



INNOVATION INSIGHTS: New Product Developments in the Venison Market

November 2019

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Innovation Insights:

Scottish Venison Association

November 2019

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INNOVATION INSIGHTS

Innovation is a key driver of growth in the food and drink industry, increasing productivity, sales and, ultimately sustainability. The Innovation Insights Team has researched and published articles that analyse and describe food and drink innovations across every aspect of the food and drink sector, in order to stimulate new thinking and identify opportunities and markets.

This research report has been created to analyse current and forecasted innovation developments focusing specifically on high value /added value derivatives of deer products.

The report is designed to be used to help with planning for the sector in Scotland and by individual deer farming businesses, suppliers of wild venison, processing companies, the wider supply chain in Scotland and its supporters.

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Venison Innovation

Executive Summary

Venison Innovation Opportunities

- Scotland is the largest producer of Venison in the UK. With the Scottish Venison strategy in place, the sector has a fantastic opportunity to meet rising demand and target new market opportunities
- In retail, venison products are becoming easier available and more convenient, ranging from ready-to-cook meals, charcuterie to venison meat snacks
- In New Zealand, world's first commercially produced deer milk has been introduced. Deer milk is a luxury product and has potential to develop in the high-end market. Furthermore, deer milk is being used for skin care products with the first skincare product being launched called 'Kotia', sold in South Korea
- Deer leather is a niche and specialised market for high-end and premium end consumers and is distributed by designers across the world

Deer farming and venison market in Scotland

Scotland is the largest producer of Venison in the UK. Venison is a premium food, renowned for its quality, provenance and health credentials, and its reputation continues to rise in both domestic and international markets

**Annual production of
wild venison**
3,500 tonnes

**Annual production of
farmed venison**
70 tonnes

**UK venison market
worth annually**
£100m

Scottish Venison Strategy 2030 targets:

Three aims to sustainably maximise the market growth potential for venison:

- 1. Wild venison sector** Ensuring full value from the **3,500 tonnes** culled annually and worth **£7.25m** at first sale
- 2. Farmed venison sector** Increasing the farm sector output from 100 tonnes to **850 tonnes**, achieved by growing the annual kill from 1.7k to **15k animals** and growing the value to the sector from £540k to **£4.6m** at farm gate
- 3. Innovation** Innovation through collaboration involving both parts of the sector by utilising the unique but complementary strengths of the venison supply chains



With this strategy in place, the sector has a fantastic opportunity to meet rising demand, displace imports and target new market opportunities

Venison cuts are becoming easier available and more convenient in retail

**Fresh game UK retail sales
£98.3m
in 2018***

**Venison UK retail sales
£6.6m
in 2018***

- The British Game Alliance hopes to encourage wider use of game in ready meals and ready-to-cook products
- Highland Game, UK's largest venison supplier, has recently gained distribution deals with Tesco and Morrisons at national level, which are expected to be worth more than £1million in sales over the next 12 months
- The company processes up to 70,000 wild deer a year with a turnover of £13 million. 90% of its venison is sourced in Scotland
- Bringing venison products in a convenient format on to the market could help raise popularity of this locally produced meat among consumers

**Venison Steaks and sausages,
Highland Game, Morrisons**



**Venison Loin Steak with
Blackberry Sauce, Waitrose**



**Venison Cutlet with Indian Spices,
Waitrose**



**Venison Medallions, Silver Fern
Farms, NZ**

*Kantar Worldpanel 52 w/e 26 March 2018, fresh game meat (does not include processed meat, such as burgers or sausages)

Source: <https://www.insider.co.uk/news/venison-producers-supermarket-deals-top-20156369>,
The Grocer 2018 'How to persuade Brits to up their game consumption'

Venison charcuterie increasingly on the menu

- In the last 10 years, the number of charcuterie makers in the UK has risen tenfold with several million tonnes of cured meat consumed every year
- The drive for more local, high-quality and sustainable produce is hitting the cured meat trend. Consumers are willing to pay more for premium, authentic and special meats thanks to the growing awareness of animal welfare and widespread interest in nose-to-tail and farm-to-table trend
- The rapidly growing market for charcuterie in the UK, but the offer of only a few British-sourced products in retail, has led Discounter Lidl to launch a new range of locally-sourced cured meats and charcuterie to push forward the support of British produce and farming. In partnership with Cannon & Cannon, Lidl will offer a range of high-quality local meats in the area local to its producers in Cornwall, Kent, Wales, Scotland and Yorkshire.
- There is great potential to expand this niche market in Scotland as Scotland's remote landscape is ideal for marketing authentic charcuterie



Venison Cigars at Restaurant Rabbit, London

Great Glen Charcuterie, Scotland, Wild Venison Charcuterie



Basecamp venison salami, NZ



Highland Charcuterie venison pate with elderberries and Islay whisky, Cannon & Cannon



