



**DEER INDUSTRY
NEW ZEALAND**

**VENISON INDUSTRY STRATEGIC INTENT
2005 - 2010**

July 2004

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1 Background - Process

There has been an in-depth process including significant targeted consultation undertaken in preparing this draft proposed Strategic Intent for broad deer industry consultation. The process to date is described below:

- *The Deer Industry New Zealand Board met for a day in Wellington prior to a Board Meeting late in 2003 to develop key strategic priorities and the framework for this paper.*
- *Deer Industry New Zealand Executive met with all venison processors/exporters to discuss individual company priorities and overall industry issues and directions.*
- *An outline was prepared with input from all processors/exporters.*
- *The final agreed outline was reviewed, amended and approved by the Board.*
- *The Deer Industry New Zealand Executive developed a draft paper which was reviewed, amended and approved by the Board.*
- *This draft was circulated to all processor/exporters, to the DFA Executive Committee and to all DFA Branches seeking feedback. Feedback was due by 14 May 2004, but comments received after that date (1 Branch Submission) have been considered in the development of this Strategic Intent. Feedback was received from:*
 - *Two companies*
 - *Two Executive Committee Members*
 - *5 Branches*
 - *8 Individual Deer Farmers (Predominantly involved on Branch Committees)*
 - *3 other branches (verbally) through a meeting of South Island Branch Chairmen.*
- *Feedback received was considered and the draft strategic intent paper was revised for Board review, amendment and approval.*
- *The draft was made available on the DINZ website and was made available on request. Its availability was publicised in industry publications and through the media.*
- *Feedback from that process was considered by the Board and this final document was approved by the Board in July 2004.*

2 Introduction

There are several important introductory points to note in relation to this Strategic Intent.

2.1 Industry Strategic Intent

This is a description of the industry's strategic intent and, as described above, has been developed in consultation with industry stakeholders.

It is founded on the principle of industry partnership as described by the 3 Partners: 1 Vision Strategy where the industry collectively is in a stronger position to achieve sustainable profitability with all partners – producers, processor/exporters and customers - working together towards common agreed goals and where individual sectors also co-operate.

As set out later in this paper, all sectors have their own roles to play and specific responsibilities to assist the industry's orderly development and to assist the achievement of the proposed objectives.

However, the commercial independence of individual companies and individual producers must be recognised. While this paper distils a direction and a set of agreed targets common to industry participants, individuals will also have their own commercial initiatives. The aim is to ensure efforts are aligned behind common agreed goals but must avoid stifling competition and innovation.

2.2 Development of Existing Strategy

This is not, and does not pretend to be an entirely new venison strategy.

Many of the fundamental themes agreed over recent years regarding venison market development are captured and repeated here. However, this has happened deliberately, after initial industry consultation and is an endorsement for the general direction previously agreed. Some of the main challenges facing the industry in recent years remain and the strategies to address them, many of them long-term, must continue to be pursued.

That said, this Strategic Intent has some notable features which set it apart from previous industry strategies and which mark an important process of development.

2.2.1 'Global'

Unlike previous strategies, which have generally been focussed on one or small number of markets this is a 'first' for the deer industry in considering a wide range of markets as targets for development and demand creation.

Furthermore, companies individually have a number of additional commercial goals outside of these common, agreed target markets. The joint promotion programme provides a mechanism to support market development activity in these company-specific target markets – giving this Strategic Intent a truly global perspective.

2.2.2 Measurable Targets

For the first time, the industry's strategic intent includes measurable targets. These are necessarily broad and general in nature, given the need to identify common goals while also allowing flexibility for commercial operations, but provide a clear indication of a common general direction supported by the industry.

It is important to recognise that no sector or participant can be held singularly accountable for the achievement of these goals. Their achievement requires collective industry action and co-operation. Even then, a number of factors may play a role outside anyone's control which will have a significant effect on the achievement of these goals.

It is intended to report against the industry's progress against these goals on a regular basis. Goals will also be regularly reviewed to ensure they remain relevant and in line with the industry's situation and aspirations.

2.2.3 Research Integration

This Strategic Intent recognises that research plays an important part in assisting the industry to address some of its main challenges and exploit market opportunities and provides a clear list of priority areas of research for research funders and providers to work from.

2.3 Role of Deer Industry New Zealand

As set out in the Game Industry Board Regulations, Deer Industry New Zealand's has an assisting and facilitating role. Consistent with the Regulations and the 3 Partners: 1 Vision Strategy, Deer Industry New Zealand is an industry-good organisation and does not take a commercial role.

In terms of the goals mentioned above, Deer Industry New Zealand's role is to assist all sectors in achieving these goals for the overall benefit of the industry.

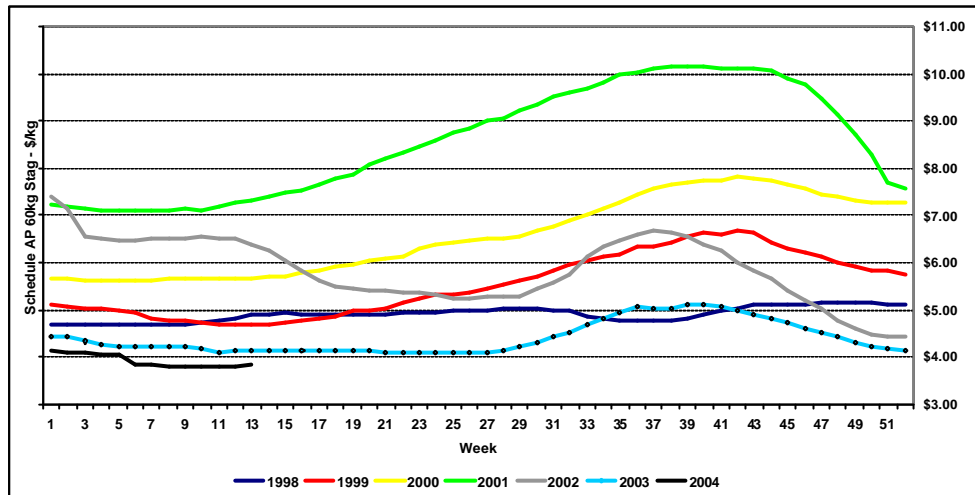
3 Situation and Issues

This section describes some of the main challenges the industry continues to face and which this Strategic Intent aims to address.

