

**RURAL INDUSTRIES RESEARCH & DEVELOPMENT
CORPORATION**

DEER PROGRAM

**VENISON MARKET DEVELOPMENT PROGRAM
VMD-1A**

AND

**VENISON MARKET DEVELOPMENT TOWARDS
2000
VMD-2A**

FINAL REPORT

DECEMBER, 1996

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Foreword

This publication covers the work and findings of two closely related deer marketing research projects.

The first, the Venison Market Development Program, implemented the strategies of a 1991 Deer Marketing and Production Study. This study was published by the Rural Industries Research and Development Corporation in 1991.

The Program identified the need for high-quality informative brochures and leaflets and for communication aimed at the main domestic target market, the hospitality trade. A public relations media program supported the hospitality clients by raising general community awareness of venison.

By 1994, it became obvious that Australia needed to boost its venison promotional efforts in important export markets. This led to the second project outlined in this publication – *Deer Market Development Towards 2000*. In addition to its strong export focus, the program emphasised training and exchange of information to producers, processors and marketers.

The author has looked at the implications of both projects and examines outcomes and futures issues for deer marketing. The report clarifies key areas such as consumer expectation and perceptions of meat and meat product quality, market development, competitor activity, deer numbers, live deer exports and industry investment in processing and processing locations.

This publication and the projects it reports, is a valuable addition to RIRDC's deer program and its efforts to foster the continued growth of a viable Australian deer and deer products industry. The research and development program is funded from industry levies and contributions from the Commonwealth Government.

Peter Core
Managing Director

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ACKNOWLEDGEMENTS

Sincere appreciation to the Chairman of the Deer Industry Development Group, Dr Peter McInnes for his advice and guidance during the term of the project and for his generosity of time in the constant monitoring of progress and outcomes.

Appreciation also to the members of the Deer Industry Development Group who were elected by the then Deer Farmers Federation of Australia to represent the industry, and those constructive comments were welcomed.

Kathryn Edwards, as RIRDC administrator of the Deer Program generally and this project in particular, gave invaluable support and guidance on all matters relating to RIRDC policy and scope. While it is not possible to name all who were involved in the progress and outcomes of the projects, both within the Deer Industry and peripheral to it, the support and willingness to be involved in achieving desirable outcomes for the whole industry by several individuals is greatly appreciated. Their input has been critical to the success of projects VMD-1A and VMD-2A.

EXECUTIVE SUMMARY

Rationale for Venison Market Development

In 1991 the Deer Industry Development Group (DIDG) as the advisory committee to Rural Industries Research and Development Corporation (RIRDC), commissioned the **Deer Marketing and Production Study**. This was conducted by AACM International Pty Ltd and reached conclusions and recommendations which resulted in the Deer Industry Action Plan (DIAP). The major thrust of this plan was for venison market development to allow the industry to make a smooth transition from dependence on sales of breeding stock to dependence on venison as its principal product.

To follow through with the recommendations of the study, the DIDG commissioned a report by FCI International to develop a **Venison Market Development Plan** with a detailed implementation schedule, which recognised the need to provide funding resources and to recruit a manager.

The **Venison Market Development Program (VMD-1A)** commenced in November 1992 with Lynelle Tume of Lynelle Tume Consulting as the contracted manager for two years to ensure that the plan strategies were translated into activities to achieve the stated goals.

The Short Term Focus

Extensive discussions and meetings were held with participants from all sections of the deer industry in each State. Despite lingering resentment by several individuals on the imposition of the R&D slaughter levy, and their initial reluctance to be involved in any general industry initiative, it was generally agreed on the need for objective product description and high quality informative brochures and leaflets. Additionally, communication with the primary domestic target market, namely the hospitality trade was undertaken. A public relations approach to the media, seeking support for coverage of events, was designed to support the hospitality clients by raising awareness of venison and its attributes in the general consumer community.

The Export Focus

Extending the Venison Market Development Towards 2000

Towards the end of 1994, the final component of VMD-1A involved desk research on export potential and a trade mission to research the needs of European buyers of Venison and Game meats. Indications were that

significant effort was required to maximise the potential development of this market, with different protocols and regulations by EU member and non-member countries. Specific resource material and a substantial public relations exercise was necessary to counter negative perceptions regarding Australian Venison and simply to increase awareness of Australian Farmed Venison in Europe. Much of the negativity was due to inferior Australian product being distributed, and the strength of the New Zealand deer industry with a well organised, relatively cohesive approach, supported financially by NZ Trade Development and the Game Industry Board.

Many Australian Venison processors, exporters and marketers believed that the Venison Market Development Program should continue, mainly to service these export needs but also to focus more directly on the Export markets.

Venison Market Development Towards 2000 (VMD-2A) commenced in November 1994 and concluded in November 1996 and was managed as before by Lynelle Tume Consulting from a Brisbane Office.

In addition to a strong export focus which involved participation in Austrade sponsored Trade Shows in France, Germany and Korea, VMD-2A was committed to a program of quality enhancement by way of training and exchange of information to producers, processors and marketers. Feedback of comments and market survey results to industry from key customers was provided in an attempt to change the cultural thinking of the industry to become more market driven.

Project Initiatives

Outcomes from the project covered a wide spectrum of the industry. Indications of significant improvement in acceptability of venison have come from venison marketers active in the domestic and export markets.

- 1) A major awareness raising and educational focus by transferring knowledge on the available venison resources - from AUS-MEAT developed material to VMDP developed material.
- 2) Encouragement in the use of these resources by
 - Farmers - to improve farm dollar returns by cost effective supply of the processor preferred animals in the shortest possible time, with fewer deductions due to out-of-specification conditions.
 - Processors- by reducing losses due to preventable contamination and trimming, and time losses due to inadequate quality control procedures.

- Marketers - by the provision of the researched and printed generic brochures and fact sheets to their customers so that a unified message is presented with accurate nutrition data and agreed preparation and handling methods for venison.
- The end user: consumer; food service catering; hotel and restaurant sector; meat trading and export companies; educational institutions eg TAFE and colleges; and the media including food and rural writers, radio and TV; by professional advice on the deer industry, but venison in particular.

3) Regular market research:

- Externally conducted as in the recent Hotel and Restaurant food professionals attitude and usage study.
- Internally by continual liaison and networking with individual and group marketers and exporters. Their perceptions on information to be communicated was incorporated into the development of all generic material. Figures indicated an increase in venison production of 19% during '94-95 and a further increase of 5.5% in '95-96, which reflected the recent shortage in slaughter animals. Initiatives of the project contributed to the increase in export of venison (85% of total production), but an improvement in domestic consumption was also reported by traders, particularly in the Hotel and Restaurant sector.

4) Encouragement of the industry stakeholders to identify the problems and threats and to seek to interest appropriate researchers in addressing these issues.

5) Promotion of a strong quality focus in making sectors of the deer industry and associated industries aware of quality related problems and initiating change to address them.

6) Provision of data on the deer industry and specific information on slaughter requirements, as well as on venison cuts, packaging and marketing trends, to government departments, rural and agribusiness consultants, processing plant managers and members of allied industries.

7) Development of a public relations approach, with some activities designed to present a better image for venison through breaking down some of the entrenched negative perceptions acting as barriers to market development.

Implications of Outcomes and Future Issues

1. Consumer Expectations and Perceptions of Meat and Meat Product Quality

It is important that strategies for industry and market development are continually fine tuned and flexibility and short response period assist with success in this area.

Trends in consumers' expectations, behaviour and ultimately their purchase patterns must be monitored. Who is this all important consumer? Globally there are many similarities although specific cultural aspects are involved in some regions.

However, most people have many different role patterns and cannot be categorised in one type of behaviour, and there are those who eat convenient foods during the week but spend much time to cook during the weekend. Therefore a consumer segmentation based according to life style can lead to an over simplified view of the situation.

Quality perceptions depend not just on the person but also on the context in which the food is eaten, for example, a picnic, family dinner, restaurant meal. Similarly there are differences in quality perceptions for down market products as well as for up-market products, and quality for the consumer could no longer be defined as technical perfection or production cost. Minced venison as well as striploin steaks could be high or low quality.

For instance those who oppose the presence of red or bloody colour in meat will continually rate as unacceptable "quality" even the most tender and flavoursome prime cut steak. The same is true in reverse for those who prefer a lesser degree of *doneness*.

When it comes to meat specifically, several other issues take on an additional importance to many consumers.

Food safety (microbiologically, and residue free), animal welfare and perceived convenience are key factors. The characteristics of meat eating quality are also complex and need to be more closely examined if red meat (particularly game meats) consumption is to increase. The need to remain aware of these changing trends in the marketplace must be highlighted, and results fed back through the chain to the producer to ensure the best

possible result for the customer as well as profitable returns for the producer.

Venison producers need the customer much more than the customer needs venison. There is an ever-increasing range of alternate foods for them to experience if venison is not available or acceptable.

2. Market Development

The many tasks associated with market development either domestically or for export markets are complex, but do require constant attention. The focus must always be clearly on the customer, and almost everything associated with the industry should be driven from the marketplace (customer) back through the value chain to the farm.

Failure to remain aware of customer needs, and meet or exceed them, will lead to a widening of the gap between customer needs and venison marketers' perception of their needs.

3. Competitor Activity

In the past, awareness of the activities of the New Zealand Deer Industry and their venison marketing activities was considered to be the only essential surveillance required.

However, venison is and will continue to be challenged by its closest competitors. Many of the novel products such as emu, ostrich, kangaroo, crocodile, camel and even specialities like "Salt bush Deja (lamb)" are strengthening their market development activities. These products have appeal to a similar niche market consumer, as well as the more traditional Hotel & Restaurant Trade as does venison, and probably represent a significant threat.

4. Deer Numbers

The re-building of the National herd, and more importantly, the expansion of herd size is critical to development of markets, but the strategic approach to this should be cautious.

The fragmented nature of the industry will not be improved by the addition of large numbers of small deer farms or by traditional farmers simply fencing off areas to hold a few deer.

Industry viability and progress will come from volume; fewer but larger deer farms with larger numbers of deer. The New Zealand principle of

specialisation will become more important as Australian deer numbers increase, with farms having specific meat herds, velvet herds, and breeding herds, or becoming finishing properties or breeding properties rather than attempting to cover all facets.

