HSA 26th October Seminar
Servicing Private Kill demand in Scotland

Humane Slaughter Association

- Fergus Younger – SAOS part-time Project Manager
- Scottish Agricultural Organisation Society – independent body, owned by its farmer cooperative members – working to boost cooperation and collaboration in agri and supply chains.
- My experience in farmer co-ops, food supply chain collaboration and routes to market for small producers.
- Have observed decline in slaughtering availability - an increasingly difficult challenge.
- Involved in many feasibility studies for small scale facilities that do not stack up as a business proposition.

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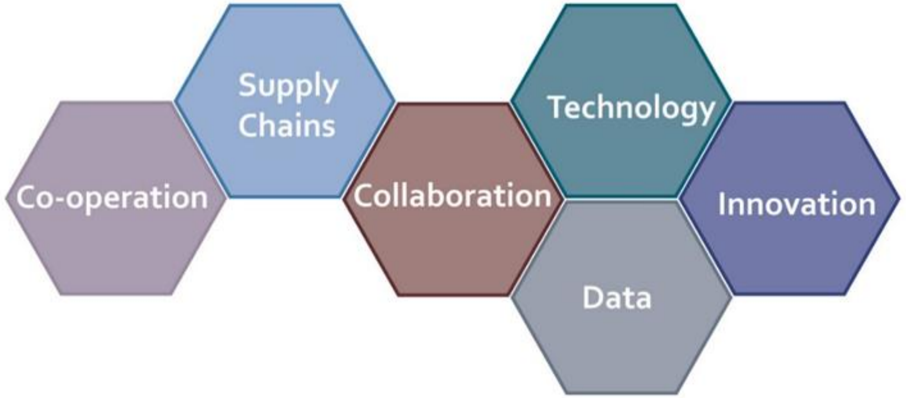
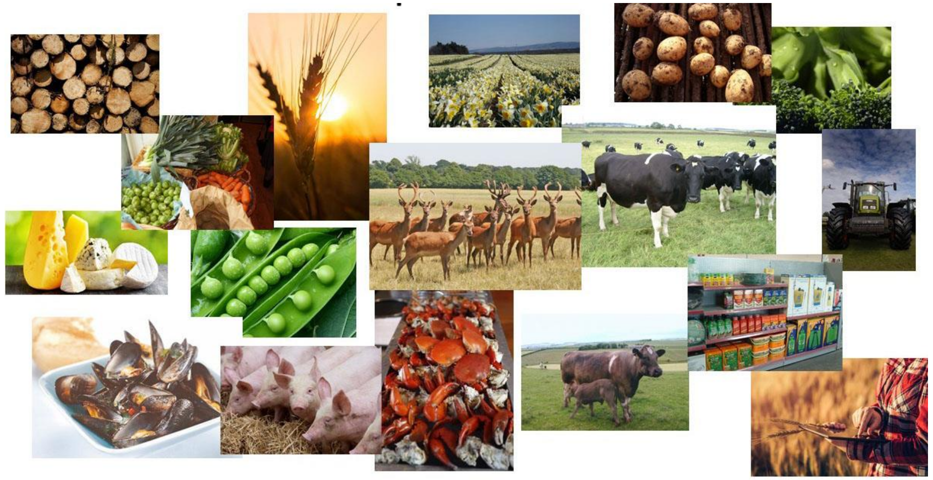




- Also part-time mixed farmer – 300 acres near Stirling
- Cattle, sheep, pigs, laying hens, cropping, horticulture and tourism
- ½ income from direct selling business based on an electric van delivery service and an online retail shop
- Process 20 cattle, 30 pigs, 40 sheep p.a.
- Utilise 3 private kill abattoirs and now with our 4th butcher in 3 years

Challenges – Abattoirs closing – very few left servicing private kill

Abattoirs by Government Region (regions from Economic Report on Scottish Agriculture)			
	2008	2013	Nov 2018
NW[1]	7	5	4
NE[2]	5	4	3
SE[3]	4	3	3
SW[4]	15	12	11

