Feasibility Study of Processing and Marketing Wild Venison in Rockingham Forest

The Deer Initiative

February 2010

Table of Contents

BIDWELLS

Tables

Figures

Appendices

BIDWELLS

Summary

This report, prepared by Bidwells Agribusiness for The Deer Initiative, investigates the feasibility of processing and marketing wild venison produced in the Rockingham Forest area.

The background research suggests that there is potential to increase the demand for wild venison, however the issues and challenges need to be understood fully. Venison is perceived to be an upmarket, niche product, which limits its market potential. That said, clearly the health benefits of eating venison provides the opportunity for the product to become more appealing to the mainstream market. In order to increase demand, there needs to be the supply and a key challenge facing any processing and marketing scheme developed in Rockingham Forest is putting in place a supply chain that provides a consistent quality of venison that meets the market demands.

Interestingly venison appeals to various consumer types including families and older adults/young adults. There is a lack of knowledge and awareness of venison which limits its demand, but because venison is not widely available, consumers are not made aware of the product and its benefits and therefore demand of the meat is limited. It is therefore deemed to be a specialised product, and consumers who do know enough about venison prefer to go to trusted sources like butchers and farmers markets to buy joints, steaks and other cuts of venison.

The focus groups highlight the growing interest in venison and the positive response consumers have, particularly to the idea of eating 'Wild Venison'. We know that UK consumers are increasingly becoming more health conscious. This creates a great opportunity to increase demand for venison by promoting its health benefits alongside the 'Wild' element of the product. We can therefore conclude that Rockingham Forest is potentially a suitable consumer product offer with strong marketing messages. The challenge, as we are aware is getting a consistent product to the market place.

From speaking to venison purchasing businesses, it is apparent that there are a number of supply chains already in place in Rockingham Forest. Many of these supply chains are longstanding and businesses deal with people they can trust. What is very apparent however is that currently there is not enough venison being supplied to match current and potential consumer demand. This highlights the potential for a Rockingham Forest wild venison offer, if the supply chain can be organised in an effective and efficient way that provides economic benefit to all parties.

The stakeholder interviews have highlighted the different priorities of key organisations in Rockingham Forest area. It is clear that both Boughton Estate and The Forestry Commission are key to the success of a processing and marketing scheme in Rockingham Forest. Between them,

they shoot enough deer to provide a core supply of wild venison. Any scheme set up does however need to provide a price that is beneficial to all parties and is commercially viable.

Complying with the regulations necessary to handle and sell wild venison on a reasonable scale will add significant costs in comparison to a single stalker selling the odd carcase. There are exemptions primarily designed to allow small scale businesses operate (normally a stalker selling a small amount of produce as a by product of his stalking). We do not believe that it is possible to use these exemptions and develop a business of the scale necessary to have a significant impact on venison production in Rockingham Forest.

Financial analysis shows that if we assume a throughput of 600 fallow deer per annum there is a margin of £91,500 between the in skin value and the average value achieved through selling butchered meat through a combination of direct sales and sales to retail outlets.

Two options were examined to structure the business to achieve this.

The option of setting up in hand infrastructure to process and butcher this throughput would require a capital investment of approximately £100,000 and would generate a net margin of £17,500 if the throughput was achieved.

The option of contracting out the butchery and processing would require a capital investment of approximately £25,000 and generate a net margin of £25,500 if the throughput was achieved.

With the butchery contracted out the model would be more financially stable at lower throughputs as a greater proportion of the costs would be related to turnover rather than fixed.

1 Introduction

This report, prepared by Bidwells Agribusiness for The Deer Initiative, investigates the feasibility of processing and marketing wild venison produced in the Rockingham Forest area.

Bidwells Agribusiness has a wide range of experience and knowledge from both a consultative and operator perspective of food marketing, working across the supply chain from farmers, estates and landowners to customers (retail and foodservice) and consumers. In addition, we have experience of deer management in the wider context of rural land management.

This report is broken down into the following sections:

- Literature Review
- Focus Groups; understanding consumer attitudes to wild venison
- Stakeholder Interviews
- Telephone Surveys
- Questionnaire of wild venison processors
- Grant funding
- Food Hygiene Legislation
- Financial Considerations
- Recommendations

1.1 Initial Insight

Work carried out by The Deer Initiative suggests that the wild deer population in the Rockingham Forest area is unsustainably high. Without effective management of this population, numbers are likely to increase and cause further impact on bio diverse habitats, crops and roads.

The Deer Initiative and other Stakeholders wish to see a 'sustainable' wild deer population in Rockingham Forest through the implementation of an effective management system. Ideally such a management system will also add value to the carcasses by processing and marketing the wild venison. This study will look at the feasibility of such a management system, investigating possible processing facilities, routes to markets and the attitudes of the end consumer to Wild Venison.

2 Background

This literature review focuses on the current routes to market of wild venison, the technical challenges that this brings, the changing attitudes of the UK consumer and the legislation changes that will affect any processing/marketing of wild venison. This review will be the foundations from which all primary research (focus groups, stakeholder interviews, telephone survey and questionnaire) will be developed.

2.1 UK Venison Consumption

Venison has grown in popularity over recent years and even as a niche product can increasingly be found in retail outlets and on the menus of restaurants, pubs and hotels. A DEFRA report has highlighted the gap between supply and demand for venison. In the UK, approximately 500 tonnes of farmed venison is produced each year. However the amount of venison from New Zealand at least equals this, if not exceeds it. Although the UK could not supply the entire venison market, this highlights the potential for the UK venison industry to grow.

This potential is also highlighted by consumer research that suggests demand for venison is increasing and that most people do have positive perceptions of the product. Indeed, a recent survey showed 87% of consumers, who had tried venison, said they would eat it again[1]. On analysis of 2008 food trends, many supermarket buyers said that Venison should be near the top of consumers shopping lists due to it being healthy, easy and quick to cook and gaining in popularity with the rise of the celebrity chef culture[2]. However the supermarket shelves still have a limited offer, with a predominance of sausages and burgers. As for the reasons for this, according to some academics, it is believed that the venison market is still limited due to the prevailing negative attitude towards game meat amongst the general public[3]. It could be argued that this negativity comes from a lack of knowledge and understanding, with many consumers having not tried venison as they don't know enough about it, or where to buy it because it is not readily available in the mainstream market.

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[1] DEFRA; Improved venison quality for sustainable deer farming, 2009

[2] http://www.farminguk.com/news/Venison-Sales-Double-as-Trendy-Meat-Hits-Mainstream-Tastes

[3] Parliamentary Office of Science and Technology; POSTnote, Number 325 – Wild Deer, February 2009

This all suggests that better communication about the health benefits of venison, how to use it and making it more accessible to consumers could help to increase the consumption in the UK.

2.1.1 Consumer Trends & Attitudes

Current consumer trends suggest a positive outlook for Rockingham Forest wild venison. An MDC report, undertaken by Bidwells Agribusiness in 2007 into dairy products with added provenance, showed that there were clear indicators that shoppers are taking an increasing interest in the origins of their food[4]. The report outlines that this is not just limited to the geographic origin but also includes animal welfare, production techniques and low food miles. These trends are mirrored across all fresh food categories including meat, and are therefore applicable to wild venison. Indeed, many supermarket chains have changed their meat and fresh produce labels to highlight the origins of the products.

A number of other studies also indicate that the market for foods with provenance attributes is increasing, which is shown by the growth in local and regional food. Research conducted by IGD in 2006, suggests that 65% of shoppers purchase local food, compared with 61% in 2005[5]. Despite the current financial crisis, local and regional food has continued to be popular and a recent study by the IGD suggests local and regional food is benefiting from the recession[6]. This is a combination of the willingness to support local producers and the expectation that local food is fresher. Provenance is important particularly in terms of consumers identifying with the origin of the meat which brings with it perceived qualities of freshness, health and better taste.

Rockingham Forest wild venison is a product offer that fits well with these trends. Customers are likely to buy into the provenance story that can be portrayed and 'local food for the local marketplace' can be capitalised on. It can also be deemed to be seasonal (there are deer shooting seasons), which can also be appealing to foodservice customers particularly. This provides a very positive outlook for such a product offer. However in our experience the fundamental purchasing factors of price, quality and convenience must be met first before any provenance marketing messages will be successful. For wild venison, these factors are challenging to consistently get right, which will be explained further in this section. It is also important to note that one bad experience of eating wild venison could deter a consumer from repeating a purchase and highlights how important it is to have

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[4] MDC, Dairy products with added provenance, Bidwells Agribusiness, 2007

[5] IGD, The retail and foodservice opportunities for local and regional food, 2006

[6] IGD, Shopper Trends – Food Shopping in a recession, 2009

the right systems in place that will ensure a consistent product offer to the market. Consumers' attitudes towards wild venison will be investigated in more detail through the focus groups. We have also obtained Dunnhumby data[7] to provide initial information on the types of consumers that buy venison which will be analysed in Section 3.

2.2 Wild Venison vs Farmed Venison

The majority of venison available in the UK is farmed. This is because it is often a more consistent product in terms of quality and availability than wild venison. This report will investigate the feasibility of processing and marketing wild venison and, whilst it is clear that there is a growing demand for the meat in the UK, it is important to understand the issues and challenges that the wild venison supply chain faces in terms of becoming a more favourable consumer proposition.

2.2.1 Wild Deer Populations

Understanding the exact UK population of wild deer is very hard, with population figures often being approximate. According to figures from the British Deer Society[8], wild deer populations in 2007 were approximately as follows:

Table 1: UK wild deer populations

Deer	Approximate Number	Growth Rate (2000 -2007)
Red Deer	> 350,000	0.3%
Roe Deer	> 800,000	2.3%
Fallow Deer	150,000 – 200,000	1.8%
Muntjac Deer	>150,000	8.2%
Sika Deer	35,000	5.3%
Chinese Water Deer	< 10,000	2%

[7] The dunnhumby Academy of Consumer Research is a joint venture between Kent Business School and dunnhumby, launched in April 2005, with a mission to expand the use of consumer insight amongst farmers and small food processors, in order to improve their prospects in an increasingly competitive environment, through targeted market and product development. The primary source of information is weekly supermarket purchasing data from a panel of 1.2 million households, representative of supermarket shoppers in the UK.

[8] Parliamentary Office of Science and Technology; POSTnote, Number 325 – Wild Deer, February 2009

Wild deer populations are increasing at a rapid rate and this strengthens the argument for sustainable management of numbers. Looking at the distribution maps for these species in 2000 and 2007 (See Appendix 1), roe, fallow and muntjac deer are increasing in number within the Rockingham Forest area[9].

These populations are currently controlled by culling, with an estimated 350,000 deer being culled each year in the UK[10]. Often this is managed by individual landowners rather than a co-ordinated effort in a particular area. It is much more difficult to estimate culling figures for specific areas like Rockingham Forest and yet one is required in order to provide a firm idea of the likely throughput for a processing/marketing scheme. This will be investigated in more detail in the primary research section of this report.