Small deer farms could be profitable provided enough of them were clustered, so that they become something of a supply alliance, and were able to take advantage of cost savings in transport etc.

5. Live Deer Exports

The export of live deer has occurred for some years, though volumes have remained relatively low. Korea is the primary market seeking Red deer, while Malaysia has imported Rusa deer on several occasions. Only a few deer exporters are active in this field as the financial returns can potentially be lucrative, but the risks are extremely high. Experienced operators understand the responsibility attached to ensuring that all protocol and regulatory issues are observed in all documents. This extends to animal health declarations and testing to satisfy both AQIS and Korean authorities and ensuring that animals exported were born and raised on properties south of the designated zone for blue tongue vectors.

While some members of the deer industry are concerned with the continuation of the live deer export trade, the numbers of deer involved have been and will probably continue to be small in the overall total deer herd population. If the production side of the industry is properly managed, it is unlikely that the export of deer will have a significant, if any, impact on the future marketing of venison.

6. Industry Investment in Processing and Processing Locations

The processing of deer at abattoirs and the subsequent boning and packing is still restricted to general abattoirs which have been designed to process cattle, calves, sheep or pigs. Although this operates well enough with only minor modifications, there are additional problems sufficient to make the abattoir management reluctant to be involved with deer slaughter. Domestic facilities will often accommodate deer slaughter, have fewer regulations and restrictions, and can therefore cope with small, intermittent numbers. However, the export licensed facilities are much more sensitive to situations which may jeopardise their accreditation, and the potential for greater contamination issues through deer hair spread is all too real. This is particularly so in the case of European Union licensed plants, which process for the primary venison export destination.

It would be unrealistic to list the facilities slaughtering and boning deer as

the changes within this sector are frequent and rapid. A full list of export plants able to slaughter deer, together with their market access accreditations is available from AQIS, Canberra. A list of domestic facilities can be obtained from State livestock and meat inspection offices.

One dedicated deer slaughter facility similar to those which process all deer in New Zealand is expected to begin operation in January 1997. This plant, situated at Oberon in NSW will be able to service most export markets, including European Union countries, and will have a quality assurance program integrating all known criteria to produce tender venison with food safety issues addressed through a Hazard Analysis Critical Control Point (HACCP) system.

Other than this venture, the only industry investment in processing has been limited to minor expenditure on unloading ramps, pre-slaughter race modifications, lairage and knocking area modifications. Without investment in specific facilities for deer and/or other *exotic* stock, the deer processors will be constrained by the restrictions and lack of product control resulting from the use of mainstream red meat plants.

PREFACE

The Venison Market Development Program and subsequently the Venison Market Development Towards 2000 project were in response to recommendations from the **1991 Deer Marketing & Production Study** by AACM International Pty Ltd and from the **1992 Venison Market Development Plan** by Food Consultants International.

These studies, which were funded by the Rural Industries Research and Development Corporation, identified issues and industry status current at that time, and predicted the short and medium term outlook for the industry. The analysis of strategy options in the marketing, processor and production sectors resulted in an action plan for each sector, which together formed the Deer Industry Action Plan.

The main thrust of this plan which was fully supported by the then Deer Farmers Federation of Australia, was venison market development to allow the industry to make a smooth transition from dependence on sales of breeding stock to dependence on venison as its principal product.

Project Synopsis:

The **Venison Market Development Program (VMD-1A)** commenced in November 1992 and was completed in November 1994. It included a range of activities including the appointment of a full-time market development manager, Lynelle Tume. The Program aimed at stimulating demand for venison. It was anticipated that the sales of all venison cuts would increase as well as an increased product knowledge amongst trades and consumers.

By seeking to stimulate demand for the product, the program aimed to ensure the long term viability of the industry.

Lynelle Tume was responsible to Rural Industries Research and Development Corporation (RIRDC) through the Deer Industry Development Group (DIDG), to manage the program. The DIDG was an advisory committee with an independent chairman and deer industry appointed representative members together with one or more RIRDC directors.

The **Venison Market Development Towards 2000 (VMD-2A)** project commenced in November 1994 and was completed in October 1996. By mid 1994 the market for Australian Venison was expanding in a number of sectors, primarily as a result of an increased awareness of the product and

to some extent from wider availability.

Stimulation to demand had occurred in food service sectors through chefs' seminars, food trade journals and newsletter articles, and food professionals' organisations and TAFE discussion nights. Reports from venison marketers nationally indicated a significant increase in the number of establishments serving venison, and in particular an increase in those featuring a regular or permanent menu item of venison.

This had also led to increased consumer demand in supermarkets and speciality retailers in areas where demographics indicated a high number of ethnic residents and/or upper income residents.

The export market sector, particularly in Europe and North America has shown strong growth with continuing further potential. The demand from these areas is stronger than the ability of the Venison Industry to serve it. The "traditional" Asian venison market of Malaysia has also improved with an increasing interest from other Asian neighbours.

These assertions are based on evidence from domestic venison marketers and from exporters. The data on export volumes and destinations is provided by AQIS EXDOC.

The project has addressed development problems which had become apparent during the VMD-1A program.

The Research and Development strategy involved:

- Assessment and evaluation of qualitative research into awareness of and attitude to venison use.
- Evaluation of methods of quantifying the supply and demand situation.
- Research and Development of appropriate resources tailored to need, namely, videos, technical specification and marketing information, recipe and information sheets.
- Addressing training and education issues in the deer industry itself, and in peripheral industries by assisting in the development of an industry Quality Assurance model for the domestic and export markets.
- Research and development of export market potential using Austrade preliminary market assessment and followed with more detailed market research at trade show participation, which led to a strategic export focus.
- Research and design of a half-yearly communication with a Public

Relations focus aimed at the Restaurant and catering professionals, media and export customers and agents.

The project aimed to deliver benefits to the Deer Industry as a result of a more credible image for marketers, with better skills, more professional resources attracting loyal, reliable customers. Additionally, improved margins should result from more efficient processing and a responsibility to the QA model system. Increased marketing success has stimulated livestock prices, as well as achieving a higher return to the farmer.

OBJECTIVES

OBJECTIVES : VENISON MARKET DEVELOPMENT PROGRAM VMD-1A

1. To develop the Australian market for venison through venison market development activities including development of product information, market-ready cuts and value added processed meats and coordination of other development activities throughout the industry.
2. To further develop and implement the industry Venison Market Development Plan.

OBJECTIVES : VENISON MARKET DEVELOPMENT TOWARDS 2000 VMD-2A

1. To develop by appropriate R & D a permanent position in the food service and specialist consumer market for Australian farmed venison. Address the need for a market research activity to measure awareness of and attitudes to venison.
2. To secure the positioning through the continued development of a program of quality enhancement using training and exchange of information to farmers processors and marketers.
3. To facilitate the entry into selected export markets by removal of regulatory and protocol constraints and provision of marketing support.
4. To communicate the progress and activities in the program by way of regular project reporting to all sectors.

BACKGROUND

Much of the early background material which led to these projects can be found in the RIRDC reports **Venison Market Development Plan** and **Annexes** to the plan. Much of this background information is based on qualitative observations formed from contact and discussions with small groups drawn from wide ranging areas of Australia.

Development strategies are challenging at a time where domestic consumer markets have been static but are only now expanding as the recession begins to turn around. Red meat has been pro-actively defending its position against the “healthier” white meats and fish, and Venison is now being challenged by its closer competitors of emu, kangaroo, buffalo and even crocodile which is viewed as game rather than a white meat.

Globally, many of these negative health perceptions associated with red meat have been negated by an aggressive series of advertising campaigns by mainstream red meat industries. The focus has now shifted to the eating quality of meat as tenderness, meat colour and cooking characteristics of particular cuts have been identified as consumer concerns.

While all these issues will also influence consumption and repeat purchase of venison, it appears that consumer confidence in red meats is again declining due to circumstances which are difficult to control.

Recent food safety breaches resulting in severe illness and deaths from Salmonella and certain E. Coli strains in several countries, coupled with the British Bovine Spongiform Encephalopathy (BSE) induced fear of consuming beef, is potentially very threatening to enhancing red meat consumption. These issues will need careful monitoring when assessing future marketing options.

Despite Australia’s small population, and an even smaller target market sector, there is scope to stimulate the demand for Venison domestically and to educate consumers in appropriate uses. This is substantiated by the increasing interest from supermarket chains in stocking venison cuts in specific stores, and highlights the need to provide suitable, low cost consumer information sheets.

Market development activity is aimed at strengthening the demand for venison and this has two aspects. The first is primary demand which refers to the generic product, namely venison. The second is selective demand which is exhibited by the purchaser preference for one brand or another, or

for one style of product such as breed preference. For a project such as this, the marketing strategy should be concerned with the primary generic demand.

