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## United Kingdom

### Product Brief

### Exotic and Specialty Meats

**2001**

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#### Report Highlights:

**The market saw good growth in the post-BSE 90's, but remains comparatively small. Consumer traceability concerns and distribution problems hampered market growth in multiple retailers. However, the outlook is favorable. Sales through independents continue to grow, and further market growth is forecast. The convenience food sector represents opportunities for new product development, while use of exotic and specialty meats in the food service sector will mainly come from the gourmet catering trade.**

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## **Executive Summary**

The UK market for exotic and specialty meats and meat products remains comparatively small. Game and exotic meats have an image as premium priced, gourmet products and use by the catering sector remains relatively exclusive, and outside of the well-off proportion of the population, few seem to have tried exotic and specialty meats. However, British consumers are increasingly adventurous and open to new types of meat which comply with their concerns about healthy eating and lifestyle, and therefore, steady market growth is realistic. Increasing disposable income should prompt demand, whilst there remains scope to supply meat cuts and products more specifically aimed at the convenience sector.

UK production of game and specialty meats is limited, with a reliance on hunted quarry for supply of game. Of the commercially farmed meats, venison and boar both remain on a small, yet steady scale, while ostrich producer numbers have declined sharply in recent years due to oversupply and high costs of production.

The game and specialty meat market saw good growth in the post-BSE 90's . However this growth was hampered by distribution problems in the multiple sector and traceability concerns. Despite this, the UK market is forecast to be worth BPS 37 (US \$53) million in 2001 and opportunities remain in the multiple sector for niche US meat products offering a regular, traceable and high quality product.

## SECTION I - Market Overview

### Production

The exotic and specialty meat market incorporates a range of different meats. Exotic meats were introduced from outside the UK, and include ostrich, crocodile, bison and kangaroo. Specialty meats consist of both farmed and hunted game, and include pheasant, partridge, venison, boar and rabbit. The supply of specialty meats can be seasonal, especially where hunted quarry forms the bulk of market stocks.

Although on a limited scale, some exotic and specialty meats are farmed commercially in the UK.

- **Venison**

This is still a relatively new industry in the UK, with red deer favored by most producers due to its larger carcass size. However, venison production appears to have faded from the livestock industry in recent years, having experienced a surge in demand during the BSE crisis. The 1998 MAFF census indicated that there were 311 holdings involved in deer production in the UK, and numbers are expected to have changed little since then. The UK produces approximately 600 tonnes of venison from 9,000 head of deer for slaughter each year. Industry commentators suggest that growth has been restricted by the lack of institutional support for deer production in comparison to other livestock sectors. As consumer concerns about traceability and production standards have grown, the industry has developed a quality mark. The Quality Assured Farmed Venison Scheme is independently inspected and provides a benchmark standard for farmers and processors. The mark differentiates farmed venison from wild venison, and goes some way to alleviating retailer concerns over traceability.

The UK remains a net importer of venison. An estimated 300 tonnes are imported each year, with most arriving from New Zealand, and a little from Ireland. Although there are no significant exports of farmed venison, exports of wild venison are commonplace.

- **Ostriches**

In 1997, there were an estimated 10,000 - 12,000 animals in the UK on some 400 holdings, producing both meat and leather. Today, a fraction of that survive. For example, Scotland now has 6 ostrich farms compared to in excess of 40 just four years ago. Producers were attracted to the market during the BSE crisis, with many of the new entrants effectively hobby farmers. However, with an oversupply of breeding stock, the market collapsed. The British Domestic Ostrich Association (BDOA) claims to still have 100 members, despite the setbacks in both supply and distribution of the product. The BDOA claim that approximately 70% of UK produced ostrich meat is exported to Europe. Ostrich production has received a great deal of criticism and negative publicity from animal rights groups.

- **Wild Boar**

The production of wild boar has grown to an extent that it has been given its own assurance mark by the Meat and Livestock Commission (MLC). The mark means that the UK's 2000-sow herd must be raised under certain standards on the estimated 100 production units currently in the UK. Producers hope the granting of the assurance mark will persuade more stores, especially the major multiple retailers, to stock wild boar products. Average size of production units is small, with only four producers regularly producing more than 100 carcasses a year.

- **Bison/Buffalo**

The largest commercial herd in the UK numbers some 300 head as buffalo production systems expand. However, the majority of animals are utilized in milk production. The rich buffalo milk is sold mainly to the ethnic communities of Birmingham and London and is also used for mozzarella cheese production. Buffalo are classified as bovine animals and therefore must comply with BSE regulations, meaning that meat from animals over 30 months of age cannot enter the food chain.

