



# British Heritage Sheep

## New Tastes from Old Traditions

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A strategic proposal for the sheep sector to promote and protect Britain's native breeds of sheep, add value to sheep supply chains, and enhance landscapes, rural communities and the environment, whilst offering consumers exciting new eating experiences.



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# Forword

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**British Heritage Sheep** is an initiative to introduce the public to the fantastic flavours and sublime eating experiences of one of the country's iconic and priceless assets – our 60 native breeds of sheep.



Whether the Romans, Vikings or Normans, Britain has experienced several waves of invaders, each of whom brought with them their own livestock. Amazingly, direct descendants of these animals can still be seen on our hillsides and pastures in the form of our native breeds of sheep, and the traditional crosses between them. Each breed has its own niche and purpose, and each has its own flavour. What is more, the flavours from the thousands of years of British sheep farming can now be found and enjoyed again, through the British Heritage Sheep scheme.

In years gone by, we ate more older sheep in this country than we do now, as meat was more of a by-product from wool production. Because animals were more mature, the taste differences between sheep breeds were more apparent. The Victorians in particular argued passionately about the merits of these different breeds. King George III for example, was a great fan of the ancient Portland breed, and Princess Diana's ancestor, the Earl Spencer, always kept a flock of Welsh Mountain sheep on his estate for the quality of their mutton.

It's not only breed which adds to the flavour of sheep meat. A sheep's principle occupation is grazing, and the different grasses and plants they eat and even the soil in which this feed grows, will affect the flavour of the meat. The Salt Marches of Britain's coasts produce a very different flavour of meat to the heathers of the hills and uplands or the lush pastures of the lowlands.

The British Heritage Sheep initiative will make it much easier to seek out a delicious piece of Herdwick lamb from the fells of the Lake District for example, a superbly flavoured slowly cooked Suffolk hogget from the Fens, or a slow-roasted leg of Welsh Mountain mutton from the Cambrian Mountains. Reared to the highest standards, matured on the bone, and cooked slowly in an electric slow-cooker at home, what could be better flavoured and have a more melt-in-the mouth texture?

Forget about the bad old image of fatty mutton, left over from the hardships of World War 2. Modern, slowly cooked Heritage Sheep meat is simply superb – probably one of our best-kept secrets of the rich culinary history of these islands.

British Heritage Sheep is indeed new flavours from old traditions.

## **Phil Stocker**

Chief Executive, National Sheep Association

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# Executive Summary

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This feasibility study has been undertaken by the NSA to determine whether a financially sustainable scheme could be developed to:

- **Conserve the genepool of UK native sheep breed characteristics** by creating specific market opportunities
- **Adding value to sheep supply chains** by creating differentiation and adding to product development
- **Expanding the scope of sheep meat markets** by appealing to a new, younger audience and a marketplace increasingly interested in food experiences
- **Enhancing landscapes** through ‘the right sheep being in the right places’
- **Helping rural communities** through adding value and creating opportunities for improved business viability and new enterprises, particularly for younger farmers
- **Protecting the environment** through establishing closer market connections between the product and its production environment
- **Making a positive asset from our agricultural heritage and culture**

The study has been carried out in several phases, including consultations with both the sheep supply chain and consumers.

## **The UK Sheep Industry**

Over recent decades the UK sheep industry has been challenged to increase its efficiency by following examples seen in other livestock sectors. This challenge, part of which is a concentration of genetic resources, and an aim to ‘compete against global commodity trading’, is based on a desire to maximise efficiency of production. Yet sheep farming is already recognised as being different to most other livestock sectors in that it is virtually exclusively land-based and extensive in nature, and is expected to deliver multi-functional outcomes. Two major threats to sheep farming, resulting from the aim of maximising textbook efficiency, have been identified as being particularly important. These threats affect two valuable aspects of sheep farming.

## **The threat to the genetic viability of our native sheep breeds**

AHDB-funded research has shown a dramatic decline in the commercial use of traditional native breeds of sheep, seriously threatening the sheep industry’s genepool. This concern extends well beyond the existing rare and endangered breeds and includes many breeds that are still considered as mainstream. These changes are occurring often without full realisation and industry acknowledgement of what is happening. All breeds carry valuable traits which need recognition and preservation in an uncertain world which includes climate change. Many have been bred for their ability to thrive in particular locations without the aid of purchased inputs. The future of all native sheep breeds will undoubtedly be more secure if they succeed in the marketplace and are not simply kept for aesthetic or historical interest.