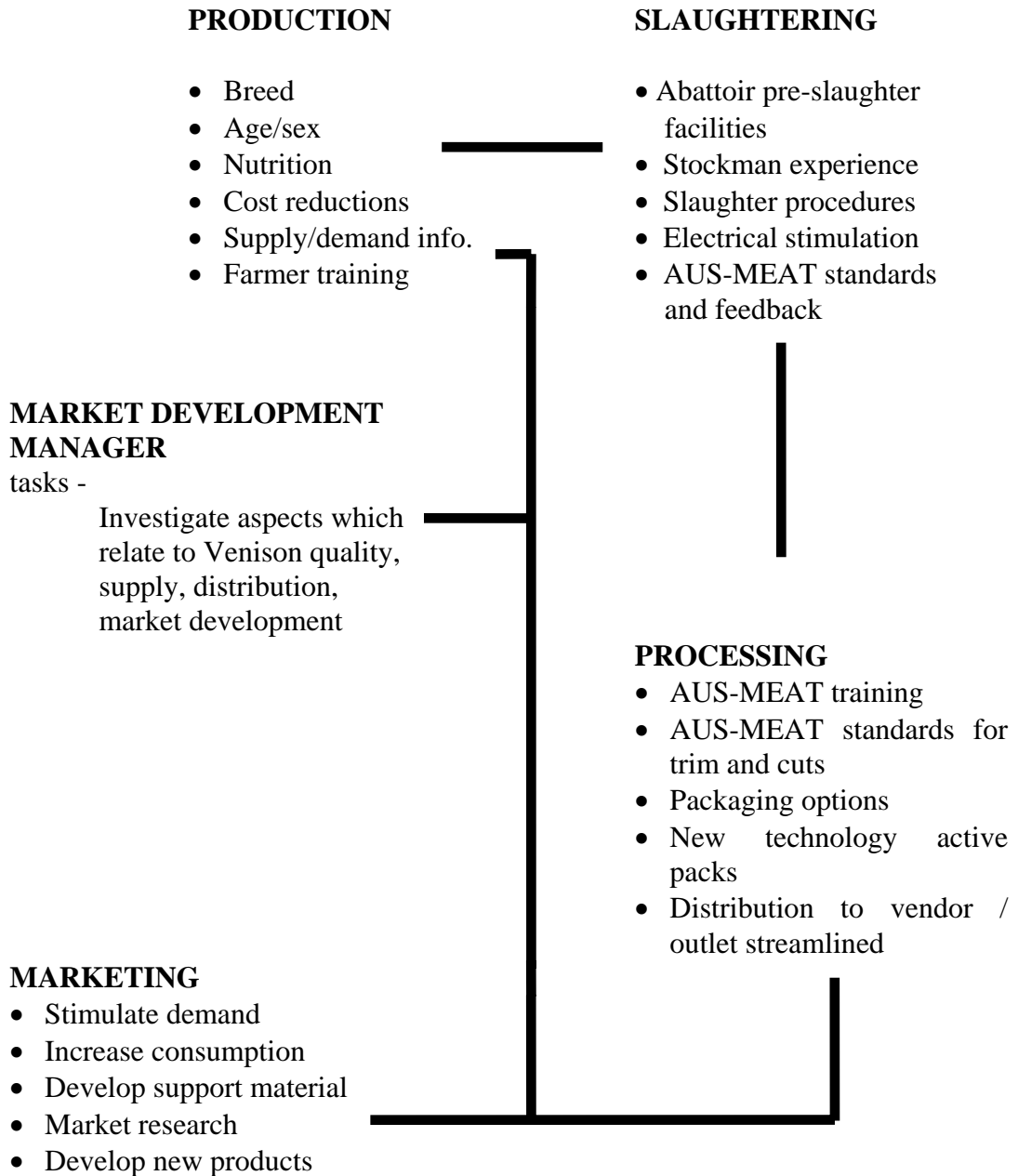
This leaves the individual vendors, processors, wholesalers, breed societies or marketing groups to promote their specific products, brands or services. Many of these groups have produced their own market support material and will probably continue to do so particularly where it applies to their product differentiation. However what these individuals are actively seeking is a pool of resource material of generic nature which can be used as tangible and effective market support. This material will assist in their attempts to educate the trade and consumers and stimulate market demand. This fits in with national industry directions, and addresses the industry acknowledgment that they have neither the marketing skills nor resources to develop and produce appropriate information material.

This must be backed-up “delivering the goods”, that is by ensuring that venison marketed to the target markets lives up to the promises made by the communication, and the expectations of the market. Marketing, production and processing skills in the industry have developed, however there is a need for significant improvement in skill and knowledge levels. Deer farmers must know how to finish livestock to meet market requirements. Slaughtering and processing provide specific challenges due to the small and intermittent volumes of throughput, relative to the mainstream meat industry. Market development demands an improvement in the quality and consistency of venison supply, particularly in view of the competition from New Zealand venison as well as kangaroo and emu which could be seen to be likely long-term competitors.

The positioning of the projects were undertaken within the structure of the deer industry as shown in Fig. 1.

Figure 1

Position of Market Development Tasks within the Structure of Deer Industry Activities



STRATEGIES

Strategies & activities to support them were designed with these basic objectives:

- Identifying specific market segments and their respective requirements.
- Developing the market by narrowing the gap between the product supplied by marketers and what is actually sought by the customer.
- Developing an increased awareness of venison's positive attributes; re-educating the food service trade and consumers to dispel myths and misconceptions.
- Developing an industry cooperative approach to individual problems.
- Developing economies of scale by streamlining the farm gate to plate chain.

IMPLEMENTATION PLAN
November 1992- June 1994

STRATEGIES	ACTIVITIES
<p>Food Service</p> <ul style="list-style-type: none"> * Encourage chefs, food & beverage managers, purchasing managers or restaurants to include Venison on the menus * Develop the creative use of Venison on menus such as lighter, more 'summery' dishes and in smaller serves such as entrees which are less expensive and may entice diners to order. * Demonstrate to restaurant owners the margins & plate costs achievable by selection of appropriate cuts prepared in particular ways. 	<ul style="list-style-type: none"> * Attend (with consultant chef) guild nights and dinners, association meetings and demonstration workshops held by chef and restaurateurs associations. At appropriate venues also include a suitable Venison producer to present their perspective (and receive feedback from the trade.)
<p>Consumer</p> <ul style="list-style-type: none"> * Encourage consumer trialing of venison, initially through dining out or function catering experience but ultimately by self purchase. * Become an alternative to mainstream meats by 'joining' mainstream meat distribution systems to ensure easy consumer access to product. * Support consumer trialing with sampling opportunities at all suitable food events, backed with information. * Develop information on health & nutrition benefits, product attributes eg taste, tenderness, subtle but distinctive flavour, quick cooking convenience in attractive but 'friendly' brochure form. * Develop actual recipe material incorporating selection of appropriate cuts, handling, cooking procedures and presentation. 	<ul style="list-style-type: none"> * Ensure availability & consistency of supply for consumers by direct liaison with butchers & their retail associations & with meat wholesale distribution/ vendors. * Establish good relationships with the above by demonstrated service focus. * Distribute point of sale recipes & nutrition information resources to butchers etc. (Limit to these sectors not supermarkets at this stage) together with wall charts, etc. * Establish a 'help line' by including a telephone contact in each state capital city to advise customers. * Provide sampling opportunities by involvement of "venison booth" at food fairs, harvest picnics, ethnic food fairs etc. These items can be sold at very modest cost eg, pies, satays, venison steak sandwich, salamis, terrines etc. Voluntary workers will be required for these events but state groups - particularly the promotion council, are already involved (with few printed resources)
<p>Manufacturers</p> <ul style="list-style-type: none"> * Encourage manufacturers already using venison to continue and develop new products, particularly smallgoods. * Encourage other manufacturers to consider range extensions using venison. * Develop & supply data on technological advantages of venison as a processing meat to improve existing product and develop new ones. * Support manufacturers with existing export markets who are seeking exotic or innovative meal items. 	<ul style="list-style-type: none"> * Document all known manufacturers using venison & including producers, small contract manufacturers, independent manufacturers large companies using it as an ingredient only. * Wherever possible contact and arrange "face to face" discussions with appropriate managers. * Circulate venison technical, processing attribute and nutritional/ composition data and promote use of AUS-MEAT material. • Raise awareness of Deer Industry desire to develop new value-added and convenience products.

STRATEGIES	ACTIVITIES
<p>Increase share of meal market</p> <ul style="list-style-type: none"> * Develop share of total meal market by education of all sectors regarding Venison advantages. * Re-enforce the education by publicising the nutrition & composition tables as well as taste, tenderness attributes and value for money. * Price considerations will have to be addressed as it will be compared with beef, lamb, pork and chicken. 	<ul style="list-style-type: none"> * Use public relations to handle this task either by direct press releases on specific topics or industry image building. * Publicising NHF nutrition results & use to compare with other meat figures. * Public relations activity to demonstrate value of venison, that's, higher price but no waste and less required per serve due to nutrient density. * Use newspapers, magazines, professional newsletters eg. Dietitians, chefs, food magazines, radio spots to disseminate releases.
<p>Enhancement of achieved market share</p> <ul style="list-style-type: none"> * Ensure a consistently high quality product with guaranteed availability. * Develop a Total Quality Management (TQM) approach to the entire industry, from farm management practices right through the chain to presentation at the table. * Involvement of every group at each stage, not forgetting the consumer who can still ruin the product if not educated in proper handling. * Create awareness in the market of Australian Venison's clean green image for export markets and to lesser extent, domestic market. 	<ul style="list-style-type: none"> * Encourage purchase and use of AUS-MEAT specifications, language and feed-back etc. * Develop training workshops through AUS-MEAT for producers, processors (abattoirs and boners). * Give feedback from customers , chefs and trade to producers by way of DFFA newsletter column and direct contact where appropriate. * Establish a market surveillance system primarily for domestic but also eventually for export. This should report all activity in the market Australia wide and should involve every sector of the industry. All information to be coordinated by the Market Development Manager. * Constant monitoring through literature and attention to market changes eg. Trends, budgets, demographics to prepare rather than react. * Develop an issues management plan to be available should animal welfare, public health or safety issues arise.
<p>Industry/ processor alliances</p> <ul style="list-style-type: none"> * Develop co-operation between producers to enable economics of scale for transport, slaughter etc. * Encourage abattoirs to agree to provide better deer handling facilities if guaranteed larger, more regular volumes. * Seek a reduction in slaughter charges if producers agree to maximise volumes. * Encourage abattoirs/ processors to train workers through AUS-MEAT venison workshops & to use AUS-MEAT standards. 	<ul style="list-style-type: none"> * All activities should be directed to building better relationships with abattoir managers, process works and boners, between producers and with AUS-MEAT. * This can only be achieved "Face to Face" with patient, steady progress.
<p>Consumer Level</p> <ul style="list-style-type: none"> * Support an adequate price structure by proper positioning of the product. * Continue consumer education on the novel aspect of venison together with health & no waste advantages to justify price. * Educate in uses for less expensive cuts of venison so that everyday family meals are a reality. * Manage cost efficient use of whole carcass by ensuring trim can be utilised for value-added consumer products. 	<ul style="list-style-type: none"> * All printed literature regardless of intended target group should position the product as "the healthy new addition to meat meals" * All occasions where public interaction is possible, advisers should be in attendance to distribute literature and recipes. * develop alternative recipes using cheaper cuts & with application over all seasons. * Position venison smallgoods as healthier and better tasting than "fattier" alternatives.

MAJOR OUTCOMES

1. Generic Resource Production
 Printed
 Video
2. Alliances
3. Market Monitoring Research
4. Market Research
5. Public Relations
6. Communication and Extension
7. Training Workshops for Industry
8. TAFE Communication
9. Retail Workshop
10. Media Tutorials
11. Liaison with Processors
 Test Yields
12. Specific Export Market Strategies and Activities
13. Quality Assurance Program 1996

1. GENERIC RESOURCE PRODUCTION

Printed Resources

A range of **Printed material** has been produced during the 4 years of the projects. Each has been designed for a particular target audience or market and the content has been in response to issues raised during formal & informal market research.

