

Ambition 2030



**A growth strategy
for farming,
fishing, food
and drink**

Scotland
A LAND OF
food and drink

The Scotland Food & Drink Partnership

SCOTLAND OF FOOD & DRINK



The Scotland Food & Drink Partnership brings together industry, government and its agencies working in the Scottish food and drink sector.



Scotland

A LAND OF
food and drink

It's 2030. Farming, fishing, food and drink is Scotland's most valuable industry, recognised at home and abroad as a model of collaboration and a world leader in responsible, profitable growth.

We are the Scotland Food & Drink Partnership and this is our shared vision for 2030.

Collectively, we are making a renewed commitment to work as one and grow the value and reputation of Scottish farming, fishing, food and drink.

This document represents an industry-led, ambitious strategy and will depend upon the commitment of the Partnership between industry, government and its agencies to succeed.

Our industry has achieved great things over the ten years since we formed our Partnership. However, the success in this sector

of which we are so proud is still a work in progress. Indeed, in a rapidly changing world, we will need to be more ambitious, innovative and collaborative than ever before.

Whether you are on a tractor or fishing boat, on the factory floor or around the boardroom table, we invite you to join us on this new journey. Collectively, we can make Scotland home to the world's most exciting food and drink industry. A £30 billion opportunity is there for the taking. This document sets out how we will grasp it.



Our 2030 vision

Farming, fishing, food and drink is Scotland's most valuable industry, recognised at home and abroad as a model of collaboration and a world leader in responsible, profitable growth.

That's our industry's vision, but what does it mean in practice?

It means that in Lerwick, London and Los Angeles, consumers will be seeking out Scottish seafood, red meat, dairy, fruit and vegetables, bakery products, whisky, gin, beer and other produce. It won't just be about taste and quality; they'll be buying into a wider story around Scotland as a Land of Food and Drink, around heritage, responsibility and people who care about their products, communities and customers.

It means across Scotland, groups of farmers, processors, buyers and researchers will be collaborating to make the most of their supply chains. High on the agenda will be innovation: perhaps workplace or process advances to improve efficiency, supply chain productivity or targeting of new markets.

It means that at your local college, university or secondary school, students will be discussing their career plans in farming, aquaculture, fishing, food and drink. Perhaps as food engineers or environmental scientists. Perhaps in management or as entrepreneurs making and selling Scottish products around the world.

It means that as an industry, we will be firmly committed to the wellbeing of the people we employ, the customers we serve and the communities and environment around us. This commitment to responsibility will pervade all our work and we'll be fiercely proud of it.

It means that Scotland will be one of the best places in the world to run a food and drink business and to attract and retain investment from home and abroad.

And it means that turnover in farming, fishing, food and drink will have doubled and hit £30 billion by 2030, thanks to the accelerated growth delivered by industry ambition and investment, collaboration, political will, streamlined and effective support and the skills of the workforce.

That target is ambitious, but firmly within our capabilities if we all pull together. This strategy sets out how we, as an industry, are going to get there, how far we've already come and what happens next.

Progress since 2007 shows the industry's capacity to innovate and grow. But we can't stop here. We must build on growth and set our ambitions even higher.

10 years of progress

Ten years on from the launch of the Scotland Food & Drink Partnership in 2007, the progress made in our sector has been impressive.

A decade ago, food and drink had a low profile in the Scottish economy, with growth in the industry flat. It has now emerged as one of Scotland's best performing domestic and fastest growing export sectors.

We're immensely proud of our sector and all we've achieved over the past decade. It's a strong platform from which we now drive on.

INDUSTRY TURNOVER
UP 44%
SINCE 2007 TO OVER £14 BILLION

EXPORTS
UP 56%
SINCE 2007 TO ALMOST £5.5 BILLION

SCOTTISH MANUFACTURING GROWTH RATE
TWICE
THE UK AVERAGE FOR FOOD AND DRINK

WHAT'S DRIVEN SUCCESS?

Collaboration

Collectively, we've promoted ourselves at home and abroad. We've shared progress and best practice, helping smaller businesses and start-ups achieve good survival and growth rates. We've brought sectors together to unlock new marketing opportunities and we've shown that the business next door is a partner rather than a competitor.

