

# THE DEER FARM & PARK DEMONSTRATION PROJECT



## The UK Venison Market: what do we know?

Dick Playfair, The Scottish Venison Partnership



The funding is being made available through the SRDP Skills Development Scheme which is jointly funded by the Scottish Government and the European Union



“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,  
The Scottish Government

# 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

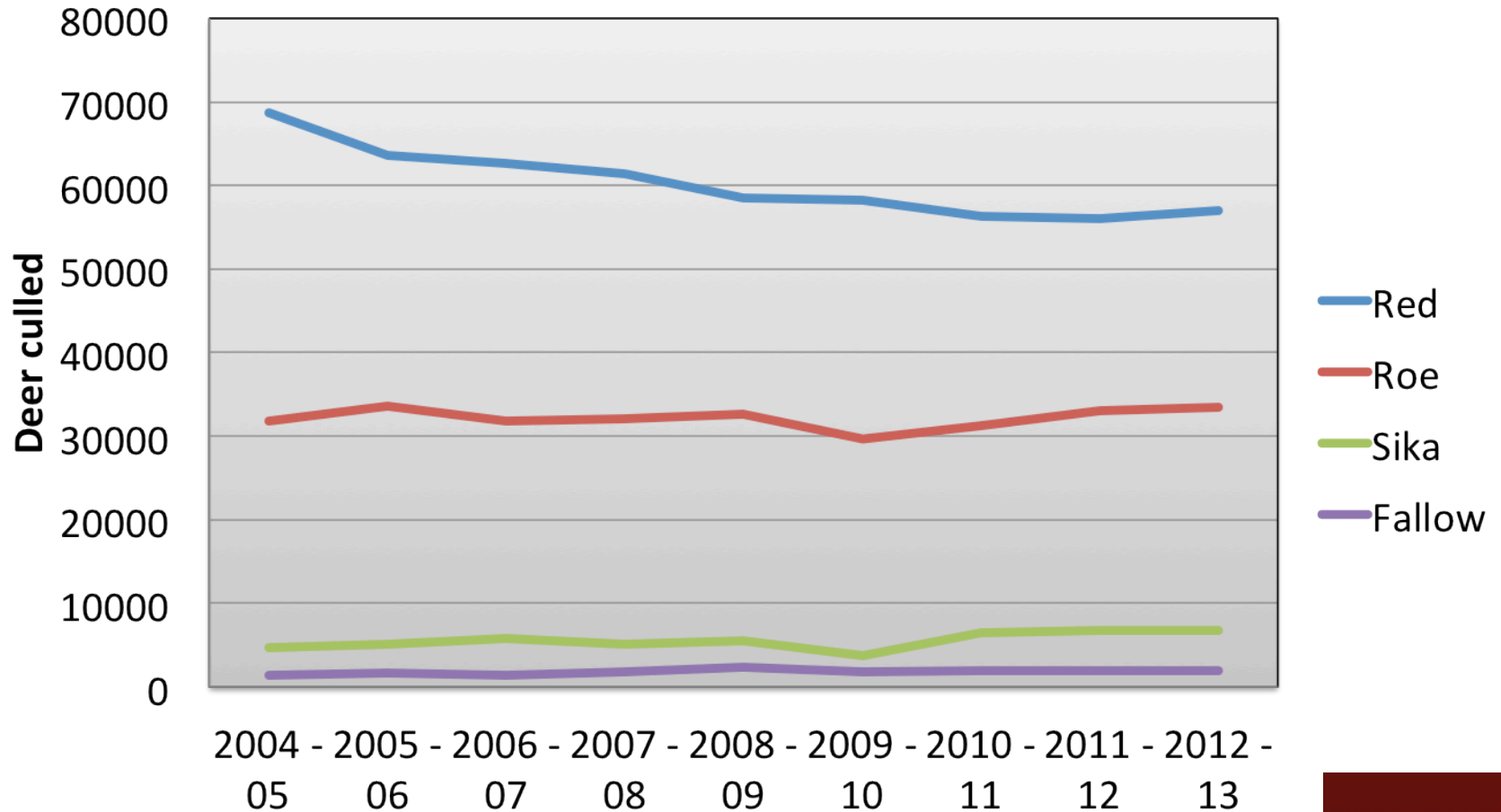
# Scotland's current venison production

- 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 around 2 per cent of total Scottish venison output

# Current issues

- The wild red deer cull is static.
- Species substitution (roe for red) is one solution, but much venison from roe is exported, or supply is too fragmented and not recorded (home consumption, and local sales)
- Market for rutted/late season venison is flat because of strong £ /weaker € exchange.
- There are still significant sales of small quantities which are illegal or for which there are no records.

