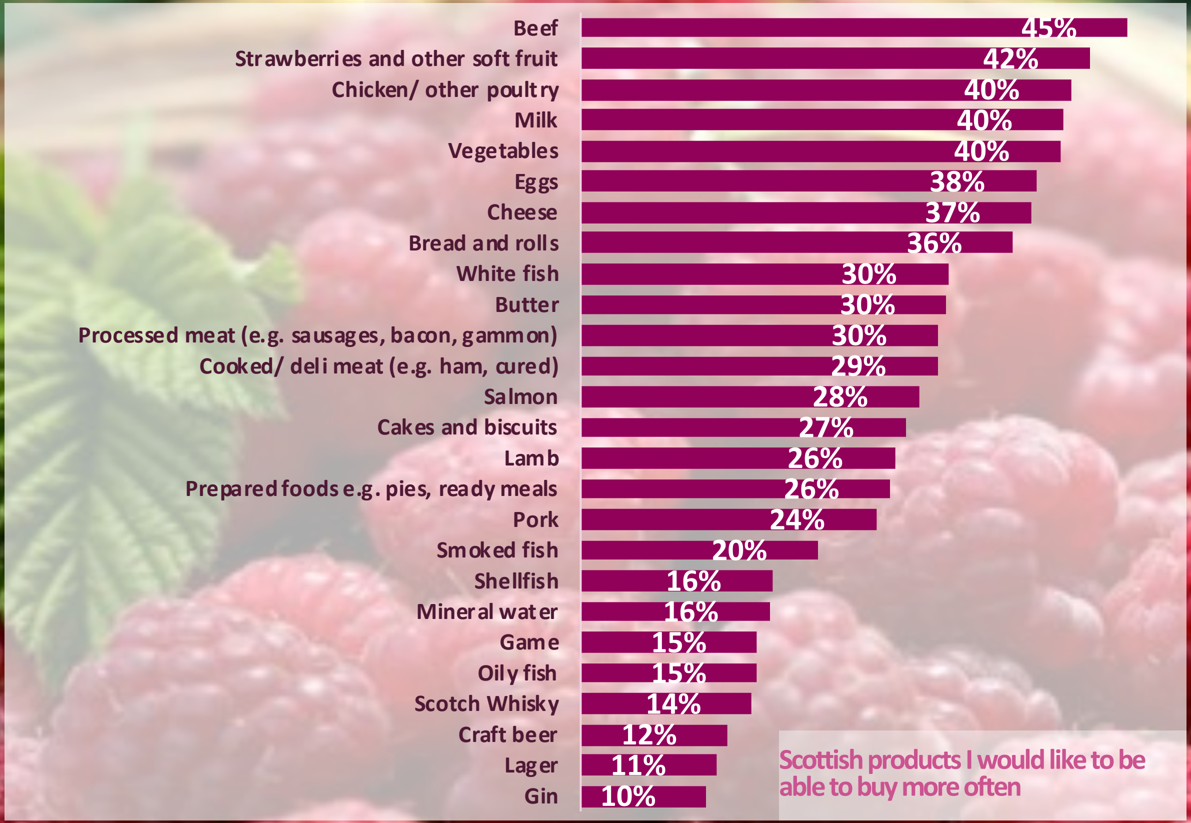


Q18 In general, given the price increases to what extent if any, have the following become any more or less important to you when you are buying food and drink?

Over four in five Scots would like to be able to buy more food and drink produced in Scotland

82%

Of Scots would like to buy food and drink produced in Scotland more often when grocery shopping (no change since 2022)



Q30 Which of the following types of Scottish food and drink, if any, would you most like to be able to buy more often

Base: Respondents who would like to buy more food and drink produced in Scotland (835)

Source: Scotland Food & Drink, The Knowledge Bank Provenance research, July 2023 | Scottish Consumers

