



Delivered by
**Scotland Food & Drink
Partnership**

Venison category performance

Total GB and Scotland

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22 June 2021

Venison category performance

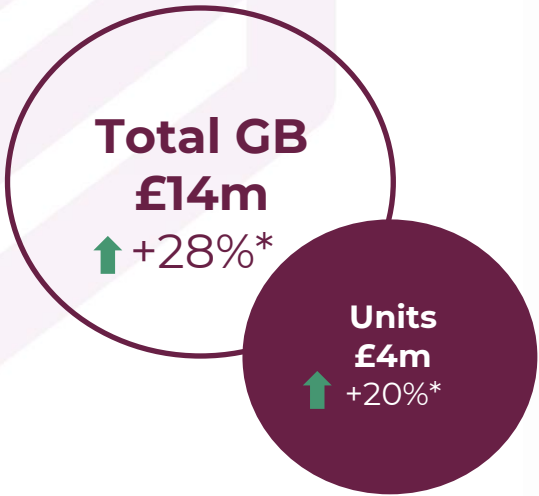
Total GB and Scotland



In GB, venison category is worth £14m with 4m units sold

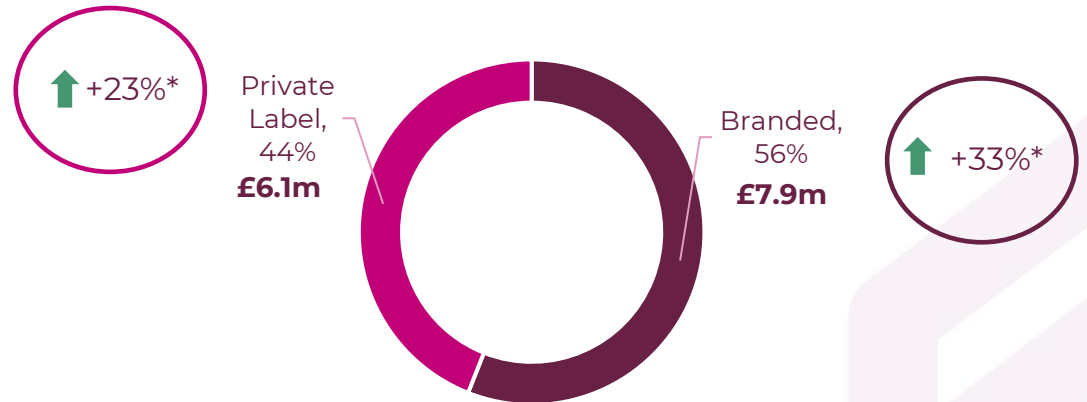
Scotland contributes 21% to category's value, which slightly lower vs London value sales (£3.3m)

Venison category: Performance Overview 52 wks w/e 08 May 2021



London	£3.3m
South and South East	£1.53m

Branded vs private label (in £%)



