Photo: Laurie Campbell

Revisiting Beyond the Glen

A refreshed strategy for Scottish Venison 2023 – 2030

It has been 5 years since the launch of the first strategy for Scottish Venison in September 2018 and now is a logical time to reassess the sector's priorities, aspirations and direction. Also, a number of global and more local UK and Scottish factors have arisen since 2018 and must now be considered in determining the sector's future approach. These have impacted to varying degrees on the sector, its operations, expectations and future pathways.

There are factors that are global and have impacted on all in UK food production to some degree:

- Brexit
- The Covid 19 pandemic
- The war in Ukraine and its effect on energy and other costs
- The declaration of the climate emergency (which has gained national prominence and traction since April 2019).

And those that are Scotland or wider UK include:

- The report of the independent Deer Working Group published in 2019; and raising of the annual cull target by NatureScot over the next five years by a minimum of 50,000 additional animals in Scotland, all species

Photo: Laurie Campbell

- An anticipated marked increase in deer numbers and culls south of the border, a more effective structuring of the deer management and venison sector in England including the launch of British Quality Wild Venison and the potential impact of this on the market in London and SE England
- The UK cost of living crisis
- Increased costs of borrowing and interest rates.

In addition, the revised strategy needs to 'fit' with the work and outcomes of the recommendations of the Deer Working Group and the Strategic Deer Board with a Bill expected in early 2024, and with the delivery of Scotland's climate change and Scottish Biodiversity Strategy (SBS) objectives.

When the 2018 venison strategy was produced its backdrop was very different. It assumed, given conditions then, that venison would be in short supply in the light of UK market growth/buoyancy and a continuing healthy export trade. Focus and emphasis were therefore placed on increasing production capacity through deer farming to meet an anticipated shortfall in supply and reduce reliance on imports.

However, venison supply from culls of the UK-wide wild herd of deer is forecast to increase in response to the climate emergency, and to support delivery of measures to increase woodland cover and reverse biodiversity loss.

Farmed venison still has a place at the premium end of the retail sector and industry growth in this area needs to be protected and sustained in line with the market. Developing other routes to market for farmed venison, as with wild, is also a priority.

Regarding the climate emergency, SVA published an interim Statement of Intent on Greenhouse Gas Emissions in July 2022 which set out aspirations to reduce the carbon footprint of venison. A further detailed report focuses on recommendations to reduce the cull's carbon footprint, developing local markets, reducing food miles and reducing carbon at the processor. This SVA commissioned report co-funded by NatureScot, ADMG and Scottish Environment LINK partners is due for publication in late 2023 with recommendations for future action.

Some highlights since the launch of the 2018 Strategy, Beyond the Glen

- Work on new supply chains is ongoing notwithstanding setbacks caused by the Covid-19 pandemic with a project undertaken to improve safe, legal supply from stalker direct to local retail working with NatureScot and Scottish Craft Butchers. Three short educational films have been produced and are available on the Scottish Venison YouTube channel.
- A butchery skills course for stalkers and butchers has been developed with Scottish Craft Butchers and Craft Skills Scotland. This has been tested and is now available.
- A programme of training/knowledge transfer days is underway for deer farmers through FAS Connect and the Venison Advisory Service with a mix of on-farm and online events exploring different themes. This programme is now in year 2.
- The local chill/processing pilot project has made progress with private sector sites in development in SW Scotland and N Argyll. A further project in Moray is expected to start soon. This project has been enabled through funding from the Scotland Food and Drink Partnership Covid Recovery Fund. A knowledge transfer programme in relation to all three sites will commence in 2024.
- Scottish Venison was supported by an online promotion campaign which ran April – May 2021 funded through the Scotland Food and Drink Partnership Covid Recovery Fund.
- Additional work has been undertaken in relation to the Wild Deer Health Project by the Moredun Research Institute, with further farmed deer health projects ongoing.
- The market insights programme covering UK retail through The Knowledge Bank continues.
- A major report into infrastructure and capacity was undertaken through 2023 with a range of recommendations to be taken forward.

Summary of Actions

The Summary of Actions of the Scottish Venison Strategy below shows the existing actions that are continued from 2018 but updated in terms of focus and detail (items 1 – 9). Page 8 also shows new actions introduced going forward (items 10 – 12).

Each item shows priority (low – medium – high) and an anticipated start date subject to available budget.