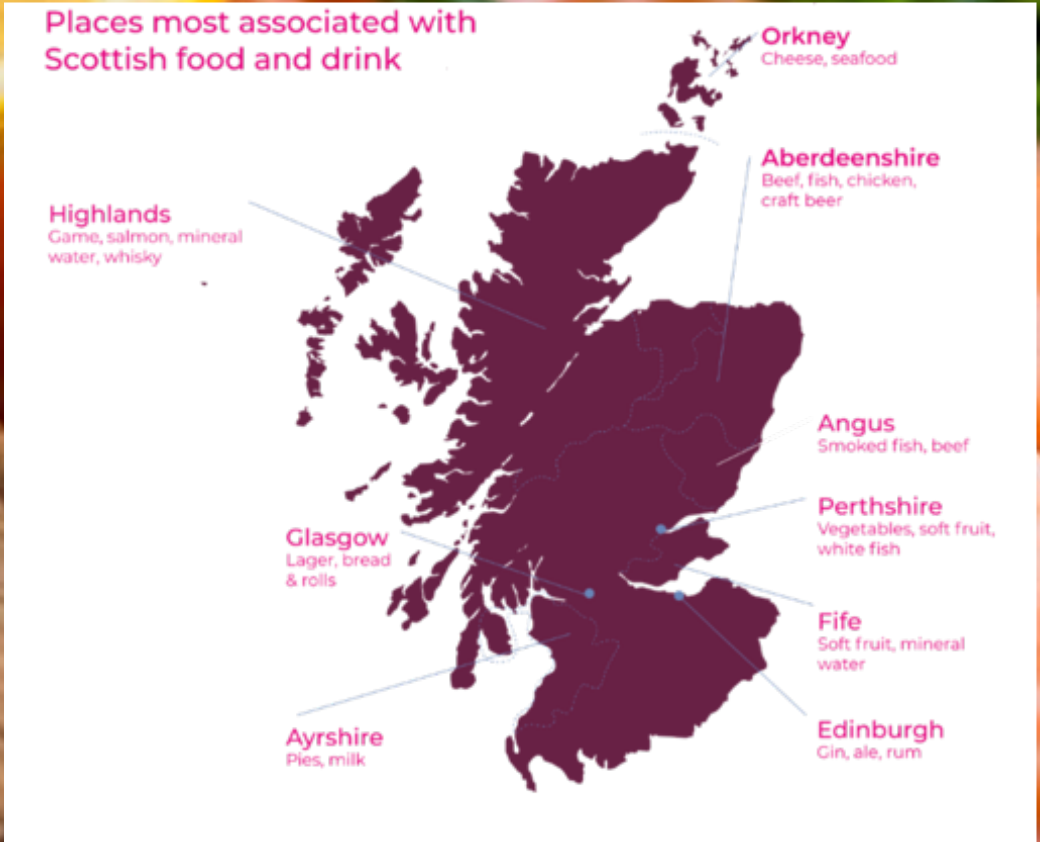
The boundaries of what constitutes “local” is getting smaller

Definition of Local

	Town or city	Region	Country in which you live	UK
				
2023	13%	34%	47%	6%
2022	8%	26%	57%	9%

Q10 When you hear retailers talk about sourcing products “locally”, what would you consider to be “local”?

Scots have a good understanding of their regional food & drink

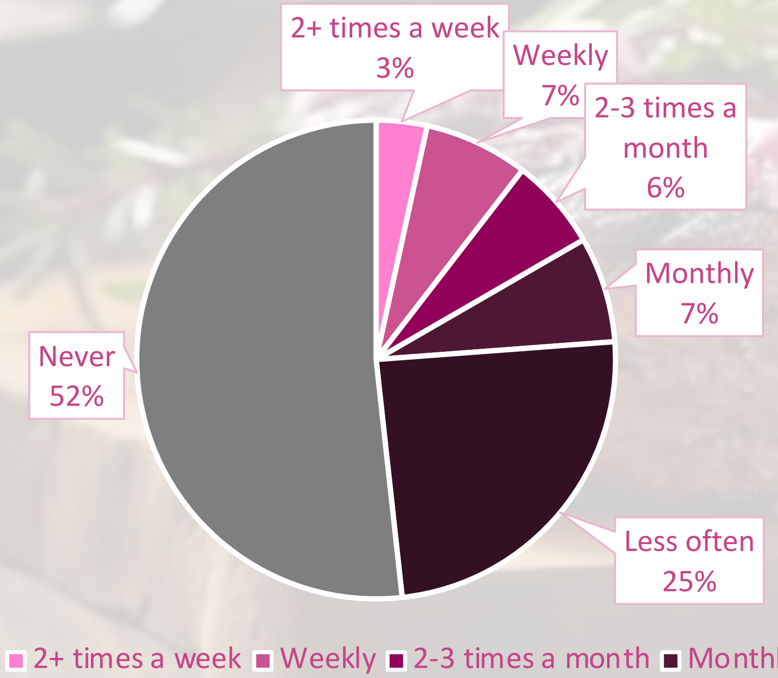


Places particularly associated with types of food and drink more likely to purchase if Scottish | *"Type in any particular places (e.g. towns, regions, etc) in Scotland which you associate with each of these types of product." Base: All respondents (1,006)*

