

THE DEER FARM & PARK DEMONSTRATION PROJECT



Day 1 – 15 April 2014



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The Venison Market: now and looking forward

Dick Playfair, Scottish Venison
Partnership

“Scotland’s venison sector has yet to realise its full potential and the Scottish Government is committed to developing that promise and securing a sustainable future for the industry.”

Richard Lochhead, Cabinet Secretary for Rural Affairs

Overview

- The estimated number of deer (all species) in Scotland: 800,000 – 900,000
- Scotland's annual venison out-turn: c 3500 tonnes
- Annual export of Scottish produced venison from UK: c 1200 tonnes
- Annual imports to UK from New Zealand, Poland, Ireland, Spain: c 1200 tonnes

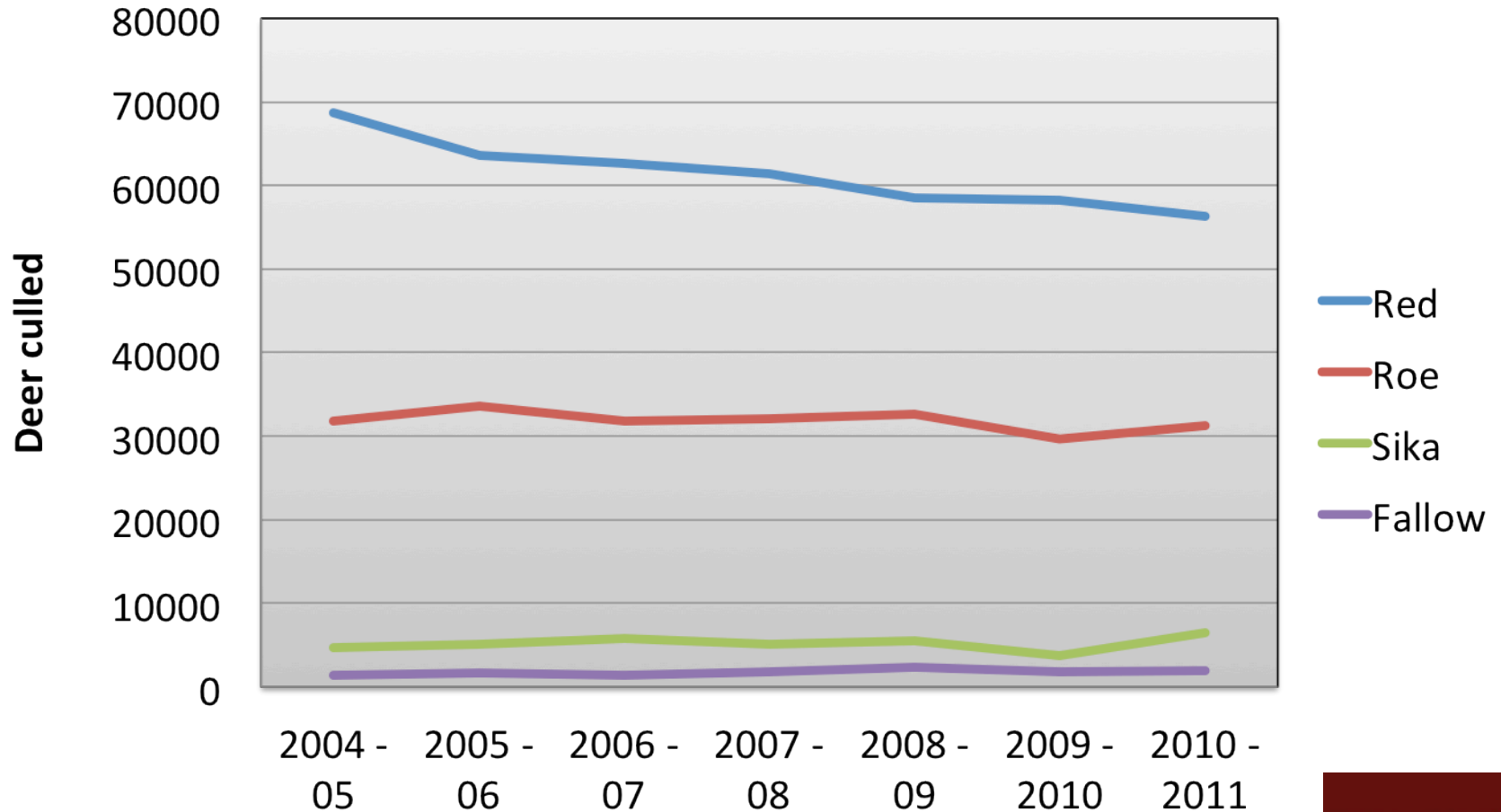
Scotland's current venison production

- Scotland produces between 3000 and 3500 tonnes of venison per annum
- The majority of this comes from the wild red deer cull
- Scotland's deer farms currently produce less than 2 per cent of total Scottish venison output

Current issues

- But the wild red deer cull is declining.
- Much of venison from roe deer goes for export, or supply is too fragmented and not recorded (home consumption, and local sales)
- Market for rutted/late season venison not as buoyant because of €/£ exchange.

Scotland Wild Deer Cull Data 2004 - 2011