# Scotland Wild Deer Cull Data 2004 - 2013



# Scottish venison production target

- The Scottish target is to produce an additional 1000 tonnes venison (wild and farmed) by 2020 – 4500 tonnes total. Is this achievable?
- 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



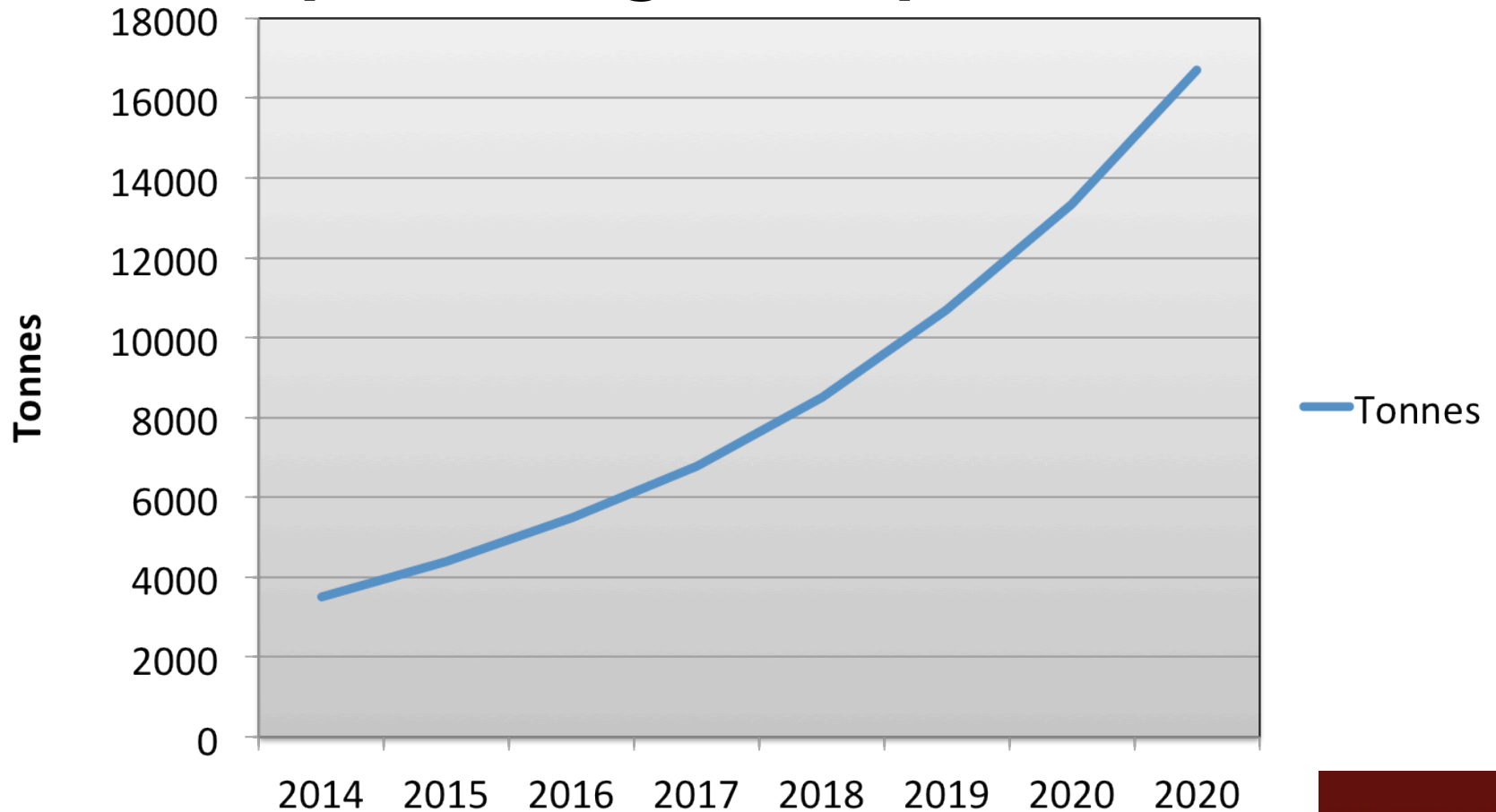
# What are the major retailers reporting?