Resource Title	Size	Target Audience	Content	Distribution
Redefining the game	A4 fold-out leaflet	chefs, TAFE hospitality trade	Industry & product information; preparation & cooking info; nutrition & ordering numbers	VMDP direct to media and government, marketers & distributors
Cuts poster (reduced)	A3 folded to A4	Butchers, retail chefs, TAFE	Reduced version of AUS-MEAT poster, derivation of cuts & carcass location	VMDP direct to media and government, marketers & stockholders
Australia's Secret Ingredient (Paper & Card French versions)	A5 fold out leaflet	Export clients, trade departments, meat packers domestic food trade	Industry overview, freight packaging, quality information, full cuts guide with skeletal diagrams	VMDP direct to media and government, trade shows, exporters, distributors, export agents, marketers
Australian Farmed Venison	A4 back to back sheet	Consumers, general retail outlets	Recipes, preparation and cooking hints & info.	VMDP direct to media and government, retail butchers, supermarket, marketers

Resource Title	Size	Target Audience	Content	Distribution
Vennews 1	A4 4 page letter	Hospitality trade, chefs, TAFE, distributors	News items on industry workshops, conferences, recipe competitions, new brochures, features on guest chefs, trade shows	VMDP direct to media and government, marketers to their customer base.
Vennews 2	A4 4 page letter	Hospitality trade generally, TAFE agents, distributors	News items on industry workshops, conferences, recipe competitions, new brochures, features on guest chefs, trade shows	VMDP direct to media and government, marketers to their customer base.
Australian Farmed Venison (European)	A5 booklet	European clients agents, distributors trade departments, meat packers	Content similar to “Australians Secret Ingredient” but in English, French & German with additional photography	VMDP direct to media and government, trade shows, exporters, distributors agents, Austrade
Natural Deep Red Venison 1. (Blue)	A4 folded in 3 leaflet	Consumers, retail butchers, supermarkets	Recipes, cooking methods (general) preparation & cuts selection, nutrition info.	VMDP direct to media and government, marketers, retail sector, distributors

Resource Title	Size	Target Audience	Content	Distribution
Natural Deep Red Venison 2. (Red cover)	A4 folded in 3 leaflet	Consumers, retail butchers, supermarkets	Different recipes, general info the same	VM DP direct, marketers, retail sector, distributors
Natural Deep Red Australian Venison 1. (Blue cover)	Poster 62 x 44cm	Consumers, retail butchers, supermarkets	Large colour photography with by-lines	VM DP direct, marketers, retail sector, distributors
Natural Deep Red Australian Venison 2. (Red cover)	Poster 62 x 44cm	Consumers, retail butchers, supermarkets	Large colour photography with by-lines	VM DP direct, marketers, retail sector, distributors
Quality Assurance Program	A4 folded in 3 leaflet	All deer industry stakeholders	Full information on Deer Industry QA program model	RIRDC newsletter to all stakeholders
Australian Deer Meat (Asian)	A5 booklet	Asian clients agents, distributors trade departments	Export brochure info in Malay, Mandarin Thai & English, full cuts charts with skeletal diagrams	VM DP direct, exporters, agents, trade departments

Other specific printed resources described later in this document.

Video Production - (See ANNEXES VIDEO SUBMISSION)

In early 1995 a comprehensive brief was developed for circulation to video production companies. Subsequent submissions resulted in the selection of Ortel TV and Video Productions Pty Ltd as contractor. The video titled **Introducing Australian Farmed Venison** satisfied the need to provide a concise but comprehensive overview of the Australian Deer Industry and Venison production. All aspects are covered including on-farm breeding programs through to end-user comments and product descriptions and attributes.

The target audience has included potential and existing export clients and their customers internationally, TAFE and hospitality trade members, journalists and media generally and potential new deer farmers. Copies of the video were produced in the PAL system for Australian, New Zealand, United Kingdom and most of Europe, Hong Kong and Singapore. A limited number were produced in the NTSC system for all American influenced countries.

2. ALLIANCES

Both projects have been involved with state industry groups and Government department support groups with attempts to form networks and alliances. A summary of these included:

- Regular communication and liaison with the **Venison Promotion Council** on need for specific resources, promotional activities and support. This is a voluntary group of Victorian deer industry members who have been led by an exceptionally dedicated president and secretary and who continue to be the most professional and stable of any group.
- Involvement with and support for **State based marketing councils/committees**. Both the Tasmanian and the West Australian committees have been strongly supported by their respective departments of Primary Industries and Agriculture. Most committees fail to achieve long term benefits because of the difficulty in securing commitment from the industry members to perform the many necessary tasks. Generally all involvement is voluntary and operating budgets are low or non-existent.
- An innovative Victorian processor and marketer attempted in 1993 to form a **national alliance**, having a simple but effective data base, for the supply and packaging of product in a new, skin packed (vacuum) portion pack. He correctly predicted that this convenient pack was a preferred marketing option, but high costs associated with new equipment commissioning, losses, and the intermittent and low volumes of venison available to his enterprise made the venture non-viable.
- The **Australian Venison Processors Association (AVPA)** was formed in 1994 in response to an AQIS refusal to continue issuing phyto-sanitary certificates unless the deer industry fund a program under the National Residue Survey. Whilst the association has opened doors to improved communication between members and the potential to form strategic alliances for supply to particular markets and clients, it has also resulted in friction as not all exporters became members, and therefore were able to continue to process and export without contribution to the NRS program.
- The VMDP facilitated the formation of a **Networking Company** to supply a potential large contract for predominantly fallow venison to a Scandinavian country. The initiative and contacts arose from one network member, and protocol difficulties with importing country

regulations were overcome. Constraints existed through dependence on access to the ever diminishing EU accredited abattoirs. Ultimately this network venture did not proceed because of failure to agree on price structures, animal supply, and customer specifications. One of the former network members is currently the sole supplier to this customer.

- **National Deer Industry Association - Tasmanian Deer Industry Association Network Meeting**

In April 1995 the project planned and coordinated a meeting held over two days in Sydney to attempt to answer the questions and criticisms from the Tasmanian Deer Association. It was designed to update them on the situation within the National body, the processors and exporters group and the progress of the market development project. Outcomes were as documented below:

- a) Tasmania requested the provision of a producers and processors AUS-MEAT Feedback workshop.
- b) The representative Tasmanian processor requested membership of AVPA and agreed to pay a share of National Residue Survey (NRS) program. All Tasmanian processors were originally invited to join but Tasmanians had no understanding of the situation. AVPA executive members agreed to facilitate this membership.
- c) Tasmanian contingent undertook to attempt to sell concept of State interim membership of DFFA and ultimately full membership of DIAA to their members. Immediate membership was desired to allow input into DIAA structure.
- d) Due to difficulty envisaged with point c), an invitation for Market Development Manager, AVPA President and DFFA President to attend a meeting in Launceston was issued.
- e) Desire by Tasmania to be part of total industry approach to quality program and support for AVPA quality mark.
- f) Tasmanian representative to work with AVPA members to formulate industry agreed minimum standards. These would form the basis for boning room training/auditing courses.
- g) AVPA representatives assert that the DFFA restructure to DIAA needs careful discussion with regard to weighting of votes. Agreement that these issues were critical to future harmony and stability.
- h) Tasmanian Deer Farmers Council planned to send submission to DIDG Review Committee but was unhappy with short time allowed.
- i) AVPA also planned a submission to Review Committee following an approach to all members to gauge their responses.
- j) General agreement to work together more closely; better feeling of involvement following face to face meeting. Agreement to ask directly

rather than speculate on rumour.

The Tasmanian contingent agreed to a participative approach, but further resolve to achieve a total co-operation with the rest of the industry nationally has not been forthcoming. Both Tasmanian and Queensland State Associations remain dissociated from the DIAA which significantly impacts on DIAA claims to be a fully representative body.

3. MARKET MONITORING RESEARCH

In April 1993 a brief was issued to develop a market monitoring system. (See ANNEXES MR1). This was envisaged to be a 2 stage system: an inception study followed by the on-going monitoring phase.

Accurate market intelligence and information is essential for the successful implementation of marketing strategies, and to remain aware of changing trends and competitor conditions.

One company, Purtell & Associates, responded with a cost effective quote for the task and the initial study produced appropriate forms for simple quarterly returns by vendors for both domestic and export movements. (See ANNEXES FORM A and FORM B)

Despite extensive discussions by Purtell and the VMDP manager with Industry vendors, the level of suspicion and secrecy associated with release of data made it impractical to proceed with the on-going monitoring. Although some improvements have occurred in the years following, the continuing fragmentation of the deer industry remains far short of the maturity required for effective development.

Since 1994/95, the development of AQIS EXDOC for electronic issue of phyto-sanitary certificates has meant that accurate figures are kept on all export venison product. However, it is not information which is easily accessed by industry members, although AQIS will cooperate with provision of data to consultants.

Similarly, the DPIE levies collection unit has deer slaughter figures from abattoir returns and from live deer export levy documents, and for levies paid on velvet sales.

There is a need for caution in interpretation of the figures:

- The levies unit does not claim 100% compliance with levy payment.
- Total state slaughter figures and volumes of venison produced are skewed since significant movements of deer occur from state to state in order to slaughter at appropriately export licensed facilities.

Deer Slaughter and Venison Production

PERIOD	NO. SLAUGHTERED	KILOGRAMS (Hot carcase weight) HCW
1 July 95 - 30 June 96	34,000	1,040,000
1 July 94 - 30 June 95	30,000	985,000
1 July 93 - 30 June 94	25,000	825,000
1 July 92 - 30 June 93	12,000	396,000

For 1995/96

STATE	NO SLAUGHTERED	KILOGRAMS
NSW	12,450	315,100
QLD	3,200	144,720
SA/NT	5,000	195,500
TAS	3,100	77,100
VIC	7,570	208,200
WA	2,520	98,500

4. MARKET RESEARCH

In early 1995 a basic brief was developed for a survey on attitudes to and usage of Australian Farmed Venison by the Food Service sector. (See ANNEXES MR2) The survey was completed and the report prepared jointly by Purtell & Associates and Bruce Horton Research. (Full Report SEE ANNEXES)

This component of the project was one of the more important in terms of the domestic market major client base. A rather limited study of this sector undertaken in 1992 as part of the research for the Venison Market Development Plan, was used as a benchmark for comparison with these 1995 attitudes & usage rates. This information has been used when planning activities in the market development project to ensure that favourable developments are supported, publicised and rewarded, while negative perceptions are addressed.