2.2.2 The challenges of processing and marketing Wild Venison

Wild venison is perceived to be a different consumer proposition to farmed venison. There are fewer systems in place and there are a number of issues and challenges to overcome in its supply, not least, to ensure a consistent and high quality product:

1. Meat quality will vary depending on the **age** of the animal shot. The older the animal, the more tough the texture and the more gamey the taste. This can provide challenges in terms of providing a consistent product and in the management of the deer as it is often the oldest and weakest animals that tend to be culled first. The key is to have systems in place that allow the identification of the age of the animal to allow decisions to be made regarding the type/cut of meat the carcase should be used for. For example, older deer carcases should go for diced or minced venison where as younger carcases can be used for fillets, steaks and joints guaranteeing a more consistent flavour profile to consumers. Meat quality is also heavily influenced by **sex**, with male deer needing to be eaten at a young age to avoid tainting.

2. Wild deer are often shot at distance which means **shot placement** varies, leading to bruising and poor quality meat. Game Dealers often dictate the price of wild venison based on the placement of the shot and the quality of the carcase.

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[9] The British Deer Society; Deer Distribution Survey 2007

[10] Parliamentary Office of Science and Technology; POSTnote, Number 325 – Wild Deer, February 2009

3. There are **minimal controls** on the slaughter of wild deer, apart from the seasonal restrictions imposed. Timescales are often inconsistent in terms of the time taken for carcases to reach storage.

4. Consistent **availability** is important for customers. Most deer species are protected by a closed season for hunting, apart from muntjac, and the number of deer shot can vary greatly. This can therefore impact on the availability of wild venison in the marketplace and the supply of wild venison can often be on an ad hoc basis. This therefore limits the appeal of wild venison to retail and foodservice businesses but can be overcome if customer expectations are managed.

These challenges often lead retail and foodservice businesses to choose farmed venison instead of wild in order to guarantee a consistently high quality product. The trade off between farmed and wild venison, is interesting and is highlighted in the quote by the celebrity cook Clarissa Dickson Wright:

'Farmed venison has the advantage of being consistently tender and young, but to my mind it does not have the same flavour of wild'

The decision making process that venison purchasing businesses undertake is important in order to understand the barriers and challenges of using wild venison. This will be highlighted in the interviews conducted with game dealers, farm shops and restaurants) in Section 5. This report will also include interviews and questionnaires with farmers, landowners and stalkers which will provide an understanding of current problems in the supply chain and how these can be overcome, allowing wild venison to be sold on a more regular and consistent basis.

2.3 Quality Assurance

There are a number of businesses across the UK that already process and market Wild Venison. Some of these businesses will be interviewed as a part of the primary research, to understand how they overcome the technical challenges of processing and marketing the product.

In some instances, there are quality assurance schemes in place to help strengthen the consumer proposition, providing a positive message about the high standard and best practice in the production of wild venison. These schemes include the Scottish Wild Venison Quality Standard and the Forestry Commission also has its own Wild Venison Standard. Other wild venison businesses have their own systems and standards in place that they strongly promote to their customers:

Yorkshire Game and their Scottish partners, **blackface.co.uk,** promote to their customers that all wild deer is shot and carcasses hung in temperature controlled conditions for approximately 10 days before being processed in an EC export approved processing plant in North Yorkshire. Quality assurance is fundamental to customers. However, it is vital that product consistency is maintained if the processing and marketing of wild venison is to be commercially viable to a business[11].

2.4 Summary

In summary, this background research suggests that there is potential to increase the demand for wild venison, however the issues and challenges need to be understood fully. Venison is perceived to be an upmarket, niche product, which limits its market potential. That said, clearly the health benefits of eating venison provides the opportunity for the product to become more appealing to the mainstream market.

In order to increase demand, there needs to be the supply and a key challenge facing any processing and marketing scheme developed in Rockingham Forest is putting in place a supply chain that provides a consistent quality of venison that meets the market demands.

The potential opportunities for a wild venison offer from Rockingham Forest will now be investigated in more detail in the sections that follow.

[11] www.yorkshiregame.co.uk, www.blackface.co.uk

3 Dunnhumby Analysis

Bidwells Agribusiness are able to access data from the Dunnhumby Academy at Kent Business School. Using the data, an analysis of purchasing behaviour was conducted to identify key trends for venison products, including market size, rate of growth, repeat purchase rates, penetration rates and exploring the lifestage and lifestyle types of consumers who buy (and don't buy) venison (both wild and farmed). Some key points to note are:

- Data from the Dunnhumby Academy is representative of UK supermarket shoppers. As such, the analysis and insight is equally applicable to other distribution routes even though the source data is derived from **Tesco** shoppers.
- Data is sourced from a panel of 12 million supermarket shoppers, equivalent to 40% of UK households.
- A sample of 10% of this panel is used in answering Dunnhumby data requests.
- Panel data collects sales information on over 30,000 food lines.

To place in context comments made later in this document about target shoppers, it is worth pointing out that Tesco divide their shoppers into 6 different lifestage and 6 different lifestyle categories as indicated in figures 1 and 2 below:

Figure 1: Lifestage Segmentation

Lifestage segment	% shoppers	Age & family
Young Adults	16%	Adults aged 20-39 with no children
Older Adults	14%	Adults aged 40-59 with no children
Young families	15%	Adults with all children under 10
Older families	16%	Adults with one or more child over 10
Pensioners	9%	Adults over 60 with no children
Mixed	28%	Multigenerational households

Figure 2: Lifestyle Segmentation

Lifestyle segment	% shoppers	Key Characteristics
Finer Foods	16%	time conscious, enjoy luxury products and are willing to experiment
Healthy	10%	interested in organic, environmental benefits, low fat/sugar and calorie conscious
Convenience	21%	regard food as fuel, are busy and rely heavily on the microwave
Price Sensitive	17%	look primarily for value and rely on staple foods
Mainstream	25%	have broad tastes, favour established brands and a influenced by the needs of children
Traditional	11%	enjoy the art of cooking but rely on a fixed shopping list so less likely to buy on impulse

This data will help us form some initial thoughts on the market opportunity for wild venison and the types of consumers that buy venison, helping inform our decisions on the types of consumer we should be talking to in the focus groups. This is part of our primary research work.

3.1 Methodology

The following products were used in the Dunnhumby work to represent the venison category:

- Finest 6 Venison Sausages 300g **(Farmed)**
- 2 Venison Burgers 284g **(Farmed)**
- Highland Game Venison Steaks 260g **(Wild)**
- Highland Game Venison Burgers 250g **(Wild)** — Available in Scotland only
- Highland Game Venison Sausages 300g **(Wild)**

Highland Game is a wild venison product offer that is only available in Scotland. We have included these products in order to see if there is any comparison between the type of consumer that buys farmed and wild venison. There have been other venison products sold including a range of pre-packed East Anglian venison – diced, grill steaks, haunch joint and products available over the counter – steaks and joints. All of these were de-listed after a short period of time suggesting that the mainstream market, based on current knowledge levels, is only ready for sausages and burgers as a venison offer.

In addition comparison was made with:

- Premium Beef Burgers
- Standard Beef Burgers
- Premium Pork Sausages
- Standard Pork Sausages

3.2 Market Overview

Figure 3 below highlights the key measures of the UK venison market:

Figure 3: Key Measures

	Year on Year % Change		Share of	Customer	Purchase	Repeat
	Sales Value	Sales Volume	Sales	Penetration	Frequency	Rate
Own Label 2 Venison Burgers 284G	New	New	35.44%	0.50%	1.48	20.1%
Finest 6 Venison Sausages 300G	189	193	29.98%	0.40%	1.36	17.9%
Highland Game Venison Steaks 260G	4	-8	17.59%	0.07%	1.96	34.8%
Highland Game Venison Burgers 250G	New	New	12.41%	0.14%	1.86	28.5%
Highland Game Venison Sausages300G	New	New	4.58%	0.07%	1.52	21.9%
Total	**53**	**43**	**100.00%**	**1.07%**	**1.63**	**24.6%**
Source: © dunnhumby 2009						

This table can be summarised by the points below:

- Year on year, sales of venison have grown 53% by value and 43% by volume. The high growth is mainly attributable to the introduction of 3 new products – Tesco Venison Burgers, Highland Game Venison Burgers and Highland Game Venison Sausages.
- It is also clear that it is own label burgers and sausages that have the highest share of the market, an understandable figure as these are the only two products available nationwide. What is interesting is that steaks also prove to be a popular product in Scotland.
- Overall, customer penetration is 1.07% and on average customers buy 1.6 units per year. Customer penetration is low for the Highland Game products because they are only available in Scotland.
- Interestingly Highland Game products have a higher purchase frequency and repeat rate of purchase compared to Tesco own label. This could suggest that that brand's can perform well in this category.

3.3 Lifestage

On analysing the type of lifestages that buy venison, some interesting trends have emerged which are highlighted in Figures 4 and 5:

Figure 4: The lifestage of a venison consumer - Sausages

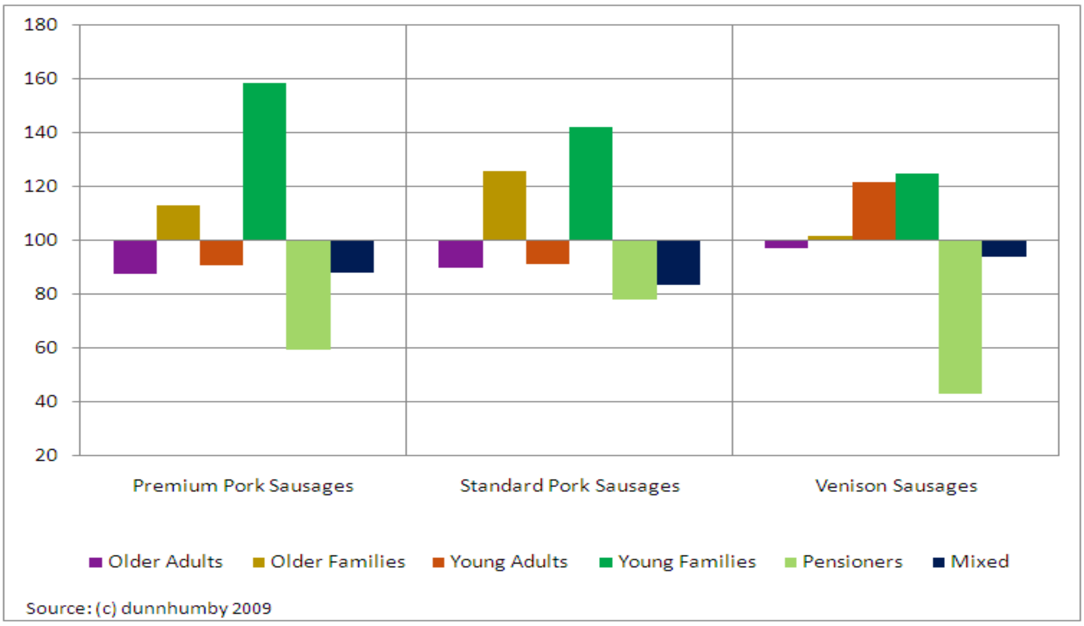
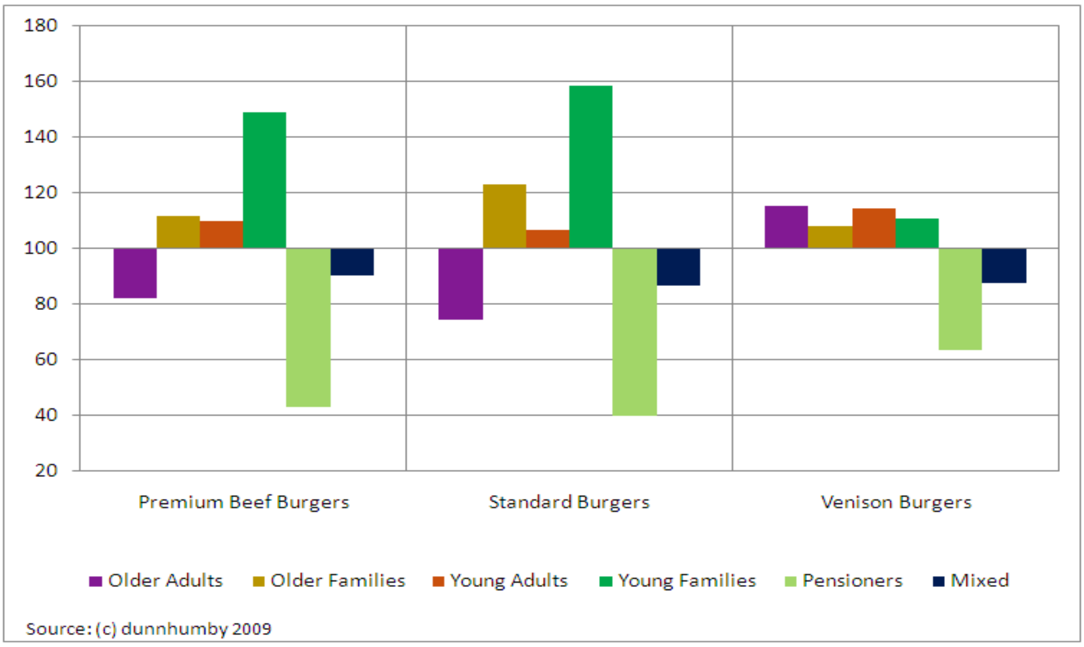


Figure 5: The lifestage of a venison consumer - Burgers



These graphs compare the lifestage type of consumers that buy Tesco venison burgers and Tesco Finest venison sausages. What is apparent is that **Young Adults** and **Young Families** over index significantly in both categories, suggesting that they are most likely to purchase venison in the supermarket. **Older Families** also over index, but to a less significant level, however venison products still appeal. What is interesting is that **Older Adults** over index on venison burgers, but under index on venison sausages. A reason for this, along with why Older Adults over index less significantly than young families and young adults, could be that these consumer types purchase venison from more specialist outlets like butchers and farm shops. They do not expect venison to be available in supermarkets and perceive it to be an inferior quality compared to more specialist outlets. This assumption will be investigated in more detail in the consumer focus groups.

The graphs also show the results for premium and standard pork sausages and beef burgers. This demonstrates that venison burgers and sausages have a different profile to conventional products. Significantly venison sausages over index against pork sausages for young adults but are less popular amongst pensioners than the pork sausages. On burgers, venison over indexes for both young and old adults in comparison with beef burgers.

It is clear that sausages and burgers do work as a mainstream product offer and appeal to a wide range of consumer lifestages. The health benefits of venison may be a reason behind this being appealing to so many types. These assumptions will be investigated in more detail in the focus groups.

3.4 Lifestyle

In terms of Lifestyle, Figures 6 and 7 below shows a very strong trend in that **Finer Food** shoppers and **Healthy** shoppers are the most likely consumers to buy venison.

Figure 6: The lifestyle of a venison consumer- Sausages

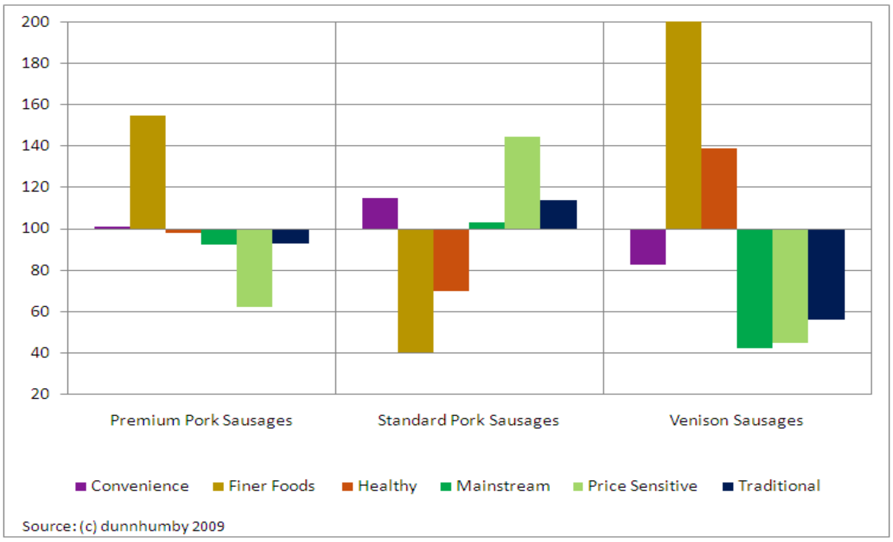
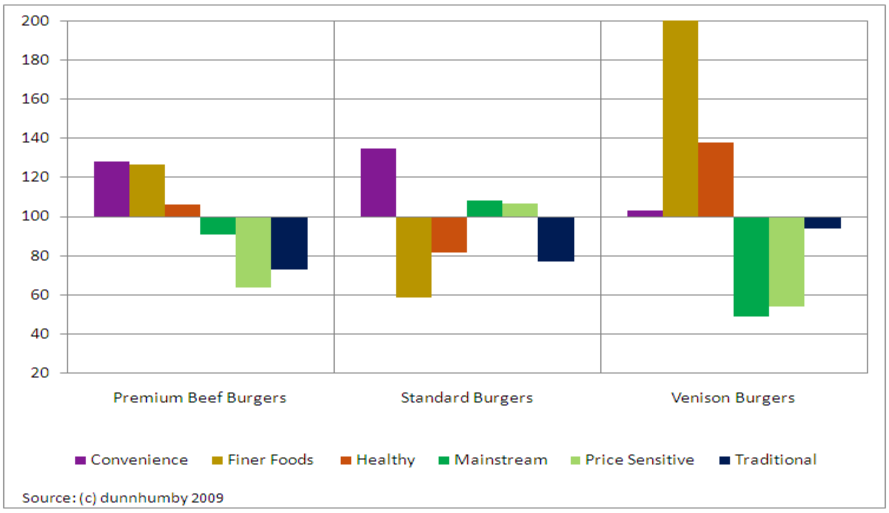


Figure 7: The lifestyle of a venison consumer- Burgers



This profile is almost a complete mirror image of the profile for standard pork sausages and standard beef burgers. This type of profile is to be expected based on the secondary research findings. Venison is perceived to be a more upmarket, niche product with significant health benefit, and this could also be the reason why many consumers opt to buy their venison from outlets other than the supermarket. The question as to whether this purchasing trend is likely to change going forward will also be investigated further in the focus groups.

3.5 Highland Game

On analysing the wild venison products from Highland Game, there is no clear difference in the consumer types that buy these products, with Young Families, Young Adults, Older Families and Older Adults over indexing in the various products on offer. The interesting points come from the key measures for Scotland only which are detailed in Figure 6 below:

Figure 8: Key Measures: Venison – Scotland only

	Year on Year % Change		Share of	Customer	Purchase	Repeat
	Sales Value	Sales Volume	Sales	Penetration	Frequency	Rate
Highland Game Venison Steaks 260G	49	35	41.38%	0.67%	1.96	34.8%
Highland Game Venison Burgers 250G	New	New	29.20%	1.27%	1.86	28.5%
Finest 6 Venison Sausages 300G	42	44	17.20%	0.88%	1.40	20.0%
Highland Game Venison Sausages300G	New	New	10.77%	0.60%	1.52	21.9%
Own Label 2 Venison Burgers 284G	New	New	1.44%	0.07%	1.52	21.6%
Total	**63**	**56**	**100.00%**	**2.81%**	**2.02**	**32.8%**
Source: © dunnhumby 2009						

Quite clearly, Highland Game products have a higher share of the market compared to Tesco own label. This is with the exception of sausages where the Highland Game product is new to the market and has a lower share of the sales. This data does suggest that brands can be very powerful in this market and perhaps have better quality assurance in the eyes of consumers.

3.6 Summary

In putting together the request for the Dunnhumby information, the lack of venison on offer in Tesco and equally the number of products that were delisted after a very short time on the shelves was noted. This leads us to question whether venison works as a mainstream product in supermarkets as well as more specialised shops like butchers and farm shops. It also raises the question as to which comes first; if there is insufficient customer awareness, demand will be low and if demand is low, supermarkets will not stock the product.

Venison is currently more of a niche/upmarket product and therefore it would be expected that it is Finer Food shoppers that are most likely to buy the product. Healthy shoppers also over-indexed and it will be interesting to understand through the focus groups how much importance consumers place on the health benefits of Venison.

Interestingly, Venison appeals to various consumer types including families and older adults/young adults. It is important to investigate the attitudes of these groups further in the focus groups that will be conducted in order to understand why they buy venison, the type of cuts they buy and the barriers to purchase.

All of the findings from Dunnhumby will be investigated in more detail in the consumer focus groups.

4 Focus Groups

As a part of the consumer research, two semi-structured focus groups have been undertaken with consumers, to gain an up to date understanding of their attitudes towards venison and their current purchasing habits.

4.1 Methodology

The focus groups took place on Thursday 16 July at The Talbot Hotel, Oundle. This location was specifically chosen due to it being located within the Rockingham Forest area and consumers were selected based on the findings of the literature review and Dunnhumby data. Details of the selection criteria of participants are in Table 2 below:

Table 2: Consumer Focus Groups

		Type of Venison Purchaser
Focus Group 1	Aged 28-50 years, with no dependent children living at home	X 4 active purchasers of Venison X 4 non rejecters of purchasing Venison
Focus Group 2	Aged 28-50 years, with a child/children living at home	X 4 active purchasers of Venison X 4 non rejecters of purchasing Venison

NB – 'Non rejecters' of venison relates to those consumers who do not actively purchase venison but would consider purchasing.