3.1 Current Returns

Figure 1 below shows the average weekly schedule over the last 6 years. Current schedule levels at the time of writing are at an all time low and are some 30% below the 10 year average for this time of year. The industry is experiencing one of the most prolonged periods of low prices in its history.

Figure 1 – Average Weekly Published National Schedule (60 kg AP Stag)

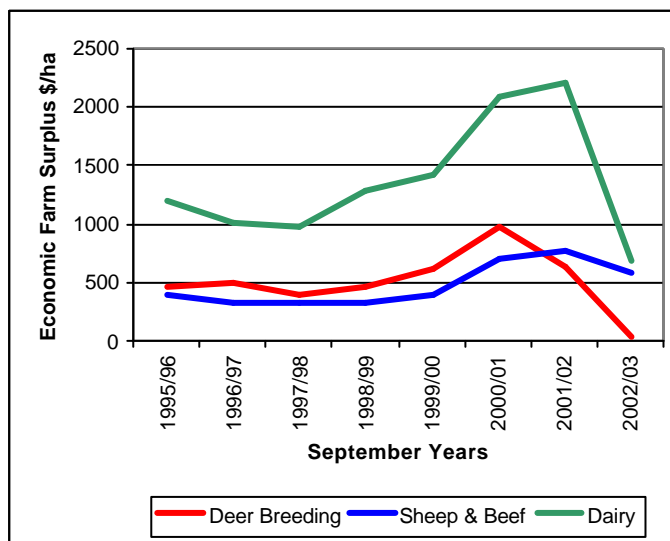


Source: Agri-fax

Data supplied by Nimmo Bell in late 2003 showed an Economic Farm Surplus for deer breeding of \$26/ha compared with \$577 for sheep and beef and \$694 for dairy. This compares with an average EFS for Nimmo-Bell's deer breeding model of \$508 over the previous 8 years. The time series of comparative EFS data supplied by Nimmo-Bell is shown in Figure 2.

Deer production is not sustainable at these prices and certainly not competitive with other livestock options.

Figure 2 – Economic Farm Surplus



Source: Nimmo-Bell

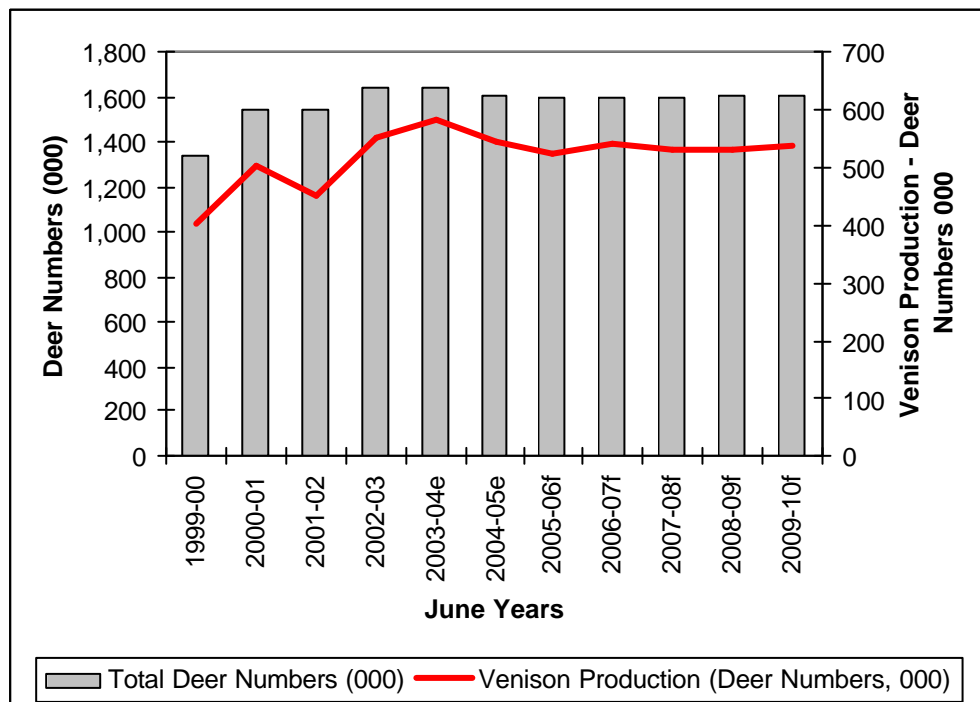
3.2 Forecast Herd Numbers and Production

The need for improved information regarding deer numbers and improved forecasting models is well recognised and there are a number of initiatives underway and planned to address this. Initiatives include:

- Data-sharing with the AHB database to identify any deer farmers not on our database (completed through a one-off access in 2003 for which Privacy Act approval was obtained)
- Advertising in rural publications to encourage any deer farmer not receiving our publications to register (June 2004)
- Working with the Agricultural Statistics Working Group, MAF and Statistics New Zealand on a Strategy for New Zealand's agricultural statistics (ongoing).
- Working with MAF and Statistics New Zealand on simplifying the Ag Census and Survey forms (ongoing)
- Promoting the need for accurate completion of Ag Census and Survey Forms to deer farmers to encourage better data return and accuracy (ongoing)
- Conducting a DFA/Deer Industry New Zealand survey of all known deer farmers regarding stock numbers and intentions (July 2004)
- Contracting Meat and Wool Economic Service, who already survey beef and sheep farms with deer, to keep and process the deer information to plug into the deer model.
- Contracting Meat and Wool Economic Service to maintain and update the deer model including the improved data input from the source described above.