- **Other Meats**

Rabbit production in the UK is on a relatively small scale, and produces just 560 tonnes from 100 units, according to British Commercial Rabbit Association estimates. In 1998, the UK exported 380 tonnes its production, and imported 500 tonnes, mainly from France.

## Consumption

Specialty and exotic meats saw significant market growth in the mid-90s despite being a relatively small market in comparison to demand for mainstream meats (beef, pork, lamb & poultry). This growth was based on the ability of exotic and specialty meats to address several consumer trends/concerns evident at that time.

- the 'natural' image of game meats was a positive attribute for the sector in a consumer environment increasingly disenchanted with conventional livestock production and increasingly concerned over animal welfare.
- lower fat and cholesterol content of exotic and specialty meats met consumers' demands for 'healthy' foods
- increasingly diverse consumer tastes meant that consumers were more willing than ever to experiment with ethnic and exotic foods
- the exclusivity attached to exotic and specialty meats appealed to a proportion of prosperous consumers

Table 1: Retail Sales of Specialty Meats by Type 1995-99 in BPS millions (source: Mintel)

	1995	1997	1999
<b>Game</b>	19	28	33
<b>Exotic Meats</b>	2	5	2
<b>Total</b>	21	33	35

In 1999, the market was worth BPS 35 (US \$50) million, most of this being the game meat sector, which has continued to grow in value. The exotic meat sector has declined through the second half of the decade. To explain this phenomenon, one needs to appreciate that the UK grocery sector is increasingly dominated by the major retailers, but that distribution of exotic and specialty meats via the multiple trade has faced some key problems.

- UK retailers are increasingly demanding full traceability, but such guarantees are difficult to meet where supply is derived from the culling of wild animals. Given the food scares of recent years in the UK, traceability of product is an attribute that has not been neglected by the key multiples.
- There is some uncertainty as to where exotic and specialty meats should be displayed in multiples. In the independent sector, game in particular is on prominent display. The chiller cabinets and limitations of in-store butcher counters in the multiple sector means that such

displays to attract customer interest are often difficult to reproduce.

- Supply, particularly for game, is reliant on the culling of wild animals, and therefore the hunting season. As a result, supply and quality can be sporadic, deterring multiples from stocking such items.
- Consumers perceive exotic and specialty meats as difficult to prepare and cook. This belief effectively acts as a barrier to purchase.

Faced with such challenges, exotic and specialty meat products stocked in multiples outlets have been relatively restricted in number. Arguably, these challenges have had a greater impact on exotic meats than the game meat sector. For example, Tesco, the leading UK retailer, removed all exotic meats from its outlets in 1997 and two smaller multiples, Somerfield and Waitrose, followed suit in 1998, citing consumer complaints and supplier difficulties respectively. Other retailers chose not to enter this market at all, and growth in this sector slowed.

Retail sales of game meats have continued to grow steadily, but unlike most food markets in the UK, the multiples do not account for the majority of sales. It is the independent butchers which dominate the market, despite a fall in the number of outlets (in 1999, the number of butchers outlets in the UK had fallen to 8,745, a drop of over 10% on 1997 figures). This growth has been augmented by the rapid growth of sales through other outlets. The Internet has developed into a flourishing sales mechanism for the specialty meat sector. In many cases, website sales are supplementing existing mail order operations run by relatively small companies. Such growth is not surprising; research indicates PC ownership/Internet use is high amongst the wealthier proportion of the UK population, which matches the profile of specialty meat-eaters. Further growth should be expected, as rates of Internet use continue to increase. Farmers' markets are another growth outlet for many specialty meats. This is another distribution mechanism which allows many small producers able to sell direct to consumers.

Game meats remain a feature in multiples. Game is sold from fresh meat counters, in keeping with the traditional presentation of game, and also from the chiller cabinets. The preferred display option will vary according to the retailer. Where products are packaged and sold in chiller cabinets, they are often presented as high quality, own-label brands. This builds on the image of game and specialty meats as premium priced. For example, Safeway plans to label all pre-pack game meats under its premium "Best" brand. Venison is widely available in both processed and unprocessed forms, with venison-based pies and sausages remaining the most common products on supermarket shelves. Many game meats are only available for a limited time due to the restrictions of the hunting season. Continuity and traceability of supply remain the key challenge facing supermarkets, with limited availability an obstacle to attracting new customers to the sector.