These groups will give us a clear distinction and show differences between families and adult only households. By recruiting both those that actively purchase venison and those that would not reject buying venison, we will also be able to ascertain both negative attitudes and barriers to purchase that a Rockingham Forest venison offer would have to overcome if it is to be successful.

Other criteria that all participants had to meet also included:

- Main Shopper of the household.
- Have an interest in where their food comes from.
- To be within the ABC1 demographic.

The focus group participants were recruited by the specialist company PH Research (www.phresearch.com) and each participant was paid an incentive of £40 for attending the focus group.

To provide some structure to the focus groups, a discussion guide was developed for the moderator to follow. This discussion guide was based on the findings from the literature review and Dunnhumby analysis and can be found in Appendix 2.

The analysis of the focus groups has been split into the specific areas detailed in the discussion guide.

4.2 Areas associated with venison production

As an 'ice breaker', participants were given a map of the UK and asked if there were any areas that they specifically associated with venison. The most common answer across the two focus groups was 'The Highlands', showing a clear association with free roaming deer and open countryside. Other answers included Wales, Scotland, Lincolnshire, Norfolk and Sandringham Estate. It was obvious from the focus groups that these answers were based on where consumers have previously seen deer in the UK.

4.3 Purchasing trends

Consumers were asked about their current purchasing behaviour regarding venison. Bearing in mind that the groups had a split between active purchasers and non rejecters of venison, the findings highlighted the following key points.

Participants in Group 1 (Adults with no dependent children living at home) predominantly bought venison in specialised outlets such as butchers and farmers markets, where as Group 2 (families), bought sausages and burgers from the supermarket. The differences in where people purchase, could be because Group 1 participants do not have the time constraints of families and can therefore go to butchers, farm shops and farmers markets. Families may only have time to go to do a one-stop shop and are therefore only exposed to the venison sausages and burgers that are available. It is also likely that families are restricted in their budget which does not allow them to buy expensive meats like venison on a regular basis.

Those that purchase venison regularly perceive it to be an everyday meat, however on the whole most participants in both groups purchase venison occasionally. They buy venison for special occasions, such as bbq's and dinner parties and at weekends as they perceive it to be 'slightly out of the ordinary' and therefore more of a niche/upmarket product.

4.4 Consumer Attitudes

It is also apparent that participants tend to purchase venison occasionally because they don't' know what to do with it. There was a definite lack of knowledge regarding venison amongst all of the focus group participants. For example, a number of the participants in Group 1 who buy various cuts of venison did not associate the meat with stews or casseroles, which they associated more with cheaper cuts of meat. Those in Group 2, who only purchased sausages and burgers also made the following comments:

> ***'I don't know what to do with them'***
>
> ***'I wouldn't even know how to cook a joint of venison'***

Venison was also perceived to be expensive by participants; hence it is seen to be an upmarket product that most people only buy for special occasions or as a luxury. Those participants from families also mentioned that venison cannot be an everyday product for them because of the quantity needed to make a family meal:

> ***'It's just too expensive to consider for a family meal'***

This could also be part of the reason as to why families tend to only buy venison sausages or burgers. What is interesting is that not many participants alluded to the healthiness of venison. The literature review highlighted the health benefits of eating venison; however it is apparent that this is not communicated well enough to consumers. Potentially health can be a key point of difference for venison and help encourage consumers to eat more of it. However there is a distinct lack of knowledge of its healthiness and there is a need for greater promotion. Participants of the focus group in the main were not aware of its healthiness but responded positively to this fact. One participant said she only realised the healthiness of the venison burgers she bought when she looked at the nutritional table and now in the knowledge of this, she would buy the burgers again:

> ***'I looked on the back of the pack and couldn't believe how low in fat they were and because of that I would buy them again'***

UK consumers are increasingly becoming more health conscious. This suggests that the venison market has great potential to grow but this will only be possible if consumers are educated more on the reasons why they should eat venison and the health benefits it provides.

Within both focus groups the strong positive images and perceptions that consumers have of venison was evident. Regardless of whether venison is wild or farmed, consumers perceive deer to have had a happy life, a good diet and have no concerns about animal welfare:

'My perception of deer farming is that it is not that intensive, certainly not compared to other farm animals'

This positive imagery means that consumers are less concerned about the origin of the venison they eat; however they did say that they would prefer UK venison and there is certainly a preference for local in some instances:

'I would usually buy it from a butcher in Oundle or Thrapston, and then you know it is fairly local source of meat'

'I would prefer it to be local, but if it can't come for the local area then it wouldn't stop me from buying it'

Finally, the literature review highlighted the issues and challenges of getting a product of consistent quality to the market place. Interestingly, when purchasing venison, consumers do not specifically purchase either wild or farmed venison; they see it as the same product. Also, none of the participants spoke about having bad experiences of eating venison, suggesting that there are the necessary controls in place within the current supply chains to prevent this from occurring.

Consumers have such positive perceptions about how deer live, that they do not feel the need to actively ask how the venison was produced. However, when asked if they had to choose between wild or farmed venison, they all said that they would choose wild venison as it has even more positive images (free roaming etc) than farmed. This would be dependent on price though, as they perceived wild venison to be more expensive to buy than farmed.

4.5 Summary

Based on the literature review and the findings from the focus groups it is apparent that there is a trade off that takes place when purchasing venison. Some consumer's who do not know enough about venison are not prepared to pay the sales price, and in the example of families, settle for buying burgers and sausages which are in a familiar form and are convenient to buy as they are available in mainstream supermarkets. Those consumers who have more knowledge and buy different cuts of venison prefer to go to butchers and specialist outlets who they trust more to provide high quality venison than they would a supermarket because they see it as a niche product.

This creates a vicious circle; there is a lack of knowledge and awareness of venison which limits its demand, but because venison is not widely available, consumers are not made aware of the product and its benefits and therefore demand of the meat is limited. It is therefore deemed to be a specialised product, and consumers who do know enough about venison prefer to go to trusted sources like butchers and farmers markets to buy joints, steaks and other cuts of venison.

It was also suggested that restaurants could be a way of increasing demand. If it was more readily available in restaurants, then more people would try and subsequently may buy for themselves. That said this does not overcome the requirement of needing to educate people on how to cook venison in the home and therefore encourage them to purchase it.

These focus groups highlight the growing interest in venison and the positive response consumers have, particularly to the idea of eating 'Wild Venison'. We know that UK consumers are increasingly becoming more health conscious. This creates a great opportunity to increase demand for venison by promoting its health benefits alongside the 'Wild' element of the product. We can therefore conclude that Rockingham Forest is potentially a suitable consumer product offer with strong marketing messages. The challenge, as we are aware is getting a consistent product to the market place. This will form the next part of the report.

5 Venison Purchasing Businesses

In order to better understand the issues within the wild venison supply chain, we have consulted with a sample of 20 wild venison purchasing businesses. The majority of these businesses are from the Rockingham Forest area and a full list of the businesses interviewed can be found in Appendix 3. Table 3 below shows a summary of the business categories covered by these interviews:

Table 3: Wild venison purchasing businesses interviewed

Food Category	No. Contacted	No. Interviewed
Farm Shops	4	3
Butchers	14	13
Game Dealers	10	3
Restaurants	5	1

These businesses were chosen based on our research findings showing that wild venison is still perceived to be an upmarket, specialist product and less likely to appear in mainstream markets.

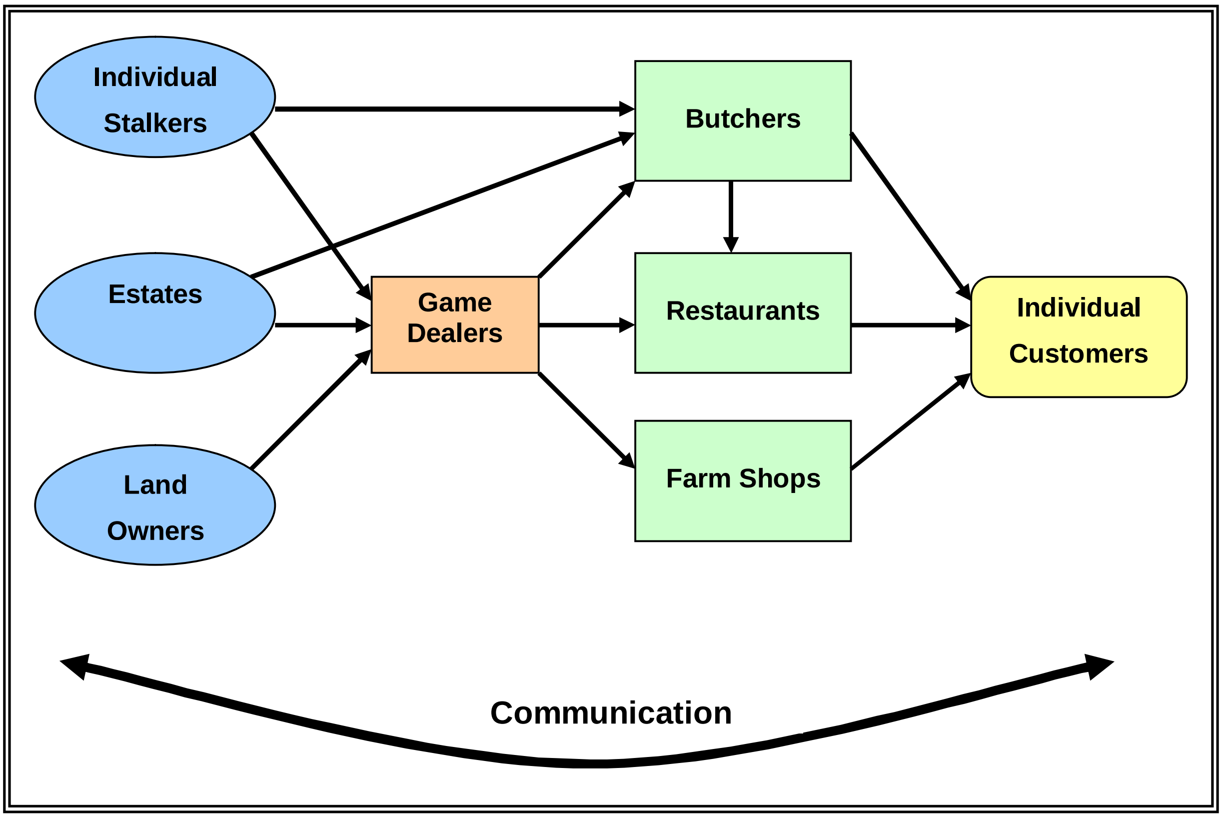
5.1 Interview Analysis

Whilst it is important to note that a sample of 20 businesses does not provide statistically proven information, the interviews that have been conducted have produced very powerful messages. It is also important to acknowledge in this analysis that some businesses were more willing than others to divulge information regarding their supply chain. The interviews have provided insightful information, highlighting some of the attitudes and behaviours that will need to be overcome if Rockingham Forest wild venison is to be processed and marketed successfully. A detailed analysis of the interviews is outlined in the paragraphs overleaf, with Appendix 4 containing notes from the interviews.

