

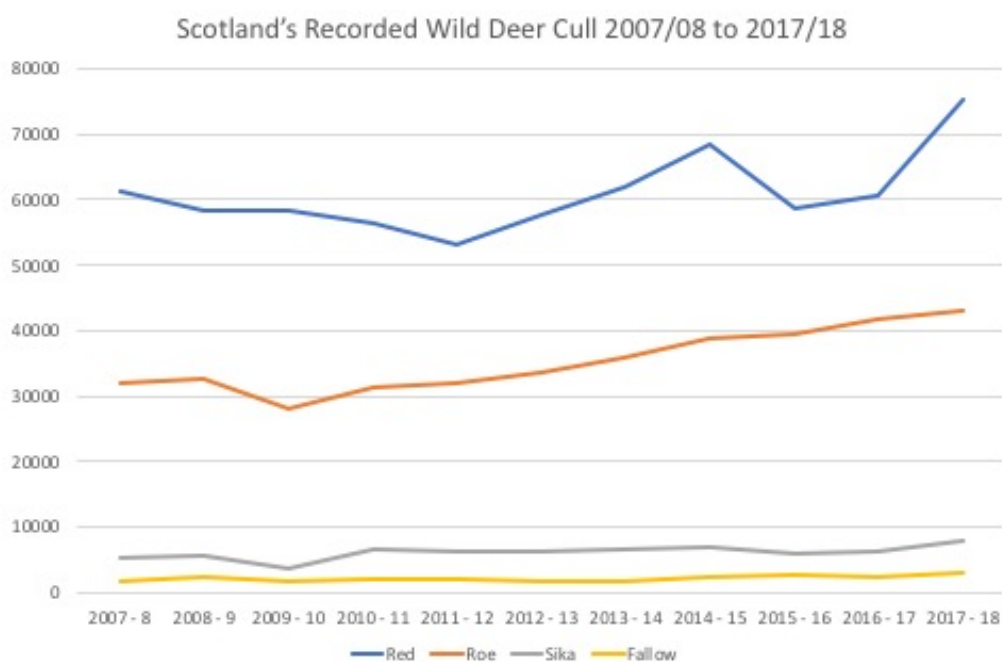
UK venison market, Scottish venison production and the market opportunity

Over the last ten years, UK retail sales of venison have grown and imported venison has filled the vacuum created by market demand, although those imports have decreased significantly in the last two years, particularly from New Zealand. A consequence of this is that the market has cooled with imported venison supply being constrained.

Sainsbury reported its venison sales up 115 per cent in December 2015 over the previous year and subsequently reported that the meat of choice for many in 2016 was venison, which saw “exponential growth” due to its health benefits. This trend developed through summer 2016, according to Sainsbury, as traditional hot dogs and hamburgers were replaced on barbecues by venison sausages and venison burgers. For these products, Sainsbury reported sales up through 2016 by 128 per cent and 188 per cent respectively. Waitrose reported demand for its venison up by 26 per cent year on year. In summer 2014 analyst, Kantar Worldpanel reported a huge spike in UK venison sales with an increase of more than 400 per cent over the previous year.

Scotland produces an estimated 3600 tonnes of venison per annum, of which c 3000 - 3200 tonnes comes from the wild red deer cull. Most roe venison is exported, sold locally or consumed by the hunter, family and friends. Only 100 tonnes (under 3 per cent) of Scottish-produced venison currently comes from farmed deer. Imports from New Zealand, Poland, Ireland and Spain continue to sustain a year-round UK market.

2017/18 saw a record wild cull in Scotland in part due to the deer management sector delivering on its deer management plans. However, such hikes in cull numbers, coupled with high rates of winter mortality, will not be sustainable and are expected to drop back following the 2017/18 peak.



Source: Scottish Natural Heritage, November 2018

Deer Industry New Zealand figures (to year-end September 2017) showed the UK as New Zealand's fifth largest venison export market accounting for 6.5 per cent (< 800 tonnes) of its total venison exports, but that volume has now reduced and the UK has dropped out of the top five NZ export markets. This is reported as being due to a drop in the value of the £ sterling following the Brexit referendum. Additional quantities of NZ venison may however be entering the UK through Benelux countries.

The USA (at an estimated 4060 tonnes imported) is now NZ's largest export market, followed by Germany (2525 tonnes), Belgium and Netherlands (1931 tonnes), Switzerland (545 tonnes) and Finland and Sweden (545 tonnes). China also presents a significant export opportunity and New Zealand's main venison producers are also now licensed to export here.

There is a drive in Scotland to encourage increased production of Scottish farmed venison and in so doing reduce the UK's reliance on imports and it is estimated that an additional 1200 tonnes of venison per annum may be required to keep step with demand.

Scottish Government Cabinet Secretary Fergus Ewing, has taken a keen interest in Scottish venison, wild and farmed. He called a venison summit involving all areas of the sector in February 2018 and, following that meeting, a [strategic plan](#) for Scottish venison, *Beyond the Glen*, was launched in September 2018 to fit with Scotland Food and Drink's *Ambition 2030*. One strategic aim is to increase Scottish farmed venison production from 100 tonnes to 850 tonnes by 2030 whilst accepting that wild venison supply will remain broadly constant.

Further supporting the venison case, market analyst Mintel reported that by the end of 2015 UK game meat sales reached £106 million, up from £98 million in 2014, with growth expected to continue, and forecast to hit £143 million by 2020:

“It is venison which is the star performer in the market, fuelling growth in game meat. Indeed, usage of venison has increased from 13% to 17% over the last 12 months.”