- 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 reported in January 2014 that its venison sales were up 92 per cent year on year
- Kantar Worldpanel said UK venison sales up by almost £5 million to £6.4 million in June 2014.

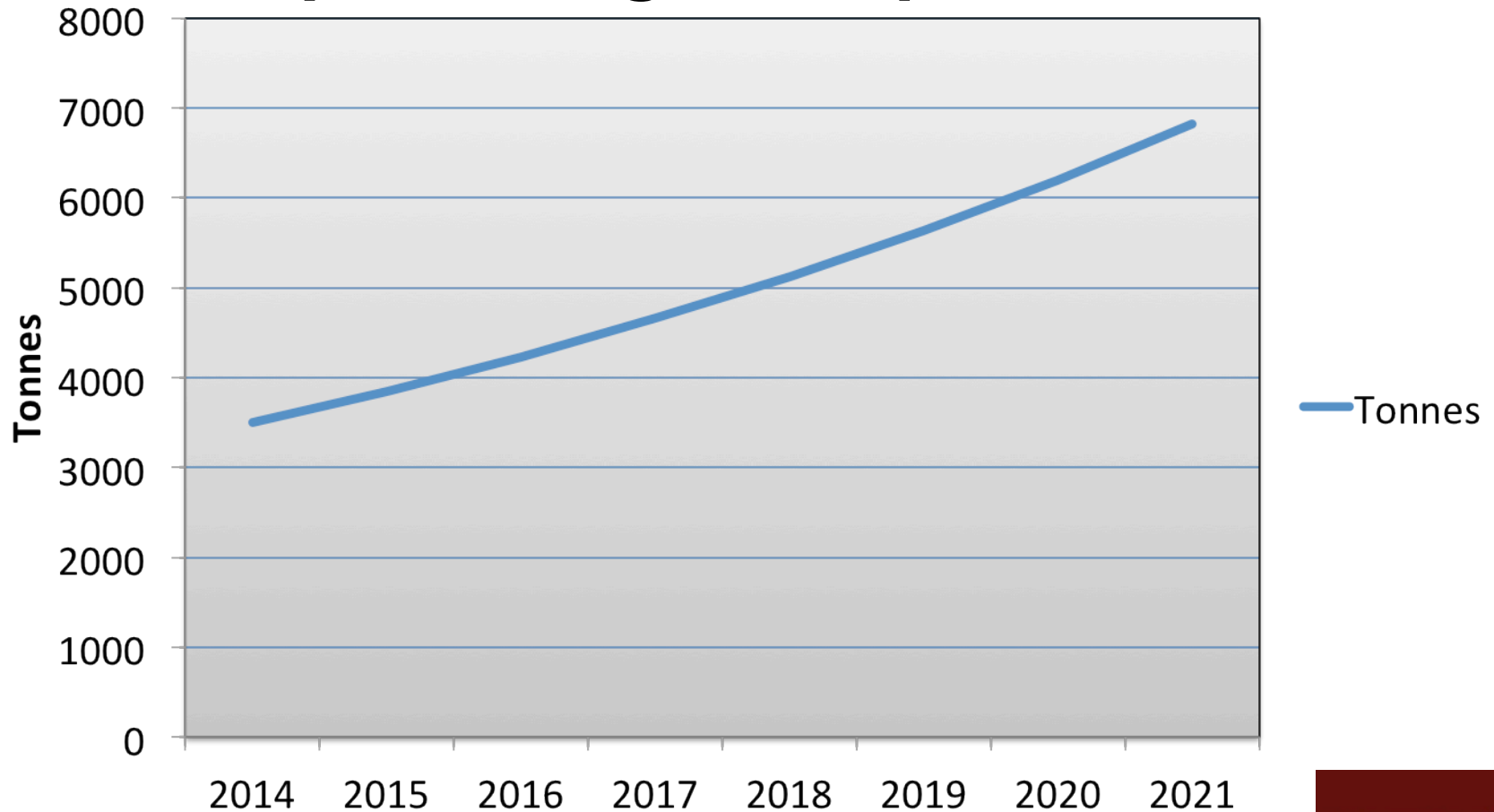
# Why this market growth?