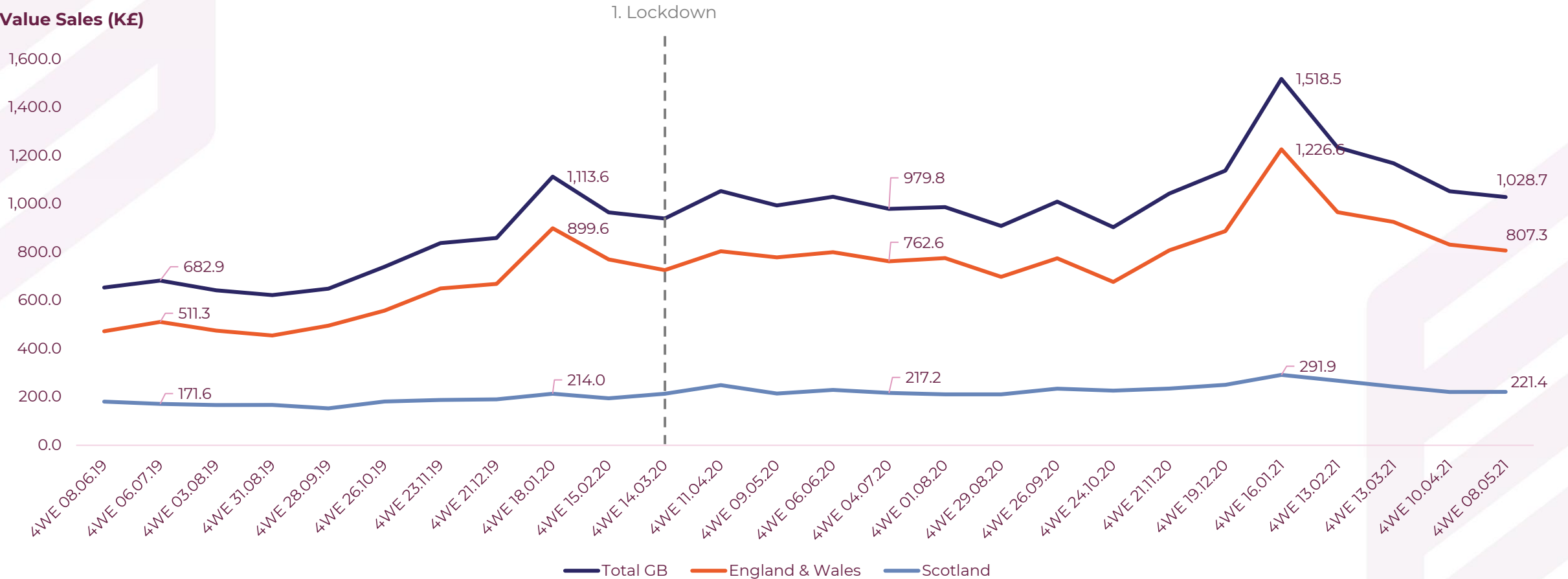
Venison sales are slightly dominated by brands (56%). However, private label accounts for £6.1m of category's value growing by +23% YoY.

Venison sales face seasonal fluctuations throughout the year with its peak during Christmas

Lockdown has had a positive effect on venison sales in retail

Venison category: Latest 26 4 week sales w/e 8 May 2021 (in £)

Value Sales (K£)