And over the past decade, the Scotland Food & Drink Partnership has operated as a unique model of collaboration between industry, government and its agencies, uniting all behind a joint mission to grow the value of the Scottish food and drink sector.

Hundreds of individual businesses have bought into this mission and joined the journey.

Collaboration has allowed us to do things that we didn't imagine possible ten years ago when we were working in silos. So much so that other sectors and nations are now looking at how we collaborate and are wondering what they can learn from us.

Reputation

Over the past decade, it has been increasingly clear that our reputation is our strongest asset. It sets us apart from any competition, anywhere.

Our brand has been underpinned by our focus on provenance and quality.

We've raised the industry's profile and enhanced its reputation in the eyes of our customers and decision-makers at home and abroad.

Diversity

Many nations of our size focus on one or two sectors in food and drink. We have strengths in many. We're blessed with a diverse natural larder and a diverse business base.

This diversity creates more possibilities for collaboration, cranking up the gears in terms of growth and profitability. It means we have a phenomenal product offering for our customers. Diversity is our strength.

Continuing challenges

In some areas, our work over the past decade has further to go:

- We need more people to regard farming, fishing, food and drink as their career of choice and we must ensure a clear and high quality career path for them.
- Success and growth must translate into greater profitability at the farmgate and on the fishing boat.
- The industry must deepen collaboration along the whole supply chain from end to end.
- We must ensure our industry and world-class research base make best use of each other.
- Greater collaboration with sectors such as tourism, textiles and life sciences can enhance our collective reputation, sales and profitability.
- We can do more by working in collaboration across industry and government to support improvements in diet and nutrition.
- We must diversify our markets and our customer base as this will support resilience in the sector.
- We must drive forward our sustainability credentials.
- Sources of support must be easier to identify and to access.

Our 2030 strategy will unlock this potential, but we must focus outwards as well as inwards, using research and intelligence to be alert to the progress of competitors and the preferences of consumers. We must be agile to flourish in a fast-changing world.

Competition and change mean we stand still at our peril. We need to build on what we do well, unlock new potential, raise our ambitions and press fast forward.

What lies ahead

TRENDS

New demographics, new technologies and new lifestyle trends will profoundly impact the opportunities and challenges for Scottish food and drink businesses. What works today may not work tomorrow.

More importantly, there will be new markets, new ways of selling and new opportunities that don't exist today.

DEALING WITH CHANGE

Political upheavals, like Brexit, bring uncertainty. They always do. But we can't sit back and wait for calmer waters. Our competitors won't do that. There is much in our world that we can't control, but also much that we can. The key is to plan around what we do know, what we can control, to remain agile.

FORECASTING THE FUTURE: A HIGH-RISK GAME?

It's impossible to predict what life will look like in 2030. But what we do know is that change happens and has always happened. Here are trends we have identified which will shape our work over the coming years.

For businesses and sectors that are resilient, agile and progressive, each change and trend offers new ways to grow.

Our challenge now is to embrace this change, identify emerging opportunities and transform our sector.

So, what are the key market and consumer trends relevant to Scottish farming, fishing, food and drink businesses?

01.

DEMOGRAPHICS

In 2030, it is estimated there will be 1.2 billion more people than today. And the number of over 65s will double in 30 years.

04.

WELLBEING

A healthy and happy mind in a healthy body – consumers will take control of their lives through food choices, personalised diets and a focus on nutrition.

02.

URBANISATION

By 2030, it is estimated that 60% of the world's population will be urban. As people cram into smaller living spaces, pre-prepared food and eating out may be the norm. Wealth concentration creates new market options.

05.

TECHNOLOGY

Agri-bots and farm drones. Sci-fi? No, these are real-life developments and opportunities. And whether you call it resource efficiency or the circular economy, we'll need to do more with less, through technological advancements.

03.

CHANGING BEHAVIOURS

The twenty-first century consumer buys online, adapts to new social media and wants experiences around food and drink consumption.

06.

CONSUMER CONSCIENCE

Consumers will show increasing interest in a broader story around their food and drink choices, both social and environmental.

The road to 2030

It's clear there are many things in the world we can't control – from political upheavals to weather. But there are also things we can control; how we understand the world, how we develop our brand, the markets we sell to and how we do business, how we invest in people, how we develop supply chains and how we innovate.

To set a path to where we want to be in 2030, we commissioned research on global trends and Scotland's key markets and talked with over 400 businesses in the sector.

