



What's Hot in Health – Let's talk Venison

Foreword by Julian Mellentin, New Nutrition Business

'We know from our many years of experience in the business of food and health that the idea of naturalness and health are inextricably linked in consumers' minds.

Scotland's natural larder has great advantages in this area – the Highland mountains, green pastures of the Lowlands and the clean waters of the North Atlantic are seen as clean, healthy places for production of meat and seafood. The "Monarch of the Glen", the great red stag roaming free, is a recognizable symbol of the wildness and vigour that this environment can produce.

But can this natural advantage be translated into sales growth for venison?

This is where things become a bit trickier, but there are nonetheless some good growth opportunities.

Venison is high in protein and low in fat – a combination which science is showing to be beneficial for weight management and which consumers are also starting to recognize as healthy.

The main barrier to growth for all meat is that in its fresh form, it's just not convenient enough. It requires a certain amount of preparation, and cooking, and with that comes a requirement for a certain amount of skill, which not all busy modern consumers have. It's a riskier purchase.

Sales show that where meat is provided in a convenient form which is ready to eat – from ready meals to new product concepts like the very successful Epic bars – consumers respond and brands grow.

Venison is less familiar to consumers, and its reputation for a "gamier" flavour and texture than beef is also a barrier which needs to be addressed for sales to flourish. This can be achieved in a number of ways:

- A campaign of sampling and tastings so that as many people as possible can try before they buy
- By creating a flavour strength rating similar to cheese or coffee which shows consumers how mild or strong the flavour is of this particular product (For example, farmed venison often has a much milder flavour than game venison and it is a question of preference)
- Providing recipes and information showing the flavour and ingredient combinations which work best with venison



There are many export opportunities for venison and deer products, but it is crucial to treat the development of these markets as you would your home market. When developing recipes and samplings, using a local chef produces the best results, creating recipes using ingredients and cuts which are acceptable to the local audience. So for the Korean market, where venison is prized, use a Korean chef to create dishes tailored to local tastes.

This report provides valuable information which, if used in the right way, should help the Scottish venison industry build on its natural advantages, develop and grow successfully’.

Julian Mellentin

The Market and Supply

There is a growing market for venison with Kantar Worldpanel research findings (Kantar Worldpanel 52 w/e 22 June 2014) demonstrating that sales of British venison in the UK have reportedly risen by 413% in 2014, from £1.2m to £6.4m. Total UK venison sales (including imports) rose from £32m in 2006 to £43m in 2009. The UK retail market for venison is quoted as growing at between 10 and 25% per annum.

Sales of premium ready meals, which includes venison, grew in the UK by between 7% and 8% in 2013 taking total ready meal sales in major supermarkets to above the £2.3bn mark in the past year. The general consensus is that health associated ready meals have a significant role to play in this market, presenting strong growth opportunities, particularly for venison. The example on the right was one of the 'The Independent's' Ten Best Ready Meals of 2014.



In response to this demand, plans to expand deer farming in Scotland and to increase output by an additional 1200 tonnes per annum by 2020, are still likely to leave the UK a net importer of venison. Scotland produces around 3,500 tonnes of venison a year, of which only around 2%, or 50 tonnes, is produced from deer farms. Around 1,200 tonnes is exported, although this is countered by around 1,200 tonnes of imported venison from New Zealand, Poland, Ireland and Spain. Meeting the industry growth target for farm venison will mean putting an extra 22,000 farmed deer on the ground in the next six years.

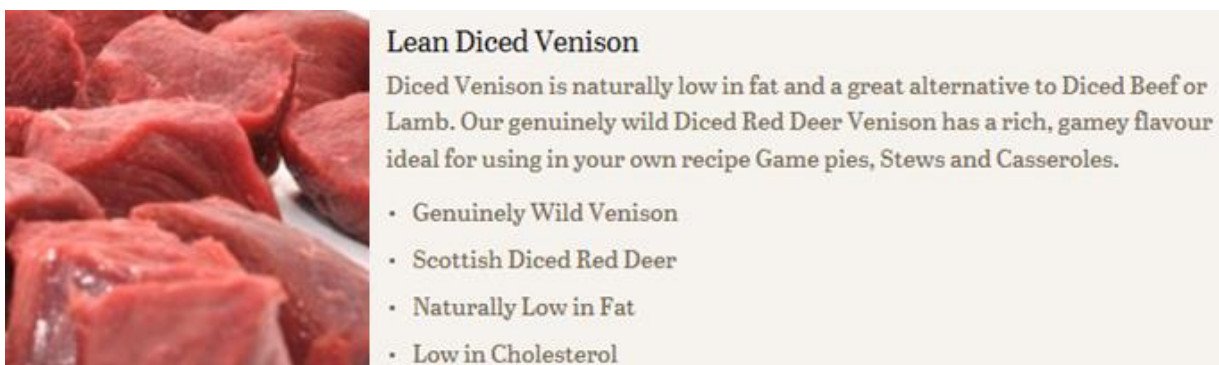
Health Messages

Venison has more protein than any other red meat, which means that it helps sate the appetite. It is also particularly rich in iron, which prevents anaemia and is good for energy levels. It's full of B vitamins: B2 (riboflavin) and B3 (niacin), which helps regulate metabolism; and vitamin B6 and B12. It is also low in fat and cholesterol and contains conjugated linoleic acid.