Venison category performance

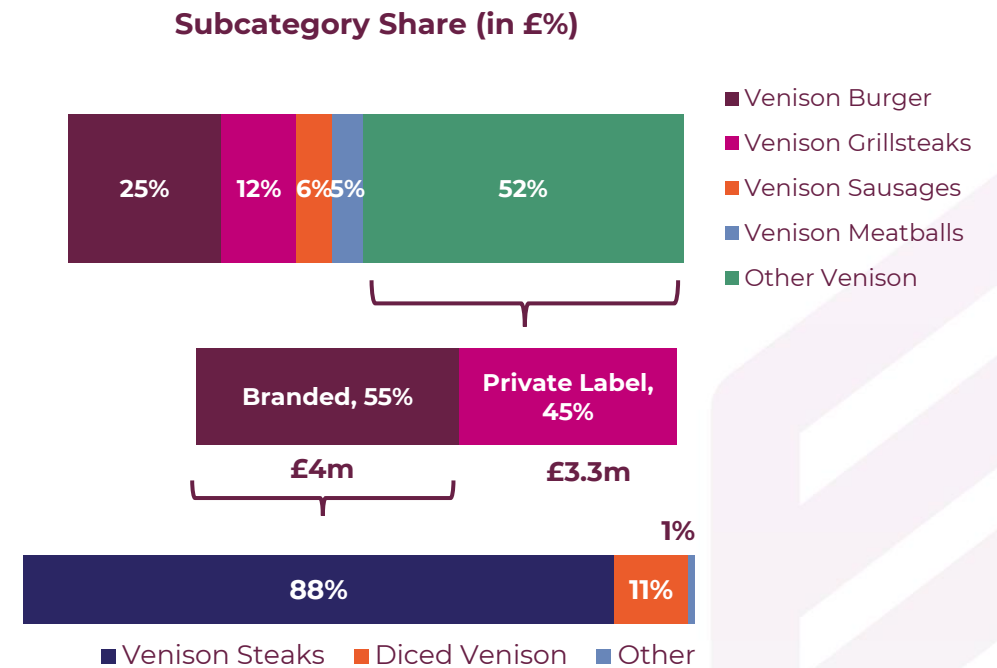
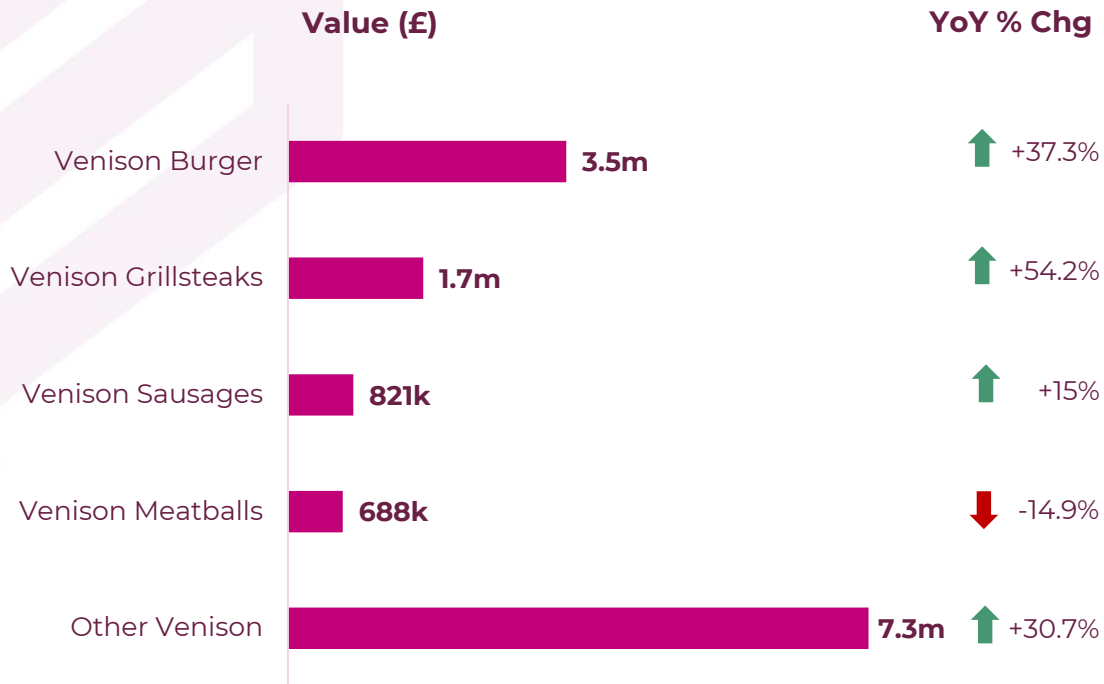
Total GB



In GB, venison burgers accounts for 25% of category's value and is worth £3.5m

All venison subcategories have increased in sales in the last year except for meatballs (-15%YoY)