We heard from farmers, multinationals and micro-businesses, global names in whisky and tech-based start-ups. We took on board their ambitions, frustrations, wish-lists and insights.

From this extensive research, we've put together a strategy for the farming, fishing, food and drink sector to achieve our 2030 vision;

Farming, fishing, food and drink is Scotland's most valuable industry, recognised at home and abroad as a model of collaboration and a world leader in responsible, profitable growth.

A SHARPER FOCUS

In pursuit of accelerated growth, the 2030 strategy gives farming, fishing, food and drink a stronger ambition and clearer direction than ever before. It set outs:

- How we develop our three main markets: here in Scotland, the rest of the UK and abroad.
- Three key pillars on which we build our future: people and skills, supply chain and innovation.
- Three ways of doing business that will help us – and our people, communities and customers – to prosper: being collaborative, being responsible and being streamlined.

In each of our markets and pillars, we will set out our ambition, what kind of actions we could undertake and what success might look like.



To achieve our 2030 vision and unlock our £30 billion potential will require huge ambition, commitment and investment from both industry and government.

AMBITION 2030

Driven by our previous strategy, launched in 2007, turnover in food and drink has risen by 44% to over £14 billion.

But this was a game of two halves: an initial period of rapid growth slowed as global economic headwinds hit.

Our ambition is to build momentum and make our reputation and brand stronger and richer than ever before. This is a statement of our ambition and reflects our belief in the potential of our sector. The prize is the doubling of annual turnover to reach our £30 billion potential in 2030.

How will we measure success?

- Contribution of food and drink to the Scottish economy
- Performance versus international competitors and other industries
- Business confidence and investment (actual and planned)
- Profitability

The Scottish brand in 2030

WHAT SUCCESS LOOKS LIKE:

It's 2030 and Scotland is famous as a Land of Food and Drink. We are known not just for our diversity of world-class products but as champions of responsible and sustainable production.

Our brand – around people, products and places – is already powerful. Now we will enrich it.

In developing the 'Scotland, A Land of Food and Drink' brand we have showcased our talented people, world-class products and iconic landscapes synonymous with heritage, tradition and our natural larder. We will continue to build this element of the brand and project it to our existing and emerging markets.

We will develop our brand values around responsibility and trust. This goes much deeper than marketing – it's about a renewed commitment to, and defining a culture around, our stewardship of the environment and resource management, our investment in the workforce and our ability and willingness to contribute to the wellbeing of our nation.

The benefits

Businesses of all sizes and in all key markets will benefit from an enhanced Scottish food and drink brand to create trust, build emotional connections with customers and consumers, raise expectations of quality and strengthen loyalty.

MY 2030

"I'm proud of Scottish food. It's good quality, healthy and there are some great new products out there. And what do I want for 2030? More celebration of Scottish food and drink and more of it on the shelves or on the menu – whether I'm in a local shop or a pub up north."

Jennifer Stewart, Scottish shopper



MY 2030

"Scotland is a trustworthy partner to London. All the suppliers I work with have something in common – quality products made in their own time. London has always had strong ties with Scotland and our influence can be seen all over the city from the names of the streets to the beef, seafood, venison and more that flood the restaurants."

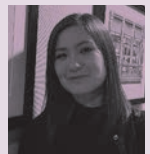
Andy Waugh, Mac & Wild, London chef



MY 2030

"Scotland has good brand strengths of premium and heritage and I believe our customers will actively seek out Scottish products because of this. Going forward to 2030, I think there is scope for retailers to enhance and showcase Scottish food and drink further and doing so will maximise sales potential for both parties."

Rewadee Anujapad, Dean & DeLuca, US Retailer



Market growth to 2030

Profitable growth will come from understanding each market and how to sell into it. Who buys Scottish food and drink and why? Who are the competition? How do we beat them?

As a small nation, we don't have the raw materials or resources to sell everything, everywhere.

But with better use of intelligence and insights, and adaptable approaches, we can target our efforts and resources better, boost growth and realise our ambitions.

In exports, we've already shown how a focused approach and smart use of market intelligence and resources can grow sales. We will apply this more widely to achieve significant market growth, drawing out consumer and market intelligence to identify the best opportunities in all our key markets.