We have used the forecasts illustrated in Figure 3 below for the purposes of this Strategic Intent. This forecasts a period of stability in herd and production growth, suggested to be at a level below estimated production levels for the current year.

Figure 3: Historical and Forecast Deer Herd and Production Numbers



Source: Meat and Wool Economic Service, Feb 2004

3.3 Seasonality of consumption

The majority of venison remains consumed within the European game season – say October to January each year.

However, as Figures 4 and 5 show, on average production (Figure 4) and exports (Figure 5) are reasonably consistent throughout the year – certainly when compared with the bulk of consumption taking place in October to January.

Figure 4: Average Monthly Venison Production 98/99 to 02/03

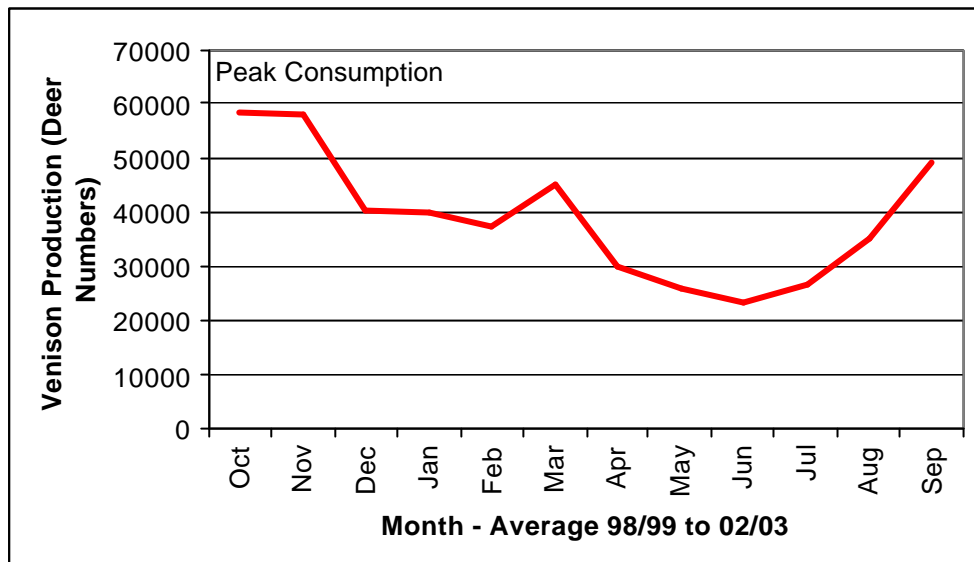
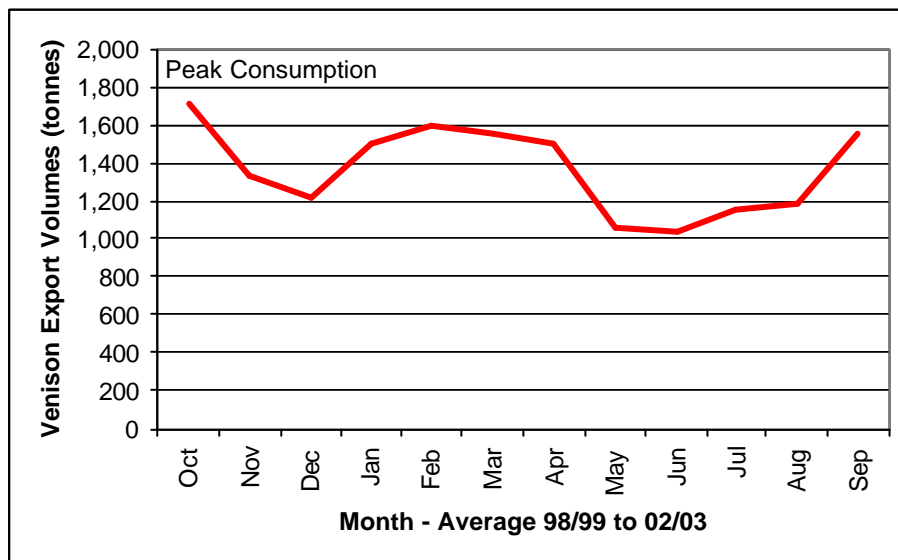


Figure 5: Average Monthly Venison Exports 98/99 to 02/03



This creates a number of issues for the industry:

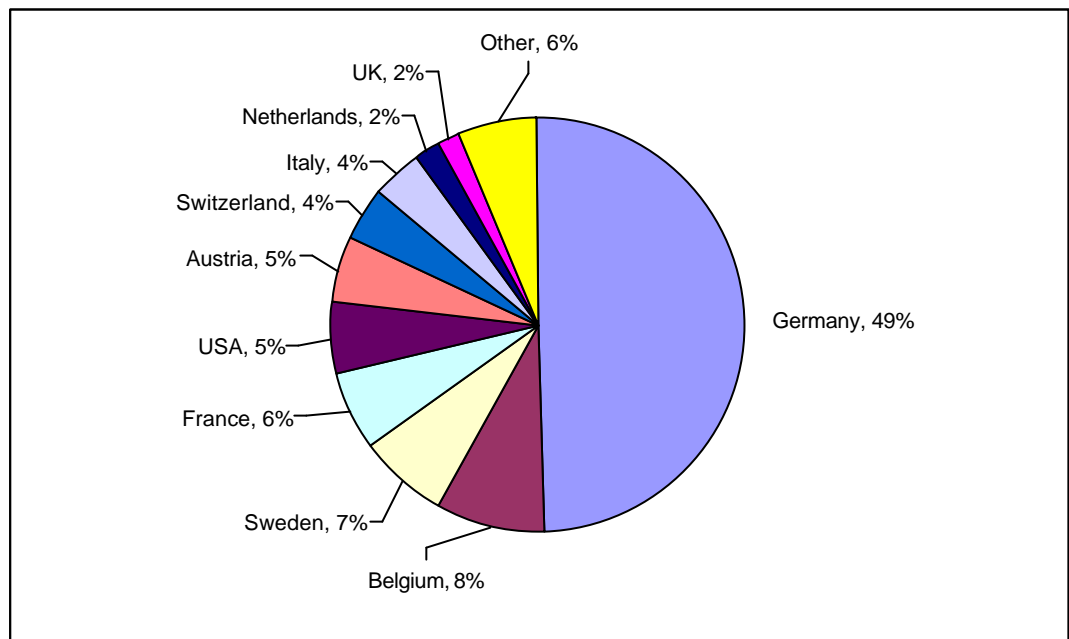
- large volumes of product produced outside the peak consumption season is frozen
 - this is generally sold at a lower price than chilled product
 - this cheaper frozen product competes with NZ chilled product in the peak consumption season

- *current deer production systems are such that there are large volumes of production available late in the peak consumption season, or after the end of the peak consumption season (as illustrated in Figure 4)*

3.4 Reliance on a small number of geographic markets

Figure 6 below shows the industry's significant reliance on a small number of markets. Germany accounts for almost half of all exports and Europe and Scandinavia account for roughly 90% of exports.

Figure 6: Venison Exports by Geographic Market



However, this is not surprising and needs to be considered in context – consider that venison is a game meat (farmed game) and Germany is the world's largest market for game.

It also needs to be noted that the type of products comprising the 49% of product sold to Germany as well as the channels through which those products are sold have changed over the years with more further processed products being exported and sold through broader channels, with retail being notable.

3.5 Reliance on traditional food-service channels

New Zealand has been heavily reliant on the traditional game sector and traditional food service channel. This has changed over the last 5 to 10 years with a focus on developing new retail markets (now estimated to represent up to 25% of industry volumes, up from almost zero 10 years ago)

However, reliance on the traditional foodservice channel has created a number of issues for the industry:

- *country of origin is rarely communicated to the diner – ie 'New Zealand' is rarely if ever mentioned on the menu. In contrast, the retail sector provides significant opportunities to communicate and promote New Zealand country of origin through to the consumer.*
- *reinforces the traditional, seasonal positioning of venison.*
- *limited market size – seasonally and demographically (eg. older consumers).*
- *longer supply chains, with less opportunity for New Zealand industry involvement.*

While it is expected that the traditional game sector will remain a very important market for New Zealand venison, there is a need to build new demand outside the game season and traditional food-service sector. This would have a number of important advantages for the industry:

- *new markets where end-consumers are exposed to New Zealand country of origin labelling and promotion and other key differentiation messages*
- *broader period of consumption*
- *broader market base*
- *less head-to-head competition with European producers and game suppliers (political advantages). In fact there may be significant advantages in working with European producers to promote venison.*
- *reducing volumes into the commodity game segment to assist prices in that segment*

3.6 Need to build awareness of NZ country of origin

- *There is a need to promote the New Zealand origin of our product as an important point of differentiation – to create an awareness of the unique benefits of venison from New Zealand and enable consumers to select New Zealand venison in preference to other game meat suppliers.*
- *'New Zealand' is an extremely valuable promotional and marketing benefit for New Zealand Venison.*
- *The Strategic Intent aims to build awareness of New Zealand country of origin by targeting retail channels where country of origin branding will get through to the end consumer as opposed to the difficulties in achieving this in the traditional food-service channel (see above).*

3.7 Adding value

- *In order to succeed at retail, New Zealand venison products must be presented in new product forms which are attractive and appealing to the consumer and which are easy and quick to prepare. There is significant opportunity to produce added-value venison products and ingredients (in New Zealand and/or through partners in-market) and this would have a number of benefits for the industry:*
 - *assist penetration into retail*
 - *provided improved opportunities for country of origin branding*
 - *reduces overall volumes exported - possible cost savings in freight as well as the benefit of reduced volumes going into a commodity market*
 - *captures value on-shore*
 - *enables greater control over quality and presentation of products*
- *There is also a need to identify ways to derive improved value from the carcase. This may be by:*
 - *identifying new products from the carcase, offals, hides etc*
 - *finding new market uses for these products*

3.8 Volatility in supply

The volatility in supply is regularly cited by the market and marketers as the biggest single issue associated with building a sustainably profitable market for New Zealand venison.

There is widespread agreement among participants that there is considerable opportunity to grow volumes profitably. However, this growth needs to take place in a steady and managed way for this to happen.

While venison production volumes have increased by less than 3% per annum on average between 1992/93 and 2002/03, Figure 7 below illustrates that actual changes in production from one year to the next have varied wildly – from reductions of up to 24% (1995/96) to increases of up to 31% (1997/98)