Meat snacks is a growing market and venison could benefit from the rising trend

Consumers are seeking for high protein and low carb snacks. Jerky, salami sticks, biltong or meat bars are on the rise. According to IRI and Mintel, meat snacks is the fastest growing segment in the UK snack market, with a volume growth of 23% between 2016 and 2017

Chomps Venison Snack Sticks, US
Salt & Pepper Venison Sticks with a blend of grass-fed venison and grass-fed beef



EPIC Venison Sea Salt Pepper Steak Stripes



Gathered Game Wild Venison Beer Sticks
Premium wild venison with a small amount of high-quality pork fat



World's first commercially produced deer milk has been introduced in New Zealand

High-end restaurants are currently experimenting with luxurious deer milk on the menus

Deer milk has recently been introduced by chefs in New Zealand in collaboration with Pamu and the McIntyre family. The milk comes in a powdered form as red deer can only be milked between November and February. This allows the product to be available all year round, has a long shelf life so wastage is reduced

The milk has double the amount of fat and protein of cow's milk making it rich and creamy. High-end chefs are experimenting with deer milk by using it in desserts, mains, savoury dishes and cocktails. Deer milk is a premium product and is likely to remain at the high-end market

Challenges:

- European red deer, who is less tamed than cows, is not easy to milk. The key to being able to milk the hinds comes down to handling, which takes a couple of weeks to get them used to the milking shed
- A new milking apparatus is required as deer is built differently to cows
- Lower yields compared to cows: Cows currently produce about 100 times the amount of milk as deer
- Time-consuming processing: to allow fats to properly emulsify, the milk has to sit, refrigerated, for at least 8 hours

Potential:

- Deer milk is a luxury and has potential to develop in the high-end market
- Desserts made with deer milk on the menu of some of New Zealand's top restaurants have won two awards for innovation
- Currently, there are talks with Australian chefs to expand and it's likely exports will be established



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World's first skincare range launched made from deer milk in New Zealand

Skin care products made from deer milk

- Deer milk contains a high fat content which benefits the cosmetic industry
- Adding value to deer milk rather than exporting raw ingredients is ideal to build up a new sustainable industry
- Kotia is first-to-market deer milk skin care product (Serum and moisturiser), which is being sold in South Korea by leading South Korean pharmaceutical company Yuhan since early 2019



Deer by-products such as antlers, tails, testicles and teeth are utilised in various ways

Tail, testicle, antler slices for soup

In Eastern/ Asian countries, antlers, tails, testicles and sinews are usually sliced and used as stew-type dishes or are mixed with other medicines. The testicles and the tails of male deer are said to possess qualities similar to those of antlers in velvet.



Canine teeth and antler for jewelry

The canine teeth of red deer have a limited market in Germany and Austria, where they are made into jewelry, such as cuff-links, brooches and earrings.



Antler handcraft designs

The antlers of various species of deer are manufactured into buttons, pipes, knife handles, letter openers and walking stick handles.



Deer leather is a niche and specialised market for high-end and premium end consumers

Finest English Deer Leather, ALC

- ALC Ltd has developed a range of technologically advanced leathers from farmed deerskins of domesticated red / sika crossed livestock targeting the premium/ high-end market
- Working with a range of suppliers, farmed skins of red deer from venison production are collected and processed into a range of luxurious leathers for: premium outer garments, leather goods, interior design etc.
- Product range include finished grain leather, dyed 'naked' crust leather, hunting suede, buckskin, hair-on skins



New Zealand Light Leathers Ltd

- New Zealand Light Leathers is world's only farmed deer leather specialist delivering luxury through intimate partnerships with the most prestigious international designers and fashion houses
- New Zealand Light Leathers is the luxury fashion division of Argent Group Europe, the United Kingdom's leading purveyor of fresh produce
- Their leather product range include Premium Deer Nappa, Washed Elite Nappa, Tipped Deer Nappa, Tipped Classic Deer Nappa, Marbled Deer Nappa, etc. and are used for luxury garment, accessory, shoes and bags



Appendix

Velvet antler is a popular product used in Chinese and South Korean medicine

Velvet antler is one of the most prized ingredients in traditional oriental medicines in both Korea and China. These countries are core market for New Zealand velvet. Korean buyers pay a premium price for NZ velvet, due to New Zealand's reputation for food safety and high-quality standards. From 2015-2020, the Deer Industry NZ (DINZ) will invest about \$500,000 a year in velvet market development. However, there are currently no market opportunities for velvet antlers in the UK.

Velvet usage



- People use deer velvet as medicine for a wide range of health problems
- Deer velvet contains multiple substances including the female sex hormones estrone and estradiol. It also contains substances which may help cells grow and function
- Velvet supplements aim to improve health and well-being, boost immunity, increase recovery after exercise, restoration of joint and muscle structure, reduction of inflammation and improves sexual health

Nutritec

Nutritec has become a world class exporter of deer antler velvet and are highly rated overseas. All farmed deer are grass fed, they only extract antlers once per year and they use the whole antlers for their product range.



Pure Deer Antler Velvet (60x500mg)
Price: \$59.95 NZD (£29.75)

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