- 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 .....

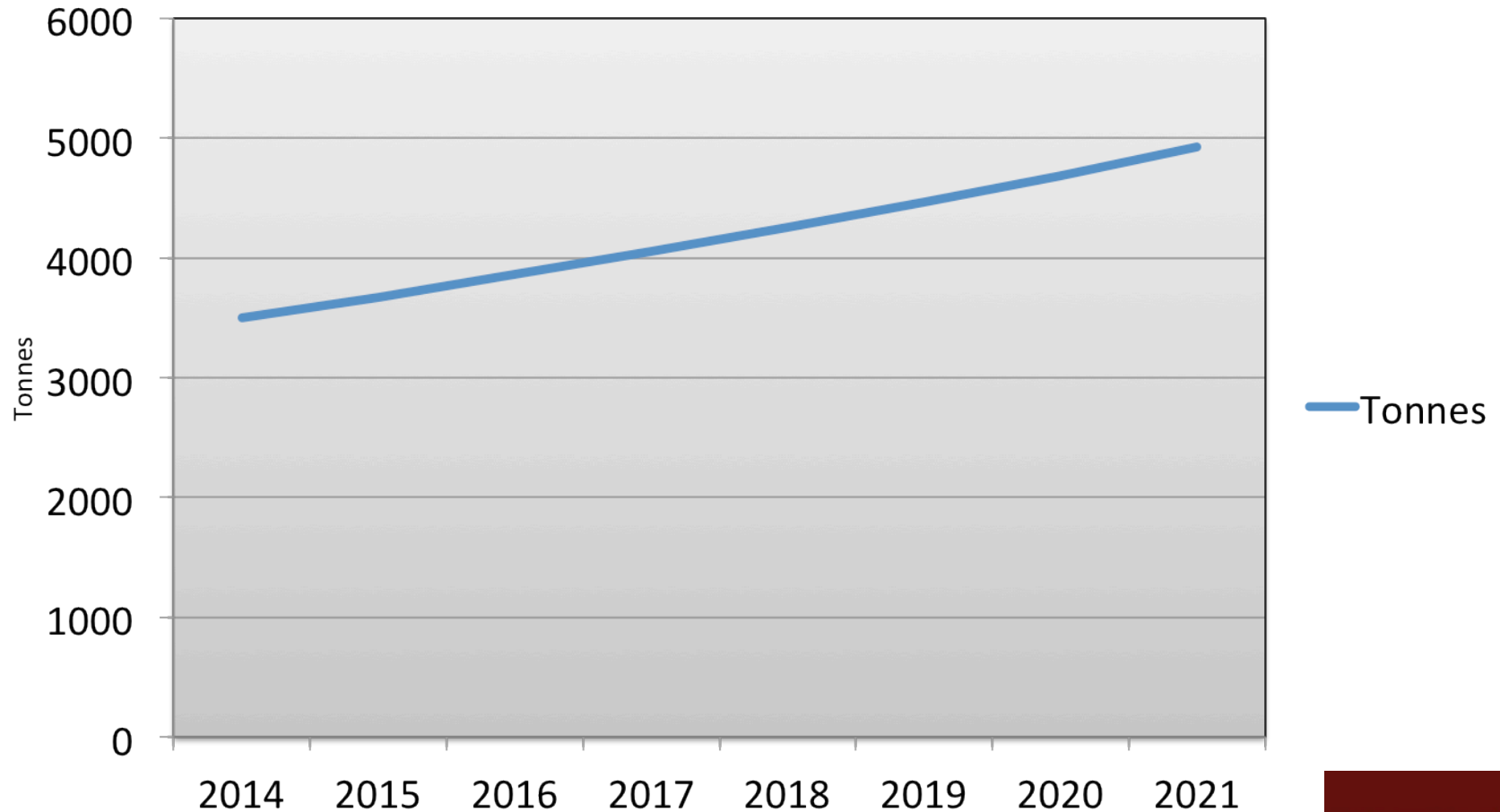
# UK Market Prediction 2014 – 2021 showing 25 per cent growth per annum