Scottish venison production target

- The Scottish target is to produce an additional 1000 tonnes venison by 2020 – 4500 tonnes total
- One farmed deer produces on average 45kg dead weight
- This means putting an additional 22,000 deer into the food chain.

What's been happening in the market?

- Retail sales of venison across whole UK rose by £32M in 2006 to £43M in 2009 – a rise of 34 per cent (Mintel)
- UK venison sales are increasing by 25 per cent per annum (BDFPA 2012)
- Two major UK game dealers/processors now importing 25,000 carcasses per year equivalent to meet demand

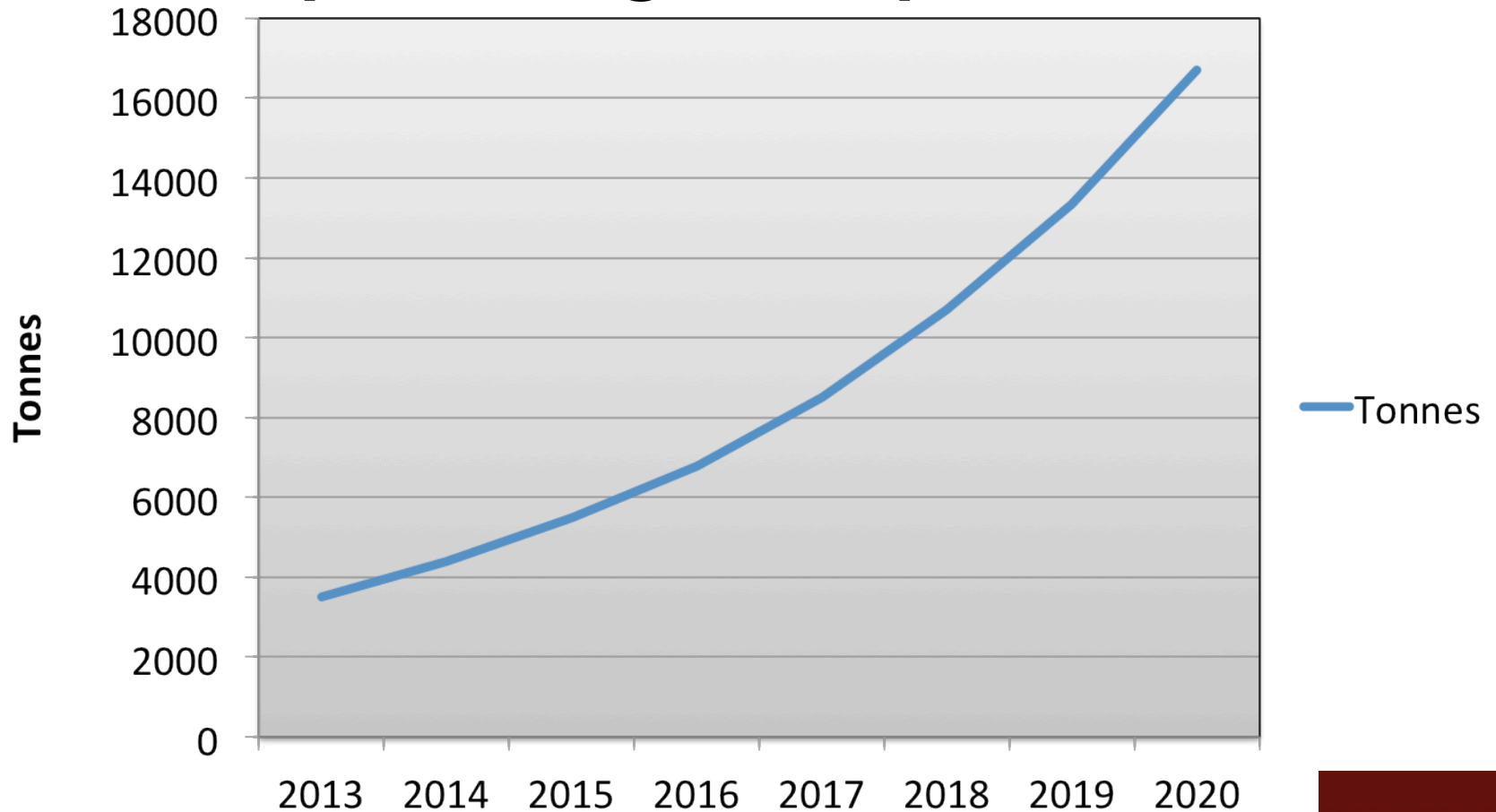
What are the major retailers reporting?