[1] North West = Shetland, Orkney, Na h-Eileanan Siar and Highland

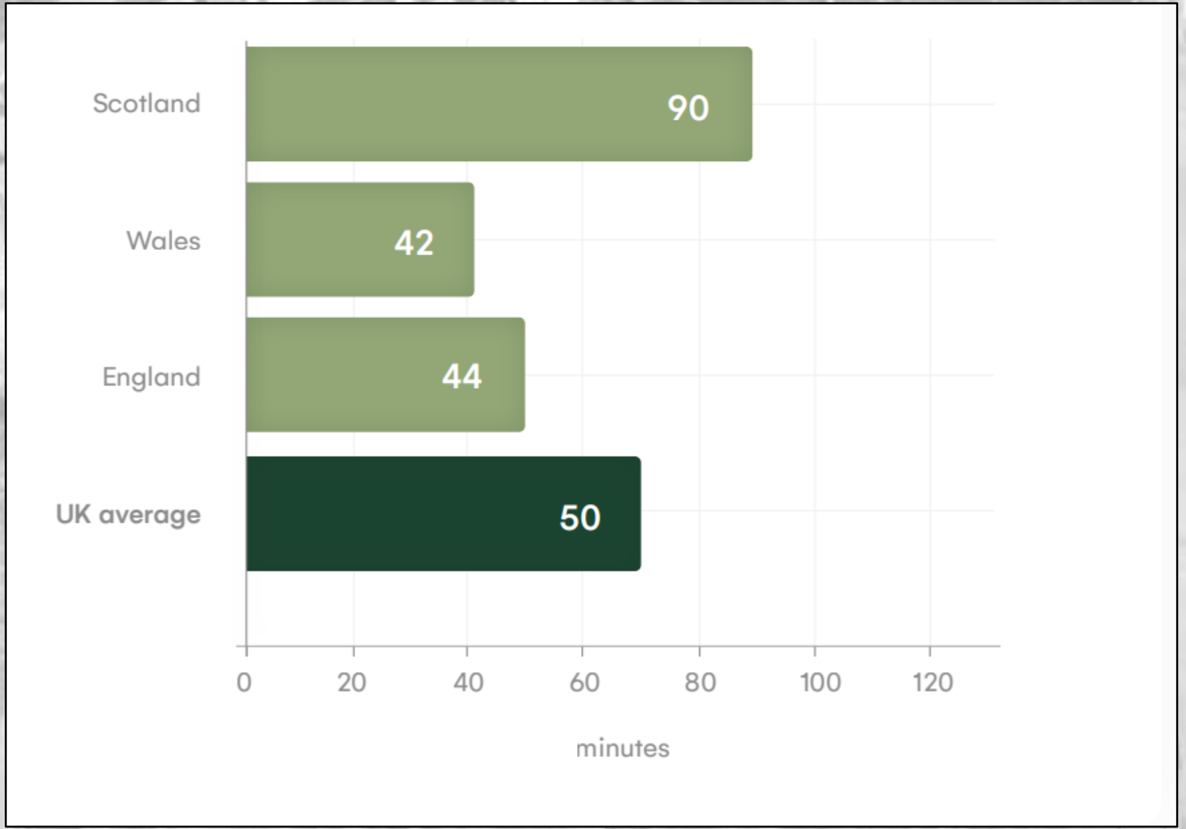
[2] North East = Aberdeen, Aberdeenshire and Moray

[3] South East = Angus, Dundee, Perth & Kinross, Fife, East Lothian, Edinburgh, Midlothian, West Lothian and Scottish Borders

[4] South West = Clackmannan, Falkirk, Stirling, Argyll & Bute, East Dunbartonshire, East Renfrewshire, Glasgow, Inverclyde, North Lanarkshire, Renfrewshire, South Lanarkshire, West Dunbartonshire, East Ayrshire, North Ayrshire, South Ayrshire and Dumfries & Galloway

Published 2018: QMS Briefing Note: Changes in Scotland's Red Meat Abattoir Sector 2008-18

Challenges – Scotland geography dictates longer travel times, but the further loss of abattoir network exacerbates problem



Published 2022: https://sustainablefoodtrust.org/wp-content/uploads/2023/05/Final_abattoir_users_survey_web.pdf

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Challenges – Economics of small abattoirs consistently do not add up!