A variety of health messages are being communicated when selling venison with a consistent focus on its naturally lean qualities. For example:

- 'Venison is high in protein, low in fat and packed full of vital B vitamins to improve the health of your heart - venison even contains more iron than beef. With the lowest cholesterol content of any meat, many people are waking up to the rich, flavoursome future of venison.'
- 'Venison is a nutrient-rich food that is much lower in fat than other red meats. Supplied from our own farm and parks and farms throughout the UK, all of our venison is reared naturally guaranteeing a beautifully flavoured yet lean and tender meat.'

- ‘All of our wild venison is fully traceable and quality assured. Wild venison will have a more intense, gamey flavour but will still offer the same healthy option as our farmed being low in fat and cholesterol yet high in protein and essential vitamins.’



Weightwatchers logo alongside product for sale online and a ‘Low KJ’ badge on products in New Zealand.

- ‘Venison is becoming more and more popular as a lean, low-fat and healthy alternative. Compared to beef, venison is not only lower in fat and calories, but higher in trace elements like iron and vitamin B.’
- We believe our venison offers the finest eating experience. Our venison is incredibly healthy being naturally low in fat, high in protein, iron and Omega 3s.’

Encouraging as these examples are from around the world, caution is always advised when making health claims or communications of any description. Expert advice should always be sought on specific labelling regulations to ensure full legal compliance within UK, EU and international markets.

Venison Products

Venison producers are making good progress towards supplying their customers with the range and quality of accessible product they are looking for. An increasingly wide choice of ready meals are available and premium, convenient niche products are also being developed such as jerky, bresaola and venison chorizo and salamis.



A table featuring the range of venison products that are currently available is below.

PRODUCT TYPE	PRODUCT	TARGET MARKET	SOLD BY
CUTS	Steaks	Mass market	Retail, online, export, foodservice
	Roasting joints		
	Cutlets, escalopes, shanks		
PROCESSED	Diced, minced	Mass market	Retail, online, export, foodservice
	Ready meals, meatballs, pies		
	Sausages, burgers		
	Bacon, chorizo, jerky, smoked	Exclusive market	
	Pate, stock		
Wellington, olives			
OFFAL	Kidneys, liver, heart	Speciality market	Online

Marketing Approaches

There are key approaches that resonate well with consumers and from which producers can benefit. These credentials are worth investing in and adhering to in order to identify a point of difference in the market.

PROVENANCE: The wild and beautiful landscape of Scotland is a great asset and is a good starting point in differentiating from imported products.

NUTRITION BENEFITS: There is a range of selling points venison can use including the high protein and naturally lean characteristics of the meat.

WELFARE: This is a key issue for consumers so providing welfare assurances is a valued selling point. Whether it be the benefits of being able to manage deer for farmed venison or the benefits of freedom for wild animals, both



messages can be used successfully if the consumer believes in the credibility of the story that is being communicated to them.

FEED: There is growing interest in the diet of livestock. Selling points such as 100% pasture fed and 100% local feed are beginning to be key points of differentiation.

ENVIRONMENTAL: Venison has an opportunity to tell the story of the environmental and landscape benefits this product can help conserve. One producer has done this in the following way on its website:

“Our green credentials: We believe that our venison is the most environmentally friendly food it is possible to produce on our small hill farm, and we are proud of our very low carbon footprint.”

Potential Opportunities

IMPORT SUBSTITUTION & GROWING DOMESTIC MARKET

In 2013 the equivalent of 29,000 carcasses or around 1300 tonnes of venison were imported to the UK and around 25,000 carcasses were imported in 2012. There is clearly an opportunity for UK venison to capture market share and grow into this market, particularly where it benefits from its natural, provenance, quality assured and product health attributes.

EXPORT

The market channels for venison in Europe developed in the 1980s, making the European market mature and highly competitive, with a range of competing products. This market is price sensitive, and therefore challenging for Scottish venison producers to create a long term premium niche. New opportunities can be developed in emerging markets, such as the Middle East and China, where consumers have a growing interest in premium natural products with provenance.

RETAILER INTEREST

Sainsbury's, Asda and Tesco are all in the process of expanding their venison ranges as a result of consumer demand. Discounters Aldi and Lidl also have added value venison ranges that are providing increasing competition in the market.

READY MEALS

Sales of premium ready meals grew in the UK by between 7% and 8% in 2013 taking total ready meal sales in major supermarkets above the £2.3bn mark in the past year. There is an opportunity for venison ready meals to take a share of this growing market.



ADDED VALUE

Producers are beginning to explore options to add value and provide processed products which their customers are seeking. There are many opportunities to explore such as smoked products, charcuterie, jerky, bacon, new ready meal concepts and protein energy bars.



BY-PRODUCTS

Meat by-products can often incur disposal costs rather than provide income. Pet food is an excellent option to consider and there is also a range of by-products that could be directed at the Asian market including hooves, sinew and tails.

Getting Support from FHIS

The Food & Health Innovation Service directly supports Scottish food and drink companies in exploiting opportunities in the growing food and health market. Making contact with FHIS is as simple as picking up the phone or emailing us for a confidential chat. Following this initial contact, most companies receive a FREE one-to-one visit from one of the FHIS team to examine the key opportunities and issues for your business around health. Following your visit the FHIS partners will work on your behalf to ensure you are provided with the appropriate support to solve your problems and exploit identified opportunities. This can involve marketing and legislative support, resolution of technical issues, and integration of underpinning science – all bespoke and tailored to your business.

If you have any question or queries relating to anything you have read here, or require specific support in any area relating to the development of healthier products please feel free to get in touch with the FHIS team on 0845 607 8787, or by email at info@foodhealthinnovation.com for a friendly confidential chat.

To keep up to date with FHIS please keep checking our website regularly. Be sure to sign up for our monthly eZine (which you can do from our homepage) and follow us on Twitter.