- Marks & Spencer sold three times as much venison in the UK in 2011 as in 2010
- Sainsbury reported in 2012 that sales of 'own brand' venison had doubled year on year
- Waitrose and Asda reported venison sales up by a third in 2011
- The Co-op stocked venison for the first time in 2012
- Waitrose reports January 2014 that its venison sales were up 92 per cent year on year

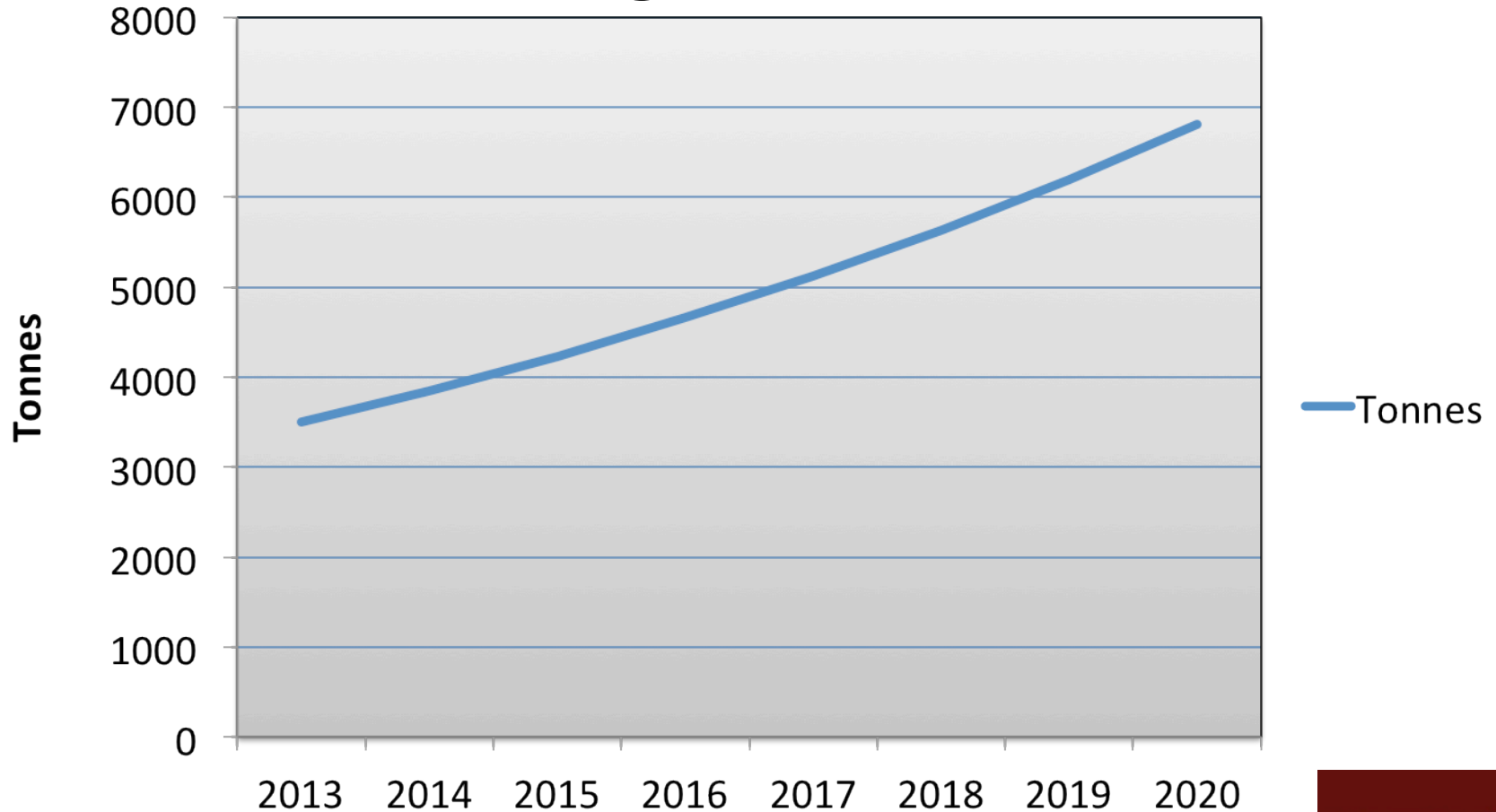
Why this market growth?

- Venison is now recognised as being healthy eating – low in cholesterol, less fat than skinned breast of chicken etc
- Availability – imports from New Zealand and elsewhere have helped drive market volumes up, particularly retail
- Seasonality is no longer an issue
- Exposure – power of the media, celebrity chefs, TV, recipe books etc
- Retailer support and ‘Eat Game’ initiatives
- Marketing and promotion –game dealers’ marketing, mail order, farmers markets, independent butchers - visibility
- Website, promotional material