SLMG
SHETLAND LIVESTOCK MARKETING GROUP

E.g. Current issues for Shetland

- Electricity cost jumped from £24-£42k p.a.
- Last 3 years of high livestock prices have dropped throughput of private kill
- Forced to make key experienced staff redundant to save costs – but now lack a key driver for the business

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Researching Supply and Demand – Private Kill and Butchery

- Scottish Government – developing the Small Producers Pilot Fund steering group – subgroup on abattoirs – abattoirs a key focus of the initiative
- Fife Council – Food From Fife – understanding Abattoir provision
- Development of a national survey
- Interviews of private kill servicing abattoirs
- Developing solutions (within constraints) to issues raised

Scottish Government
Riaghaltas na h-Alba
gov.scot

Fife Council

Food from Fife

Producer Survey Overview

- **554 responses** -1/4 to 1/3 of target.
- **60% of respondents process as much as they wish** and 40% are keen to process more livestock, currently limited due to abattoir access. The primary concerns among producers regarding abattoir access encompass aspects of availability/accessibility, travel distance, traceability, animal welfare and cost.
- **Long travel times** of 2-3 hours one way were observed in most areas, suggesting travel time issues are not isolated. Exceptions in Argyll and Orkney were due to the requirement of ferry travel, which naturally resulted in extended travel durations. Poor for livestock and humans too.
- 52% were interested in **collaboration** solutions, with 48% expressing doubts. Logistics, traceability, and animal welfare stood out as key concerns.

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❖ Are you able to process all you would like? If your response is "no", what are the reasons for this?

Abattoir Far Away

Only Open Seasonally

Hard To Find A Butcher

Lack Of Local Abattoir

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- Outline the one thing for your business that would help improve the abattoir service that you currently receive.

Having An Abattoir Closer

A More Local Abattoir

An Abattoir Closer

An Abattoir On Orkney

Outline the one thing for your business that would help improve the butchery service that you currently receive

A Mobile Butchery Service

A More Local Facility

Happy With The Service

Butchery & Packaging

❖Concerns expressed when considering a collaborative coordinated route?

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Loss Of Personal Control

Small Local Facilities

Own Produce Back

Getting Own Animals

Private Kill Abattoir Interviews Overview

- **Abattoir interviews** -a variable picture of throughput, where 2 businesses have experienced an increase , 4 are static and 4 businesses' throughput is declining. For some private kill is key business, but for majority is a "bolt on" to their core meat wholesale business.
- **Unutilised capacity** in most of the abattoirs which has the potential to service additional demand. However, increasing private kill does not necessarily improve £ viability.
- **Immediate challenge** – potential of further loss to the existing abattoir network.
- **Short term areas to explore** – can improved cooperation/coordination help private kill customers with access to services and help abattoirs with the additional costs of servicing private kill.

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No easy answers!

Overcoming Distance –Efficient high welfare coordinated livestock haulage? –Well coordinated return of meat products? A “go-to” resource for producers – i.e. where can I find a butcher etc?

Cost challenge of servicing private kill – can we improve this for abattoirs? And make it more affordable for producers?

New micro facilities – Orkney is latest conducting a feasibility – with known throughput – can they make it work is there the leadership or desire?

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Initiatives in Development

National private kill coordinator –potentially hosted by a national organisation such as QMS – be the point of contact for producers struggling to find abattoir services, helping abattoirs benchmark their services, working with managers in abattoirs to coordinate better throughput etc

Supported coordination within abattoirs - to batch and coordinate throughput, feasibility studies and succession, hubs for collection of livestock and return of meat produce, training, survey or producer customers, better engagement etc