Source: Scotland Food & Drink, The Knowledge Bank Provenance research, July 2023 | Scottish consumers

Around a quarter of Scottish consumers buy game at least monthly. Men are significantly more likely to be consumers than women

Frequency purchased Game in last 6 months:



Overall 23% normally buy Game at least monthly.

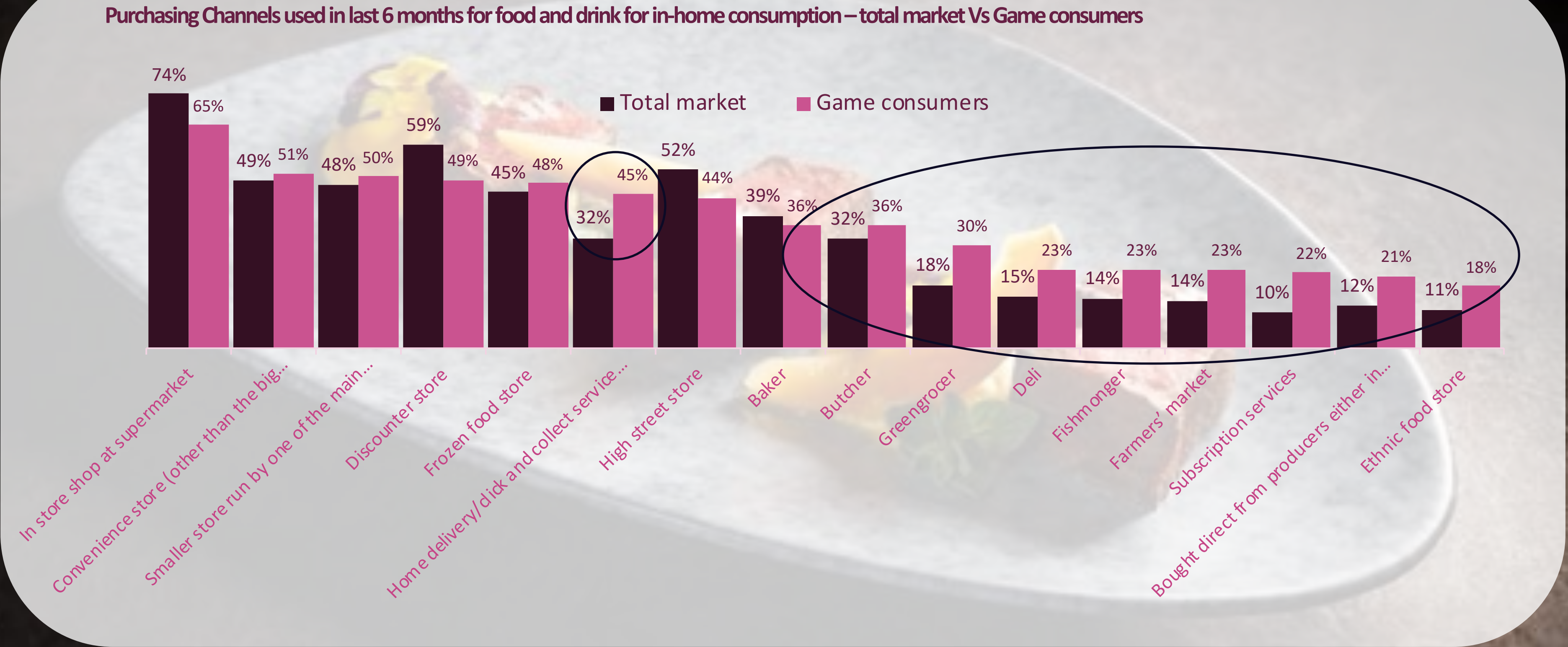
Higher amongst:

- Men (31% vs 17% of women)
- People with children in household (44%)
- Residents of city or large town (38% vs 20% countryside/rural)
- People who are financially comfortable (30%)