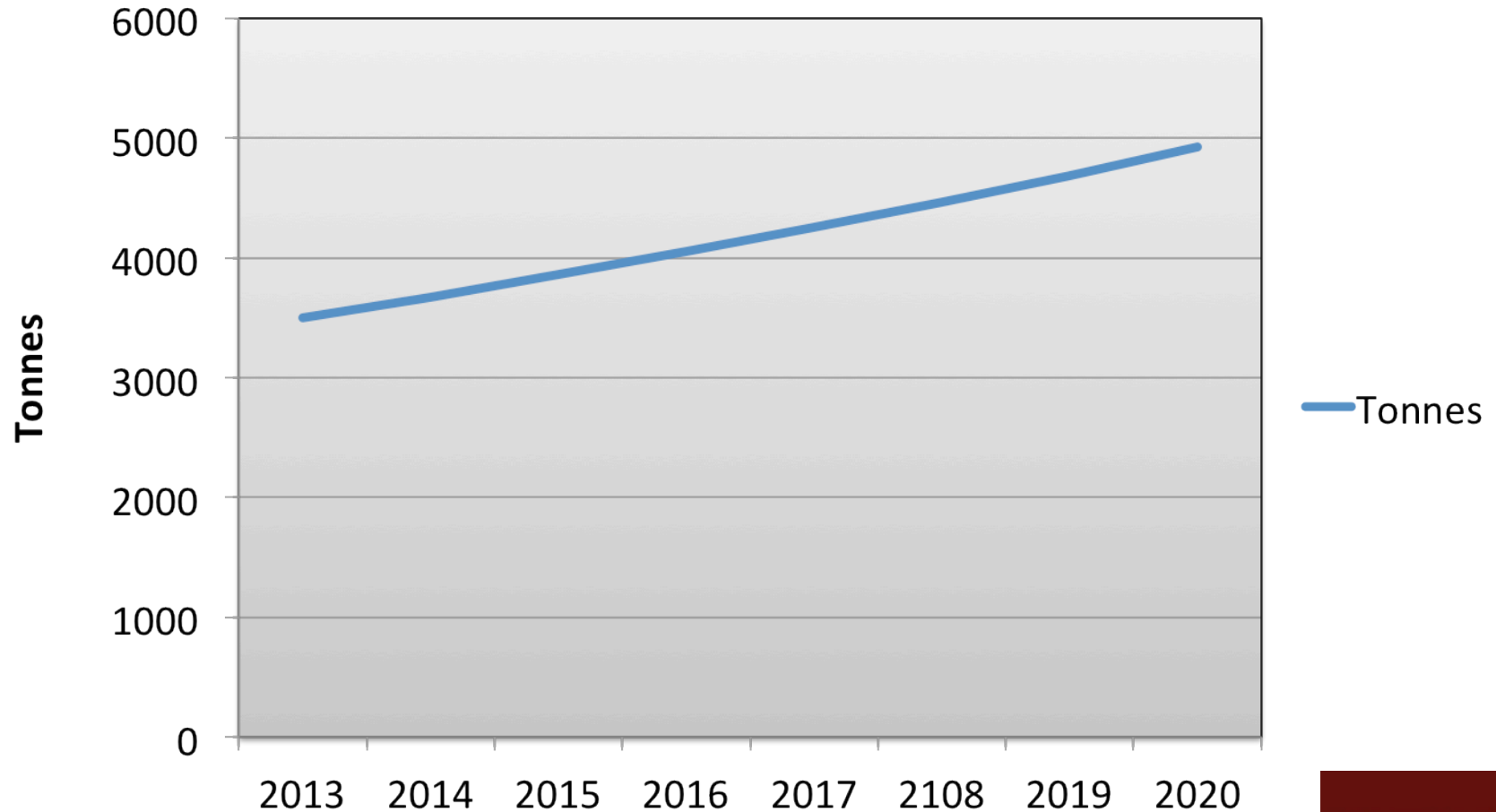
UK Market Prediction 2013 – 2020 showing 25 per cent growth per annum