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## **The threat to the landscape and communities of the uplands.**

The intensification and 'increased efficiency' of farming enterprises such as pigs, poultry and dairy have changed these sectors beyond recognition. Sheep farming, particularly in the uplands, although increasingly in lowland cropping land as well, remains the final bastion of traditional farming systems in the UK. The sector is based largely on family farms and still provides employment and business opportunities for new British entrants. The abandonment of traditional sheep farming has particularly far-reaching impacts both on the landscape of the uplands and other pastoral areas, and on the communities which still largely rely on traditional sheep farming for their survival.

Other serious problems facing the sheep sector include

- Brexit preparations,
- the long-term decline in lamb consumption
- an increasingly aged profile of lamb consumers

**It is these threats and problems which the NSA believes need addressing, and around which it has developed this scheme.**

## **Other background aspects**

The proposals acknowledge the great importance of finding a younger market for sheep meat, and offering a wider choice to consumers, while continuing to further develop market opportunities domestically and abroad for Standard Lamb, including existing PGI definitions. **It is not the purpose of the scheme to compete with the mass-market product, but to add to it and enhance consumer choice.**

In view of current uncertainties surrounding future export markets it seems sensible to maximise the UK domestic market, whatever the final Brexit outcome may be. There is also a great opportunity to use the heritage aspects of the UK sheep industry as a standard bearer for exporting to new markets in the Far East and elsewhere, where, if properly branded it could be perceived as a prestige product.

Work on the study was temporarily put on hold whilst the issue of the dramatic decline in local abattoir infrastructure was addressed. Over the past 6 months, both government agencies and Parliamentary groups have begun looking seriously at this, and so the work on Heritage Sheep has continued in the hope and expectation that the decline in smaller local abattoirs can be halted and reversed.

A YouGov poll of 2,000 adults, carried out in early 2019, confirmed that the idea of such a scheme would be of positive interest to all ages of consumer, and many meat-eaters who currently do not eat sheep meat. This could expand sheep meat consumption into as yet untapped areas of the marketplace. Crucially, young consumers and those who currently do not eat lamb showed significant interest in the scheme.

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# Executive Summary

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## Genuine Taste Differences to Promote

In extolling the benefits of a diverse sheep meat market, it is important to have confidence that there is a genuine diversity of flavour which goes with it, as well as an overall positive eating experience. Much of the research on sheep meat flavours between breeds have been based on lamb. However, the UK has a proud history of eating older ages of sheep meat and savouring the flavour variations between many of our native breeds, as can be found in plenty of Victorian literature.

The NSA carried out several criteria-based taste tests at events such as the Royal Welsh Show. Other organisations, including the Guild of Food Writers and the Pasture Fed Livestock Association have also carried out more informal trials in recent years, all with similar results. There was a very real perception that flavours and textures varied between lamb and older animals, and between different breeds of mutton (over two years old). These genuine differences are important. Not only do they enable the perceptible differences between ages and breeds to be a useful marketing tool for a new way to market sheep meat, but to take this further, they offer the opportunity to start developing 'taste grids' which differentiate and categorise the various eating qualities of the different breeds. This follows the development of such flavour grids in many other foods and alcoholic drinks. A YouGov survey found that this type of approach would be highly attractive to two groups of people which would have a significant impact on the sheep sector, namely the young and those people who eat meat, but do not currently eat sheep meat.

## The Basis of the Scheme

The Heritage Sheep proposal is based on identifying the 'ABC' of individual packs of sheep meat – **A**ge, **B**reed and **C**ountryside.

**Age** would have three categories – lamb (up to 12 months); hogget (12-24 months), and mutton (24 months+).

**Breeds** would be confined to UK Native breeds developed before 1960 – around 60 of them.

**Countryside** would be specific UK landscapes and environments.

Examples of this system could be Herdwick Mutton from around Lake Coniston, Beulah Hogget from the Brecon Beacons, or Hebridean Lamb from North Uist.