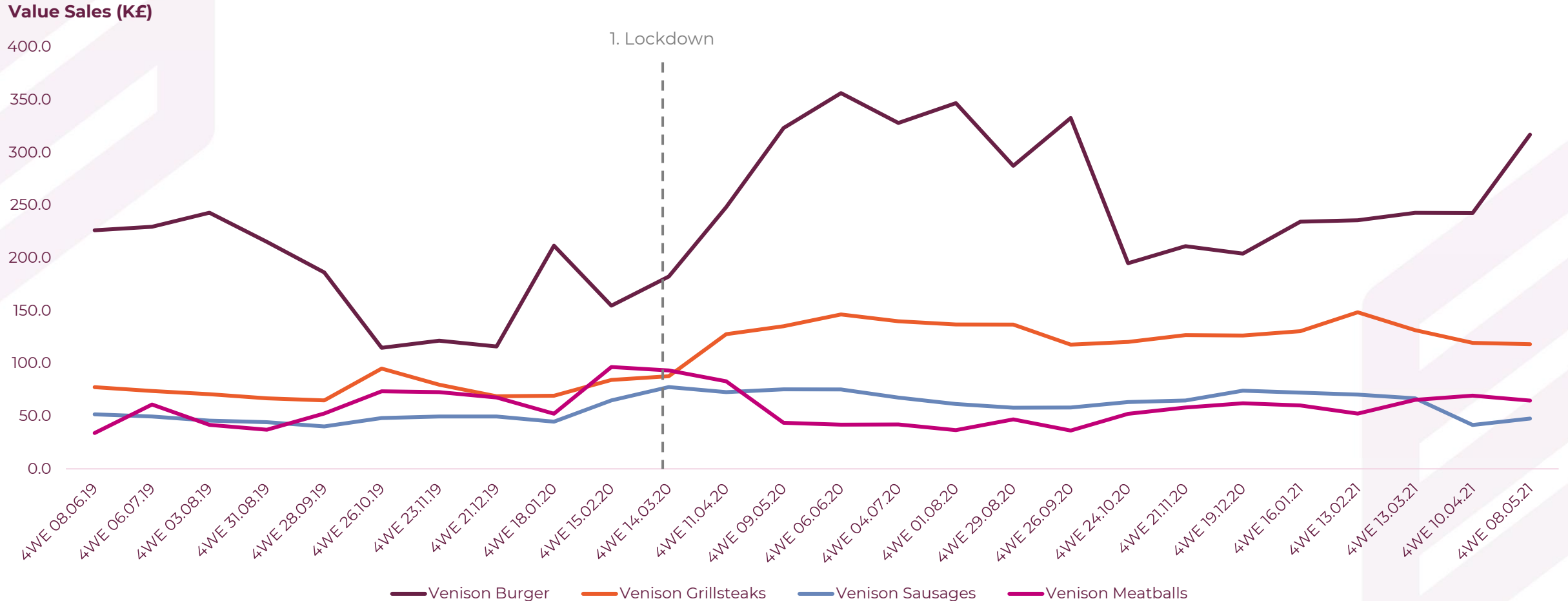
Venison category: Subcategory performance



Venison burger sales are driven by the barbecue season in summer

Venison sausages sales remain relatively flat throughout the year

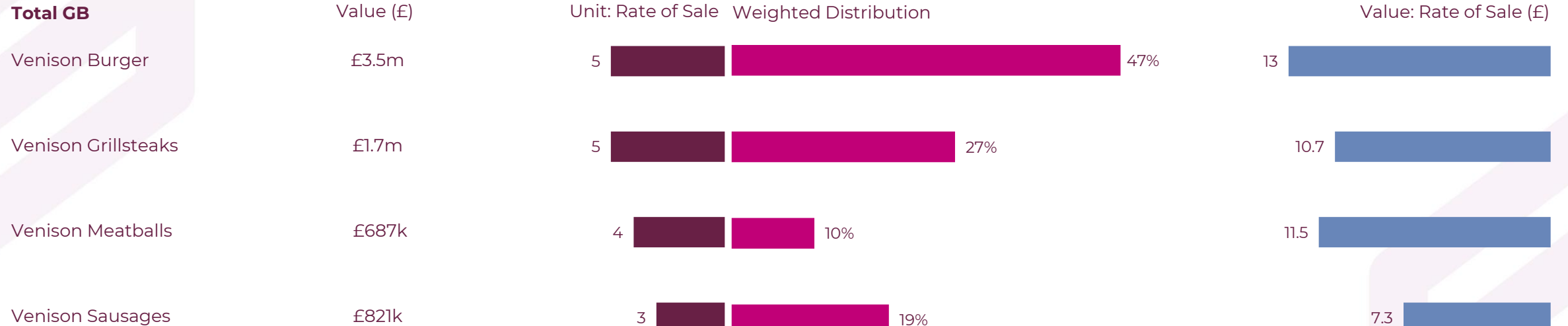
Venison category: Latest 26 4 week sales w/e 08 May 2021 (in £)



Venison burgers and grillsteaks are the best performers with the highest weekly RoS

Meatballs perform better than sausages but have a lower distribution

Venison category: Rate of Sale and Weighted Distribution



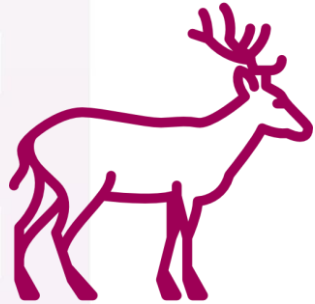
Grillsteaks have the same RoS as burgers but lower distribution. On average, meatballs perform better in an average sized store compared to sausages and would improve sales if they were to be stocked in more stores. Increasing distribution for grillsteaks and meatballs could help increase sales within the category.