Existing Actions

No. 1	**Action:**	Establish a 'go to' hub for research, accessing technical advice, information and as the focal point for the sector in Scotland (2018 action).
	Responsibility:	Scottish Venison Association (SVA)
	Comment:	The decision has been made to streamline and restructure the Scottish Venison Association. The Scottish Venison Association (SVA) effectively becomes the umbrella for the sector including SQWV and Scottish Venison a brand in its own right. The move to a new simplified financial model, to be agreed and formalised, will set SVA on a more stable financial footing with greater opportunity to leverage funding. As the SVA remit grows an increase in core funding is essential for running costs and project management. Consideration should be given to recruiting a dedicated project officer, subject to additional funding. **Cost (£):** 30K (per annum met internally) **Priority / start:** High 2024 SVA will also take on some of the administration and promotional work for SQWV. **Cost (£):** 5K (per annum) **Priority / start:** High 2024
No. 2	**Action:**	Improve and establish new supply chains
	Responsibility:	SVA, SAOS
	Comment:	Set short-term targets to work with consultants to explore opening up the wholesale channel and other routes to market. Working with wholesalers may open the door to public sector opportunities both through local authorities and broader public sector procurement. SVA needs to develop new markets/outlets for cull increases and not flood a potentially fragile existing market with additional product. The market for Scottish venison in London and SE England must be prioritised as this is likely to become more competitive. The Scottish market should be relatively secure but there should be opportunities for it to grow prompted by promotion, education and availability of local product particularly. There are also opportunities for more local processing and local sales although these will be low volume. The 'third sector' also provides an outlet, albeit at no return for the producer. In this context the short supply chain (producer/small processor/direct sale) should be developed for both wild venison and farmed venison (as an alternative route to market) but will not account for high volumes (see action 6 below) or challenge established AGHE business. With sufficient budget there may be opportunity to support export effort through one or more trade events/trade missions in Europe. **Cost (£):** 10 - 20K over 1 year **Priority / start:** High 2024

No. 3	Action:	Continuously enhance quality assurance schemes
	Responsibility:	SVA, SQWV, BDFPA
	Comment:	The current SQWV scheme should move from being a basic scheme ensuring compliance to a more nuanced (possibly tiered) scheme which could allow access to different markets (eg the wholesaler market will require a proper 'end to end' scheme and more confidence than the current scheme generates). This work will require additional funding and development to be put in place. The SQWV scheme is largely superfluous to processors/AGHEs who have other national accreditation (ie BRC, SALSA) but is essential to maintain and enhance standards although it should be noted that it assures the process and not the product. It should also be of relevance and benefit to smaller, low volume processors and has proven worth in terms of food safety and traceability. A key challenge will be to gain agreement from stakeholders (producers and processors) that they want and value SQWV. We should also assess whether there is benefit in SQWV becoming 'consumer facing'. Scheme delivery should be reviewed at the end of SAI Global's contract term. SQWV should work with British Quality Wild Venison (BQWV) and establish how both schemes can gain advantage together. Current arrangements for Farm and Park Deer Assurance should be maintained. **Cost (£):** 10 - 20K over 2 years **Priority / start:** High 2024


Farmed deer, Highland Perthshire

No. 4	**Action:**	Build and strengthen skills for future growth
	Responsibility:	SVA, Craft Skills Scotland, Best Practice, FAS Connect, Venison Advisory Service
	Comment:	We require a skills development programme across wild and farmed sectors covering exemplary (Best Practice) guidance to achieve CPD for producers, processers and butchers to promote and ensure food hygiene. We also require ongoing awareness-raising and skills training for the farmed deer sector, knowledge exchange, stockman training, butchery skills for small volume producers etc. The wild venison small processor pilot project (see 6) and opportunities in the farmed deer sector will provide ongoing knowledge transfer opportunities as will other 'independent' enterprises with their agreement. Overall, skills development is currently piece-meal and a commissioned gap analysis would be an important first step in consolidating what is available now and for planning its expansion. **Cost (£):** 10K per year for 3 years **Priority / start:** Medium 2025
No. 5	**Action:**	Tailor support for deer farming
	Responsibility:	SVA, VAS, FAS Connect, BDFPA
	Comment:	Progress in the sector has slowed due to a range of factors (slow-down in market growth, loss of the Scottish abattoir, increasing costs for fencing). However, it is vital to continue to support those who have invested and diversified and seek ways to allow them and new entrants to develop further. There is current provision through FAS Connect with VAS to deliver deer farming knowledge transfer days and farm visits through 2023/24. There are very limited options for deer farmers to access markets. We should develop alternatives including support and advice for setting up own supply chain enterprises (from field slaughter through processing and butchery to local supply and mail order). A Scotland located or 'mobile' abattoir remains a priority. **Cost (£):** 10K per year for 3 years **Priority / start:** High 2024