5.1.1 The Supply Chain

It is apparent that there are some interesting patterns regarding how wild venison moves through the supply chain. This is shown in Figure 7 below:

Figure 9: The wild venison supply chain



There are two distinct product preferences which the market is demanding – processed and unprocessed:

- **Butchers** who have a regular venison offer prefer to build direct relationships with deer stalkers rather than be supplied via third party game dealers. They have the facilities and skills that allow them to process the carcase to their specific needs and requirements.
- **Restaurants & Farm Shops** deal with third party game dealers which allows them to receive venison already processed and cut to their requirements. This is because these businesses do not have the facilities and skills to deal with a carcase and therefore prefer ready prepared cuts of venison.

5.1.2 Communication

Communication and building trusted relationships is vital to wild venison appearing in the display counters of butchers, shops and on restaurant menus. The venison supply chain is clearly a competitive area and this creates a challenge to Rockingham Forest both in terms of how to add value back into the supply chain and how to breakdown the barriers operating within the supply chain. Examples of this are detailed below:

- **Butchers** have developed longstanding relationships with stalkers that are built on trust and an understanding of their requirements. This relationship then produces the reliability and consistency that the butcher requires, with many stalkers 'shooting to order'. It will be a challenge to persuade butchers to change from their current source.
- **Game Dealers** spoke about the difficulty of securing good venison. Landowners, estates and stalkers can be quite fickle and shop around for the best price they can get for carcases. They also mentioned that they often get offered the venison that others have rejected on quality grounds, with suppliers trying to disguise damage. This results in the game dealers refusing to deal with certain people and therefore sticking to their trusted supply chain.

This suggests that the wild venison supply chain is very traditional, built on relationships and trust that if broken can prove very hard to overcome in the future. This needs to be acknowledged in any recommendations put forward for the processing and marketing of Rockingham Forest wild venison and how this could be overcome.

5.1.3 Price

In the focus groups, consumers perceived wild venison to be more expensive due to the positive points of difference it has over farmed venison. Interestingly all of the purchasing businesses interviewed commented that wild venison is in fact cheaper than farmed venison. If consumers expect venison to be a premium price, there is an opportunity to add value back into the supply chain and increase the price at the producer-end. However, there will be a fine balance in order to ensure that businesses do not switch to farmed venison supplies because they are deemed to be cheaper.

5.1.4 Volume/Quality Control

The extent to which businesses are concerned about availability and quality is very dependent on the supply chain they operate and the size of the business:

- **Aubrey Allen** (a large butchery chain in the West Midlands) prefers to use farmed venison rather than wild. He explained that the reasons for him not buying wild venison included the variability in quality, age of the animal, inconsistency of supply, lack of knowledge regarding the feeding regime and the poor shot placement on some animals.
- **Other Butchers** push the issue of the quality back on their suppliers and would reject poor, badly shot animals. That said they feel that the skill is in how you handle the carcase. This does however lead to inferior meat being sold to game dealers.
- **Farm shops and restaurants** allow the game dealers to deal with the quality issues.

- **Game Dealers** said that they are prepared to pay a premium for the best animals and to suppliers that provide them with a consistent supply. They dock the price on poorly shot carcases.
- **All businesses** commented that there is more demand for wild venison than can be supplied.
- Wild venison is deemed to be a seasonal product to many businesses.

5.1.5 Consumer Attitudes to wild venison

Interestingly, the businesses interviewed also acknowledged that consumers do not actively distinguish any difference between wild and farmed venison:

- **Specialist Butchers** prefer to buy wild venison only as they perceive it to be a better product when handled properly. They also feel that 'wild' is a strong selling point to customers because of the positive imagery it portrays.
- A **restaurant** interviewed uses both wild and farmed venison (depending on the season). They find that their customers never comment about the difference.
- **Game Dealers** reported that there were no preferences made by customers between wild and farmed.

This backs up the findings from the focus groups, suggesting that wild venison can be a very powerful marketing tool. Interestingly, none of the businesses mentioned the health benefits of eating venison which further suggests that there is lack of awareness across the supply chain of the positive attributes of the product. This needs to be addressed going forward and can only help increase demand for the product.

5.2 Summary

From speaking to venison purchasing businesses, it is apparent that there are a number of supply chains already in place in Rockingham Forest. Many of these supply chains are longstanding and businesses deal with people they can trust. It will be worthwhile investigating further the opportunity to utilise these existing supply chains to get Rockingham Forest wild venison more easily to the market place. What is very apparent however is that currently there is not enough venison being supplied to match current and potential consumer demand. This highlights the potential for a Rockingham Forest wild venison offer, if the supply chain can be organised in an effective and efficient way that provides economic benefit to all parties.

6 Questionnaires

The scope of a potential wild venison offer will be affected by the consistency, quality and volume of supply. As a part of the investigation into how venison is currently supplied, we have sent out questionnaires to deer stalkers and landowners regarding the current level of wild venison shot in Rockingham Forest and how they pass down the supply chain. The questionnaire focused on four key areas:

- The current supply of wild venison (numbers shot, age, sex and type of animal)
- The motives and priorities of landowners and deer stalkers.
- The existing wild venison supply chain.
- Attitudes to processing and marketing wild venison from Rockingham Forest.

Working with the Deer Initiative, a total of 38 questionnaires were sent to deer stalkers and landowners in the area. Copies of the questionnaire sent out can be found in Appendix 5 of the report. Disappointingly, to date, we have only received 6 questionnaires back. This can be broken down as follows:

Table 4: Questionnaire responses

	Questionnaires Sent	***Questionnaires completed***
Deer Stalkers	22	4
Landowners	16	2

The questionnaires that we have received back have provided some interesting data and information which is detailed in the analysis overleaf:

6.1 Questionnaire Analysis

The analysis of the questionnaires has been broken down into the following sections:

6.1.1 Venison Supply in Rockingham Forest

As described in the background research, there are closed seasons for all deer species except for muntjac. This has an obvious effect on the amount of wild venison shot in Rockingham Forest and subsequently the potential supply of venison to any processing and marketing scheme. The questionnaires highlighted the following points regarding venison supply in Rockingham Forest:

- The majority of deer shot are between 2 and 6 years old. This would suggest there is potential to supply good quality meat which isn't tough or has a strong flavour.

- Fallow Does are shot at a consistent level throughout the season (November – March), but numbers tail off as the season draws to a close. Fallow Bucks are mainly shot at the beginning of the season (August –September). This suggests that there could be a consistent supply of carcases throughout the fallow season.

- According to the questionnaire, very few muntjac are shot during the fallow close season and instead are mainly shot in January & February. Therefore it is unlikely that any processing or marketing scheme set up in Rockingham Forest could substitute fallow deer for muntjac during the closed season.

- Most stalkers are qualified to at least DCS level one and choice of shot placement tended to be approximately equally split between the head and chest and neck.

6.1.2 The motives and priorities of Deer Stalkers & Landowners

The poor response rate to the questionnaires highlights some of the motives and priorities of deer stalkers and landowners in Rockingham Forest:

- Some stalkers felt that their interests conflicted with the aims of the project and regard deer populations as an asset and not as a problem that needs to be managed. This suggests that a large amount of stalking in Rockingham Forest is carried out for recreational or sporting purposes.

- People are nervous of a more joined up management scheme.

This correlates with the information gathered in the Stakeholders interviews and highlights the barriers that any new processing and marketing scheme is going to have to overcome. The management of the deer population in Rockingham forest is a very political topic, with many different opinions and motives that need to be considered. Stalking does appear to be mostly for sporting purposes and the management of the deer between different blocks of ownership is fragmented.

6.1.3 The existing supply chain in Rockingham Forest

All respondents to the questionnaires stated that they sell venison in the skin. No one knew of a processing facility in the area where they could send the carcases to be butchered. The telephone interviews carried out indicated that most venison is sold directly to Butchers or Game Dealers. Although these may not be classed as processing facilities for third parties, these are likely to be the facilities that need to be used for any processing and marketing scheme that is set up. It is very apparent from talking to various businesses that there are some very established supply chains in place that any new scheme would be competing against.

The questionnaires also clearly indicated that the vast majority of carcasses are held in refrigerated storage (larder) prior to being sold. This does suggest that there is potentially a supply of venison in hygienic storage throughout the winter months. The fact that the majority of carcases would be in the skin could be seen as a positive, as it means that all butchery could potentially be done centrally which would make creating a consistent product much easier.

6.1.4 Attitudes to processing and marketing wild venison

None of the respondents had considered marketing their venison or collaborating with others to sell a 'Rockingham Forest Wild Venison'. The replies to the question 'would you be interested in selling venison through a scheme which sought to add value to wild venison produces in Rockingham Forest' was mixed. All positive responses to this question were driven by the guarantee that they would get a better price for the venison. Interestingly, one respondent stated that they would be interested in the project but only on the condition that the location of the culling was given no more specifically than Rockingham Forest.

6.2 Summary

The low response rate clearly highlights that this is a very difficult topic area and any processing and marketing scheme with have barriers to its success. The consumer research clearly highlights the demand that there is for wild venison and that there is currently not enough supply to match demand. The biggest barrier to this being achieved is to increase the economic value of culling deer for processing purposes through increasing the price that landowners and deer stalkers will get for the carcases.

7 Stakeholder Interviews

The stakeholder interviews provided the opportunity for face-to-face interviews with a number of key organisations and landowners in the Rockingham forest area. This allowed us to test and examine in greater depth information received via telephone interviews and the written questionnaires. In addition it allowed the opportunity to understand the differing priorities of some of the key landowners in the Rockingham Forest

7.1 Deer Numbers

Given the wooded nature of the area, it is very difficult to assess overall population numbers for the deer herd in Rockingham Forest. It has also been difficult to measure the total annual cull across the forest as there is no history of collecting this information and individuals are reluctant to disclose annual cull numbers. None of the stakeholders were able to provide detailed estimates of total deer populations. However from deer cull numbers provided by each of the stakeholders our estimate is that the total annual cull in Rockingham Forest is between 2000 and 3500 animals per year with slightly more than half of this being fallow.

7.2 Management Priorities

All of the organisations and landowners involved had set themselves management targets involving deer numbers. These management targets were primarily set with the objective of ensuring that grazing by deer did not jeopardise commercial forestry or wild vegetation establishment and growth. This was being measured in different ways but all referred to the vegetation and included whether there was a visible browse line, how well coppice re-established after cutting and more detailed measurements on high environmental value sites.

7.3 Deer Management in Rockingham Forest

There is a belief that the low economic value of venison is a barrier to people shooting, especially with the muntjac deer. There is also concern from some that many of the stalkers in the wider area are focused on trophy and corporate shooting and are therefore seeking to maintain a higher level of deer numbers than is sustainable for the area. This can be exacerbated on estates where game shooting is important and so there is not any stalking until after the end of January so it does not disturb the birds.