Results of the survey were presented to deer industry stakeholders at the 1995 National Conference in August 1995. Complete copies of the report which includes an executive summary were sent to members of the Australian Venison Processors Association.

Some of the key findings and comments are as follows:

- Six percent of respondents did include Venison dishes and half of these did so on a regular basis.
- Nearly all of the Venison non-users had considered using venison.
- Of the venison users, denver leg cuts, loins and saddles were most frequently purchased and it was nearly always served as a main course.
- Venison was often bought from specialised game suppliers and most bought Australian product.
- Of those users of venison, Australian was preferred to NZ venison by 2:1
- (However) preference reasons were mainly, *support Australia, prefer fresh meat, and price*, while quality was the main reason for preferring NZ venison.

- Slightly less than half (43%) had the opportunity to compare Australian and NZ (low level of NZ product available to Melbourne chefs).
- When questioned on differences between the two, users of both rated NZ venison as superior.
- Most non-users did not have particular reasons for not using Venison but mentioned perceived high costs as one factor.
- Most non users(65%) said they would consider using venison if suitable cuts, packs and recipes were available.
- If non-users were to consider using venison their main needs would be consistent quality, supply reliability, price, cuts availability and customer demand.
- Of a list of venison product features, availability of chilled vacuum packs and tray portions were mentioned as most likely to increase their use of venison (users and non-users).
- 58% of all respondents expressed interest in new and innovative recipes.
- Of all the respondents, 84% served game birds, 72% served kangaroo and 60% served venison.
- 72% would be prepared to serve Venison and another game dish on the same menu.
- 86% said that denver cuts are an advantage and 80% believed that Venison was a premium product justifying a premium price.
- 72% of all respondents still saw venison as exotic rather than mainstream.
- Quality was the most important criteria for choosing meat for menus, followed by prompt delivery, good service, price availability of specified cuts in equal rating of importance.
- 57% of venison users expected to use the same amount in the future but 37% expected to use more. Cheaper prices and more customer demand were most likely to lead to increased use.

- 55% of non-users of venison said they were very or quite likely to begin using venison and although no dominating influences were mentioned, reducing price, good reliable supplier and recipes gained most attention.
- Slightly more than half of those with a definite view said that health features of venison were important but nearly as many said that it was not.

5. PUBLIC RELATIONS 1993

Excellent opportunities existed within the scope of public relations linked events to significantly raise awareness of venison in education and information services. Careful management was exercised to ensure that all specific programs planned were not actively promotional in an advertising sense so as to remain within an R&D brief as prescribed by RIRDC policy.

A brief to develop and implement public relations concepts was issued in April 1993 (See ANNEXES) Concept proposals and budget estimates were received from three companies from the three Eastern States.

Following discussions with members of the Deer Industry Development Group (DIDG), it was decided to accept the proposal from PPR as being the most cost effective and suitable concept for the current industry needs. (See ANNEXES for full proposal)

The initiatives were designed to target both food service professionals and a segment of the consumer group who are the ultimate end-users of the food industry's offerings.

A food service seminar program was presented, linked with a special 4 page feature on venison in **Vogue Entertaining Guide** October/ November 1993 issue. The following by-invitation events were conducted.

- 1 seminar at Launceston College with John Bailey.
- 1 seminar at Hobart Catering College with John Bailey.
- 2 seminars in Brisbane at Gas Cookery school with Gillian Hirst.
- 2 seminars in Melbourne at Gas Cookery School with Tansy Good and Marc Bouton.
- 2 seminars in Sydney at Gas Cookery School with Chris Manfield.
- 2 Food Service venison dinners in Adelaide presented by Ann Oliver.

Each of these chefs was asked to develop five (5) recipes for venison and present them to other chefs/ caterers as well as sharing their venison knowledge and experience.

In each case, invited guests were the chefs & restaurateurs from

establishments that would be likely to include venison on the menu or from those who already were (perhaps in a limited way). Invitation lists were drawn from the Good Food Guide in each city as well as the membership list of the States' Restaurant and catering associations.

Additionally, food media, particularly key opinion leaders were invited to one seminar in each state.

Some of the outcomes were:

- Personal contact with food service trade's decision makers/ innovators, who usually show the way with use of "new" products, ingredients and food styles.
- Positive and negative feedback regarding Australian farmed venison generally, New Zealand venison, cut types and accuracy/ inaccuracy of description, quality of meat presentation (colour/packaging), tenderness and flavour. Comments also surfaced reflecting quality of service by vendors, reliability and consistency.
- The opportunity to meet food writers, media representatives etc to present our venison attributes in an interesting way - other than the standard, boring press release.
- Provision of a reference source to the participants by way of brochures, cuts charts, information, business cards and supplier details for their state.
- Future features in newspapers, magazines, TV and radio can be sought through media contacts.

As a **direct result of involvement** in the seminars the following activities occurred.

1. Venison segment by chef Geoff Janz on Channel 9; "What's Cooking?" with chef Tansy Good as guest chef.
2. Cooking segment on Lindy Milan's "At Home" on channel 7 showing slow cooking of venison forequarter cuts and fast microwave cooking of round cuts.
3. Segment on the "new venison" characteristics and a presentation of different recipes on Jan Power's life style on channel 10.

4. Half-page feature by Meryl Constance in the Sydney Morning Herald entitled “Farmed Venison will make you wild about game”
5. Feature on changes in the Deer Industry and Venison Market Development in November issue of “Food Manufacturing News”
6. Food Service Trade magazine, “Catering Update” is carrying a venison story by Jennifer Larson in the November publication.
7. The January issue of “Asia & Middle East Food Trade” will carry a major feature story on Australian Farmed Venison.
8. Letter of thanks from Kate Sparrow (Nediz Tu) Adelaide regarding the chefs dinner that she and her partner attended. She advised that Geoff Janz’s TV unit has filmed a segment in their restaurant on the cooking of a venison dish for the “What’s Cooking?” channel 9 show to go to air week of 13-12-93.
9. The article appearing in “Catering Update” has produced numerous requests for more information and supplier details. The magazine has a reader inquiry service, which is continuing to forward all leads.

Another positive outcome of the Food Service targeted program was the involvement of the David Jones Food Halls and their demonstration program.

This also introduced our “Venison chefs” to interested consumers and helped to raise awareness of venison through the David Jones “Good Morning Australia” food segment on channel 10.

In addition to the chefs seminar program, the major publication has been the Vogue Entertaining Guide spring issue. The feedback from vendors, their distributors and retailers was very positive and with run-on costs quite low, the number of brochures available was substantial.

These less expensive brochures were also suitable for distribution at TAFE colleges/ Food schools for large numbers of students and staff.

The first 4 sessions were held as part of the programs’ commitment to education through the TAFE area. Of these, 3 have been in Sydney campuses and curriculum centres (which will ensure transfer to country colleges) and 1 in Brisbane. In states such as Victoria and South Australia, I supplied local vendors or state representatives’ names to colleges who then organised speciality night or day seminars. Active involvement by the

industry members in TAFE education occurred in South Australia, Victoria, Tasmania and New South Wales.

A continuation of the domestic market focus in 1993 involved participation in two events.

- A trade show booth as part of the **Fare Exchange National conference of Restaurant & Caterers Associations** at the Gold Coast. This provided good access & contact with chefs & restaurant owners from all over Australia. The generic venison stand was well supported by industry venison marketers, industry personalities, our consultant chef and research and hospitality staff from University of Queensland Gatton College. Excellent feedback was received from delegates tasting venison steak and venison smallgoods which had been provided from several state groups. A mail out to all interested delegates followed the event to re-enforce the awareness of Australian Venison. Subsequently, articles appeared in **Inside Dining** and in **Food Australia** as a result of stand visits by the respective journalists.
- A generic Australian Venison stand at **Fine Foods 93** at Darling Harbour. This is the largest Australian food, beverage and equipment show and alternates between Sydney and Melbourne. As a specialised trade only event it offered the opportunity to develop new business in both retail and food service. Overseas exhibitors and buyers also attend providing a potential export focus. Such events are reliant on support from deer industry members and highlighted the standards which must be set for the quality of presentation of display product.

6. COMMUNICATION AND EXTENSION

A major commitment for the duration of both projects has been a regular and extensive communication program.

Attendance at all National Deer Farmer Association meetings prior to October 1994 offered the opportunity to update on project activities. Invitations were not issued to attend any DFFA executive or general council meetings after that time.

Project updates and presentation of new resources were made when invited to attend state association meetings, annual general meetings or state conferences or seminars. These events were an excellent opportunity to liaise with farmer members and encourage them to attend AUS-MEAT training workshops.

Contributions were made to the RIRDC newsletter, originally the Rural Action publication and more recently the Deer Products News which appears quarterly. This publication has a mailing list which includes all known deer industry stakeholders, and represents fulfilment of a requirement by a senate committee that RIRDC communicate with the industry on the expenditure of the research and development levies.

Regular exchange of the project and more general deer industry information was made with the public relations area of the Department of Primary Industries & Energy. Some press releases and AQIS news bulletins included this deer industry information.

Communication with some State Government trade and export development departments was made. This led to involvement in visiting Overseas trade delegations, but also allowed the opportunity to present the deer industry case for improved access to export accredited slaughter facilities.

Printing and distribution of Vennews, a VMDP seasonal newsletter with a target audience primarily of the Hotel and Restaurant trade allowed for ongoing contact. Venison marketers were bulk supplied to allow them to circulate their customers without disclosing the customer list to the VMDP project. Items of general and particular interest to the hospitality industry were featured together with recipe competitions and seasonally featured venison cuts. As always, attempts were made to interest chefs in the use of the "less-preferred" cuts which might require a slower, lower temperature cooking method, and also in the greater use of venison as entrees rather than the more usual featured main course.