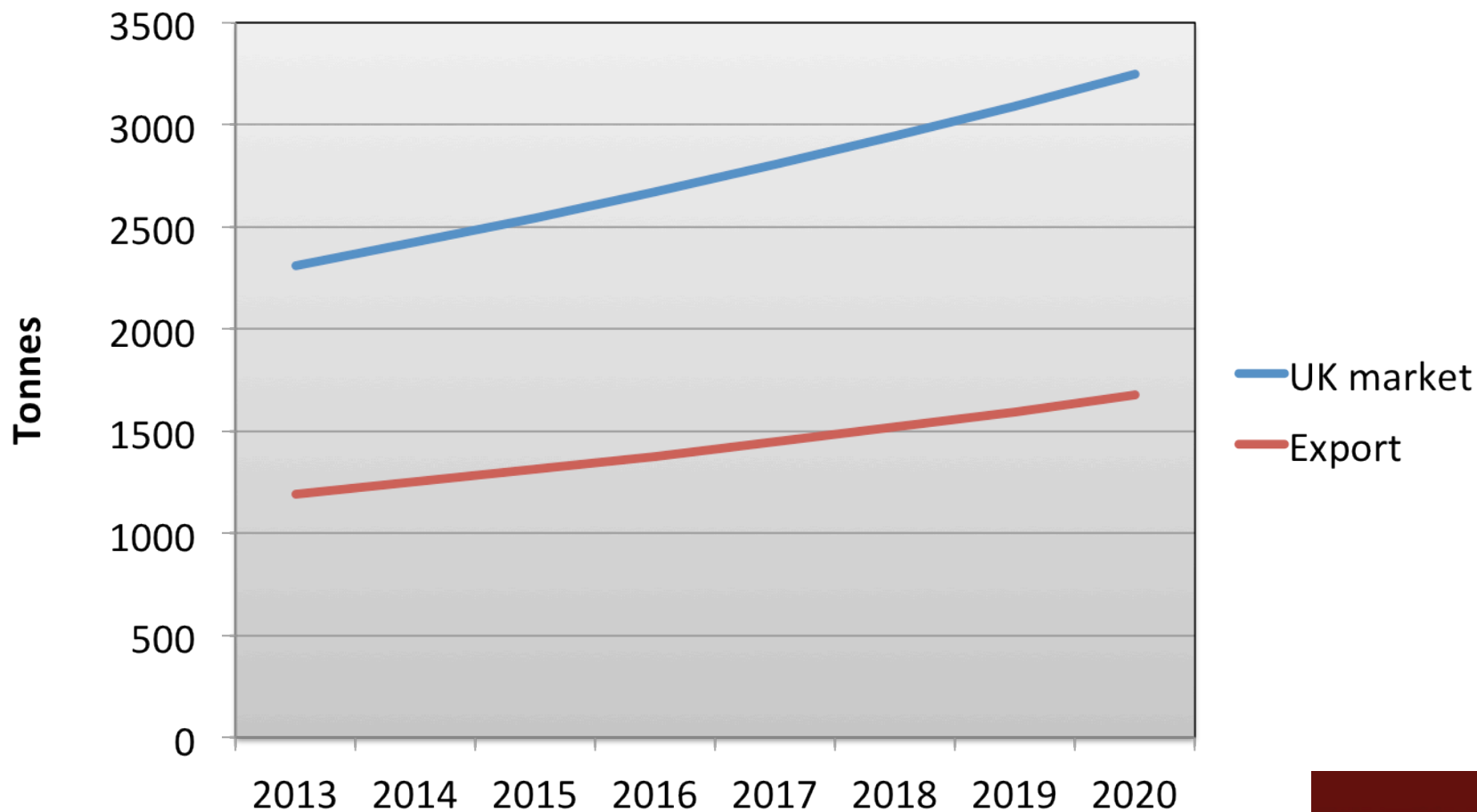
UK market prediction 2013 - 2020 showing 10 per cent growth per annum