Table 2: UK Retail Sales of Game and Exotic Meat by Distribution Outlet 1997 and 1999 (source: Mintel)

	1997		1999	
	BPS million	%	BPS million	%
<b>Independent Butchers</b>	18	55	20	57
<b>Supermarkets</b>	13	39	10	29
<b>Other*</b>	2	6	5	14
<b>Total</b>	33	100	35	100
* includes mail order, Internet and department store foodhalls				

Given the dominance of independent outlets, it is no surprise that there is very little media spend for the sector. In the 12 months to July 2000, less than BPS 20,000 (US \$29,000) was spent on advertising. This is a tenfold increase from the low of CY1998, although much of the advertising is done on a regional and local basis.

In addition to domestic consumption, there is a demand from the catering market for specialty and exotic meats. For example, the UK's largest venison producer sells direct to the London restaurant trade. Despite the failure of ostrich meat to take off in the retail sector, there remains some appeal in the up market restaurant trade. The wild boar market is worth an estimated BPS 2 (US \$3) million, with most of the meat destined for the hotel and restaurant trade and only a limited amount entering the retail trade as joints, sausages and pate. Indeed, small scale producers actively target independent catering and retail outlets, where a regular buying relationship can be established. At present, demand remains exclusively from the gourmet catering trade, which represents only a small part of the total catering market. The food service sector as a whole remains massively underdeveloped as a potential market for exotic and specialty meats; they do not feature on most restaurant menus at present.

### **Future Consumption Growth Factors**

Processing of exotic and specialty meats in the UK is limited mainly to sausage production. Venison and wild boar sausages are both established products in the specialty meat sector. There remains huge opportunity for further developments in the processed foods sector. Ready meals and easy to prepare dishes have shown significant growth in the UK as convenience becomes a sought-after product attribute. The development of processed specialty meat products would meet consumer demand for convenience, remove consumer concerns over how to prepare and cook specialty meats, and possibly introduce game and exotic meats to new consumers. As yet, processors and retailers have been slow to introduce new products targeted at the convenience sector.

Exotic and speciality meats tend to be premium priced products and are viewed as luxury foods. It is unsurprising then, that the more affluent (AB socio-economic group) members of the population tend to be the 'heavy' consumers of speciality and exotic meats, according to Mintel research. Following on from this research, there are two related trends which may have a positive impact on consumption of speciality and exotic meats in the future. Firstly, disposable income is forecast to increase steadily until at least 2004, with consequent growth in consumer expenditure. Secondly, the number of people classified as ABs in the UK is already increasing and is forecast to grow by an additional 6.9 % between 2000 and 2004. These represent potential for growth in this sector, if the challenges of distribution and consumer demand for convenience can be met by speciality and exotic meats.

Improved consumer knowledge about how to prepare and cook speciality and exotic meats is fundamental to continued sector growth. The specialty meat sector has suffered from a need for better consumer knowledge, and also the fact that for the majority of the UK population, the prospect of eating exotic meats remains an unappealing one. Increased coverage of game and exotic meats on television cookery programs may help in achieving this aim. However, a more likely source of knowledge would be improved packaging on game and exotic meats, with cooking guidelines and recipe suggestions. This mechanism is already being utilized by some retailers and suppliers. For example, oven-ready game birds are already on sale in some multiple outlets, with the aim of significantly reducing consumer concerns over cooking and preparation.

The limited use of exotic and specialty meats by the catering trade does little to improve consumer knowledge. Consumers are often tempted to recreate a meal that they have enjoyed in a restaurant. With exotic and specialty meats mainly utilized by the gourmet sector at present, such occurrences are all too rare, and are unlikely to stimulate consumer demand.

Overall, the prospects for the sector are positive. Mintel forecasts the market to grow to BPS 41(US \$60) million by 2004, with specialist food retailers continuing to be the key supplier to relatively high income consumers. Increasing disposable income and an ageing, wealthier population will be the key growth factors. In terms of accessing a wider market, products will have to increasingly be processed and aimed towards the growing convenience food market. In terms of distribution, independent and specialist shops are likely to

dominate sales, despite falling numbers, whilst the growth of the Internet should help to drive the market forward.