Figure 7 – Annual Percentage Change in Venison Production

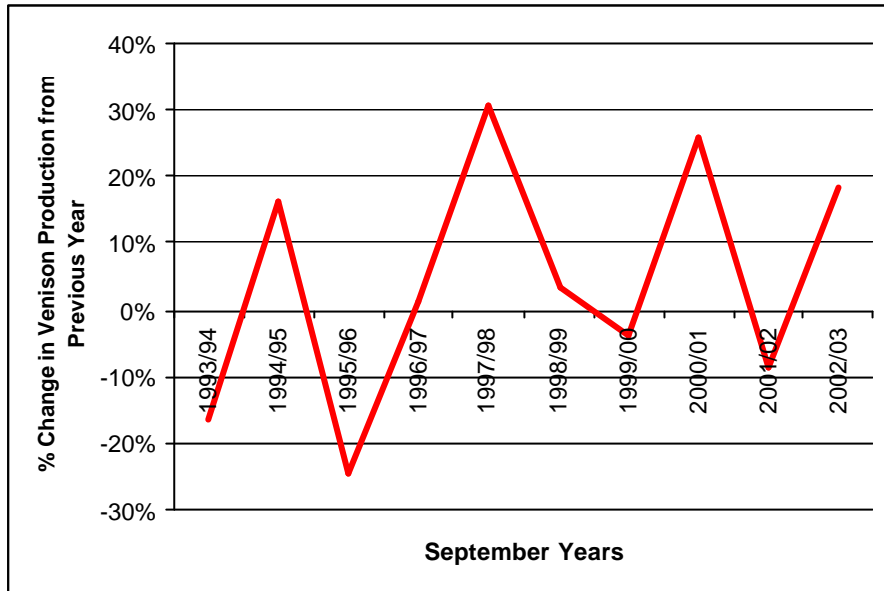
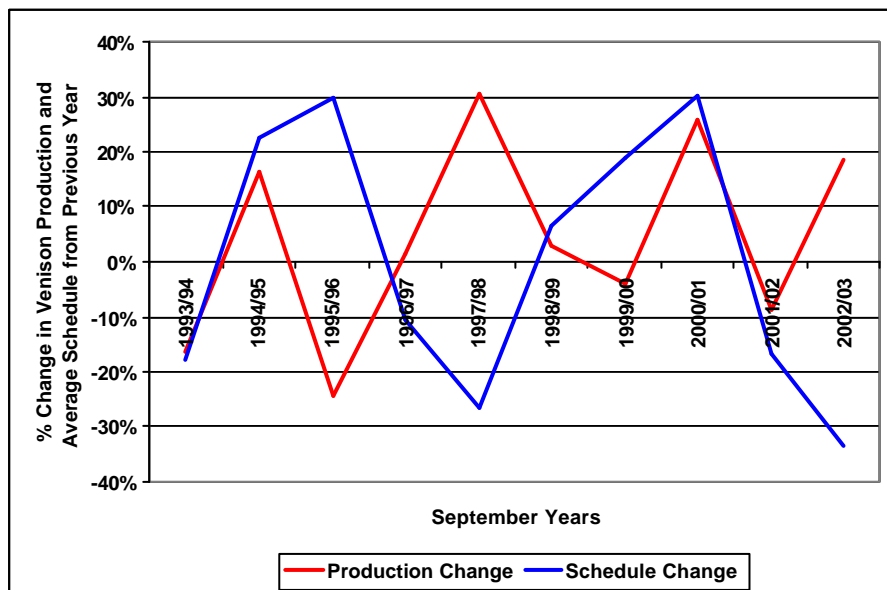


Figure 8 below overlays Figure 7 with the annual change in average annual schedule over this same period. It is notable that while there are examples of production increasing in line with an improving schedule (1994/95 and 2000/01), the general trend this shows is an opposite movement between production and schedule price changes – in 1995/96 when the schedule had improved 30%, production dropped 24%, in 1997/98 a 26% drop in average schedule was matched with a 31% increase in production, in 2002/03 the average schedule dropped 33% and production increased 18%.

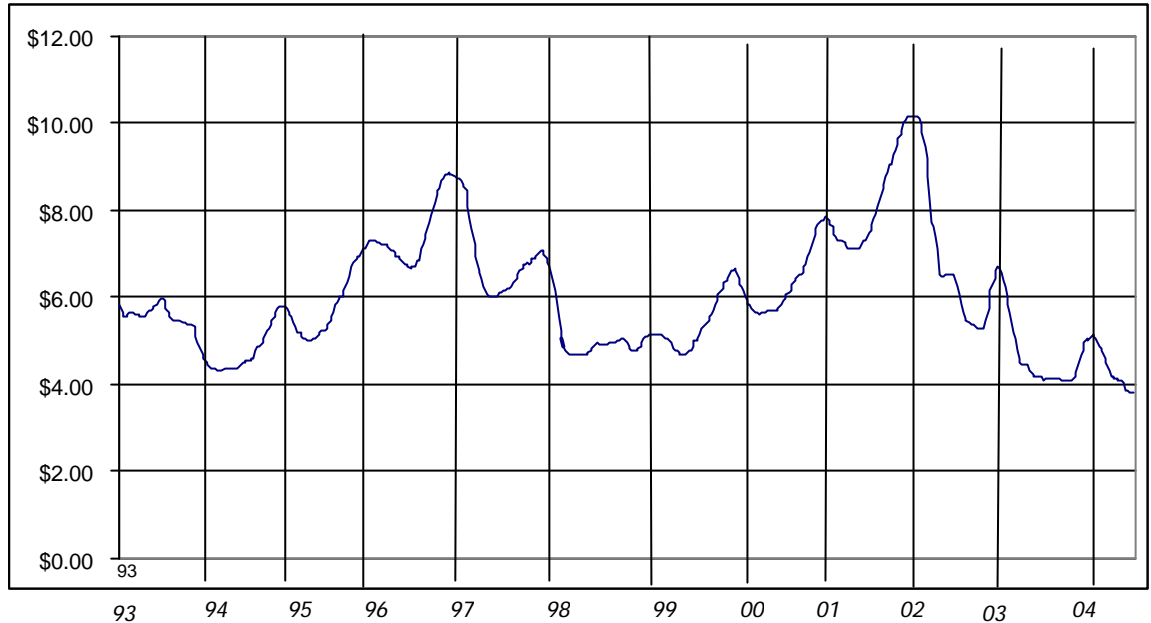
Figure 8 – Annual Percentage Change in Venison Production and Annual Percentage Change in Average Annual Schedule