Media communication took several forms and involved live & pre-recorded radio interviews, usually on general venison issues, but occasionally in response to a specific topical issue such as nutrition. Interviews and provision of reference material to food journalists from major daily newspapers and national magazines were sought regularly, and a continuing program of interviews with rural journalists from the Stock Journal, The Weekly Times, The Land and Queensland Country Life.

Presentations at conferences and seminars on venison processing and market development.

7. TRAINING WORKSHOPS FOR INDUSTRY

AUS-MEAT Venison Feedback Workshops 1994

Discussions were held with Peter Evans, AUS-MEAT product description and standards manager, who had prepared the venison specifications and venison language manuals, standard carcass sheet, bruise score sheet, cuts chart, feedback sheets & carcass tags for the deer industry. Following his advice on producer feedback needs, contact was made with the AUS-MEAT Training Group through the divisional manager Judith Ruello. A written brief on industry needs resulted in a proposal from AUS-MEAT Training to conduct 3 workshops, each of 2 days duration. (SEE ANNEXES) Logistics and interest level determined that they would be held in Victoria, Queensland and NSW and all were completed by late October 1994.

AUS-MEAT limits the participant numbers to 20 per workshop to fulfil the supervision requirements at abattoirs and boning rooms.

The objectives were basically:

1. For deer producers to be able to read and interpret the AUS-MEAT feedback sheets for venison and be able to use the information to plan modifications to their farm management and handling of deer to ensure more deer meet buyer's requirements, and
2. For producers and processors to be able to apply correct product descriptions and specifications to venison cuts.

A comprehensive workbook and course notes were developed for use by participants. Contents included.

- Objectives
- Introducing AUS-MEAT
- Ecchymosis
- Accelerated conditioning
- Code of practice - animal welfare
- Reading a carcass ticket
- AUS-MEAT feedback sheet
- Carcass specifications
- Feedback targets
- Live animal assessment

- OTH trading
- Making money from feedback
- Course summary
- Action sheet
- Glossary
- A-M accredited establishments
- Contact organisations

Workshop Evaluation

At almost all workshops, producers were in the majority with two or three processors attending.

During group discussions with participants, this project noted comments and responses. Additionally, each participant anonymously completed workshop evaluation forms which allowed for scoring of the course and individual content components.

Researching the success of the initial training modules was followed by focused and clearly defined development of the most effective delivery system. Subsequently 3 additional courses were conducted in 1995, in Western Australia, Tasmania and South Australia.

It was proposed to use these workshops as “train the trainer” situations, such that deer experts and highly motivated and aware participants could, in future, conduct further training workshops for small groups regionally. Ongoing producer training must become an industry responsibility, if only because of the constraints of cost and regional diversity. The industry has not proceeded with this task which will ultimately lead to a slow rate of product quality improvement.

Unfortunately, some of the more prominent industry association members are more focussed on political, structural and administrative changes rather than the actual tasks which will lead to objective growth and development.

8. TAFE COMMUNICATION

All TAFE Colleges with hospitality divisions and those with butchery units were supplied with a set of venison specifications, language and information resources.

Subsequently the VMDM attended sessions for students and/or staff at staff development days. Many colleges in New South Wales were visited, including the Tourism & Hospitality Industry Training Division and curriculum development centre at Ryde. Visits to Regency College, Adelaide, to the University of Queensland Gatton College hospitality unit & University of Western Sydney food unit, confirmed that they are successfully working with venison for recipe development and product development.

9. RETAIL WORKSHOPS

Following a major commitment by Woolworths NSW meat division to support the supply of product from a Tasmanian Venison company, it soon became obvious that problems existed at a number of levels. There certainly were problems with preparation, marketing and merchandising of the products. Poor slicing methods, a lack of understanding of cutting lines for venison and display of the product between pork and veal cuts which highlighted venison's naturally darker colour, were some of these.

At the request of Woolworths and the Tasmanian supplier, 3 workshop sessions were set up in Sydney for a total of 40 meat department managers and butchers.

Exchange of information did result in changes to the type of product supplied to Woolworths, and to the development of the 2 consumer brochures and posters to address the products' perceived negative attributes and to present simple, appealing recipes.

10. MEDIA TUTORIALS

For both domestic and export growth, there is a wide understanding that the deer supply situation is a major development constraint. Often the best way to raise awareness of the deer industry as a profitable option for investment or expansion is to engage the attention of the media.

With this in mind, the program has conducted a guided venison tasting for the food media, and followed it by offering tutorials to the members of the food media club and their associates. Information kits were developed for the participants, which included deer industry background information and statistics, suppliers, preparation and cooking methods and more specific material for individuals such as extra nutrition details for nutrition writers.

Christine Manfield, owner-chef of Paramount Restaurant in Sydney, developed 5 signature recipes and gave her notes on each venison cut used and particular preparation details. As a former teacher, she has a rare combination of professional food knowledge & skill, creative flair and natural communication ability. Her presentations are always thoroughly professional and in an utterly credible and personal style.

To accompany her tasting notes, the project developed a set of technical notes for each cut being tasted, which included full AUS-MEAT product description and cut number and specific meat (muscle) characteristics of each cut.

The ultimate tenderness and eating quality of each cut of venison is influenced by many factors, including the connective tissue (collagen) content, muscle fibre type, the location on the carcass and the contractile nature of the muscle. These factors determine the cooking method chosen for each cut, for example the slow, low temperature, moist cooking style required for many forequarter cuts to convert the insoluble collagen to soluble gelatin and ensure a moist tenderness.

Outcomes

From these events has been an excellent response from participating media members and the following list gives an indication of the results to date.

PUBLICITY REPORT

(Following food writer luncheon, March 14th 1996 and Food Media Club, May 7th 1996)

SkyTV segment (Peter Howard) - 6th March 1996 filmed at Wynns Winery for TAFE training

The Land (Alan Dick) - 2 May 1996

North Shore Times (Catherine Saxelby) - 20 March 1996

Australian Gourmet Traveller - August issue 1996: Venison dish in Menu on the Run (Kathy Snowball) venison to be included in Game feature (Jenny Sheard)

The Canberra Times - Venison lead feature story (Christine Salins), 27th March 1996, full page with photographs

The Canberra Chronicle - 27th May 1996 Venison feature (Liz Posmyk)

What's Cooking - GTV9 - Venison pasties to air 24th April 1996 by Geoff Jansz. Phil Neil has expressed an interest in featuring another venison recipe in July 1996

ABC Regional Radio NSW - 8 minute interview 24th April 1996, 10 minute interview 2NC Newcastle 15th April 1996, 10 minute interview ABC Regional Radio WA - 26th April 1996 (Barvara Lowery), ABC Regional (Orange) - 15 minute interview (Lynelle Tume)

The Sun Herald - Game feature (Sheridan Rogers) 5th May 1996

Farm Journal - June 1996 (Rachel Blackmore) feature on venison

Daily Telegraph - Jacqui Hocking has written a story (Have provided trannies). She has advised that it is in the system for publication.

Eastern Suburbs Newspapers - Review (Bunty Turner) 20th March 1996

Jill Duplex - has expressed interest in recipe testing venison - not sure for which of her publications.

News Weekly - feature for June/ July issue - (Kathy Knudson)

Financial Review Magazine - June 1996 - feature on venison and restaurants using it.

Australian Slimming - information in July issue (Dianne Parks)

Doctors TV - mention in context of NHF approved meat (Jane Barnes)

Australian Good Taste - (New magazine co-published by Woolworths) - coverage of venison (issue to be advised) by Anneka Manning)

Farm Journal - feature in June/ July 1996 (Rachel Blackmore)

Channel 7 Food Segment - date to be confirmed (Lyndey Milan)

ABC Food Program - feature on deer genetics/ cross breeding etc and relating it to venison guided tasting (Alan Saunders). Not yet recorded.

Burkes's Backyard - Healthy food/ nutrition segment featuring venison (Rosemary Stanton). Filming on 7 June 1996 for late date screening.

North Shore Times - Cuisine - Versatile venison 31st May 1996 (Lynne Mullins)

Easy Entertaining - September 1996 issue, venison saddle featured.

11. LIAISON WITH PROCESSORS

The project manager was part of a team assembled to evaluate the incidence of ecchymosis, particularly in fallow deer, and the possible factors and variables that might influence this. The group was assembled by the RIRDC Deer program manager and also included an AUS-MEAT consultant, researchers, a deer farmer and venison processor together with abattoir management and boning room staff.

Documentation of the incidence of ecchymosis in fallow, red and rusa deer in several different states together with photographic illustrations were forwarded to the researchers who subsequently were successful in achieving RIRDC funding for the 2 stage project.

Aside from the fact that the AQIS standing meat orders specifically exclude ecchymosis affected meat (including venison) from export, the presentation of the product represents a significant constraint to market development as it implies inferior quality.

The project acknowledges the value of the comprehensive report prepared by Chris Tuckwell in his role as senior officer, developing Industries for Primary Industries South Australia. The title of this technical report is **Development of Slaughter Facilities for the South Australian Deer Industry**.

Test Yields

On occasions, in association with an AUS-MEAT consultant and boner, we conducted test yields on deer carcasses and compared the results with the overall boning room yields for the remainder of the carcasses. The losses were recorded and an assigned dollar value enabled the actual dollar losses to be calculated. The scope for improved performance then was obvious, and a report was prepared for the particular boning room and slaughter facility management as well as the venison exporter involved.

- The yields are obviously dependant on a number of factors including the customer specifications, condition of the live animals, slaughter floor practices and skill levels of boners and slicers.
- For indicative purposes the test yields on 2 carcasses compared to the overall boning room production yields are shown below. The actual dollar values have not been shown as these were commercial in confidence.

The Overseas customer specifications were:

1. Tenderloin
 - * chain off 2 per vacuum bag
 - * silverskin on

2. Striploin 11 ribs
 - * chain off 2 per vacuum bag
 - * machine denvered (denuded)
 - * no knife cuts or tears

3. Knuckle
 - * Machine denvered 2 per vacuum bag

4. Rump
 - * Rump and tail, machine denvered 2 per vacuum bag

5. Outside
 - * Heal muscle removed 2 per vacuum bag
 - * Machine denvered

6. Topside
 - * Cap muscle on 2 per vacuum bag
 - * Machine denvered

7. Blade
 - * Machine denvered 1 per vacuum bag

8. Trim
 - * Bulk packed (27.2Kg)
 - * Exclude large fat pieces

- All primals were denvered whole without following the AUS-MEAT specifications to break into sub-primals prior to denvering.
- Blade was the only forequarter cut vacuum packed. Remaining shoulder, neck and chuck went to high grade trim.