Venison category performance

Scotland



The availability of buying locally sourced game is important to Scottish shoppers



12%

of Scottish population have bought game in the last year, equivalent to 554,000 Scottish shoppers.



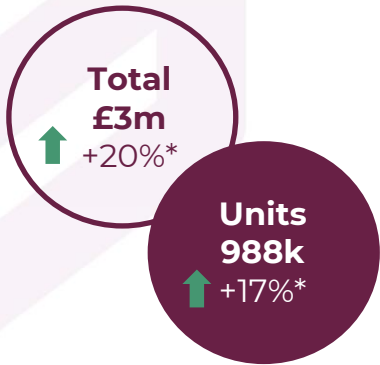
78%

of Scottish shoppers, who buy game, believe it is important to buy locally sourced game, equivalent to 426,000 shoppers.

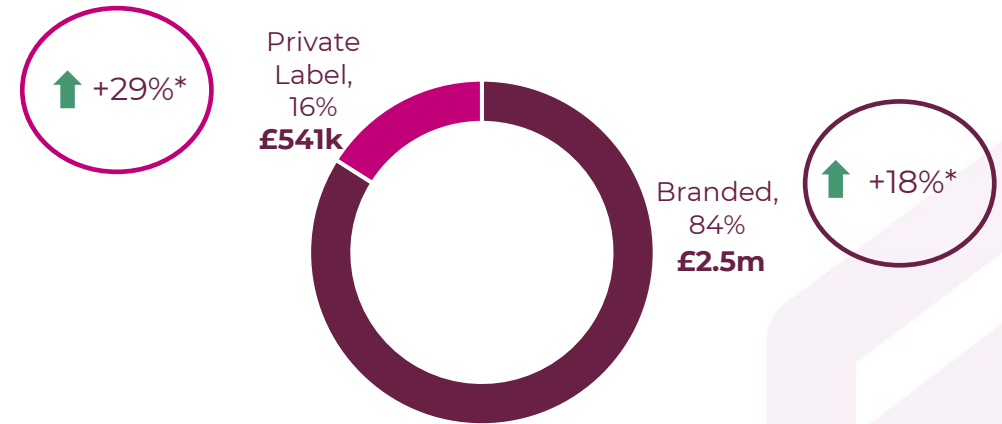
In Scotland, the venison category is worth £3m with 988k units sold

Central Scotland accounts for 63% of the sales

Venison category: Performance Overview 52 wks w/e 08 May 2021



Branded vs private label (in £%)