*"There's a couple of local butchers and the meat is very, very good. It is quite dear so it's more for a **special occasion** like at Christmas we might get a venison joint or if we are nearby we might call in and get something."*

Jane, mid 60s, rural Aberdeenshire

People who buy game are more likely than average to shop in independent retailers, in farmers markets or to buy directly from producers



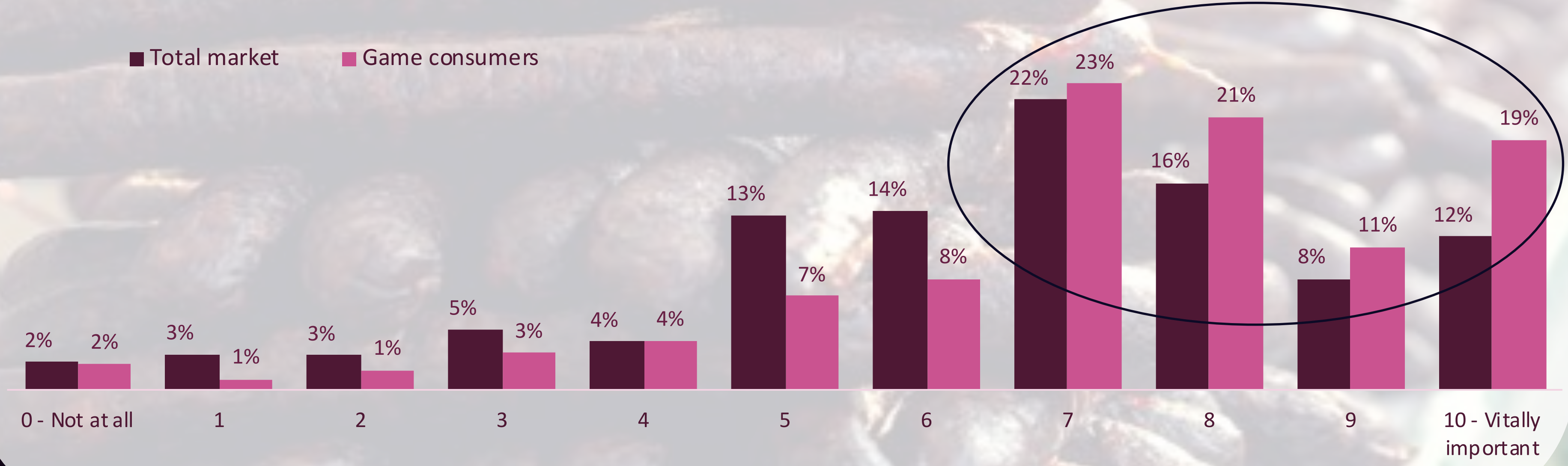
Q5 During the last 6 months or so, from which of the following places have you bought food and drink to eat or drink at home?
Base: All respondents (1,006)

People who buy game are more likely than average to rate food provenance as important

Perceived importance of food provenance – total market Vs Game consumers

Food provenance can be defined as knowing where food was grown, caught or raised, how it was produced and how it was transported.

On a scale for 0 (not at all important) to 10 (vitally important) to what extent do you think food provenance matters?

