The Scottish Venison Summit

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20th November 2023





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.





SUSTAINING SCOTLAND. SUPPLYING THE WORLD.

SCOTLAND FOOD & DRINK PARTNERSHIP

A strategy for Scotland's food and drink industry.

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:

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 <mark>| Enablers:</mark> Brand & Reputation

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

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 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





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Delivered by Scotland Food & Drink Partnership

The importance of Scottish Provenance

Provenance – knowing where you come from

PROVENANCE

Place (country of origin, cultural links)

(His)story (tradition, values, integrity)

Craft (made with love, artisan)

Authenticity (unique products with unique standards connected to a country)

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Why is provenance important to Scottish people?



THANK YOU FOR SHOPPING LOCAL Supporting the economy has been #1 since 2021

26



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

It helps support the local economy 64% It is fresher 56% It has a low carbon footprint 44% It is higher quality 40% Familiar with Scottish brands 38% There are specialist producers based in... 37% Good, reliable availability 34% **Higher standards of production** 34% **Better animal welfare** 34% The traceability of ingredients 32% More likely to be ethically sourced 28% It feels special 26% There is a wide range of products to... 22% It is more premium 18% **Competitively costed** 17%

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

3. The 2. It has been 1. Knowing the product/brand has produced with Country of an authentic story love and care Origin Production Environment Geography 5. It is produced in 4. Is it 6. It is a way that produced in produced minimized damage Scotland to the environment locally

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

Provenance related

 \mathbf{X}



Pro

Changing importance when buying food and drink given the price increases

Price		78%				More important		
romotions/discounts	5% 20%		71%					
Freshness 4	<mark>4%</mark>	41%		53%	(+14pt)			
tions (e.g. high sugar,	9%	47%		40%				
and easy to prepare	10%	48%		3				
recyclable packaging	10%	48%		3	7%			
produced in Scotland	12%	51%			34% (+14pt)			
ct is produced locall y	13%	52%			32% (+11pt)			
produced sustainably	13%	52%			31%			
mes from and how it	12%	54%			31% (+11pt)			
best quality product	23%	23% 46%			29%			
miles are minimised	12%	.% 55%			27%			
nce/treating yourself	30%	30% 45%			22%			
produced organically	22%	22% 50%			21%			
sa well known brand	32%	32% 46%			19%	Less important		
Less important	No change More important							

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

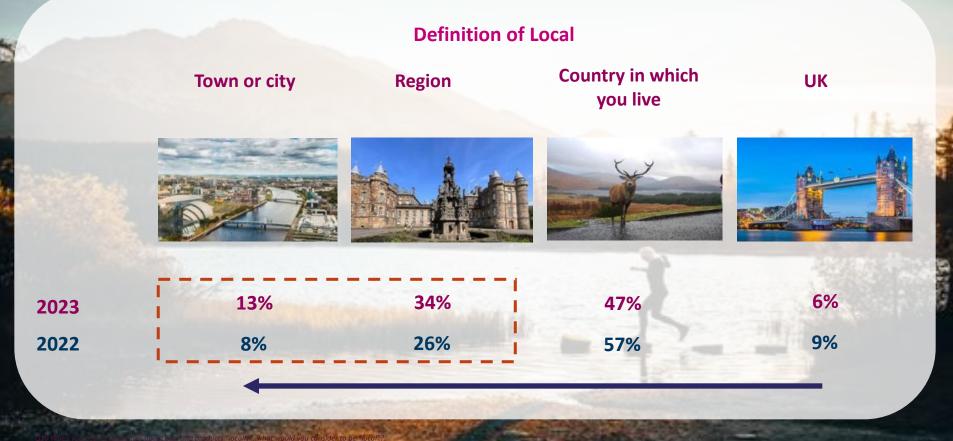
82%

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

Beef
Strawberries and other soft fruit
Chicken/ other poultry
Milk
Vegetables
Eggs
Cheese
Bread and rolls
White fish
Butter
Processed meat (e.g. sausages, bacon, gammon)
Cooked/ deli meat (e.g. ham, cured)
Salmon
Cakes and biscuits
Lamb
Prepared foods e.g. pies, ready meals
Pork
Smoked fish Shellfish
Mineral water
Game
Oily fish
Scotch Whisky
Craft beer
Lager
Gin