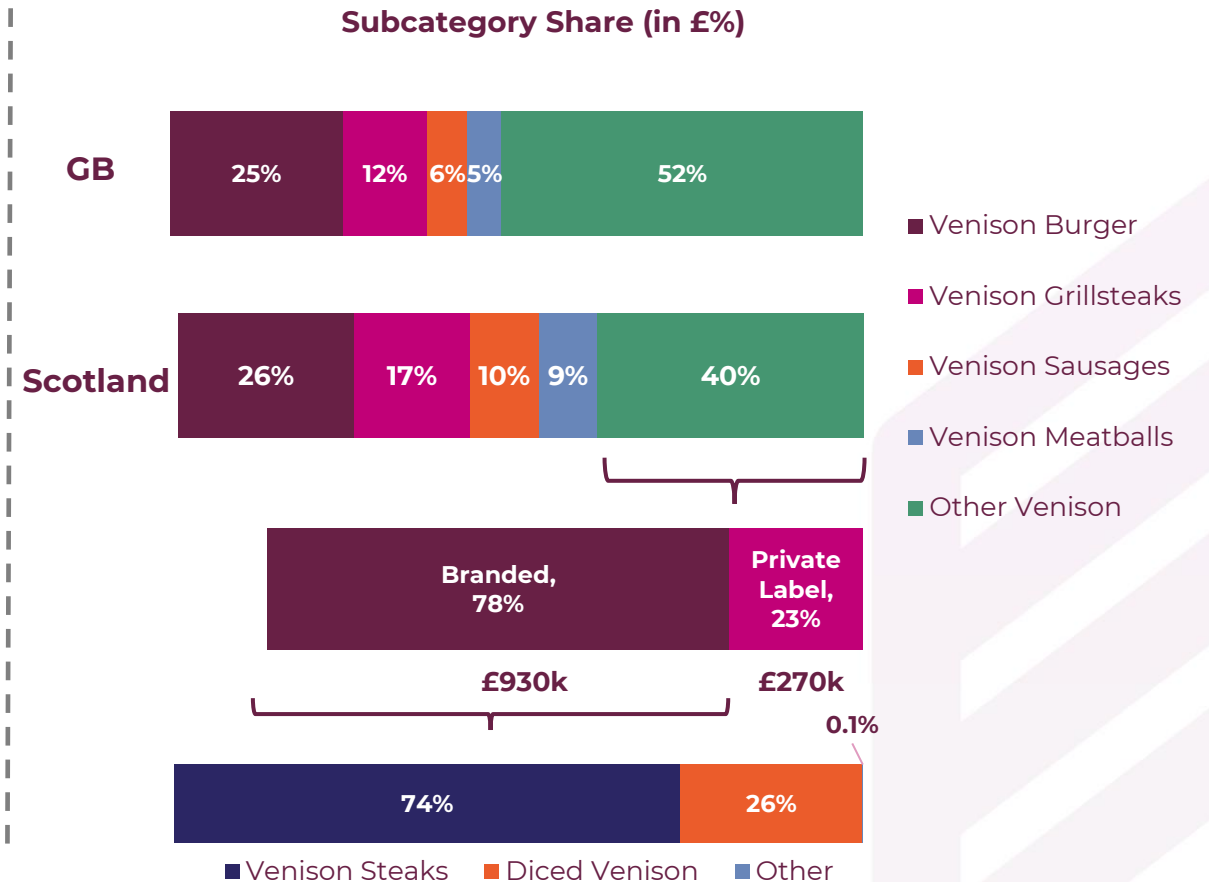
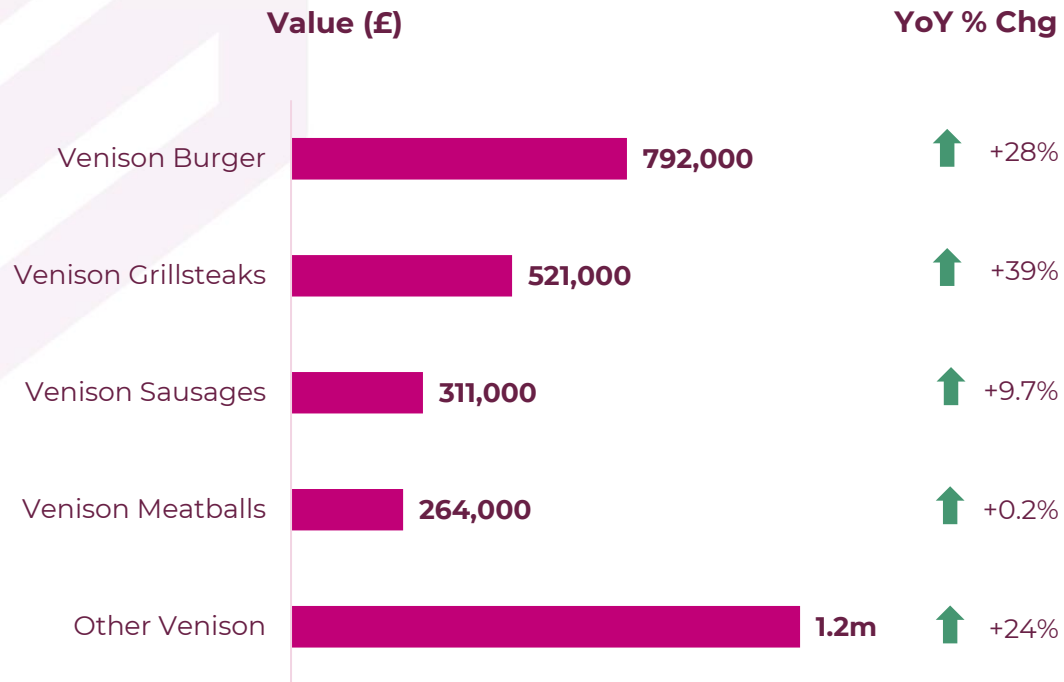