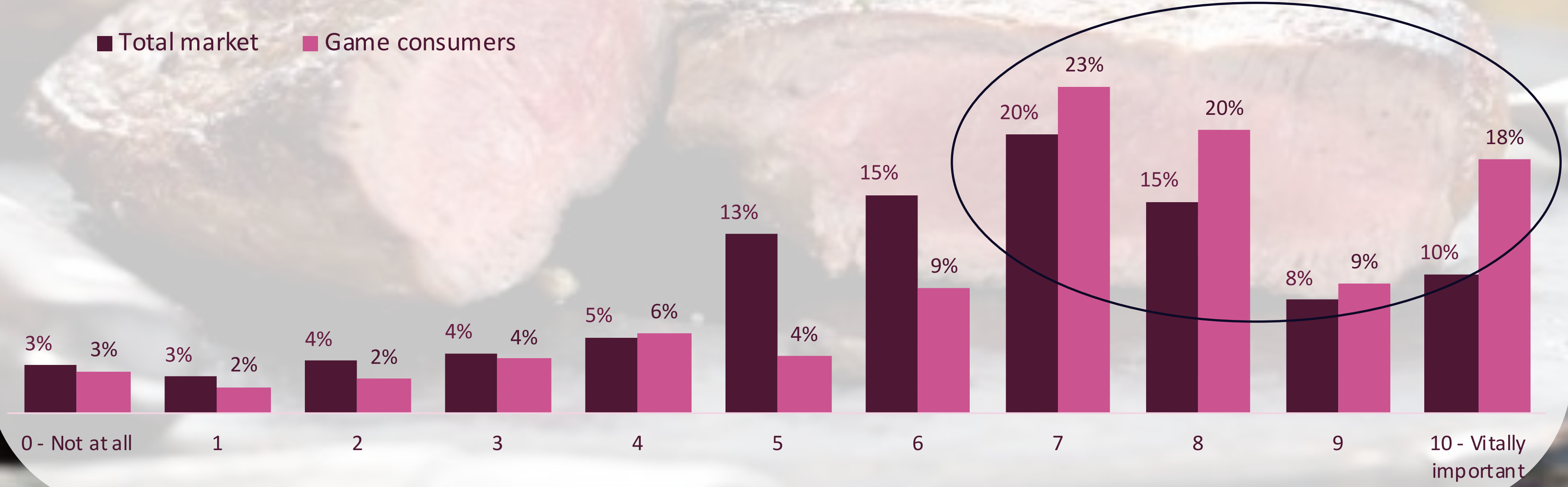


Q19 On a scale for 0 (not at all important) to 10 (vitally important) to what extent do you think food provenance matters?

People who buy game are also much more likely to rate Scottish provenance as important

Perceived importance of Scottish provenance – total market Vs Game consumers

More specifically, when it comes to buying food and drink to eat and home or when you are out of home, on a scale for 0 (not at all important) to 10 (vitally important) in general how important is Scottish provenance? i.e. the food or drink was grown, caught, raised or made in Scotland



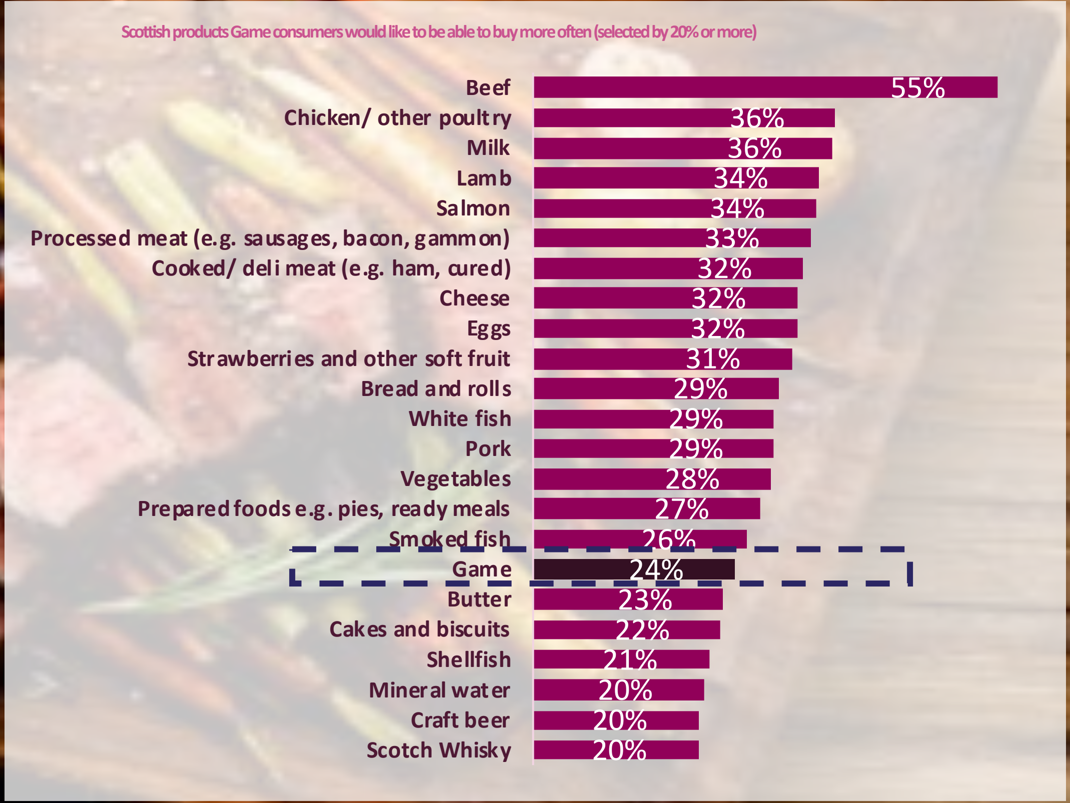
Q19 On a scale for 0 (not at all important) to 10 (vitally important) to what extent do you think food provenance matters?