7.4 Facilities

The Forestry Commission has a larder at Southwick where they can hang 60 to 70 beasts in skin and another one at Yardley Chase. They also have a chiller trailer at Bourne. All of these facilities are purely cold storage for hanging skin in beasts. They are not processing facilities at present. Boughton Estate also have their own larder which is refrigerated but only has limited capacity for their own use. These facilities could potentially be utilised in any processing and marketing scheme that is developed.

7.5 Current Marketing

Current marketing arrangements vary. On one estate all venison is currently sold to a local game dealer who also takes all the pheasants and game from the Estate. They find that having a reliable long term arrangement is preferable in seeking the highest spot price for the venison each time.

The Forestry Commission markets their venison centrally, establishing a three-year contract with one of the national game dealers. The contract covering Rockingham Forest is currently out for tender.

7.6 Involvement in Future Venison Market Scheme

Natural England believes that the South Lincolnshire approach has worked well as this has helped existing shooters to get more money for their carcasses. They think that a holistic approach is necessary with the key aim to get more people shooting more often. There also needs to be funding for training and for more woodland work. This sort of approach has worked in the Welsh Marches and they think it is important to recognise that grazing by deer is reducing the marketable value of coppice material. They would like to see more demonstration estates in the area and more night shooting licences.

The Forestry Commission believes that the price of the carcass can be significant in encouraging people to shot more. The Forestry Commission would be interested in taking part in a venison marketing initiative in the area as long as they achieved prices comparable or better than their main contract.

7.7 Summary

These stakeholder interviews have highlighted the different priorities of key organisations in Rockingham Forest area. It is clear that the involvement of a small number of significant players will be key to the success of a processing and marketing scheme in Rockingham Forest. Any scheme set up does however need to provide a price that is beneficial to all parties and is commercially viable. Once the recommendations of this study are agreed, further discussion needs to take place with key players over how to pursue these opportunities.

8 Legislation – Structural and Cost Impacts on Project

There are a number of pieces of legislation in place that regulate the handling and sale of wild venison. This legislation is primarily in place to ensure that only healthy animals enter the human food chain and that the carcases and meat are handled in an appropriate way to ensure that it is safe to eat.

According to the Wild Game Guide developed by the Food Standards Agency[12], the processing of wild venison is covered by the following EC regulations:

- **Regulation (EC) No 178/2002** – outlining general food law requirements, including establishing traceability of food, feed and food producing animals.

- **Regulation (EC) No 852/2004** – outlining general food hygiene rules applying to all food businesses.

- **Regulation (EC) No 853/2004** – outlining additional hygiene rules applying to businesses producing food of animal origin. Section IV of Annex 3 of this regulation covers wild game supplied to and processed in approved game handling establishments (AGHE's)

A summary flow chart of what the regulations require can be found in Appendix 6. In essence the level of regulations that a processing marketing scheme must adhere to depends on the type of business that is developed. We have considered below two possible scenarios for the Rockingham Forest project and how the legislation might impact on them. It should be noted that quite subtle changes to the scale, geography and nature of the business can have significant impacts on the way in which the regulations are implemented.

8.1 Build a processing and cutting plant

If this is the scenario that is taken forward, then it is likely that the business will have to become an Approved Game Handling Establishment (AGHE). The only way of avoiding this is if the business falls into either of the following exemptions:

- **Hunter exemption;** allows hunters to supply small quantities of game direct to the final consumer or to local retailers that directly supply meat to the final consumer. It is the premises where you

[12] Food Standards Agency (October 2008); Wild Game Guide – a guide to food hygiene legislation

prepare meat that have to be local to retailers that the hunter plans to supply. In this scenario, you must still register as a food business.

NB - The definition of local supply is within the supplying establishment's own County plus the greater of either the neighboring county or counties or 50km/30 miles from the boundary of the supplying establishment's county[13].

- **Retail to Retail exemption;** a retail outlet can supply food of animal origin to another retailer, if the supply is marginal, localised and restricted. This means the following:

  Marginal – the retailer can only supply food of animal origin to other retailers of up to 25% of total sales.

  Localised – the retailer may supply other retailers in the same county, in immediately neighbouring counties or those situated no more than 30 miles from the boundary of the retailer's county.

  Restricted – game must have undergone an initial examination by a trained person.

Similarly in this scenario, you must still register as a food business.

It is evident from the report that there is a clear opportunity for wild venison from the Rockingham Forest area to be sold across many outlets including butchers, farms shops and restaurants. There is also the potential for a significant amount of carcases to pass through the business and therefore the exemptions outlined would not be applicable.

Therefore, it is likely that any new business will need to become an AGHE. This will firstly require a trained person to carry out the initial examination of when it is shot and the necessary documentation completed. This trained person is likely to hold Deer Stalking Certificates Level 1 and Level 2 (DSC 1, DSC 2).

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[13] South Lakeland District Council; Game Handling Establishments – Guidance for Hunters and Operators

[13] Food Standards Agency (October 2008); Wild Game Guide – a guide to food hygiene legislation

In order to become and AGHE, the processing and cutting facilities will need to be approved by a representative from the Meat Hygiene Service. According to the Meat Hygiene Service, the following information and documentation would be required to achieve approval[14]:

- A site plan and a buildings plan
- A description of the (proposed) method of operation
- A description of the (proposed) equipment maintenance arrangements
- A description of the (proposed) equipment and transport cleaning arrangements
- A description of the (proposed) waste collection and disposal arrangements
- A description of the (proposed) water supply quality testing arrangements
- A description of the (proposed) arrangements for product testing
- A description of the (proposed) pest control arrangements
- A description of the (proposed) monitoring arrangements for staff health
- A description of the (proposed) staff hygiene training arrangements
- A description of the (proposed) arrangements for record keeping
- A description of the (proposed) arrangements for applying identification mark to product packaging and wrapping

All of these processes and documentation will need to be put in place in order to gain approval. This will obviously come at a cost.

8.2 Contracting out the processing

If the processing of the Rockingham Forest carcases were contracted out, the processing facility would have to be an AGHE. In order for them to be able to take the carcases they would need to receive signed documentation from a trained person for each deer. This trained person would need to be present at the time of the animal being shot and certify that carcase has been initially examined and there is no abnormal behaviour.

This is a less costly route to take as a significant amount of the regulations will be covered by the AGHE. The only costs incurred by the new business would be the time of the trained person

[14] Meat Hygiene Service; Application for Approval of Meat Establishment Subject to Approval under Regulation (EC) No. 853/2004

examining the carcases (which could be the stalker himself) and ensuring the transport and storage of the carcases and butchered products were up to standard.

8.3 Summary

Complying with the regulations necessary to handle and sell wild venison on a reasonable scale will add significant costs in comparison to a single stalker selling the odd carcase. There are exemptions primarily designed to allow small scale businesses to operate (normally a stalker selling a small amount of produce as a by product of his stalking). We do not believe that it is possible to use these exemptions and develop a business of the scale necessary to have a significant impact on venison production in Rockingham Forest. We would be concerned that an attempt to do this would involve the business having to be structured in a way that would possibly bring it within the exemptions but would also be potentially detrimental to its commercial development. For instance it would force the business to be primarily retail rather than wholesale and it would complicate the structure and ownership of the business. In addition we would be concerned that any business handling food has a duty of care to its customers and if this business develops on the scale discussed this general duty of care will involve taking many of the steps defined in the legislation anyway.

That said it is also apparent that a structure whereby the butchery and packaging of the venison was handled by a third party contractor would greatly reduce the legislative burden on the business compared to establishing an in hand processing facility.

9 Financial Implications

This section considers the economics of two separate routes to achieve the marketing of branded venison from Rockingham Forest. In doing this, we have drawn on a range of sources including the Feasibility Study prepared on behalf of the Lincolnshire Deer Group.

9.1 Value of Venison Produced in Rockingham Forest

Examining the current situation within Rockingham Forest, we can project that the number of animals killed per year is likely to be in the range of 2000 to 3500. We accept that this is a wide range but there is currently no established figure and it has proved difficult to get an accurate estimate.

In terms of the types of animal killed, we have estimated this as 50% muntjac and the remainder fallow. This reflects the responses achieved through the stakeholder interviews and questionnaires.

We have also assumed the following carcase weights in skin (kg.):

Fallow	30
Muntjac	10

The prices (in skin) assumed are (£/ kg):

Fallow	2.25
Muntjac	0.50

The prices quoted above are higher than those quoted in the Lincolnshire Study but are the approximate prices that the Forestry commission would need to beat to participate in a scheme.

Based on these figures, total revenue achievable from Rockingham for in skin carcases, based upon a 2000 kill number (the lower end of the range) would be

Fallow	£67,500
Muntjac	£5,000
TOTAL	**£72,500**

This provides a base figure for us.

Looking at revenue flows, we again need to make some assumptions:

We have drawn on block test data from the Lincolnshire Study as well as other sources to make assessment of saleable carcase breakdown. For fallow deer, these are:

Total saleable retail product 70% or 21kg on in skin carcase of 30kg

The cuts assumed are:

Loin	6kg
Haunch	8kg
Diced/Mince	7kg

We then need to convert this into additional revenue from the in skin prices. Given we are using a total number of 600 from a total shot number of 2000 we have assumed processing would be restricted to just fallow deer initially.

Estimating price after processing is not easy as our research has shown this to be highly variable. It will also be heavily dependent upon the proportion directly sold and the remainder sent on to other retailers. For these calculations, we have assumed the following:

Diced/ Minced	£5 per kg average
Haunch	£10 per kg
Loin	£15 per kg

We believe that these figures should be obtainable in current conditions. Based on these assumptions and a throughout of 600, the total revenue would therefore be

Diced/ Mince	£21000
Haunch	£48000
Loin	£63000
TOTAL	**£132000**

This compares to revenue in skin for 600 fallow deer of £40500. Therefore the additional revenue from the processing facility envisaged is £91500.

9.2 Options for Processing Venison

There are two clear separate routes that could be taken to achieve this.

9.2.1 Build a new processing facility from scratch. This facility would be owned by the marketing company.

In developing processing, the smallest facility which could be considered would need to employ at least one full time employee who would need to be able to deliver across marketing, butchery and administrative functions. Needless to say, such a person would not likely be found easily. Even in such a scenario, there would need to be significant part time assistance possibly from members and their staff as well as additional marketing costs in developing new outlets either direct to customer or to retailers.

Our views on minimum throughput for such a facility would be in the range 500 to 750 and we have used the figure of 600 in our costings. This would not deal with the entire throughput but would be a starter and certainly any larger unit would require increased staffing etc. As we are starting from scratch, an initial facility based on 600 is in our view sensible and right. We have written separately about legislation and exemptions. We would propose that from the outset we build a facility fully to standards and invest in relevant training. Whilst there are exemptions, these are subject to tight and specific conditions and we feel that from the outset this facility should be established fully compliant and fit for purpose.