The scheme will:

- a. **Develop a marketing system** to promote the diversity (ABC - Age, Breed, Countryside) of sheep meat.
- b. **Register interested producers, processors, retailers and caterers** who fulfil the criteria.
- c. **Initiate an on-line marketplace** along the supply chain, assisting the meeting of buyers and sellers, as well as consumers.
- d. **Clearly brand sheep products** (meat and potentially wool and skins) as being within the Heritage Sheep Scheme.
- e. **Orchestrate public education and publicity to consumers** through PR about Heritage Sheep meat and choice.

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# Executive Summary

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## Participants in the scheme

- **National Sheep Association (NSA)**
- **Meat Levy Bodies**
- **Farming Unions**
- **The Supply Chain** – Farmers, Abattoirs, Cutting Plants, Butchers, Farm Shops/other retailers, Caterers, Wholesalers, Farmers Markets and Livestock Markets.
- **Routes to market** – various, including on-line marketplace for both producers, processors and consumers (including the Big Barn Website).
- **Friends of Heritage Sheep** - The idea behind this group of organisations is to garner public support for the project through the organisations' memberships. Social media could play a positive role in further popularising the Heritage Sheep project.

## Legal structure of the scheme and management

It is proposed that the scheme will be a company limited by guarantee, incorporated for non-profit making functions, with no share capital and Members rather than shareholders. The body will have a Board of Directors (which may or may not be representatives of the same entities as the members). The Members' liability will be negligible as they simply undertake to contribute a predetermined nominal sum to the liabilities of the British Heritage Sheep company which becomes due in the event of it being wound up. In addition to a conventional Board, it is proposed to establish an Oversight Committee consisting of a wider group of stakeholders, reflecting those along the supply chain. Policy will be enacted through managerial and coordinating activity from the project's small management team. Technical and administrative support being supplied 'In Kind' by bodies such as AHDB, HCC, National Farmers' Union, breed societies, and large landowners such as National Parks, etc..

Finally, the Friends of Heritage Sheep grouping will consist of interested parties who have the ability to communicate directly with consumers through their public memberships.

## Innovation and Technology

The Heritage Sheep project will benefit heavily from IT both within the supply chain for market intelligence, and particularly with Social Media and websites to market the scheme. Additionally, ground-breaking block-chain technology can be developed for a robust system of meat traceability from the farm through to the consumer or diner.

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## **Funding the Scheme**

It is important to ensure that the scheme is financially sustainable, and so it has been structured to work with industry partners who are able to supply aspects of the scheme 'in kind'. The management costs of the scheme will be kept to a minimum, and will fulfil more of an enabling role for contributing organisations. Whilst some initial grant funding will be needed, together with some cash contributions from participating organisations, crowdfunding will also be employed to raise initial and continuing funding. Also, once underway, other economic activity of the scheme will contribute to future income streams.

## **Widening the Scheme**

Already, Brecon Beacons National Park is preparing to launch a pilot project based on the principles of British Heritage Sheep, which will offer lessons as the scheme develops. There are several local initiatives which are already offering similar benefits as the Heritage Scheme, and these should enjoy the additional opportunities which the scheme can offer. Local livestock markets could help source and co-ordinate a consistent supply once demand gets to a level which requires it.

The scheme is designed to be as local or regional as participating organisations wish it to be – from UK-wide, regional, or individual farms.

## **Exports**

There is also a great opportunity for a Heritage brand to be used to spearhead exports. Heritage sheep could act as the vanguard for export initiatives in many countries, offering a real point of difference, and playing on British heritage, tradition and quality.

## **Future Action**

The conclusion of this report is that with some modest funding, a Heritage Sheep scheme could be a sustainable venture, could expand the market for sheep meat, and fulfil the criteria required of it. It has positive support and interest from both the supply chain and potential consumers.

The next stage after this report's launch on 29th November 2019, is to confirm and involve organisations and individuals who wish to be part of the scheme, establish the British Heritage Sheep Company, and identify future funding.

# Acknowledgements

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BigBarn.co.uk

Brecon Beacons National Park Authority

Hill Radnor Flock Book Society

Lake District National Park

Norfolk Horn Breeders Group

Peak District National Park

Prince's Countryside Fund

Rare Breeds Survival Trust

Ryeland Flock Book Society

Shropshire Sheep Breeders Association

Southdown Sheep Society

Suffolk Sheep Society

Swaledale Sheep Breeders Association

The Master Chefs of Great Britain

Welsh Hill Speckled Face Sheep Society

Yorkshire Dales National Park

# 1. Introduction

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The sheep industry is currently facing a very uncertain future, with both export and domestic markets in potential turmoil. This proposal is aimed at expanding the market for sheep meat by differentiating the wide diversity which the industry offers, but which as yet, unlike most other food sectors, has not been exploited.