Base: All respondents (1,006)

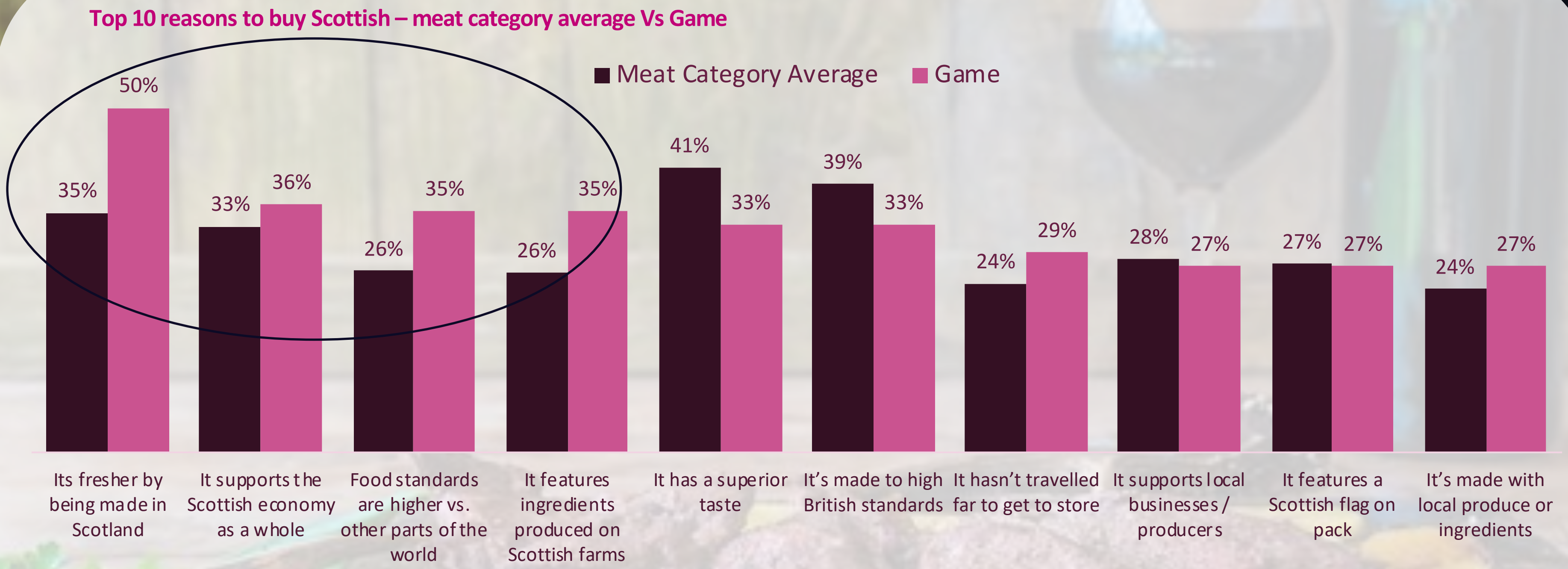
Almost 9 in 10 game consumers would like to buy more Scottish food and drink. Around a quarter would like more opportunities to buy Scottish game.

89%

Of Game consumers would like to be able buy more food and drink produced in Scotland when they are grocery shopping – ***higher than 82% average across all Scottish consumers***

