



Game Meat Marketing: 4 Year Update

Summary

The retail market for feathered game has grown by 9.6% since BGA was founded in 2018. These figures were generated for BGA by Kantar and are the first to exclude venison and farmed 'game' such as guinea fowl. They also exclude the great strides being made in hospitality and, more recently, public procurement. This growth has been achieved through a combination of independently-certified assurance and professional game meat promotion, both through public-facing online channels and through business to business market development. With further support the scheme could grow further, leading to more estates opting into assurance to create a shooting sector that is economically, socially and environmentally sustainable.

British Game Assurance

Formerly British Game Alliance, BGA was founded in 2018. We are a not-for-profit and we make no money from the sale of game. All our funding comes from shoot and game farm registration fees, a voluntary 50p/bird levy raised by participating shoots, and occasional direct donations and fundraising. We exist to promote, develop and assure the production and consumption of game birds.

Assurance

The British Game Assurance Scheme operates on two levels. Shoots can 'Associate' with the scheme, pledging to abide by best practice and subjecting themselves to a complaints procedure. However, the combined shooting organisations operating under the banner of Aim to Sustain encourage all shoots supplying the commercial food sector through Approved Game Handling Establishments to 'Certify'. A Certified shoot or Game Farm agrees to abide by the most comprehensive set of Standards ever produced for this sector, and is subject to regular auditing from an independently-accredited certification body. We use SAI Global to perform this function, who also audit Red Tractor. Game dealers report an increase in customers asking for 'farm assurance' in feathered game.

Retail

- Retail volumes are expected to be circa 2.5 million birds in 2021/22.
- Sainsbury's began to stock feathered game for the first time in 2020, putting a BGA logo on all new gamebird product lines. The products were a great success, with approximately 500,000 birds sold in 20/21 and orders were increased for the 2021/22 season.



- Morrisons will soon be bringing six BGA assured gamebird products onto the shelves, the first time Morrisons have stocked feathered game.
- In 2021 we collaborated with Co-op on a game BBQ range, which Co-op are repeating in 2022 with new additions to the line.
- We have worked to grow the quantities of game being sold in Aldi and Booths.
- Away from the supermarkets, we have supported the switch to online-retail during the pandemic. Wild and Game and Exmoor Game are both entirely BGA assured and have experienced excellent online sales.
- We have worked with Big Barn, who have both a large online following and supply small independent delis and farm shops, to grow demand for game in smaller outlets.

Hospitality

- BGA has invested in New Product Development, creating recipes that present game in new and interesting ways that could be readily reproduced in hospitality outlets.
- Peach Pubs featured BGA game in all their 20 pubs over the 21/22 season.
- Thwaites Hotels put BGA game on all their hotel menus for the first time in 2021, as did Youngs pubs and hotels across their 200 sites.
- Sodexo, one of the world's largest catering companies, worked with BGA to offer game for the first time at the Chelsea Flower Show in 2021. Sales of BGA assured pheasant exceeded projections by 100%.
- DRAKE AND MORGAN, with 19 bars and restaurants located from the heart of London near Kings Cross to Manchester, have BGA game on all their menus.

Public Procurement

- We have worked with Aramark to source BGA game for the Ministry of Defence. Approximately 48,000 head of game a year are now being consumed in MoD barracks.
- In the next few weeks the first six NHS hospitals will be putting BGA game on the menu. We have worked with central NHS nutritionists and catering staff to develop appropriate recipes and we are confident this could rollout across the country. Each participating NHS Trust is anticipated to require around 12,000 birds per year. There are 223 NHS Trusts in the UK, so the potential is huge.

Export

- The European market is saturated, but vital. We have been working with processors, vets and Defra to maintain some sort of flow of game into the EU post-Brexit, trying to overcome some extraordinary barriers at the border.



- With the growth in lead-free game, we are now opening new markets in the Middle East and will soon be sending shipments of mixed game for falcon-food, a key market in that part of the world alongside human consumption.

Eat Wild

- Eat Wild is BGA's public-facing promotional division. It targets young, millennial audiences that have not previously been exposed to game.
- Eat Wild has undertaken recipe drops and given out food samples in Bristol and London, reaching over 15,000 people directly.
- Eat Wild has generated recipe booklets and videos. The videos were created for social media and have been shared thousands of times.
- Eat Wild leverages both the start of the shooting season and Great British Game Week to raise the awareness of game among social media influencers and celebrity chefs. "Game drops", in which chefs receive game and a recipe have generated social media reaches in the millions, while one particular collaboration with Le Bab achieved a social media impact of 39,348,200.

Conclusion

Commercial success achieved by the BGA achieves three goals. It secures a market for every bird shot, preventing the dumping of shot game which is both a PR disaster and frankly utterly unethical. It has the potential to bring value back to game at the shoot gate. And it is a driver for positive change in the sector, because the wider the demand for an assured product, the more shoots will register for the BGA scheme. The BGA scheme audits shoots to the highest standards of animal welfare, environmental stewardship, biodiversity net-gain and game meat hygiene. Furthermore, development of the game meat market drives the switch away from lead ammunition. All new markets, and many existing outlets, are insisting on game from lead-free shoots.

Any support that can be provided to the mission of BGA would help enormously. Driving change in a historically-conservative sector is challenging, and the more shoots and game farms that opt-in, the greater impact we can have. Our results to date demonstrate what can be achieved with only a fraction of the sector behind us, imagine what we can do with universal adoption of shoot assurance.