After test boning session, the following observations were made:

- Several striploins and knuckles were lost due to severe ecchymosis and a count of labelled bags revealed that some cuts had obviously been mis-identified and mis-labelled.

- Boning room efficiency improved with time and experience, although any new customer specification such as the inclusion of bone-in racks or bone-in saddles resulted in significant yield losses.
- Many boning rooms with highly skilled boners and slicers who process venison regularly achieve high yields and high standards of product presentation.
- This highlights the need to provide appropriate training on specific venison cutting lines and points of specification. Clear communication between venison exporters and boning room managers or supervisors, and clearly displayed boning and slicing specifications for each lot is essential for a profitable result.

In the following Tables for test yield boning, Test Yield (1) compares the yield on a 35kg carcass with the overall boning room production yield. Test Yield (2) compares the yield on a 49.8kg carcass with the overall boning room production yield.

Total Carcass Weights^(a) represents the expected yield if the same % yield as the test was achieved;

Optimal % Yield^(b) is that achieved from the test;

Actual Yield^(c) is the yield achieved by the boning room; and

Actual % Yield^(d) is the percentage achieved by the boning room.

A comparison of column (a) and (c) shows the difference in recovery (kg).

12. SPECIFIC EXPORT MARKET STRATEGIES AND ACTIVITIES

General strategies were designed to facilitate entry into preferred export markets. These included:

- Accessing Austrade market intelligence system
- Accessing State Trade and Development departments' market intelligence.
- Conducting preliminary enquiries on venison's potential in selected export markets using relevant Austrade offices.
- Participation in international food trade fairs by provision of generic venison market development stands in the Australian pavilion.
- Compilation of a guide to entry protocols for selected countries and AQIS and other documentation requirements.
- Facilitation of a series of network meetings with a diverse group of venison exporters trying to negotiate a Danish supply venture, which each, alone would be unable to sustain.
- Maintaining communication with the West Europe branch of the Department of Foreign Affairs & Trade in Canberra regarding export constraints both from the Australian end as well as existing conditions and proposed changes to European protocols and directives which might represent future constraints.

ANUGA '93 Observer Mission

In **October 1993**, the market development manager undertook an **observer mission to Europe** primarily to attend the world food trade fair ANUGA in Cologne Germany. This offered the opportunity to make contact with all major game meat traders within the European community, and to photograph the products as presented, and to see and obtain technical specifications for their preferred packaging.

Additionally it allowed an examination of New Zealand's venison exporting companies and the specifications and product descriptions for Europe, and their distribution networks.

Following ANUGA 93, meetings were held in Brussels at the Australian Embassy, with the AQIS counsellor Veterinary Services, regarding possible outcomes from the Farmed Game Directive and the harmonisation of the members of the European Community.

Similar meetings were attended at Milan Austrade and the Australian Embassy in Rome to seek a farmed game (including venison) protocol into Italy and have venison removed from the wild shot game documents for Italy.

Trade show participation in a generic sense was as follows:

Trade Exhibit at SIAL, Paris 1994

At the request of several venison marketers, a program of international trade support began with a stand exhibit with Austrade under the country pavilion at SIAL in Paris. Two intending participants dropped out which left three exporters represented; and one exhibiting value-added products but not present on the stand.

The response from SIAL visitors was overwhelming, possibly due to several factors:

1. New Zealand withdrew from the fair at the last moment and was barely represented by European distributors.
2. The Australian stand was visually impressive and very well located.
3. European venison is in very short supply
4. Australian venison provided for taste sampling & for display, performed very well.
5. The “new” European consumer is also looking for convenience and portion packs and there was great interest in the skin packed trays.
6. The presence of one Australian exporter’s Danish importer & distributor showing a wider range of processed products made from Fallow venison.

The specifically produced European language brochure was extremely well received and a number of features drew favourable comment:

1. The cover photograph and its by-line. Fresh, unpolluted air and pastures were appealing, given the general haze and smog of pollutants of air and land in Europe.
2. The Australian commitment to quality improvement (which must be backed up by “delivering the goods”).
3. The cuts photographs, particularly the skeletal diagrams which transcend any language of description.

Hong Kong Hotel Restaurant and Trade Show, 1995

Exhibiting at this trade show was achieved at very moderate cost through the Queensland Department of Trade and Economic Development.

A range of venison products including value-added cold-set bound products were displayed alongside a range of dried velvet products and velvet liqueur and whisky.

Provision of generic resources and Australian supplier details was designed to raise awareness of the Australian Farmed Venison and co-products industry. In the weeks following the show, a number of meetings occurred between Australian Exporters and visitors to the trade show. These have since resulted in on-going sales of product to Hong Kong, although the volumes remain small at this stage.

ANUGA '95, Cologne, Germany

ANUGA '95 was held from September 30th to October 5th at the Köln Messe fairgrounds at Cologne in Germany. This is the world's largest food fair held every two years, and is restricted to trade only.

The Venison Market Development Program had an exhibitors stand as part of the Australian Austrade stand and five Venison and Deer co-products companies chose to be involved. Three of these had representatives on the stand while the remaining two sent display material and were represented by our whole team.

Trade fairs are no longer simply a place to buy or sell, they are increasingly a source of information and communication and have great potential for market development.

Few other marketing tools are capable of detailed presentation of the industry and its products with personal customer contact. The acceptance

of new products or packaging can be tested very quickly at a trade fair and the reactions provide invaluable information for market research.

Prior to participation, Australian Venison companies were asked their aims in attending, and subsequently each completed a questionnaire following the event. It was generally agreed that participation had met all their aims with the additional benefit of a sense of teamwork on the stand and an agreement to work more closely together when targeting export markets. Their primary participation aims were:

- To discover new markets (or niches within a market)
- To examine their own competitiveness
- To access export changes
- To recognise development trends
- To generate new market interest in their company/ product.
- To meet the competition and research competitor activity.

From the VMDP perspective, the role was to provide professional, generic publications on Venison and the Deer Industry to educate the visitors to the fair and to provide a contact name and details for further information on product, supply or resources.

A new version of the export cuts brochures was produced for ANUGA and also for future use in all European markets. This booklet is printed so that each section including the cuts description is in English, German and French. These booklets were all received and proved to be an extremely useful resource where language difficulties were involved.

Seoul Food '96, Korea

In April 1996, the VMDP shared the cost of a stand with ADP Pharmaceutical's Pty Ltd and Australian Game Meats who exhibited, respectively, food supplements and therapeutics derived from deer antler cartilage and other co-products, and venison cuts and meat and bone powder.

The opportunity to research the potential for venison in this new market revealed that the deer co-product market is well established, but that the market for prime table cuts remains limited to the hotel and restaurant trade. Although this sector is undergoing growth, the import of Australian venison prime cuts will remain relatively low. However, great potential exists for supply of low grade carcasses or low grade, bone-in cuts for production of the traditional "deer essence or extract".

Ultimately the most profitable option would be to render the carcasses in Australia and supply the essence direct. This would obviously require the input of a Korean person experienced in the preparation of such a product.

Export Procedures File

With the increased emphasis and interest in Venison exports, it became necessary to document the procedures. The following guide was produced in late 1995.

Australian Venison Exporters Guide (See ANNEXES)

This is in the form of a bound handbook or guide, and has been designed to answer some of the questions, and to avoid some pitfalls for the intending new exporter. Some of the areas covered and the information relating to them appear to be basic, essential knowledge for the industry exporter, but past experience has shown that many do not seek even the most simple information.

There are many disasters on record in the Deer Industry for first-time exporters, and many for those who have managed to survive the requirements for one market, but failed to identify and meet differing regulations in a new market.

As has been stated, the document is a guide only and obviously subject to change, particularly in view of major changes in some areas of European access, also proposed new regulations by the USDA and also in certain Asian markets such as Korea.

While the guide does give actual detail, it suggests where to go and where to look for assistance in ensuring a trouble-free export order. Copies were distributed on request, following advice that it was available in Deer Product News. Established exporters are unlikely to require a copy, but it is a valuable aid for those still becoming established in the Venison export business, as little help can be expected from their competitors.

Export of Venison Value-added Product, 1995

There has been evidence of increase in the use of venison forequarter by the manufacturing sector, although at this stage it represents test marketing only.

A joint venture with SAFCOL in South Australia and Victoria has seen them extend their current range of specialty export soups for the Chinese

market to include a venison soup. The existing range includes Kangaroo tail, crocodile and emu. For our trade stand at SIAL, Paris, SAFCOL also produced a production trial batch of Venison Ragout and Venison Goulash for market research of potential new products.

Another extension of range to include venison is by the innovative group “Aussie Gourmet”. These are shelf-stable retort packed pouches which can be heated in boiling water, or removed to heat in the microwave. This company also exhibited at SIAL and is seeking export markets. The potential benefits for the deer industry are in the use of the forequarter venison, with the products having the export benefit of less expensive freight (non-refrigerated) and absolute convenience of a cooked portioned product. Some sacrifice of texture and possibly flavour is common to this type of product, but the range has good quality sauces and attractive packaging.

Venison Export Constraints and Issues

The following points should be considered:

- Limited access to export slaughter facilities and/or boning rooms which are approved to kill deer.
- Extremely restricted access to slaughter facilities with European Union licences. Since Europe is a primary market, this represents a significant constraint.
- Most venison exporters are under capitalized and lack financial flexibility to cope with contingencies and costly pitfalls or delays.
- Financial constraints often lead to shortcuts which may compromise either product quality, food safety or business ethics.
- For quality focused companies faced with such financial crises, they may simply cease to export and become reliant on the domestic market which is fickle and difficult to service without a cost effective distribution system.

13. QUALITY ASSURANCE PROGRAM, 1996

The VM DP has worked co-operatively with the DIAA QA committee chairman and their consultant in the early stages of their QA program development. The market development project printed the explanatory brochure for distribution to all deer industry stakeholders.

QA is about becoming a customer-driven industry and consistent supply of product to market specifications is the key.

Market Focus

In both the domestic and international venison trade, the quality program needs recognition in the market place to assure continued and future access to some markets and to give credibility to marketing claims.