Knowledge transfer day with SAC
and the Venison Advisory Service (VAS)

No. 6	**Action:**	Invest in area-based facilities to maintain wild carcass quality and open new routes to local markets
	Responsibility:	SVA, Scottish Govt, Local Enterprise, NatureScot
	Comment:	Much work has already been done on developing local infrastructure, with a pilot up and running covering three projects in North Argyll, SW Scotland and Moray. There is the opportunity for the development of other locally based capacity, both upland and lowland, private sector and community led. A grant structure needs to be in place to support this, especially since such enterprises are supporting Government objectives for an increased deer cull. We need to investigate available capacity in public sector chills/ larders and whether use could be made of such surplus space (if it exists) by private sector stalkers / producers whether year-round or just at certain times of the year The successor scheme to the Food Processor Marketing Co-operation Grant (FPMCG) scheme should be open to developing venison infrastructure at all scales and types, whether chills and collection points, or chills and local processing/butchery and sale or other permutations. There are a number of low cost/low capacity options now available which could work well. Membership of the respective assurance scheme should be one pre-requisite for consideration of an application. A template/specification for a small/medium size chill/butchery unit should be drawn up and available - effectively an advisory starter kit. Given strong community/public interest credentials there should also be opportunity for Local Enterprise Company support. As an alternative to FPMCG or similar a dedicated, competitive fund to encourage development of small/medium capacity local larder/chill/processing units administered by SAOS could also have considerable potential. **Cost (£):** 600K (fund or through FPMCG to support 12 local projects over initial 5 years) **Priority / start:** High 2024
No. 7	**Action:**	Develop a consumer facing communications campaign and engage with education in schools
	Responsibility:	SVA
	Comment:	Develop a 5-year communications plan to support Scottish Venison in the UK venison markets. Run as a pilot in year 1 with focus mainly on PR across all markets including local sales and mail order (£60K per annum for 5 years). **Cost (£):** 300K (60K per year for 5 years) **Priority / start:** High 2024 Develop separate web-based education programme for Scottish schools; generate/upgrade education materials for roll out in 2025/26. **Cost (£):** 30K (15K per year over 2 years) **Priority / start:** Medium 2025
No. 8	**Action:**	Build on world class husbandry expertise and R&D to improve productivity in Scotland
	Responsibility:	VAS, Moredun, BDFPA
	Comment:	Deer health, both wild and farmed, is a continued focus through work at the Moredun Research Institute. This programme and interest is ongoing. There may be opportunities in the farmed deer sector for increased work in genetics and testing. **Priority / start:** Ongoing

No. 9	**Action:**	Deploy consumer insight to accelerate NPD for both home and international markets.
	Responsibility:	Knowledge Bank, SVA
	Comment:	SVA would continue to work closely with The Knowledge Bank for supply of industry data (retail) to guide/underpin decision making. Further usage and attitude research should be commissioned to firm market information, demographics and targeting etc in 2 – 3 years. **Cost (£):** 20K (1 year) **Priority / start:** Medium 2025 / 26

New Actions

No. 10	**Action:**	Implement measures to reduce carbon emissions
	Responsibility:	SVA, SAC
	Comment:	Work is already underway through SVA with SAC commissioned to produce a report on pathways to achieve a reduced carbon/emissions footprint across wild deer and wild venison sector. **Cost (£):** 30K already funded **Priority / start:** Ongoing
No. 11	**Action:**	Risk analysis
	Responsibility:	SVA + consultant
	Comment:	A risk analysis of the sector would be advantageous. The JF Consulting report highlights capacity but does not highlight risk. It would be helpful to understand better the impacts that major events might have on the sector, and subsequent consequences reaching back down the supply chain with their impact on actions on the ground in terms of meeting climate change objectives and the SBS. **Priority / start:** Low 2025
No. 12	**Action:**	Scottish Venison, the brand
	Responsibility:	SVA + consultant
	Comment:	We should develop Scottish Venison as a brand, ultimately a brand that the consumer recognises and that they can trust, reinforced by SQWV and other appropriate assurance, a brand synonymous with healthy protein rooted in supporting climate change and other environmental and biodiversity recovery objectives. The Scottish Venison website should be reviewed and refreshed and other marketing and promotional materials re-assessed. PGI status for Scottish Wild Venison as a sub-set of Scottish Venison should also be revisited. **Cost (£):** 15K over 1 year **Priority / start:** High 2024

Scottish Venison Association/SAOS

Scottish Venison Association
www.scottish-venison.info

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