Even before the current Brexit uncertainty, in late 2016 a meeting was held at the NSA offices in Malvern at which a proposal by the NSA to develop a strategy for the UK's native breeds of sheep was discussed by some 35 representatives from across the sheep sector.

The proposal was aimed at:

- Conserving the genepool of sheep breed traits
- Adding value to sheep supply chains
- Enhancing landscapes,
- Helping rural communities
- Protecting the environment

The meeting supported the NSA's approach, and from this initial meeting the current proposal has been developed.

## 2. The modern UK sheep industry

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The sector can be characterised as:

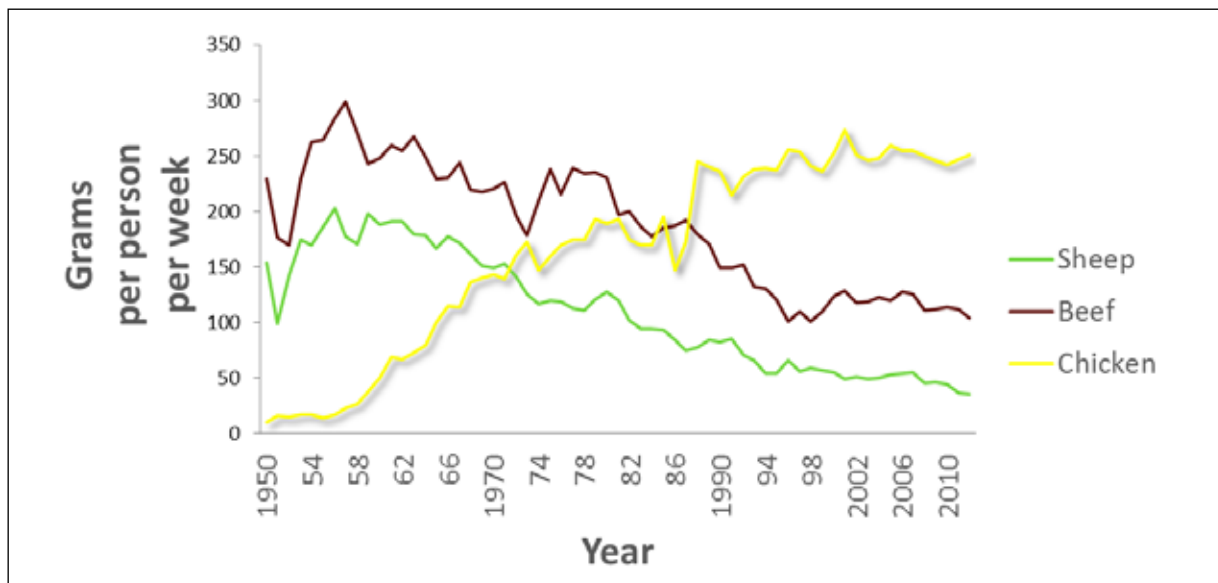
- The UK is a small country with large sheep population
- Production is highly lamb-meat market focussed
- High dependence on grass and free-range
- High level of involvement by farmers with agri-environment schemes and high reliance on Single Farm Payment for viability
- The world's 3rd largest exporter
- The world's 6th largest producer
- 40% production export driven and 60% home market