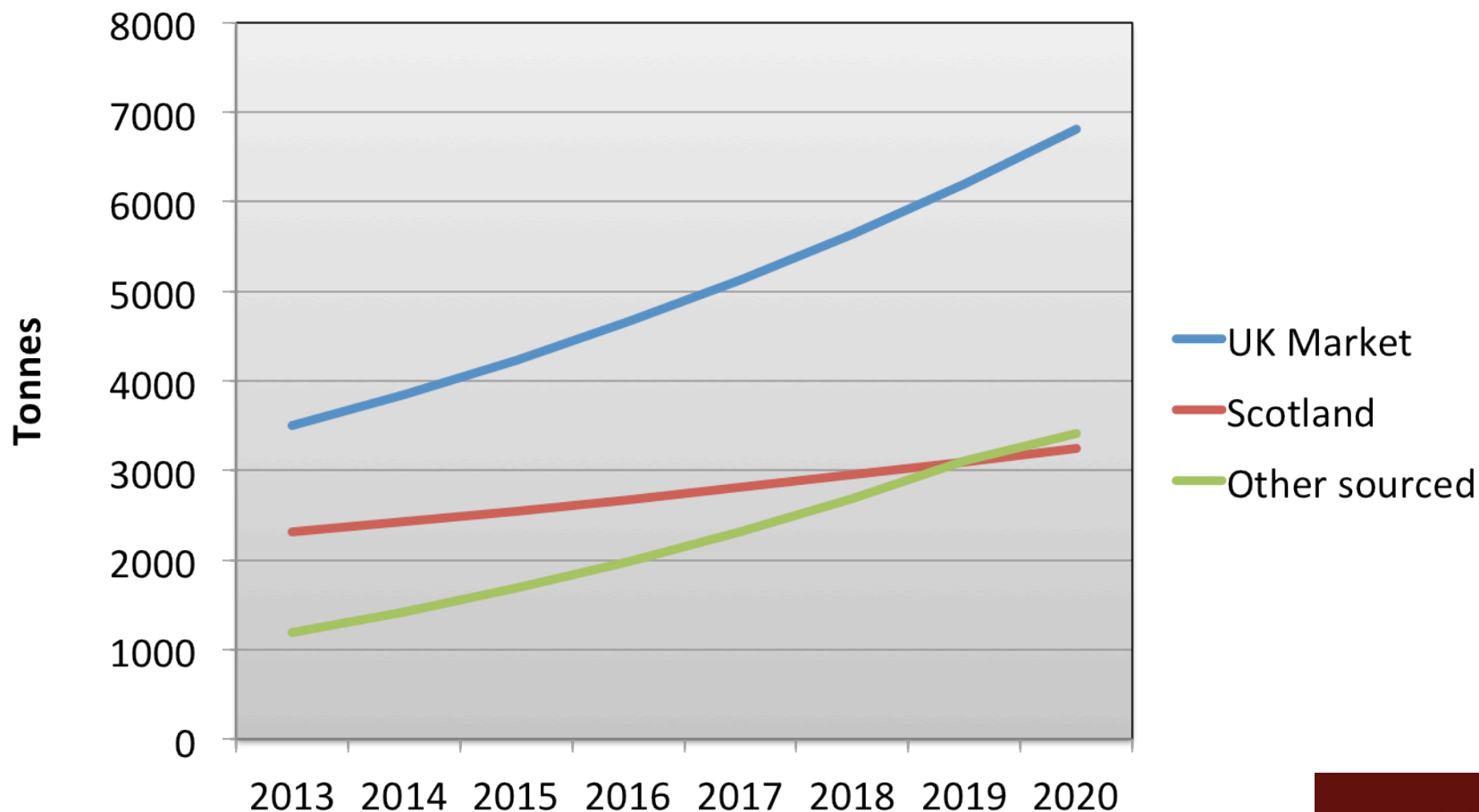
Scotland production growth at 5 per cent per annum