Table 3: Forecast of the game and exotic meats market 2000-2004

(source: Mintel)

Year	2000	2001	2002	2003	2004
Market Value (BPS million)	36	37	39	40	41



## SECTION II - Regulations and Policy

### Tariffs

Imported game meat (tariff code 02089040) has an applicable tariff of 0 %.

Bison/buffalo meat is classified as bovine, and the tariff code is dependent on the product i.e. chilled/frozen, carcass/boneless, etc. For clarification on these tariff rates, and tariff information on other species, please contact the USDA London Office, the Foreign Agricultural Service, Washington or refer to the internet:

[www.europa.eu.int/comm/taxation\\_customs/dds/en/home.htm](http://www.europa.eu.int/comm/taxation_customs/dds/en/home.htm)

General information on EU import duties is also available at: [www.useu.be/AGRI/import.html](http://www.useu.be/AGRI/import.html)

### Packaging/Labelling

The UK, as a member of the European Union (EU), conforms to all EU Directives, Regulations and obligations. For more information, refer to the Food and Agricultural Import Regulations and Standards for the UK (Report Number UK0029). This is available from the USDA London Office and on the internet:

[www.fas.usda.gov/scripts/attacherep/](http://www.fas.usda.gov/scripts/attacherep/)

UK general labeling requirements are laid down in The Food Labelling Regulations 1996 (which consolidate and replace The Food Labelling Regulations 1984) and The Food Labelling (Amendment) Regulations 1998 (which introduce quantitative ingredient declarations (QUID) to be given on food labels for certain ingredients or categories of ingredients used in foods). Hence, for some meat products, the meat content must be declared, generally in the form "minimum x % meat" near the list of ingredients. For some whole meat products any added water must be declared (this will be indicated where relevant). The lean meat content must be minimum 65% of the declared meat content, except for meat pies, sausage meat and meat pate, when it must be minimum 50% of the declared meat content. A booklet entitled "Food Law" produced in December 1999 by the UK's Ministry of Agriculture, Fisheries & Food (MAFF) in conjunction with the Department of Health is available. This lists all UK food regulations known at time of publication are in one document. It can be downloaded from the following website as a pdf document:

[www.foodstandards.gov.uk/maff/archive/food/foodsafte.htm](http://www.foodstandards.gov.uk/maff/archive/food/foodsafte.htm)

### Import Regulations

The import of food products of animal origin are covered by the Products of Animal Origin (Import and Export) Regulations of 1996. Imports may enter the UK/EU through approved Border Inspection Posts where they will be checked to ensure that they comply with the relevant animal and public health regulations.

Imports of fresh meat from the U.S. must come from establishments that have been approved to UK or EU standards. The U.S. Department of Agriculture's Food Safety and Inspection Service (FSIS) offers the Export Library System for computer users to provide country specifications for foreign regulations for meat and meat products. It holds current information on export requirements of foreign countries and approved plant lists at:

[www.fsis.usda.gov/fof/export/explib.htm](http://www.fsis.usda.gov/fof/export/explib.htm) .

A detailed guidance note on UK import requirements on food of animal origin from the UK Ministry of Agriculture can be obtained from: [www.maff.gov.uk/animalh/int-trde/prod-im/vet-chks.htm](http://www.maff.gov.uk/animalh/int-trde/prod-im/vet-chks.htm) .

See Appendix for relevant USDA and UK Ministry of Agriculture contact addresses.