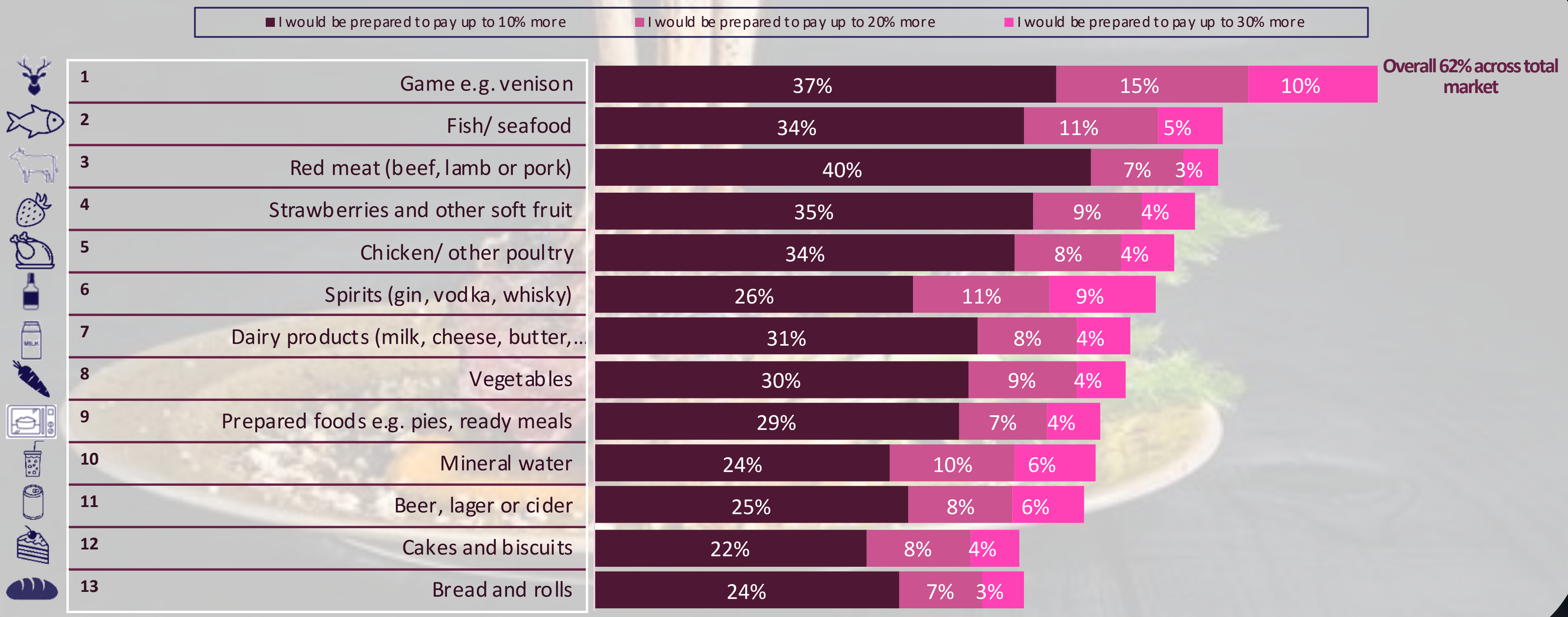


When buying game, produce being fresh, of a higher standard and featuring ingredients produced on Scottish farms is particularly important to consumers

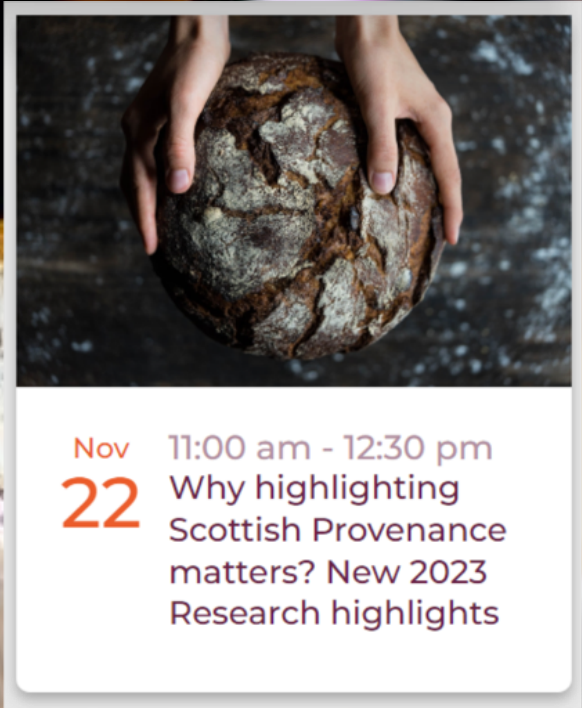


Overall around 3 in 10 Scots who ever eat game would be prepared to pay more for this product if it was labelled as Scottish. Willingness to pay more is higher for game than any other category

Willingness to pay more for products labelled 'from Scotland'



Full provenance Webinar on 22nd November



https://theknowledgebank.scot/

Thank You!

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