Our research into opportunities, barriers and consumer preferences means we are adopting a tailored approach to our three key markets for food and drink.

Ideas for action: how can we press fast forward in our markets?

Scotland

- Create regional showcase events for connecting suppliers with buyers
- A National Food Tourism Plan

Rest of UK

- Create a food and drink resource in London as part of a new London Hub
- Create joint posts with major retailers and foodservice companies

International

- Create showcasing events in major international cities
- Develop inward missions for buyers and key influencers

How will we measure success?

- Growth of food and drink in Scotland versus rest of UK
- Visitor spend on food and drink
- Growth in each of our three markets (volume and value)

SCOTLAND

Focus on Scottish consumers and visitors to Scotland

We know that pride in Scottish food and drink is flourishing.

Scottish shoppers in retail are looking for local produce and provenance is more celebrated in foodservice.

We can build on these growth opportunities and develop local food and drink networks.

There's also potential to work more closely with our exciting tourism sector to unlock growth. We know that every visitor to Scotland will eat and drink and there's growing interest in local and authentic food and drink experiences.

This, as well as embracing Scottish produce in our schools and hospitals, will help us to become a Good Food Nation.

REST OF THE UK

Growing in the biggest market on our doorstep

With a strong foundation in Scotland and the growing reputation of Scotland as a Land of Food and Drink, businesses can look further afield.

Through working with major retailers, wholesalers and foodservice sectors, there's an opportunity to open new doors in the rest of the UK.

In particular, we will develop our presence in the London market – not only does it have over eight million consumers, it can be a gateway to the wider home and abroad market. As we have successfully done with exports, we can use insights and intelligence to identify and focus on key opportunities.

INTERNATIONAL

Premium products for premium markets

Over the past few years Scotland has invested in a collective Export Plan to help Scottish businesses to grow internationally, focusing on lucrative opportunities in premium retail and foodservice.

The whisky sector has already shown the way on export success – 40 bottles of whisky are exported every single second. Our food exports have increased 111% since 2007 to almost £1.5 billion with salmon and seafood leading the way.

We will learn from their approaches and refine the existing Scotland Food & Drink Export Plan to help other food and drink sectors export a broader range of products to a broader range of markets. We will build Scotland's international reputation as a Land of Food and Drink and getting this right will achieve significant export growth and double food exports by 2030.



MY 2030

“Summer Harvest has been working with the Scottish restaurant scene for years and together we have shown local diners and visitors what we have to offer, but there is always room to do more. If the supply chain works better with the Scottish tourism sector, we could open up a wealth of opportunities for producers like Summer Harvest and we could really show visitors to Scotland how amazing our produce really is.”

Mark Bush, Summer Harvest Oils



MY 2030

“The exporting support we currently receive – contacts in key markets, events which showcase Scotland’s food and drink and market insight – have informed our export strategy and has led us to success. Our priority for 2030 will be to build upon this success by accessing support to help us find new and emerging markets.”

Iain Weir, Ian Macleod Distillers



MY 2030

“We have been selling our products outside of Scotland for over ten years. It is an important market for our business with sales to the Rest of the UK doubling to 20% of our turnover in the last three years. Furthermore, the UK has the second largest dairy trade deficit in the world providing us with a massive opportunity for continued growth.”

Robert Graham, Graham’s The Family Dairy



MY 2030

“Exports will be even more important to SMEs in the future. MIS-CES are working in collaboration with some of Scotland’s best brands and this provides us with a fantastic opportunity to grow the value and volume of exports for these Scottish businesses.”

Alastair Dobson, Made in Scotland - Collaborative Export Solutions (MIS-CES)





The pillars of growth:

1. People and skills

WHAT SUCCESS LOOKS LIKE:

It's 2030 and farming, fishing, food and drink is the destination of first choice for workers. They recognise the industry as Scotland's most successful and the one most committed to developing its people.

Farming, fishing, food and drink employ around 119,000 people in Scotland. With around 27,000 new job opportunities emerging in the next ten years alone, we need a queue of enthusiastic new entrants and we want them to be the very best we can get – enterprising, adaptable, ambitious and diverse.

We must ensure all parts of the industry have the business leadership skills they'll need to thrive all the way up to 2030.

With both new and existing talent, we want people who are skilled but also open to learning – able to use intelligence, best practice or innovation to improve what they do.