3.9 Price volatility

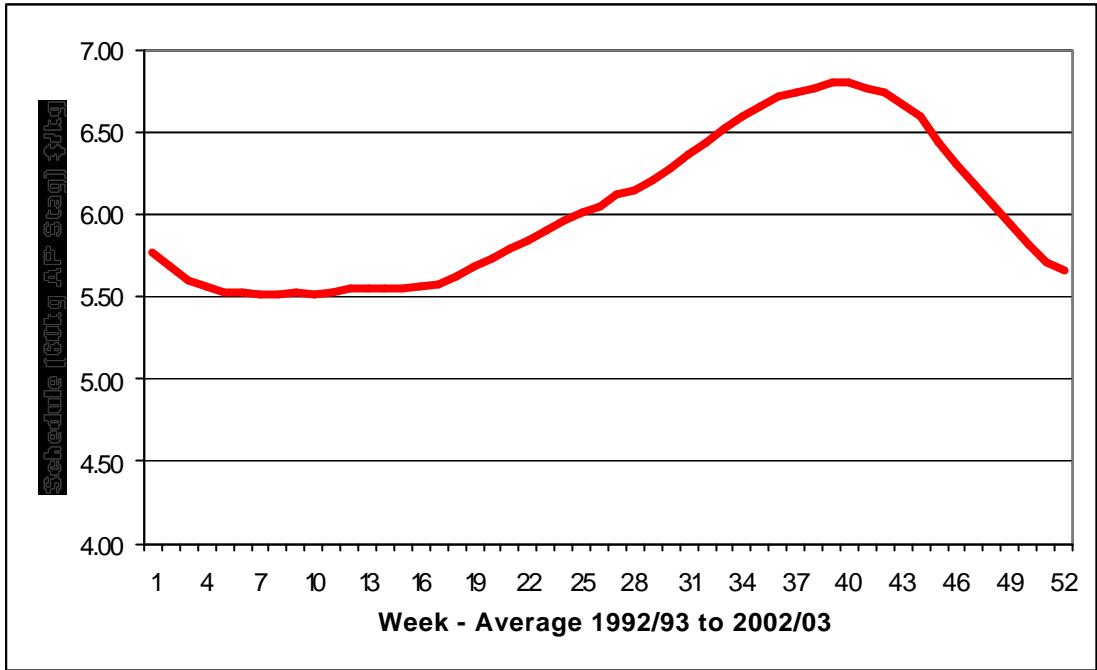
Figure 9 below shows a time series of the weekly average national published schedule. The volatility in schedule pricing over time is obvious, but the impact of extraordinary events such as the Asian Economic Crisis and BSE/FMD must be recognised as a key driver in this.

Figure 9 – Weekly Average National Published Schedule (60kg AP Stag)



In contrast, though recognising this is based on averaged data, Figure 10 below shows the average weekly schedule for each week across this 11 year period. This appears to be good support for the concept of \$5 to \$7 'tramlines' referred to by some industry commentators.

Figure 10 – Average Weekly Schedule 1992/93 to 2002/03



4 Objectives and Targets

Overall, the objective of the Venison Industry Strategic Intent is to improve venison returns from current low levels, and then maintain returns, through managing supply and demand, at levels at which all sectors are sustainably profitable.

To achieve this, the industry's most important objectives have been, and must continue to be to:

- *build new demand in new and existing markets outside traditional game channels*
- *increase consumer demand for venison outside the game season*
- *manage herd growth and supply of animals in line with market needs*

As explained in section 2.1, it must be stressed that these overall industry targets are intended to illustrate the general, common direction which stakeholders have generally indicated support for. They are not individual company targets and each company continues to have its own specific commercial objectives.

Furthermore, no single sector or participant is responsible or able to ensure the achievement of these targets. As set out in section 6, each sector and all participants have roles to play to assist the industry achieve this agreed direction.

4.1 Diversification – Reducing Reliance on Traditional Channels

Build new demand for 3,000 tonnes of venison outside traditional game channels. An example of how this could be achieved is set out below:

<i>German retail</i>	<i>additional 1,000 tonnes (Today: estimated to be less than 3,000 t)</i>
<i>USA & Canada</i>	<i>additional 500 tonnes: subject to structures enabling this – ie, dependant on result of Cervena review (currently approx. 1,100 t)</i>
<i>France</i>	<i>additional 500 tonnes (Today: approx. 1,250 t)</i>
<i>Benelux</i>	<i>additional 250 tonnes (Today: approx. 2,100 t)</i>
<i>UK</i>	<i>additional 250 tonnes (Today: approx. 400 t)</i>
<i>Other Europe</i>	<i>additional 250 tonnes (Today: approx. 4,400 t)</i>
<i>NZ and Australia</i>	<i>additional 250 tonnes (Today: estimated at approx. 500 t)</i>

It should be recognised that the figures given above are export figures and are not necessarily the same as volumes consumed in that market – this information is not available.

Based on current export figures, the example above would see the industry's reliance on Germany reduce from 49% to 39%. It would also see a significant diversification of volumes within Germany from traditional foodservice channels to new market segments (esp. retail – also see section 4.3).

Based on current models forecasting relatively stable production over the period of the strategy, this diversification strategy combined with active demand creation programmes (see section 5) is clearly aimed at improving market returns for venison through addressing supply and demand fundamentals.

4.2 Extending the Period of Consumption

It is proposed that the industry attempts to align production and demand through both extending the period of consumption as well as assisting production to become available earlier.

In terms of the former approach the objective is that chilled exports from April to July are to be >1,000 tonnes (Today: <2% of annual exports each year between 1999 and 2003).

