Scottish Venison presentation for ADMG online meeting – 5 December 2023

Some of you will have heard me speak at the Scottish Venison summit, attended by some 100 people from all aspects of the venison sector, this event was the major event in our venison calendar in recent years, attended by producers, processors, buyers and everyone in between with excellent representation from all corners of Scotland and the islands including Jura, Rona and Skye.

At that event we launched the new Scottish Venison strategy and I'm just going to talka little about that now as just about everything we will be doing going forward ties back into the new strategy in one way or another.

So, five years is probably a reasonable period to consider whether the strategy that had acted as our focus and on which we set our course in 2018 was still the one that we should be pursuing. But a lot has happened in five years.

Launched in 2018 Beyond the Glen was the first strategy for Scottish venison – embracing wild, farmed, all species, public and private sector. It took stock of where we were at that time – 2018 – and set out where we hoped to be by 2030.

It was hugely ambitious; based on forecasts that assumed that the wild cull would be static and declining, that the market would be growing as it had been at around 10 per cent per annum, and that we would still be exporting into Europe without over-bearing controls.

The over-riding influencing factor however has been the declaration of the climate emergency by the Scottish Government in 2019, but in addition to that we have seen the consequences of Brexit, the Ukraine war, rises in costs of fuel and materials and a cost of living crisis. We have also seen the publication of the Deer Working Group report with its 99 recommendations (some already implemented), advice from NatureScot to raise cull targets by an additional 50,000 in the course of the next five years, and a blanket target of 10 deer per sq km across Scotland with far less than that in certain areas.

We have also seen increased organisation of deer management activity in England and Wales, a Defra consultation on deer management which closed in September 2022, the setting up of a Venison Working Group for England and Wales and the launch of a quality standard south of the border, British Quality Wild Venison

Covid 19 was a game changer. For two years it effectively shut down all routes to market except for retail and mail order. The restart for restaurants, catering, food service and events has been sporadic and, while that all seems in the past now, we are still living with the pandemic's setbacks and consequences.

The strategy contains 12 main actions. Some of these are carried forward from Beyond the Glen. Some are new. Each one has a cost and priority attached. You can download a copy from the Scottish Venison website, and I'll put the link on the ADMG website with the minutes after today's meeting.

The organisation

Scottish Venison has reorganised. We have brought new members onto our board, and will be setting up a number of sub-groups to work on specific projects. SAOS continues to work with us giving us significant extra capacity and routes to project funding. Tom has mentioned that we need to increase our core funding from its current c £25K per annum for everything that we do. In addition, we are bringing the assurance scheme SQWV under the Scottish Venison umbrella, and with that comes additional cost.

We want to improve and establish new supply chains
John will tell us more about this in his presentation shortly. But we want to open up new markets and the wholesale sector is key to this. We need to retain and strengthen our markets in London and SE England. We must do more to grow local markets in Scotland through raising awareness with the consumer and availability. We are encouraging supply of venison into the charitable sector too.

We want to enhance quality assurance
The current SQWV scheme needs to be developed to be ‘end to end’. It has no relevance to the consumer, but it ought to have. We also need to work with BQWV south of the border. In essence we need to make sure that quality assured is not just maintained but relevant and developed.

We want to build and strengthen skills
We need a gap analysis to help us assess and consolidate the training that is already available and identify what is missing. We know we are doing a lot, and have developed a new course for venison butchery, but we need to consider whether we are doing enough and where we could be doing more.

We want to develop small localised processing operations
We have a pilot scheme underway supporting three projects in N Argyll, SW Scotland and Moray. We recognise that one of the keys to future market success is to develop more opportunities for processing and sales but closer to the point of kill. A number of off the shelf solutions are available for chills and larders but still require sites and services. We want more focus on the low ground where infrastructure is scarce and getting increased volumes of roe to market is important.

We are pushing for venison enterprises to be on a level playing field with other (often much larger) projects in the successor food processor marketing co-operation grant scheme or failing that for a dedicated fund to support up to 12 local projects.

In addition, there is a role for local enterprise companies. They need to understand why they should support venison processing ventures given some very clear economic, environmental and community objectives.

We have talked a lot about developing processing, but we also need people to understand our product and ask for it.

We need an annual marketing and PR programme
We need to reach the consumer with all the good messages that we have around venison. We want to spend at least £60K per annum for the next five years on PR in London, SE England and Scotland. Government, through the Scotland Food and Drink Partnership Covid recovery fund, granted us a small budget to support an online marketing campaign over 3 months post-Covid but as with all marketing programmes one year is not enough and some sustained messaging would certainly be helpful. We also need to revisit and re-develop our education programme for schools.

Research into animal health should be ongoing
The wild deer health project at the Moredun was ground-breaking and any initiatives that come forward in terms of deer health we would strongly support, both for the wild and farmed deer sectors.

We need ongoing market research
Until 2018 we knew very little about the market. Since then we have been fortunate again through Government funding to receive regular updates on UK venison retail through The Knowledge Bank. We need that to understand direction of travel and future decision making. We would also like to revisit work done in 2018 on usage and attitudinal research, possibly next year or in 2025 to be sure that our messages are being directed at the right quarters.

We are researching and will be recommending measures to reduce carbon emissions
We have a project with SAC Consulting Food and Farming to investigate wild deer emissions and emissions from the supply chain to and at the processor. We need to understand these better so that action can be taken to reduce avoidable emissions and the sector play its part in addressing the climate change challenge. We are expecting this project to conclude this month.

We need to assess risk
We need a risk analysis of the sector – we need to know what impacts major (or minor) events may have on the sector and the subsequent consequences reaching right back down the supply chain, for example the cull not being delivered for whatever reasons. We recognise the fragility, particularly at certain times of the year, of the whole of the sector and that there is no plan B.

We want to develop Scottish Venison, the brand
We know that provenance adds value, brings benefit and has no price. So, we should use it. We are keeping SQWV as firmly Scottish and we want to develop Scottish Venison as a brand – a subset of that being a re-application for Scottish Wild Venison for UKGI, the UK successor to PGI.

That broadly sums up where we are and what we are doing. You have heard mention of a venison subsidy and Richard may wish to talk a little about that. We have a very busy programme of activity ahead and will be hoping for your support to enable us to deliver that as we move forward.