Central to this is engaging with schools, colleges, further and higher education establishments, universities, training providers, skills bodies and employers.

We must continually identify and invest in the skills we want in this sector in order to prosper. We must develop clear progression pathways at all levels for people who want to make their career in our industry.

As well as attracting people to the sector, we must keep them here, supercharged and at the top of their game. We'll do this by rewarding them, investing in them, being responsible employers and making this a career destination of choice.

Ideas for action: how can we press fast forward with our people and skills?

- Coherent and joined-up education programme
- Develop a new national industry recruitment campaign
- Nationwide mentoring programme

How will we measure success?

- New entrant rates (including graduates) and retention rates
- Diversity of workforce, including age and gender

"I feel totally justified in choosing food and drink for my future career. We have high standards in production and environment – something I'm passionate about. I'm working in a Scottish industry that exports worldwide and there's excellent training and career progression. My goal for 2030 is to inspire other people to come into the sector."

Siobhan Macleod, employee, WooHa Brewing



MY 2030

"As we look towards 2030, we know there will be skills gaps as the world changes and exciting new roles emerge. Individual businesses can make a difference here. We can help draw young people into the sector through things that are easy to do – training, apprenticeships, internships and treating people well. And we should also talk up the sector – people don't always appreciate what a range of amazing careers are involved."

Heather MacDonald, employer, WooHa Brewing



The pillars of growth:

2. Supply chain

WHAT SUCCESS LOOKS LIKE:

It's 2030 and supply chain relationships are transformed. Farming and fishing businesses, manufacturers and buyers view each other as partners; collectively they drive profitable and more equitable growth in markets both new and long-established.

Industry research shows us that supply chains should be better connected. In particular, between the primary and processing sectors and with deeper, mutually beneficial and profitable supply chains that stretch from farm to fork and sea to shelf.

Through sharing knowledge and translating research into practical actions, supply chain efficiency will be improved and added value unlocked. We'll stay ahead of competitors and release even more value from our industry.

Progressive supply chains with a culture of trust, shared responsibility and innovation will feed into a greater understanding of what the end-customer wants and translate into higher productivity, equitable growth and better margins.

MY 2030

"Farmers, growers and crofters don't feel that they have benefited from the huge growth that has taken place in the food and drink industry. We are the start of the quality and provenance story. My wish for farming to 2030 is that all the supply chain shares in the risks and rewards and that together we are collaborating to make the farming, food and drink industry a profitable success."

Andrew McCormick, NFU Scotland President



Ideas for action: how can we press fast forward with supply chains?

- Launch next generation of support to transform market-driven supply chain development
- Undertake a logistics review for transporting goods to and from Scotland
- Explore the feasibility of a Scottish e-commerce platform

How will we measure success?

- Net farm income/profitability versus competition
- Number of producers involved in producer groups/co-operatives
- Productivity and increased margins

MY 2030

"Working with fresh produce, the availability of product is a challenging business, especially when the weather can change our plans. We prioritise forecasting crop availability, weather analysis and factory capacity planning, in tandem with our end-customers' estimated demand to seamlessly supply the best quality, every day. We work directly with our growers in our fields, through to our customers at their offices, to ensure our data and forecasting are as robust as possible."

Chris Orr, Kettle Produce



MY 2030

"The ability for us to anticipate the next big food or drink products that meets customer demand is key for us. If the whole supply chain can work together on this, using intelligence converted into successful products, it will create a relationship of trust and will be win-win for us all."

Marion McCormick, Aldi







The pillars of growth:

3. Innovation

WHAT SUCCESS LOOKS LIKE:

It's 2030 and innovation is culturally embedded in our farming, fishing, food and drink sector. The pace of change in technology, markets, consumers and supply chain is rivalled only by our sector's ability to adapt to the new opportunities this creates.

The phone, the bike, golf, radar, TV – innovation has long fuelled Scotland's reputation, growth, productivity and prosperity. We must sustain this tradition. To compete with the best, we must innovate with the best.

Food and drink producers and manufacturers in Scotland have a world-class research base on their doorstep and many of them already use it very fruitfully. But for innovation to be a pillar of growth across the entire sector, we must create a renewed culture of relentless innovation and we must make it easier for all businesses to innovate and to profit from innovative approaches.

What do we mean by innovation?