It must be noted that extending the period of consumption requires a significant shift in consumer perception and culinary tradition. This should not be seen as a quick-fix. It is a long term strategy.

4.3 Timing of Production

As well as working on aligning production and consumption through extending the consumption period the strategy proposes to work from the other end as well by also assisting producers grow animals to killable weights earlier in line with peak consumption. As with efforts to move consumption, efforts to change the timing of production across the industry are not a short term exercise – though some producers are well advanced on achieving this individually. Specific objectives are set out below:

- *Availability of cost-effective production technologies, systems and know-how to enable natural venison production (methods acceptable to the market) in line with peak consumption periods.*
- *65% of venison production (for a June year end) able to take place between August and December (averaged 47% between 92/93 and 02/03). (Note: This means animals would be at killable weights coming into the New Zealand winter, providing farmers with options for those animals. The strategy does not suggest that animals will necessary be processed at this time – market signals will influence the timing of slaughter).*

4.4 Branding and Differentiation

75% of venison exports marketed through channels where the end consumer can be identified with clear NZ country of origin branding (Today: estimated at roughly 25% of exports in 2004).

5 Tactics

5.1 Joint Promotion

Joint Promotion will be used to support company demand development priorities.

- *In some cases this will see joint promotional funds used to support activities which are directly aligned with the specific targets described above.*
- *However, it must be recognised that companies have commercial targets outside those listed above (eg in other specific markets), but which support the overall goal of diversification and new demand creation, and hence which are deserving of joint promotion support.*
- *It is proposed that Deer Industry New Zealand maintains its existing Joint Promotional criteria. (These are available from Deer Industry New Zealand on request). In summary, the criteria ensure that Deer Industry New Zealand will only support activities which are consistent with the agreed strategy, key messages etc.*
- *Joint promotion activity is not available for activity designed to capture market share. It is only available for activity aimed at new demand creation.*
- *Joint promotion activity is designed to leverage off and add-value to company specific promotions by building in industry-good elements.*
- *Joint promotion activities are generally initiated by companies and their in-market partners, but involve Deer Industry New Zealand input in finalising details, agreeing contributions and in execution. However, Deer Industry New Zealand Executive also takes a proactive approach to developing ideas and concepts for joint promotion activities for companies to consider.*
- *The full range of possible joint promotion activities cannot be identified in advance, but may include support for:*
 - *Retail promotion, for example*
 - *retail tasting and demonstration programmes*
 - *in-store merchandising*
 - *Point of sale materials*
 - *In-store signage*
 - *chef and salespeople education/demonstrations*
 - *advertising*
 - *direct mail promotions*
 - *trade shows*
 - *promotional materials*
 - *sponsorship – events, awards etc associated with target markets*

5.2 Generic Promotion

- *Deer Industry New Zealand will undertake generic promotion of New Zealand Venison in agreed markets, promoting agreed key messages (see section) to target segments.*
- *Specific generic activities will be developed in consultation with processor/exporters and integrated with company activities wherever possible.*
- *The objectives of generic promotion are to:*
 - *generate awareness among targeted consumers*

- demonstrate to retailers that the industry and exporters are investing in promotion (to encourage retailers to stock the product)
- to convey key messages that are not company specific and benefit all companies
- *Specific generic activities which are contemplated include:*
 - Preparation of promotional materials in a range of languages – chef and consumer recipe materials, point of sale display materials, retail merchandising materials, chef and consumer education/information materials.
 - Upgrade and maintenance of the nzvenison.com website in a range of languages.
 - Regular development of new recipes and photographic resources
 - Maintaining capability – availability of skilled and knowledgeable chefs, butchers and retail demonstrators
 - Agreed advertising campaigns
 - Direct-mail campaigns
 - Education in cooking schools and culinary institutions
- Opportunities to co-operate with British, French and German deer farmer groups in promoting venison will be explored.
- It must be noted that in addition to the joint and generic promotional activities undertaken or supported by Deer Industry New Zealand, companies will also undertake company/brand specific promotional and market development activities. Deer Industry New Zealand will maintain a close relationship with companies to identify company specific initiatives to avoid conflicts and encourage collaboration wherever possible.

5.3 Differentiation

- One of New Zealand Venison's strongest marketing advantages is its 'New Zealand-ness'. The New Zealand country of origin will be promoted in all materials and activity. (Note: An exception to this rule may be made in cases where promotion is conducted jointly with other industries (eg France) and where a generic venison campaign can be agreed – eg to promote out-of-season consumption).
- Local language variants of the New Zealand Venison logo will be used in all generic promotion and in joint promotional activities wherever possible. Companies will be encouraged to use the logo on company specific promotional activities and on product packaging for example.
- In addition to the New Zealand country of origin, the following are the **key messages** supporting the positioning of New Zealand Venison:
 - Year-round
 - Modern and convenient
 - Healthy
 - Natural production

5.4 Managing Supply

- It is critical that supply is managed in line with market needs. It follows that the responsibility for managing supply rests best with the same group of people responsibility for managing marketing – namely processor/exporters.