Putting a capital cost on such a facility is not easy without clearly identifying the location. Can it be in improved existing buildings or does it need to be new. Whatever was constructed would need to have room to grow with appropriate walk in freezer facility/ cold store, an intake chiller area as well as a holding cooler, a butchery and packing area, office, toilet facility etc. As said, it would need to meet requirements to ensure that it is an approved facility under the regulations of the Food Standards Agency. In these terms, it would be referred to as a Game Handling Facility (previously referred to as Wild Game Processing Facilities). Adequate attention would need to be paid to waste disposal and the consideration of sustainability in terms of materials and its operation. The latter would be especially important in terms of grant aid if sought.

Given all said, we would propose a purpose built facility and for the purposes of this appraisal linked to initial enquiries made, we have put in a capital investment for this of £60K. If we then allow for working capital needs in set up as well as investment in training. Marketing etc., we need to be thinking of an initial set up cost of £100K minimum.

Purpose Built Facility	£60K
One off & Working Capital	£40K

In revenue terms we have already demonstrated the potential to create an additional £91500 of income by processing and marketing.

From this additional revenue, we need to deduct operational costs (£K):

Labour		25
Other Costs		
- Van Lease	5	
- Power & Services	5	
- Machinery Costs	5	
- Office/ Admin.	5	
- Maintenance/ Misc.	3	
- Rates	2	
- Finance Costs	1	
- Packaging/ Waste	5	
		31
Depreciation Building (10%)		6
Marketing linked Esp. to direct retail		12
Total		**£74,000**

Therefore the profit margin can be calculated as:

Total final value on 600 animals	£132,000
Less In Skin value	£40,500
GROSS MARGIN	£91,500
Costs	£74,000
NET MARGIN	£17,500

Based upon a total capital investment of £100K, a projected profit of £17,500 produces a gross return of 17.5%.

In itself this is not a strong case but throughout we have sought to use assumptions which we think are fully achievable and not optimistic. If for example, we were to increase the prices of our final product by 5%, the profit would lift by £6600 and the gross return as a consequence move to 24.1%. Conversely a 5% drop in prices would lower profit to £10900.

9.2.2 Contract out the processing, butchery and packing of the venison. The marketing company would retain ownership of the meat, would be responsible for transporting to and from the processor, would store the processed meat and would be fully responsible for marketing.

Establishing a processing unit would not only require capital and a location, it would need commitment and collaboration and not a little effort for all involved. An alternative option which could be considered would be to use a third party to process for which the project would make a payment. They would then need only to deal with the marketing of the branded product. There would still be capital investment needed but this would be restricted to appropriate storage for the product and transport as needed for distribution. There are two significant advantages of this method before returns are considered. The first is that it is much more scalable and has a lower risk profile than direct investment. This is because if the correct contractor is found it will be much easier to increase or decrease production in response to demand. If the project is not as successful as projected this route will also mean that less capital has been invested. Secondly as the lead role in this scenario only requires marketing and coordination skills it should be easier to find a suitable individual than in the previous scenario where butchery skills were also needed.

We have made initial enquiries to assess interest. This would indicate that most butchers are unlikely to have the capacity or the interest and they are often lacking in formal registration as a game handling establishment. On the other hand registered game dealers are an opportunity and we have already had a clear expression of interest from a number. Enquires have indicated that there are a number of people around who would be interested in a contract of this scale and would provide basic butchery and packaging of the carcase for approximately £30 per head (Bestwicks, Ben Rigby and Deerfield all showed interest in this proposition). This cost would increase if more complicated processing or higher quality packaging was used.

A calculation is summarised below:

Assumed capital investment in Facilities	£20k
On off/ Working Capital	£5k

Annual Costs:

Labour	£10k
Other Costs	£15k
Depreciation	£2k
Marketing	£12k
Butchery	£18k (600hd at £30/hd)
Additional Butchery	£9k (to allow for additional cutting & high quality packaging)
TOTAL	**£66,000**

Therefore our margin can be calculated as:

Total final value on 600 animals	£132,000
Less In Skin value	£40,500
GROSS MARGIN	£91,500
Costs	£66,000
NET MARGIN	£25,500

Therefore if we did generate this return with the much lower capital investment required we would make a return of 102% on capital invested.

9.3 Summary

Financial analysis shows that if we assume a throughput of 600 fallow deer per annum there is a margin of £91,500 between the in skin value of £40,500 and the average value achieved through selling butchered meat through a combination of direct sales and sales to retail outlets of £132,000.

Two options were examined to structure the business to achieve this.

The option of setting up in hand infrastructure to process and butcher this throughput would require a capital investment of approximately £100,000 and would generate a net margin of £17,500 if the throughput was achieved.

The option of contracting out the butchery and processing would require a capital investment of approximately £25,000 and generate a net margin of £25,500 if the throughput was achieved.

With the butchery contracted out the model would be more financially stable at lower throughputs as a greater proportion of the costs would be related to turnover rather than fixed.

10 Grant Funding Opportunities

The research clearly shows that there is the potential for a Rockingham Forest wild venison offer, if it can be marketed appropriately. There are also the deer numbers to support a significant uplift in demand should this occur. One of the challenges of creating a sustainable business in the long term will be the amount of investment required in marketing and product development to capitalise on the opportunities. From a commercial perspective both Boughton Estate and the Forestry Commission have intimated that they might be prepared to become part of a commercial venture.

There is a great opportunity to develop a strong business, but it will take a collaborative approach. In our opinion it would be in the interest of all parties to get public sector support through RDPE funding firstly to help investigate and develop the business plan in more detail, and secondly (assuming the business case supports it) to help bear some of the brunt of the start up and running costs of the business. It could be argued that without this support any initiative would struggle to either get off the ground or have the impact needed.

10.1.1 RDPE

As indicated, we would anticipate that the Rural Development Programme for England (RDPE) would have the greatest potential for getting grant funding for a processing and marketing scheme. The programme is managed by the Rural Development Agencies, which for the Rockingham Forest area, EMDA (East Midlands) would be the agency responsible. RDPE focuses its activity across a number of themes. In this case, two particular themes are likely to be relevant:

- Sustainable food and farming seeks to increase competitiveness and sustainability of the land based sector by supporting added value and diversification ventures and developing skills in the workforce. This proposal certainly fits within this category.
- Rural business development also addresses economic under performance by supporting start up or enhancing micro enterprises that benefit an area. Again this proposal fits within this category.

We have spoken to the Rural Development Programme Manager (Michael Stubbs) at EMDA about the potential of securing funding for this project. While funding cannot be guaranteed until an application is assessed it has been confirmed that there are funds available for this type of project. Also that the co-operation between a number of businesses, value adding and the environmental benefits from the project will all be key positive messages for funding. In principle funding would be available to support both capital items and also revenue items such as marketing and training. Funding is available at rates up to 40% of total eligible expenditure.

10.1.2 Other grant opportunities

The process for applying for funding is not easy and can be rather bureaucratic. However, we do believe that it is an opportunity and certainly this project fits with RDPE criteria. Other opportunities for grant aid include support for skills training and increasing awareness amongst those directly involved in any development. A particular source of support would be an initiative known as 'Landskills'. The application of this grant varies across regions, but essentially Landskills seeks to bring a new focus on skills and knowledge transfer for farming, forestry, horticulture and other related land based activities. It targets owners, directors and managers in order to improve their business competitiveness. Key priorities to target would be supply chain efficiency, management and business including collaboration and application of relevant practical and technical skills. This area of funding could potentially be used to assist with training stalkers and employees to ensure that all food hygiene standards were complied with.

11 Summary of Findings

In carrying out this report Bidwells have been asked to consider a number of objectives set out in the tender document provided by The Deer Initiative. For the sake of completeness we have laid out our summary of findings in line with these objectives.

- ***Does the market exist for wild venison? If so, where and who are existing or potential suppliers?***

  Our research illustrates that a market does exist for wild venison and that there has been growth in its popularity in recent years. This has been particularly emphasised by our exclusive use of Dunhumby data and outcome from Focus Groups. We have demonstrated that consumers have a positive perception of wild venison however; the market is restricted by the lack of reliable supply and lack of demand due to lack of knowledge about the product, how to cook it and where to buy it. Our focus group work and other statistics demonstrate there is latent demand but the consumer finds difficulty in sourcing product While the majority of wild venison is exported from the UK there are a number of businesses successfully retailing wild venison in the UK. At a national level this includes businesses such as Highland Game who have a successful website and also sales through supermarkets. Locally within Rockingham Forest there are a number of butchers who sell small amounts of wild venison. Restaurants have said that they are held up by supply and, if consistent local product was more readily available, they would capitalise by putting it on their menus.

- ***If the market exists, are they local? Are they national? Is there potential to expand? If so, how?***

  The opportunity that exists for wild venison is one of promoting the provenance of the product, emphasises where the product comes from and providing consumers with the right information. The "Wild" element is actually a key positive message to communicate to the consumer. Given the positive perception for local food at the moment we would recommend that initially the marketing should be focused on a local scale where the branding will have the greatest resonance. However, once a successful brand is established there is potential to expand this to a wider geographic scale. The limits on this would depend on the supply of venison and in particular the ability to produce a consistent product for larger markets. The brand can be expanded through a number of routes. The two with the greatest potential are internet based marketing and marketing through a supermarket. However, both of these routes also have their complexities to deal with.

- ***If the market could be developed, to what sustainable scale? Over how long a period?***

  As discussed above in reality the limit to the scale of the market will depend on the availability of high quality wild venison. The speed of development will depend directly upon the effort and investment put into a marketing and promotion campaign. Our marketing work indicates that a local market could be developed quite quickly with reasonable scale achieved over a two to three year period. A supply chain is already in existence through game dealers, butchers, farm shops and restaurants. The results of this project need to be highlighted to everyone in the supply chain. Better integration would benefit all parties, with farm shops being a key outlet to capitalise on an increased wild venison offer. Throughout the report we have emphasised the current interest in provenance and how progressive farm shops have capitalised on this. These shops, stocking a wide range of product to satisfy consumer demands, have often focussed on butchery. They then communicate with consumers on the various cuts and products. Venison would be an ideal product in such situations and any marketing strategy for Rockingham Forest wild venison must seek to maximise this opportunity. Seasonality and supply are key factors in making such a product offer successful. It needs to be built upon as a major strength – an opportunity for consumers to buy local product from a known source, when it is the season to eat that type of meat. This requires a planned supply of deer at the right times and in the right volumes to ensure availability matches demand.

- ***What is the diversity of consumers who would be potentially interested in a sustainable market strategy?***

  The study indicates that there can be a very wide range of potential consumers provided that the issues on communication and marketing are addressed. There is a particular opportunity in providing a high quality provenance product to farm shops and other small retailers in the area. There is also the potential for direct sales through farmers markets and/or an internet based platform. With butchery outlets there appears to be a group of butchers who were successfully retailing wild venison already often using a local stalker to provide this. Butchers who did not currently retail venison often felt that there was little potential for it in their shops. We suspect that this diversity of opinion depended on the customer base and operating style of the individual butchers. Restaurants provide another potential outlet however, the key component for restaurants is to have a consistent product in all aspects (including size of the cut and taste). If wild venison is to be successful in these outlets then these issues will need to be addressed.