Scotland produced venison split by domestic sale and export 2013 - 2020

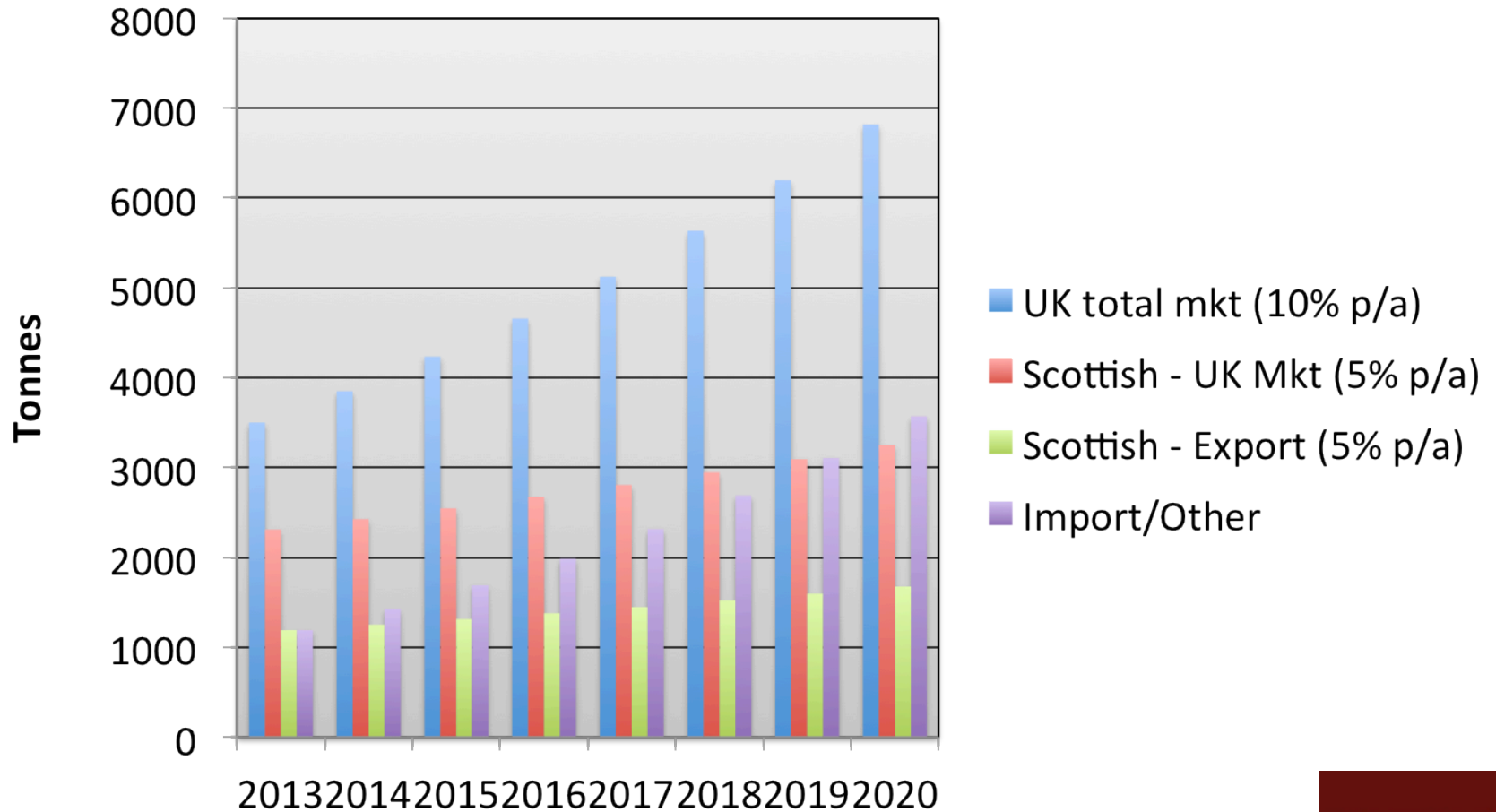


Scottish venison v other (England and imported) to meet 10 per cent UK market growth 2013 - 2020



Scotland produced is overtaken by other UK and imports by 2020

Overview – projected volumes 2013 - 2020



In conclusion

- We need 22,000 more deer from Scottish farms and parks going into the food chain to hit our 2020 target – reflecting 5 per cent growth in production. That is the outturn from 30 deer farms of significant size
- We can modestly predict that the market is growing at 10 per cent
- There is plenty of opportunity to get involved at small, medium or large scale

Dick Playfair

Scottish Venison Partnership

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