In Scotland, venison sales are dominated by brands (84%). However, private label has grown by +29% YoY.

In Scotland, venison burger and grillsteaks account for 43% of category's value

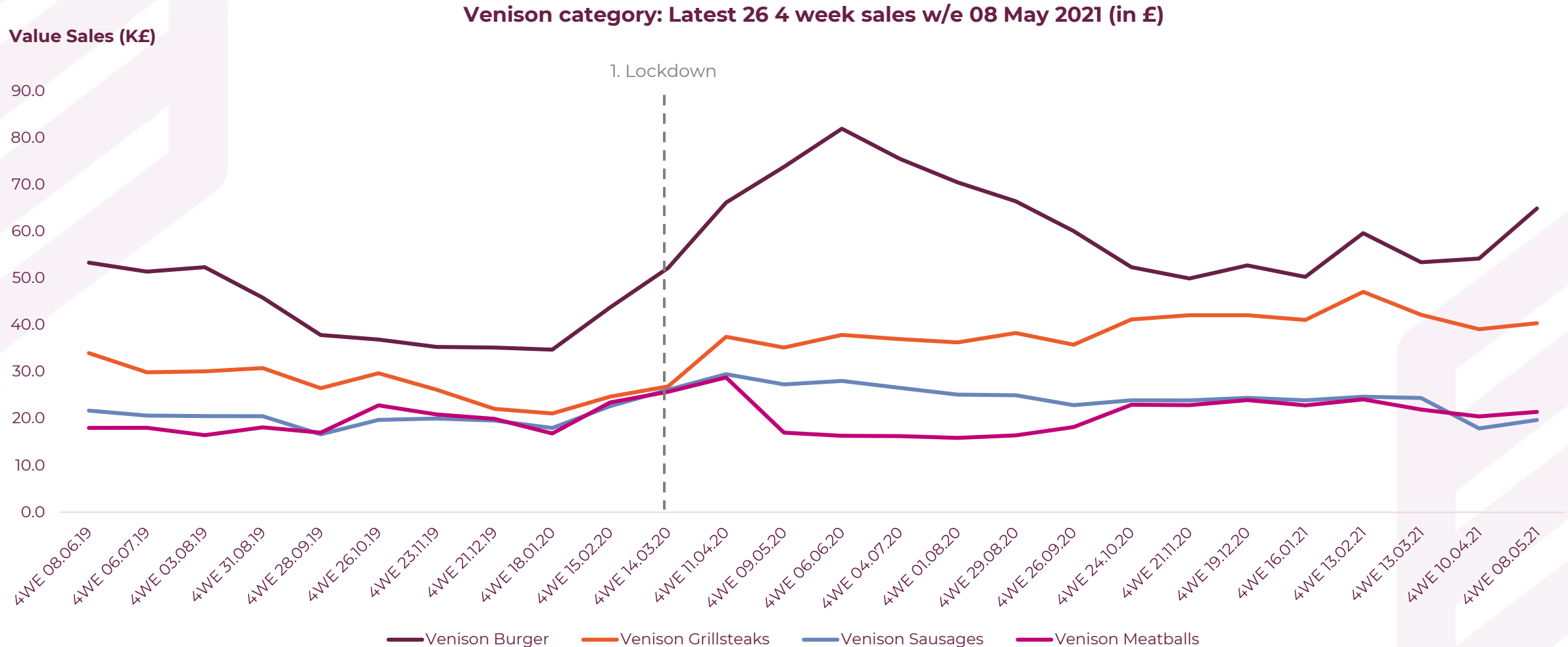
Venison sausages and meatballs play a bigger role in Scotland compared total GB