- ***What is the perception of wild venison for both secondary and tertiary consumers? Is education required?***

  It became apparent in the course of this work that those people who work in the management of deer are well aware of some of the quality problems that can occur when handling wild venison (due to shot placement, species, age, sex of animal, handling of carcass) these attitudes were also apparent in a proportion of the secondary consumer base, in particular where they had had bad experiences in the past. That said, there were a number of secondary consumers who were very happy with the quality and consistency of the product they were sourcing and this was all dependant on a close relationship with a stalker.

  Interestingly, at a tertiary consumer level members of the public overwhelmingly had a positive view of wild venison, associating the concept of wild with high animal welfare and other positive attributes. However at a tertiary consumer level there were also more concerns about the price of venison (with it being perceived as a luxury product) and a lack of knowledge in how to prepare the product, what cuts were available and where to buy it from. We believe that this means that given effective marketing, coupled with a rigorous quality process protected by a brand, that there is great potential for marketing this product to the public. We believe that it would be essential to have an education and publicity campaign that promoted the benefits of venison and gave assistance on how to prepare and cook the product.

- ***What are the consumers understanding of the benefits from eating wild venison?***

  Consumers generally had a relatively low level of understanding of the health benefits of venison compared to other red meats and this was demonstrated in the focus groups. The Focus Groups also illustrated that consumers perceive deer to roam freely and have happy lives and see this as a positive attribute. In addition there was little knowledge about the management of wild deer populations and there impact on the countryside. Undoubtedly there is a real strength in promoting wild deer and, with the current marked emphasis on provenance and consumers wanting to know where their meat originates from, Rockingham Forest wild deer has real opportunity.

- ***Would targeted marketing be constructive?***

  Targeted marketing would not just be constructive, but would be essential in order to drive sales of wild venison and therefore establish and protect a new brand and product.

- ***What is the value that consumers might place on wild venison?***

  Our consumer research showed that consumers perceived venison as being an expensive product. Ultimately venison would need to be priced competitively against other red meats (in particular beef and lamb) in order to be attractive to consumers. As part of a marketing campaign some price promotions would be a positive element in order to encourage people to make their first purchase of venison without fear of the price.

- ***What is the current economic value of wild venison in the region? What is the potential, with a secure supply chain in place, likely to be in terms of income, jobs generated and business supported?***

  There are currently no reliable figures to estimate the annual cull of deer in the Rockingham Forest area. From our research we have estimated that the number of deer killed in the Rockingham Forest area annually is between 2,000 and 3,500. Working at the conservative end of this range the value of venison sold in the skin would be £70,000/annum. In addition to this there is a small amount of value adding within the region and there is also considerable economic activity and employment surrounding the management of this wild deer population.

  Assuming a minimum of 600 animals a year were processed in this particular supply chain in the Rockingham Forest there would be an increase in employment through the potential employment of one person to run this project. In addition there would be further employment created through increased stalking and increased retail. If all processing, marketing and retailing took place within the Rockingham Forest area then we would expect the economic value of the venison to the region to increase by £90,000 per annum.

- ***How could The Deer Initiative complement a developing business infrastructure based on sustainable venison marketing in the region?***

  The Deer Initiative should support efforts to bring landowners and stalkers from across Rockingham Forest together to discuss the benefits of a sustainable marketing strategy for venison in the region. As well as supporting the processing in its wider sense, The Deer Initiative should also provide assistance with specific items such as training of stalkers.

- ***Would there be a displacement with farmed venison?***

  Due to the very small amount of venison consumed by the UK public we would conclude that wild venison marketed correctly would have little direct impact from the sales of farmed venison. In fact a successful marketing campaign for wild venison might have some positive benefits for the marketing of farmed venison.

- ***Are there possible linkages to existing game dealers and suppliers?***

  We have discussed this project with a number of game dealers and suppliers. There are some supply chains in place within the Rockingham Forest particularly between individual stalkers and a number of butchers shops which we feel are unlikely to be disturbed by the setting up of a new marketing strategy for wild venison in the area. If the messages from the project were positive then it may be that some of these micro supply chains could be persuaded to buy in the branding of the Rockingham Forest wild venison. Having discussed the process with a number of game dealers we believe that there may be the potential to involve an existing game dealer in the processing of the venison for this project. This could either be done by acting on contract to butcher and pack meat, or with an alternative approach the game dealer buying the carcasses and selling back any cuts that we want from those carcasses for marketing under a Rockingham Forest brand.

- ***How many further processing plants are needed to meet potential demand and where are they best located?***

  In the estimated scale of wild venison production a single processing plant would be the best way forward. This plant could be built from new as there are no comprehensive existing facilities in place in the Rockingham Forest area. However, the cost of processing and in particular the capital invested would be a high proportion of the cost of the project. We would encourage members of the group to consider the opportunity of contracting out some or all of the butchering and packaging of venison for the project. This would potentially involve expansion of an existing facility.

- ***Is there potential private sector support for a sustainable venison marketing strategy?***

  At present we have had indication from one large estate that they would be prepared to consider investing some money in this project. In addition, Natural England and the Forestry Commission are positive about the project and might consider investment in it by various routes.

- ***What costs would be involved in instigating a Chain of Custody for all carcasses and what would the impact of this be?***

  We believe that in order to secure the reputation and brand of any new marketing initiative there must be a chain of custody that goes with this to guarantee a level of quality. This should involve as a minimum a stalker qualified to DSC level 1 & 2 being present when any animals are shot and animals being tagged appropriately. All animals must then be quickly handled into a chilled storage facility prior to moving to the central processing site. The main cost in this process will be some training costs which should not be significant. In addition, there might be a need for a small number of additional chilled larders depending on facilities available on other estates in the area.

- ***How important is quality of venison delivered to a secondary consumer (processors, game dealer or butchers) and how is the price of meat per kg adjusted as result?***

  The quality of venison is of paramount importance. Many of these smaller purchasers (e.g. individual butcher shops etc) will only handle carcasses of a highest quality and are prepared to pay a premium for these but are not interested in second quality carcasses. Where carcasses are damaged they can either fail to find a market or achieve an absolute minimum price.

12 Conclusions & Recommendations

12.1 Recommendations

12.1.1 The aim behind setting up an initiative to process and market wild venison from Rockingham Forest has primarily been to provide a higher price back to the stalker and landowner and therefore, provide greater financial encouragement to manage the deer population in the Rockingham Forest area. Within Rockingham Forest the two largest landowners and also the two largest contributors to the annual cull are the Forestry Commission and the Boughton Estate who collectively produce enough venison each year to give the scale needed to set up a local venison marketing enterprise. However, to achieve the aim of the project it is essential that a much wider range of landowners are brought into the project.

12.1.2 The next step to achieving this project therefore, should be to take the findings of this report and present them to landowners within the Rockingham Forest area and to canvass support and commitment to a processing and marketing project. This process would be much easier and more successful if there was a functioning deer management group within the area as this could provide the focal point for the project. It should be noted that this is a significant difference from the Lincolnshire project where there was already a deer management group up and running. We understand that through The Deer Initiaitve the Boughton Estate are aiming to set up a stalkers group and this may be able to become the focal point for the project.

12.1.3 To take the project any further a commitment will need to be obtained from sufficient landowners and stalkers to supply their venison to the project. Without a committed supply of venison it will be impossible to set up the supply chain. The Forestry Commission may have a balancing role within this project. The project is most likely to achieve its aims if the marketing group could commit to take all the venison from committed members and if The Forestry Commission were able to provide a variable quantity of carcasses to make up the difference between supply and demand. This would rely on The Forestry Commission retaining their own market for the balance of their production.

12.1.4 A chain of custody would need to be agreed to a sufficient standard to meet the relevant hygiene regulations. This would involve as a minimum suppliers committing to their stalkers being qualified to DEC levels one and two and tagging carcasses. Carcasses would also have to be put into chilled storage within a defined time period.

12.1.5 The group will then need to agree how the deer marketing business is to be structured. With regards to processing we recommend that in the first instance the group would be wise to find a contractor to carry out butchery, processing and packaging on behalf of the group. This would have the advantage of:

a) Reduced capital requirement

b) Greater adaptability to scale of project

c) Lower financial risk to the members if the project failed

d) A lower cost of butchering and processing per carcass.

e) Would resolve the issue of trying to find a qualified and competent butcher for the project.

Alternative methods of operation could be feasible including building a dedicated premises in the area and employing or contracting somebody with butchery skills to process the meat.

12.1.6 The ownership of the deer marketing project will need to be agreed. We would recommend setting this up as a limited liability structure (either a company or a Limited Liability Partnership) to ensure that the member landowner and estates are not put at risk by the trading activity of the business. Ownership of the company should be in proportion to the target number of carcasses to be supplied each year and capital should be introduced in the same ratio.

12.1.7 A grant application should be put together to seek funding from EMDA (East Midlands Development Agency) for RDPE funding. This funding should be sought for the capital costs of start up and also a contribution towards the initial running costs including marketing cost.

12.1.8 A Key individual will need to be employed to run the project. Depending on the availability of funding and intended scope this could be part or full time and the individual will need to have a combination of hands on skills and also marketing skills. The individual will be responsible for ensuring carcasses are delivered to the butchery business and that meat is collected from there. They will need to manage a cold store (this could be rented space in an existing facility or could be a refrigerated container store). Ideally a store and some office space would be available on an estate within the Rockingham Forest area. The individual will then be responsible for marketing the Rockingham Forest venison to retail businesses and also responsible for any direct marketing.

12.1.9 A promotional campaign will need to be designed including branding for the Rockingham Forest venison.

12.1.10 A concerted effort will be necessary in early years to market venison to retail businesses. We suggest that initially this is focused within and close to the Rockingham Forest area and that farm shops and similar businesses will be a key target. High quality restaurants will also be a target but it will be essential to be able to ensure that sufficient quality and consistency is available for the number of customers sought.

12.1.11 A product line up will need to be defined. This will need to include prime cuts to achieve the highest values including roasting haunches and saddles. It will also need to include products such as stewing packs, mince, burgers and sausages. These products will allow use to be made of fore quarter cuts. It will also allow use to be made of any superficially damaged quarters (where undamaged meat can be recovered) and from some animals outside the ideal age or spec for the prime cuts. However, it is essential that the products produced are of high quality and good taste and that a clear line is drawn from carcasses which are not to be included in the branded marketing.

12.1.12 Natural England may be able to make some contribution towards marketing through in kind contribution of marketing systems.

12.1.13 It is essential that as part of the marketing campaign that provision is made for consumer education. This may involve training days for retailers selling the product, training days for chefs cooking the product, recipe ideas and marketing literature at the point of sale.

12.1.14 Promotion will also be assisted through direct marketing at farmers market evens and consideration could be given to an internet site. This could either be designed as a source of product information or could be developed into a retail platform.