Product development is the highest-profile form of innovation in our sector, but innovation extends way beyond that to include:

- New or improved processes or technologies along the supply chain making businesses more resource-efficient, profitable, productive and sustainable
- New routes to customers or using data and intelligence along the supply chain to boost sales
- Improved management models or ways of thinking

Ideas for action: how can we press fast forward in innovation?

- Launch a single gateway where businesses can access help and support
- Collaboration between City Deals and their wider investment in innovation
- Raise profile of industry with investors and ensure the right investment is attracted into the sector

How will we measure success?

- New products and processes brought to market
- Business start-ups and survival rates
- Investment in process improvement and innovation, including R&D

"For innovation to flourish in Scotland, we have to encourage more efficient collaboration between research centres, academia and business – it's a two-way process. Unlocking the young talent and fresh ideas and allowing them to support individual businesses across the country will lead to vital commercialisation of the science that drives innovation. Macphie has explored some ground-breaking concepts in partnership with universities, from using ultrasound in food production to sourcing natural emulsifiers."

Alastair Macphie, Macphie



MY 2030

"Innovation is a key ingredient in growing the food and drink industry and ensuring its competitiveness both through meeting the demands of an increasingly knowledgeable consumer while improving efficiencies along the supply chain. Scotland's world-leading academics can help to support and deliver industry growth and sustainability to 2030 and beyond."

Howell Davies, Interface



What we stand for

We know that certain ways of working will fuel our growth. We have learnt this from the last decade of progress in farming, fishing, food and drink, through conversations with our industry and through research.

These ways of working are not targets, but a set of behaviours, a culture that will define us over the next decade and beyond.

BEING COLLABORATIVE

Collaboration has driven growth. It has been our most important ingredient to date.

It has been evident, between the industry, different trade organisations, government and its agencies and amongst individual businesses themselves. However, we must now deepen this way of working.

Farming, fishing, food and drink must link with other sectors, such as tourism, to fuel sales and grow our collective reputations. Different parts of the supply chain must share intelligence more effectively. Categories need to work with other categories – red meat and bakery or seafood and craft beer – to drive profitable growth. And we must continually look at home and abroad to identify new collaboration opportunities.

Other countries now consider Scotland a role model in collaboration, but we mustn't sit back. It must now define our food and drink community in the coming years.

BEING RESPONSIBLE

“When I buy Scottish products, I know they are produced responsibly, by an industry that operates to world-class standards and enhances its people, environment and communities.”

If this is what our consumers are saying in 2030, we will be where we want to be.

Responsibility can take many forms, from animal welfare to reducing waste. From being good employers to supporting our wider communities. From ethical trading to supporting consumers in their efforts to live healthier lifestyles. From going 'beyond compliance' to recognising the need to do



more with less, reducing our environmental impact and being ready for challenges around food waste, climate change and biodiversity.

The Scottish brand can thrive on being associated with responsibility, giving businesses a head start in markets around the world. However, more than all this, making a new commitment to enhance Scotland's countryside and seas, its communities and the wellbeing of its individuals just makes good business sense and underpins our future.

BEING STREAMLINED

Over the past decade, the support available to farming, fishing, food and drink businesses has multiplied. Collaboration has been a strong catalyst in our success to date, but with growth comes complexity.

Industry bodies, government and their agencies will continue to collaborate in order to streamline their support and simplify the journey for businesses.

This will make it easier and more straightforward than ever for businesses of all sizes to access the right advice and support in the right form at the right time.

We have set out an ambitious vision for where we want our food and drink industry to be in 2030



NOW THE REAL WORK STARTS

We'll roll up our sleeves and work collaboratively as partners across industry and the public sector. We'll define the actions that will make a difference and the resources required to make it happen. And we'll need the support of all those who work in – and with – our sector.

There will be bumps in the road, there always are. It is an unpredictable world, so we'll have to be agile in our planning, adapting to change along the way.

We will be relentless in seeking to make Scotland home to the world's most exciting food and drink industry, a model of responsible, profitable growth.

With a £30 billion prize to aim for, we must never forget that our uniquely collaborative approach has got us to where we are now. And it will be the catalyst for the next stage of our exciting journey.

Let's get to work!

A handwritten signature in black ink, appearing to be 'J Withers', written in a cursive style.

James Withers
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