- *Deer Industry New Zealand is not responsible for marketing New Zealand Venison. Deer Industry New Zealand has a role in assisting with promotion – but this is only one part of the overall marketing mix.*
- *Just as Deer Industry New Zealand assists processor/exporters with promotion, Deer Industry New Zealand provides a facilitating role in relation to supply management. This takes the form of assisting with communicating market messages back to producers and encouraging producers and processor/exporters to work together to manage supply in line with market needs. Deer Industry New Zealand does not have a role in supply management beyond this. Supply management is seen as a strictly commercial matter between processor/exporters, their in-market partners and producer suppliers.*
- *Processor/exporters already have a range of contracting arrangements available for producer suppliers. The terms of these are strictly commercial between processor/exporters and their producer suppliers. However Deer Industry New Zealand is strongly supportive of mechanisms which assist the sectors to manage supply in line with market needs and will play a facilitating role to assist commercial operators where this is appropriate.*

5.5 Quality Assured Underpinning

- *QA is increasingly a 'cost of business'. It is a 'given', and 'absolute must' to do business in many markets and segments. This is especially the case with European retailers.*
- *Accordingly robust and credible QA systems are a critical underpinning tool for the industry to enable penetration into demanding European retail outlets.*
- *The primary responsibility for meeting customer requirements, including demands for QA programme rests with the processing/exporting sector. These companies have the direct relationships with in-market partners through which such requirements are conveyed and discussed.*
- *The future role of Deer Industry New Zealand in relation to QA is currently under review through a separate consultation process. However, currently, Deer Industry New Zealand has a role in facilitating QA programmes at an industry-good level. DeerQA programmes form the 'base-level standard' for most companies' commercial QA programmes. Companies build specific market and customer requirements on top of this base-level standard. This structure has the following advantages:*
 - *Companies remain primarily responsible for meeting customer needs through commercial programmes.*
 - *For common 'industry insurance'-type issues, Deer Industry New Zealand is able to facilitate and co-ordinate a common agreed base-level standard among participating companies. This leads to efficiencies as companies do not have to duplicate this work individually and producers have a common set of base-level guidelines to work to.*
 - *Companies have flexibility to adopt and adapt the DeerQA base-level standard to ensure they meet their customers' specific requirements.*

5.6 Scientific Research

5.6.1 On-Farm/Transport

DEEResearch (which includes farmer and processor/exporter representation) will be encouraged to invest in research to:

- *enable production to be better aligned with peak consumption (eg. early calving, faster live-weight gain). However, any technologies, systems and other tools developed to achieve this must be consistent with New Zealand Venison's key messages (eg. natural production) and must be fully acceptable to the market.*
- *Improve on-farm productivity – targeting liveweight gain and improved weaning percentage rates.*
- *support the development and improvement of natural and welfare friendly production methods to ensure environmental sustainability and the sustainability of production systems as well as to support the natural positioning of New Zealand Venison.*
- *identify and eliminate causes of hide damage and other areas of waste or down-grading of product quality*

5.6.2 Processing

DEEResearch (which includes farmer and processor/exporter representation) will be encouraged to invest in research to:

- *support companies' further processing activities where there is an agreed common need (eg areas such as blown pack spoilage, colour etc)*
- *support the healthy positioning of New Zealand Venison by understanding the nature and characteristics of venison.*
- *identify whether there are additional market opportunities from the carcase – for example, by investigating whether deer products can be used as a source of valuable bioactives or pharmaceutical/nutraceutical ingredients.*
- *undertake other research in areas where there is an agreed, generic industry need to ensure food safety, market access and product quality issues are addressed efficiently.*

6 Roles and Responsibilities

	Producers	Processors/Exporters	Deer Industry New Zealand
Building Demand		<i>Invest in promotion and market development activities in line with agreed strategy and objectives and in collaboration with in-market partners</i>	<i>Support companies' promotional efforts with joint promotion</i>
			<i>Develop and implement agreed generic promotional programmes in consultation with processor/exporters.</i>
	<i>Support market development activities by ensuring required quality standards are met – eg company and industry QA requirements, welfare standards etc.</i>	<i>Operate individual company QA programmes to meet customer needs.</i>	<i>Facilitate industry base-line QA programmes.</i>
Managing Supply	<i>Manage herd numbers and numbers and timing of animals for supply in line with market needs.</i>	<i>Communicating market needs to producer suppliers.</i>	<i>Assisting in communicating market needs to producers.</i>
	<i>It is recommended that producers read newsletters and other materials disseminated by their processor/exporter partners and take up the opportunity to attend processor/exporter field-days and client seminars.</i>	<i>Working with in-market partners and producer suppliers to establish market needs and manage supply.</i>	<i>Encouraging producers and processor/exporters to work together to manage supply in line with market needs.</i>
		<i>Communicate with other processors/exporters with the goal of assisting the orderly development of markets</i>	<i>Facilitate communication between processors/exporters and assist in identifying common interests, common goals and opportunities for collaboration or efficiencies.</i>

7 Summary of Key Aspects of the Strategic Intent

Key Issues	Actions/Tactics	Targets
<i>Seasonality of Consumption</i>	<i>Promoting venison's consumption outside the game season. This will be a key message promoted through generic and joint promotions. The focus on the retail sector gives year-round exposure to consumers and enables this message to be communicated and reinforced.</i>	<i>Chilled exports from April to July to be >1,000 tonnes (<2% of annual exports each year between 1999 and 2003)</i>
	<i>Research to assist producers to get animals ready for supply earlier - in line with market demand.</i>	<i>Availability of cost-effective production technologies, systems and know-how to enable natural venison production (methods acceptable to the market) in line with peak consumption periods.</i>
		<i>65% of venison production (for a June year end) able to take place between August and December (averaged 47% between 92/93 and 02/03)</i>
<i>Reliance on narrow range of geographic markets and traditional foodservice channels</i>	<i>Building new demand for venison in new channels outside traditional foodservice channels and game segments through targeted generic and joint promotion. Targeted demand creation activities in a range of markets. Retail is a focus for year-round promotion.</i>	<i>Build new demand for 3,000 tonnes of venison outside traditional food-service channels.</i>
ON FARM PRODUCTIVITY		
<i>Need to build awareness of NZ country of origin.</i>	<i>Generic and joint promotional activities. NZ country of origin the overarching message in all promotional activities.</i>	<i>75% of venison exports marketed through channels where the end consumer can be identified with clear NZ country of origin branding (estimated at up to 25% of exports in 2004)</i>