Venison category: Subcategory performance



In Scotland, venison burgers had a seasonal peak in the summer

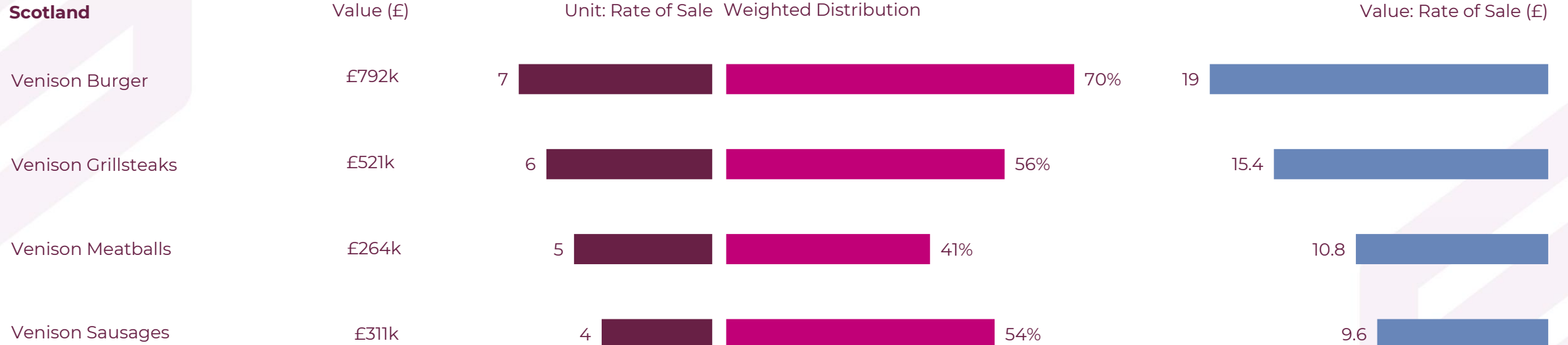
Grillsteaks have seen an increase in sales since lockdown began



In Scotland, venison burgers are the category leader with highest weekly RoS and distribution

Sausages have the lowest weekly RoS but high distribution

Venison category: Some Key Performance Indicator



On average, grillsteaks and meatballs perform better in an averaged sized store compared to sausages and would improve sales if they were to be stocked in more stores. Increasing distribution for grillsteaks and meatballs could help increase sales within the category.

Venison category performance

Key Findings



Key Findings

Findings

Strong performance within the venison category over the last few years. In GB, the venison category has grown by 28% in the last year and is currently worth £14m with 4m units sold. Scotland contributes 21% to category's value, accounting for £3m and 988k unit sales.

Venison sales face seasonal fluctuations throughout the year with its peak during summer and the festive season.

In GB and Scotland, venison burgers, steaks and grillsteaks are most popular within the category and have outperformed category's growth in the last year. A greater consumer demand (Rate of Sale) and increased distribution have been key drivers for success within the category.



So what?

The growth of venison sales during the pandemic is likely due to lockdown restrictions with hospitality being closed, causing consumers to cook more at home and to treat themselves. Venison sales should be monitored throughout the hospitality re-opening phase. Overall, a positive story for the category.

Marketing campaigns relating to summer/bbq season as well as winter/festive season could help boost sales and add to category's growth.

Encouraging businesses to act on improved consumer demand by having discussions with Retail buyers to expand shelf space and distribution channels to lead to greater sales for the category.

THE KNOWLEDGE BANK

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**Scotland Food & Drink
Partnership**

**“The Knowledge Bank is a comprehensive source of insight for
Scottish food and drink companies of all shapes and sizes.”**

Scotland Food & Drink Partnership

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