## SECTION III - Key Contacts - Retailers and Importers

### Major Supermarket Chains

Retailer	Address	Phone /Fax	No. of Outlets	Exotic/Specialty Meat Sales
ASDA Group plc	Asda House Southbank Great Wilson Street Leeds LS11 5AD	Tel: 011 44 11 3243 5435 Fax: 011 44 11 3241 8666	229 (includes 20 Wal-Mart style hypermarkets)	<ul style="list-style-type: none"> <li>• none.</li> <li>• market under review but no firm plans at present.</li> <li>• unsuccessful venture into ostrich meat retail 3 years ago</li> </ul>
Safeway plc	6 Millington Road Hayes Middlesex UB3 4AY	Tel: 011 44 20 8848 8744 Fax: 011 44 20 8573 1865	472 (inc N Ireland)	<ul style="list-style-type: none"> <li>• venison steaks and pate, wild boar sausages, selection of oven ready game birds, depending on season.</li> <li>• product specifications and presentation will be upgraded, and all stock will be sold under the premium "Best" label</li> <li>• currently all game is sold in chiller cabinets</li> </ul>
J Sainsbury plc	Stamford House Stamford Street London SE1 9LL	Tel: 011 44 20 7695 6000 Fax: 011 44 20 7695 6132	401	<ul style="list-style-type: none"> <li>• range of game birds on sale at in-store butcher counters, with some prepack cuts in chiller cabinets</li> <li>• sales are limited by the seasonal supply of game</li> <li>• ostrich steaks and 5 different venison products; all prepack in chiller cabinets</li> <li>• wild boar products discontinued due to supply problems</li> <li>• distribution limited: 50 stores stock ostrich, 170 stock the venison range, and all stores stock venison grill steaks</li> </ul>
Somerfield plc	Whitchurch Lane Bristol BS14 0TJ	Tel: 011 44 11 7935 9359 Fax: 011 44 11 7978 0629	Somerfield 541 Kwik Save 810 (discount operators) Gateway/Solo 59	<ul style="list-style-type: none"> <li>• no exotic meats are stocked</li> <li>• limited game - mainly partridge &amp; pheasant on a seasonal basis</li> <li>• no plans to expand the range</li> <li>• experienced bad PR following previous ventures in the exotic and specialty meat sector in mid - late 1990's</li> </ul>

Tesco plc	Tesco House PO Box 18 Delamere Road Cheshunt Hertfordshire EN8 9SL	Tel: 011 44 19 9263 2222 Fax: 011 44 19 9263 0794	673 (inc N Ireland) store size ranges from mini-market to hyper market	<ul style="list-style-type: none"> <li>• venison and bison in limited stores</li> <li>• some game meats are stocked seasonally</li> <li>• contact fresh meat buyer for more information</li> </ul>
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### Minor Supermarket Retailers / Department Stores

Retailer	Address	Phone /Fax	No. of Outlets	Exotic/Specialty Meat Sales
Waitrose	Doncastle Road Southern Industrial Area Bracknell Berkshire RG12 8YA	Tel: 011 44 13 4442 4680 Fax: 011 44 13 4482 4488	118	<ul style="list-style-type: none"> <li>• venison has been sold for a number of years in most stores</li> <li>• range of game birds available according to season and supply</li> <li>• all meats in this sector are prepacked</li> </ul>
Morrisons	Hilmore House Thornton Road Bradford West Yorkshire BD8 9AX	Tel: 011 44 12 7449 4166 Fax: 011 44 12 7449 4831	95 supermarkets	<ul style="list-style-type: none"> <li>• none at present</li> </ul>
Marks & Spencer plc	Michael House 37-67 Baker Street London W1A 1DN	Tel: 011 44 20 7935 4422 Fax: 011 44 20 7487 2679	290 dept store foodhalls (UK)	<ul style="list-style-type: none"> <li>• pheasant is the only game meat currently stocked, and only then on a seasonal basis.</li> <li>• no exotic meats.</li> </ul>
CWS Retail	PO Box 53 New Century House Manchester M60 4ES	Tel: 011 44 16 1834 1212 Fax: 011 44 16 1834 4507	Superstores 27 Supermarkets 267 Convenience 347	<ul style="list-style-type: none"> <li>• none</li> <li>• no plans to enter into this market sector in the short term</li> </ul>

### Independent Traders / Suppliers

In addition to the key retailers referred to above, there are a large number of relatively small companies involved in the distribution of exotic and specialty meats in the UK. For further information and contact details relating to independent traders and suppliers of exotic and specialty meats, contact the USDA London Office.

## **Appendix**

### **Contact Addresses**

#### **USDA London Office**

USDA/Foreign Agricultural Service  
American Embassy  
24 Grosvenor Square  
London, W1A 1AE  
United Kingdom  
Tel: 011 44 20 7894 0040  
Fax: 011 44 20 7894 0031  
E-mail: [AgLondon@fas.usda.gov](mailto:AgLondon@fas.usda.gov)

### **For import regulations/health certification**

USDA/FSIS Technical Center  
Federal Building  
Room 904, 106 South 15<sup>th</sup> St.  
Omaha, Nebraska 68102  
Tel: (402) 221-7400  
Fax: (402) 221 7479

International Trade Unit  
Ministry of Agriculture, Fisheries & Food (MAFF)  
Fifth Floor, Area 507  
1A Page Street, London, SW1P 4PQ  
Tel: 011 44 20 7904 6501/6496  
Tel: 011 44 20 7904 6508