- It needs to focus on providing product which consistently meets or exceeds customer expectations, and to eliminate waste within the industry.
- It needs to be developed and owned by the industry, and deliver clear benefits.
- It must involve everyone from farmer to exporter and all levels from slaughter floor workers to management.
- It shall be integrated throughout the industry yet remain voluntary.
- Certification to ISO 9002 should be a milestone rather than a reason for developing the program.

The technical standard that the program is targeting is:

- The development of codes of practices
 - * *Deer-care* Program-Farm
 - * *Deer-care* Program-Transport
- Process Management (Abattoir)
 - * Quality systems ISO 9002 +
 - * HACCP
 - * Product Specification
 - * AUS-MEAT Language (Product cuts and specifications)

The sensitivity of market/customer specifications regarding special requirements will be acknowledged in developing this program.

Cost savings to the participating companies will be achieved through the development of generic documents such as:

Deer-care Program for farmers

Deer-care Program for transport

+ A formal ISO 9002 system is not practical for the industry at this stage since there is no mechanism for centralised monitoring or external auditing of the quality system. ISO accreditation is for individual marketers/ processors to seek and fulfill.

Pre-requisite Tasks

To facilitate the program development, certain issues need to be researched.

1. Desk research on known factors affecting “quality” of venison.

Definition of quality being “fitness for use”.

- Quality of venison fit for fresh table use requires criteria such as acceptable taste/ flavour, texture, tenderness, colour, leanness to be addressed.
- Quality of venison fit for manufacturing or further processing requires factors such as chemical lean, pH value, water holding capacity to be identified.
- Quality of venison for chilled export in vacuum packs requires factors such as uniformity of carcass size, pH values, colour and technical specifications of vacuum bagging system and holding temperatures be addressed.
- Quality of venison fit for frozen export in carcass form requires identification of suitable processing pre-treatments, appropriate wrapping materials and methods, uniformity of carcasses, and maximisation of container packing space.

2. Identification of factors affecting “quality” - pre-collection handling, removal of all velvet (including regrowth), transport, pre-slaughter conditions and handling; actual slaughter methods/ techniques/ training, processing procedures, chilling times.

3. Attention to boning and cutting to AUS-MEAT specifications, measurement of pH values, elimination of bruising and ecchymosis, care in

packaging, labelling and storage.

4. Documentation of all points above as “recommended and preferred procedures for production of quality grade A Venison”. Ideally a grading system would be best but this may need to be a future goal as it requires a mechanism to issue certification, to monitor use etc.
5. Print an explanatory brochure on QA & distribute with newsletter (RIRDC)
6. Make copies available to all sectors including boning rooms, abattoirs, transporters etc.
7. Supply information to MINTRAC for inclusion in red meat processing curriculum.

PROJECT INITIATIVES

Outcomes from the project covered a wide spectrum of the industry. Indications of significant improvement in acceptability of venison have come from venison marketers active in the domestic and export markets.

1) A major awareness raising and educational focus by transferring knowledge on the available venison resources - from AUS-MEAT developed material to VMDP developed material.

2) Encouragement in the use of these resources by

- Farmers - to improve farm dollar returns by cost effective supply of the processor preferred animals in the shortest possible time, with fewer deductions due to out-of-specification conditions.
- Processors- by reducing losses due to preventable contamination and trimming, and time losses due to inadequate quality control procedures.
- Marketers - by the provision of the researched and printed generic brochures and fact sheets to their customers so that a unified message is presented with accurate nutrition data and agreed preparation and handling methods for venison.
- The end user (consumer; food service catering; hotel and restaurant sector; meat trading and export companies; educational institutions eg TAFE and colleges; and the media including food and rural writers, radio and TV; by professional advices on the deer industry, but venison in particular.

3) Regular market research:

- Externally conducted as in the recent Hotel and Restaurant food professionals attitude and usage study.
- Internally by continual liaison and networking with individual and group marketers and exporters. Their perceptions on information to be communicated was incorporated into the development of all generic material. Figures indicated an increase in venison production of 19% during '94-95 and a further increase of 5.5% in '95-96, which reflected the recent shortage in slaughter animals. Initiatives of the project contributed to the increase in export of venison (85% of total production), but an improvement in domestic consumption was also reported by traders, particularly in the Hotel and Restaurant sector.

4) Encouragement of the industry stakeholders to identify the problems and threats and to seek to interest appropriate researchers in addressing

these issues.

- 5) Promotion of a strong quality focus in making sectors of the deer industry and associated industries aware of quality related problems and initiating change to address them.
- 6) Provision of data on the deer industry and specific information on slaughter requirements, as well as venison cuts, packaging and marketing trends, to government departments, rural and agribusiness consultants, processing plant managers and members of allied industries.
- 7) Development of a public relations approach, with some activities designed to present a better image for venison through breaking down some of the entrenched negative perceptions acting as barriers to market development.

KEY ISSUES FOR THE FUTURE

1. Consumer Expectations and Perceptions of Meat and Meat Product Quality

It is important that strategies for industry and market development are continually fine tuned and flexibility and short response period assist with success in this area.

Trends in consumers expectations, behaviour and ultimately purchase patterns must be monitored. Who is this all important consumer? Globally there are many similarities although specific cultural aspects are involved insane regions.

However, most people have many different role patterns and cannot be categorised in one type of behaviour, and there are those who eat convenient foods during the week but spend much time to cook during the weekend. Therefore a consumer segmentation based according to life style can lead to an over simplified view of the situation.

Quality perceptions depend not just on the person but also on the context in which the food is eaten, for example, a picnic, family dinner, restaurant meal. Similarly there are differences in quality perceptions for down market products as well as for up-market products, and quality for the consumer could no longer be defined as technical perfection or production cost. Minced venison as well as Striploin steaks could be high or low quality.

For instance those who oppose the presence of red or bloody colour in meat will continually rate as unacceptable “quality” even the most tender and flavoursome prime cut steak. The same is true in reverse for those who prefer a lesser degree of doneness.

When it comes to meat specifically, several other issues take on an additional importance to many consumers.

Food safety (microbiologically, and residue free), animal welfare and perceived convenience are key factors. The characteristics of meat eating quality are also complex and need to be more closely examined if red meat (particularly game meats) consumption is to increase. The need to remain aware of these changing trends in the marketplace must be highlighted, and results fed back through the chain to the producer to ensure the best possible result for the customer as well as profitable returns for the

producer.

Venison producers need the customer much more than the customer needs venison. There is an ever-increasing range of alternate foods for them to experience if venison is not available or acceptable.

2. Market Development

The many tasks associated with market development either domestically or for export markets are complex, but do require constant attention. The focus must always be clearly on the customer, and almost everything associated with the industry should be driven from the marketplace (customer) back through the value chain to the farm.

Failure to remain aware of customer needs, and meet or exceed them, will lead to a widening of the gap between customer needs and venison marketers' perception of their needs.

3. Competitor Activity

In the past, awareness of the activities of the New Zealand Deer Industry and their venison marketing activities was considered to be the only essential surveillance required.

However, venison is and will continue to be challenged by its closest competitors. Many of the novel products such as emu, ostrich, kangaroo, crocodile, camel and even specialities like "Salt bush Deja (lamb)" are strengthening their market development activities. These products have appeal to a similar niche market consumer, as well as the more traditional Hotel & Restaurant Trade as does venison, and probably represent a significant threat.

4. Deer Numbers

The re-building of the National herd, and more importantly, the expansion of herd size is critical to development of markets, but the strategic approach to this should be cautious.

The fragmented nature of the industry will not be improved by the addition of large numbers of small deer farms or by traditional farmers simply fencing off areas to hold a few deer.

Industry viability and progress will come from volume; fewer but larger deer farms with larger numbers of deer. The New Zealand principle of specialisation will become more important as Australian deer numbers

increase, with farms having specific meat herds, velvet herds, and breeding herds, or becoming finishing properties or breeding properties rather than attempting to cover all facets.

Small deer farms could be profitable provided enough of them were clustered, so that they become something of a supply alliance, and were able to take advantage of cost savings in transport etc.

5. Live Deer Exports

The export of live deer has occurred for some years, though volumes have remained relatively low. Korea is the primary market seeking Red deer, while Malaysia has imported Rusa deer on several occasions. Only a few deer exporters are active in this field as the financial returns can potentially be lucrative, but the risks are extremely high. Experienced operators understand the responsibility attached to ensuring that all protocol and regulatory issues are observed in all documents. This extends to animal health declarations and testing to satisfy both AQIS and Korean authorities and ensuring that animals exported were born and raised on properties south of the designated zone for blue tongue vectors.

While some members of the deer industry are concerned with the continuation of the live deer export trade, the numbers of deer involved have been and will probably continue to be small in the overall total deer herd population. If the production side of the industry is properly managed, it is unlikely that the export of deer will have a significant, if any, impact on the future marketing of venison.

6. Industry Investment in Processing and Processing Locations

The processing of deer at abattoirs and the subsequent boning and packing is still restricted to general abattoirs which have been designed to process cattle, calves, sheep or pigs. Although this operates well enough with only minor modifications, there are additional problems sufficient to make the abattoir management reluctant to be involved with deer slaughter. Domestic facilities will often accommodate deer slaughter, have fewer regulations and restrictions, and can therefore cope with small, intermittent numbers. However, the export licensed facilities are much more sensitive to situations which may jeopardise their accreditation, and the potential for greater contamination issues through deer hair spread is all too real. This is particularly so in the case of European Union licensed plants, which process for the primary venison export destination.

It would be unrealistic to list the facilities slaughtering and boning deer as the changes within this sector are frequent and rapid. A full list of export

plants able to slaughter deer, together with their market access accreditations is available from AQIS, Canberra. A list of domestic facilities can be obtained from State livestock and meat inspection offices.

One dedicated deer slaughter facility similar to those which process all deer in New Zealand is expected to begin operation in January 1997. This plant, situated at Oberon in NSW will be able to service most export markets, including European Union countries, and will have a quality assurance program integrating all known criteria to produce tender venison with food safety issues addressed through a Hazard Analysis Critical Control Point (HACCP) system.

Other than this venture, the only industry investment in processing has been limited to minor expenditure on unloading ramps, pre-slaughter race modifications, lairage and knocking area modifications. Without investment in specific facilities for deer and/or other *exotic* stock, the deer processors will be constrained by the restrictions and lack of product control resulting from the use of mainstream red meat plants.

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