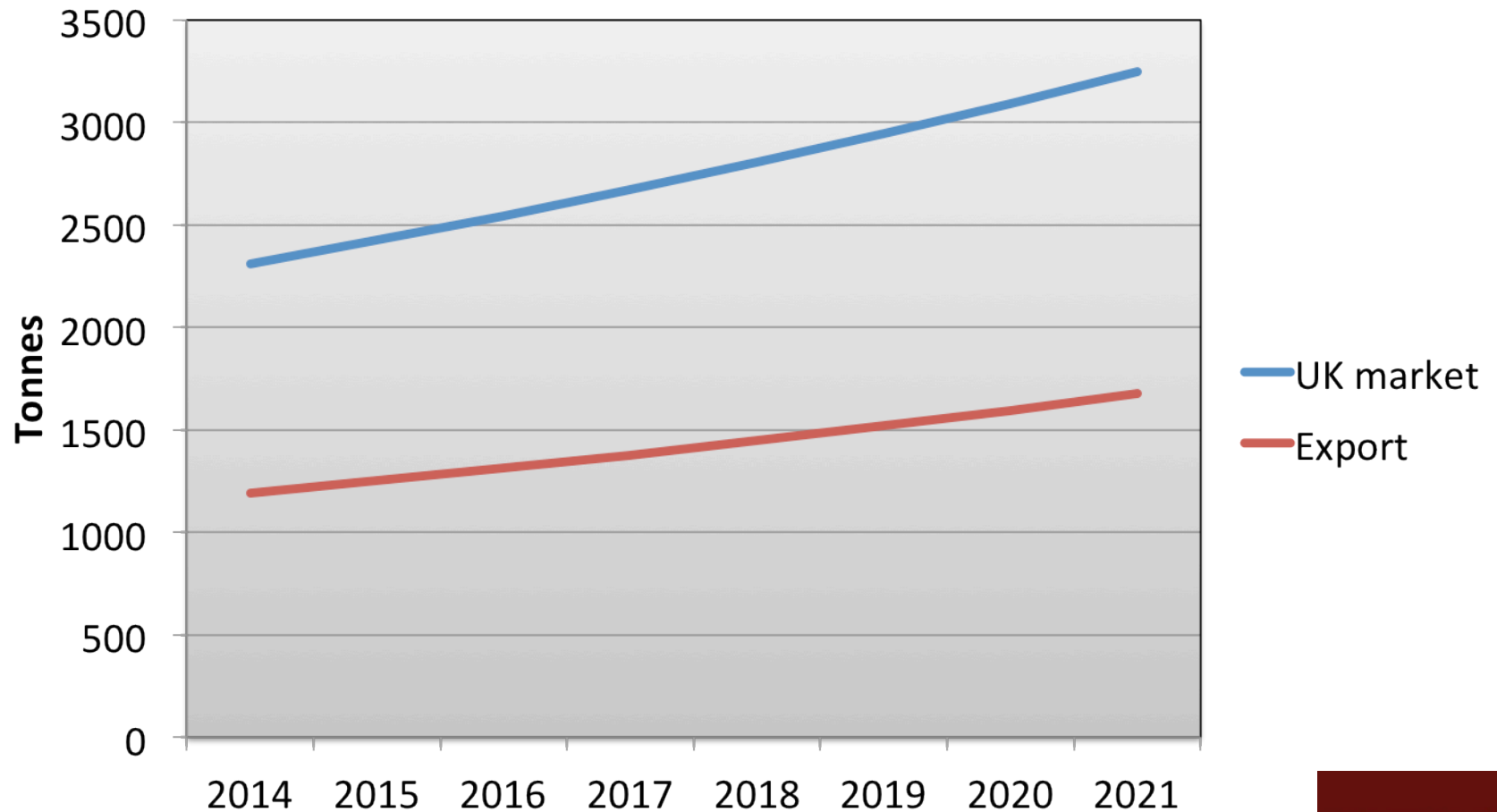
# UK market prediction 2014 - 2021 showing 10 per cent growth per annum