	45%
	42%
	40%
	40%
	40%
	38%
	37%
	36%
	30%
	30%
	30%
	29%
	28%
	27%
	26%
	26%
200/	24%
20% 16%	and the second
16%	
15%	100 million (1997)
15%	
14%	
12%	and the second se
11%	Scottish products I would like to be
10%	able to buy more often

The boundaries of what constitutes "local" is getting smaller



Scots have a good understanding of their regional food & drink



icularly associated with types of food and drink more likely to purchase if Scottish

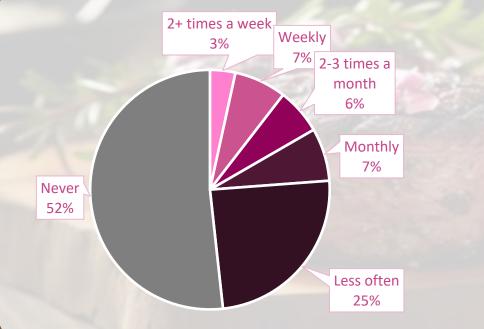
s, regions, etc) in Scotland which

s of product." Base: All respondents

Around a quarter of Scottish consumers buy game at least monthly. Mer consumers than women

significantly more likely to be

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%)

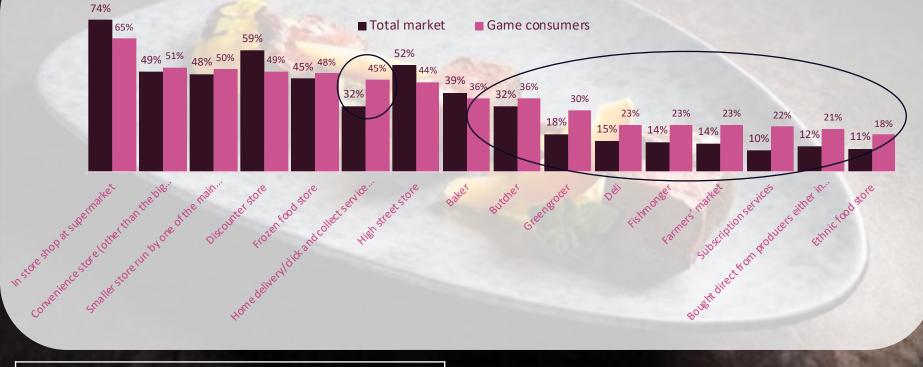
"There's a couple of local butchers and the meat is very, very good. It is quite dear so it's more for a **special occasion** like at Christmas we might get a venison joint or if we are nearby we might call in and get something."

Jane, mid 60s, rural Aberdeenshire

2+ times a week Weekly 2-3 times a month Monthly Less often Never

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

Purchasing Channels used in last 6 months for food and drink for in-home consumption - total market Vs Game consumers

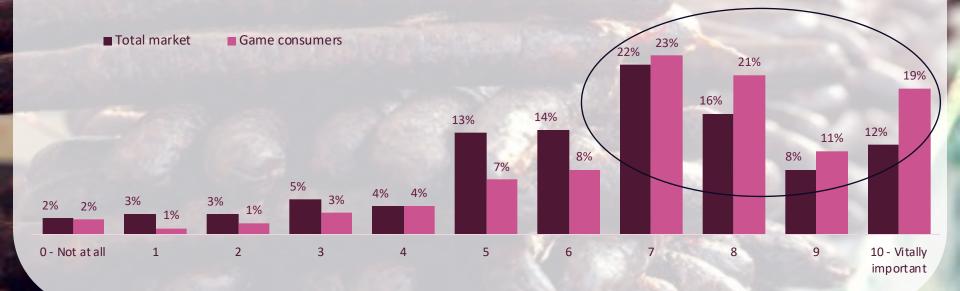


Q5 During the last 6 months or so, from which of the following places have you bought food and drink to eat or drink at home? Base: All respondents (1,006)