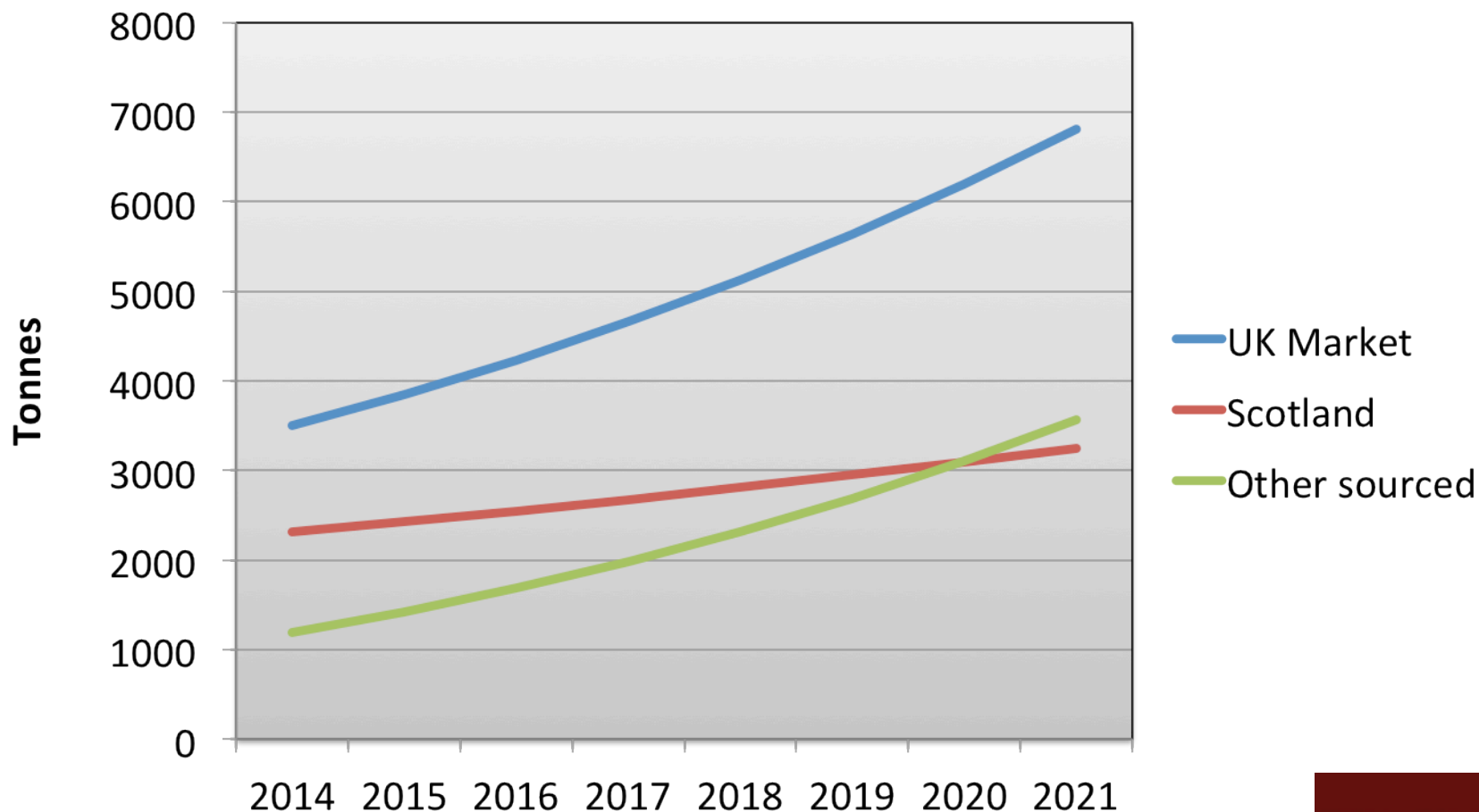
# Scotland production growing at 5 per cent per annum 2014 - 2021



# Scotland venison split by UK domestic sale and export 2014 - 2021

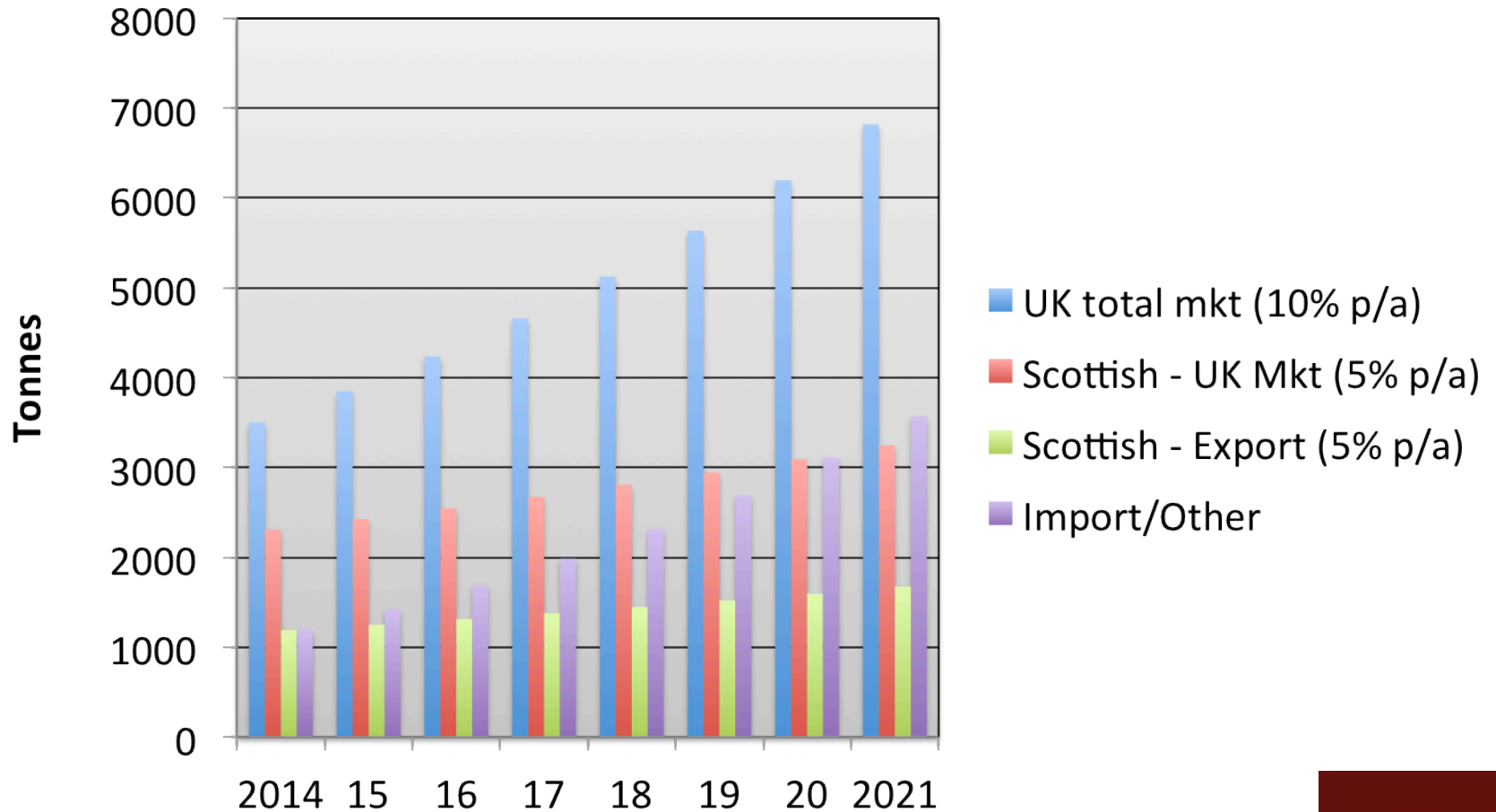


# Scottish venison production v other sourced (imported and rest of UK) to meet 10 per cent UK market growth 2014 - 2021



\* Scotland produced venison (growth of 5 per cent per annum overtaken by other UK and imports by 2020

# Overview – projected volumes 2014 - 2021





# In conclusion ....

- We need 20,000 more deer from Scottish farms and parks going into the food chain to hit that 2020 target –this reflects 5 per cent growth in production of all Scotland's venison output – wild and farmed
- 29,000 deer carcase equivalents were imported into the UK from New Zealand in 2013
- We are predicting that the UK market is growing at a modest 10 %
- There is plenty of opportunity to get involved at small, medium or large scale

Dick Playfair

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