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

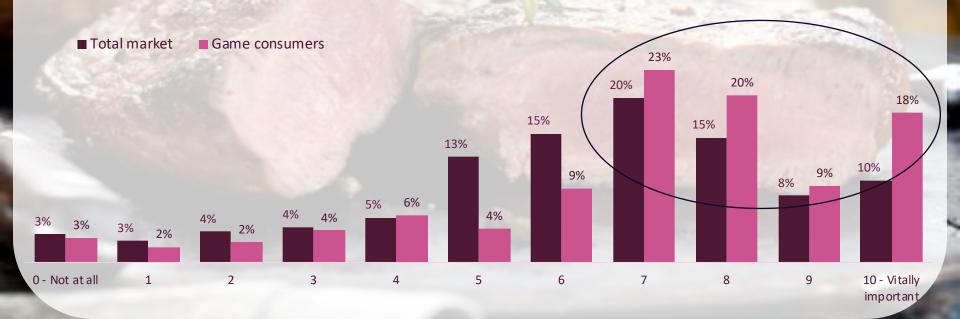
Food provenance can be defined as knowing where food was grown, caught or raised, how it was produced and how it was transported. On a scale for 0 (not at all important) to 10 (vitally important) to what extent do you think food provenance matters?



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 me 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%

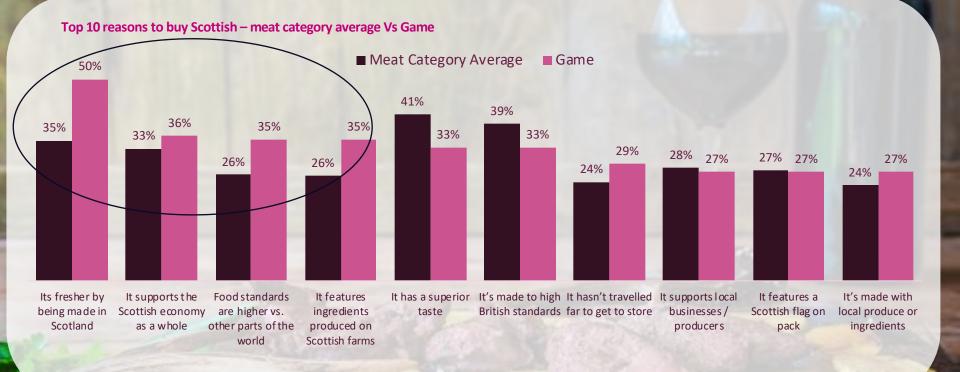
Of Game consumers would like to be able buy more food and drink produced in Scotland when they are grocery shopping – higher than 82% average across all Scottish consumers

Scotush products Game consumers would like to be able to buy h	fore often (selected by 20% or more)
Beef	
Chicken/ other poultry	36%
Milk	36%
Lamb	34%
Salmon	34%
Processed meat (e.g. sausages, bacon, gammon)	33%
Cooked/ deli meat (e.g. ham, cured)	32%
Cheese	32%
Eggs	32%
Strawberries and other soft fruit	31%
Bread and rolls	29%
White fish	29%
Pork	29%
Vegetables	28%
Prepared foods e.g. pies, ready meals	27%
Smoked fish	2.6%
L Game	24%
Butter	23%
Cakes and biscuits	22%
Shellfish	21%
Mineral water	20%
Craft beer	20%
Scotch Whisky	20%

Scottish products Game consumers would like to be able to buy more often (selected by 20% or more)

55%

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'

		■ I would be prepared to pay up to 10% more	I would be prepared to pay up to 20%	prepared to pay up to 20% more I would be prepared to pay up to 30% more						
¥	1	Game e.g. venison	37%				15%		Overall 62% across total market	
K)	2	Fish/ seafood	34%	34%		11%	5	5%		
N. N.	3	Red meat (beef, lamb or pork)	40%			7%	<mark>3%</mark>			
	4	Strawberries and other soft fruit	35%			9%	<mark>4%</mark>			
00	5	Chicken/ other poultry	cken/ other poultry 34%			8%	4%			
	6	Spirits (gin, vodka, whisky)	26%	1	1%	9%				
WILK	7	Dairy products (milk, cheese, butter,	31%		8%	% <mark>4%</mark>				
No.	8	Vegetables	30%		9%	6 <mark>4%</mark>				
	9	Prepared foods e.g. pies, ready meals	29%		7%	4%				
•0	10	Mineral water	24%	10%	6	6%				
9	11	Beer, lager or cider	25%	8%	69	5%				
	12	Cakes and biscuits	22%	8% 4	4%					
_	13	Bread and rolls	24%	7% 3	3%					

Full provenance Webinar on 22nd November







https://theknowledgebank.scot/

Thank You!