## 2. The modern UK sheep industry *(continued)*

### a. Background Traits

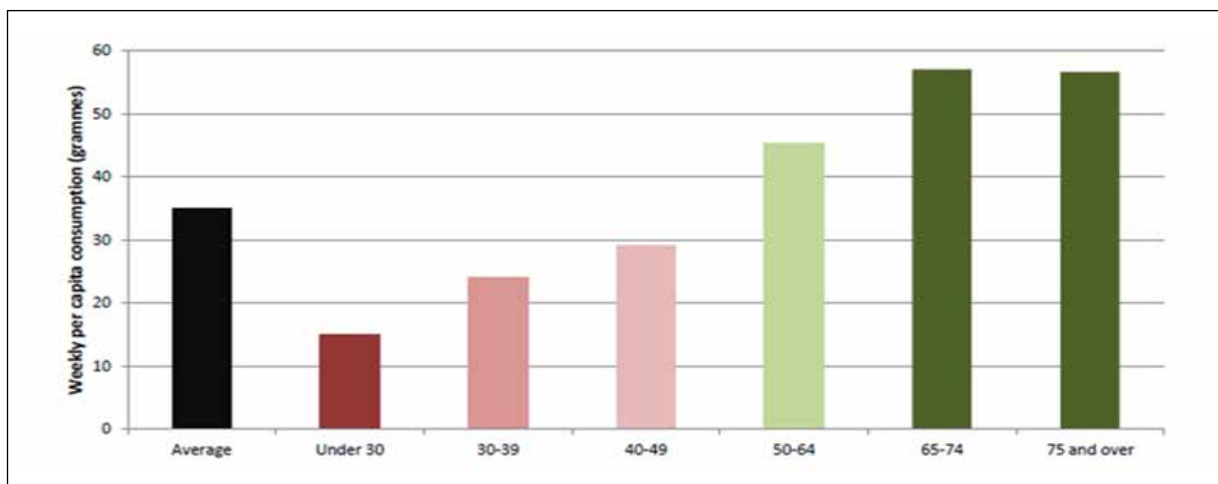
A number of factors are pointing to background problems within the sector which require addressing.

i. *Consumption of sheep meat is in long-term decline, especially when compared to poultry consumption:*



In the 12 months to October 2019, annual fresh and frozen lamb consumption in the UK fell by 2.2%<sup>1</sup>

ii. *The demographic of lamb consumption is dominated by older people.<sup>2</sup>*



There is a very real correlation between increased lamb consumption and increased age of consumers. It is important that the sheep industry attracts younger people to enjoy sheep meat if most such consumers are not to disappear with time.

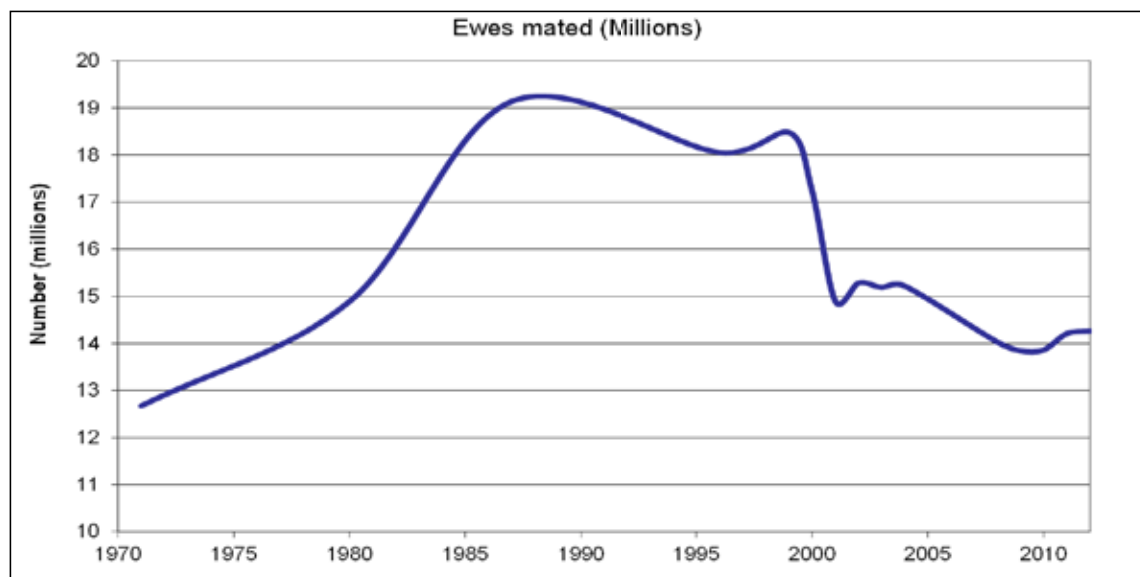
iii. *The number of breeding ewes has levelled out after the impact of previous headage payments has gone, at around 16 million.*

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1 AHDB Retail Consumption data October 2019

2 Source: National Sheep Association

## 2. The modern UK sheep industry *(continued)*

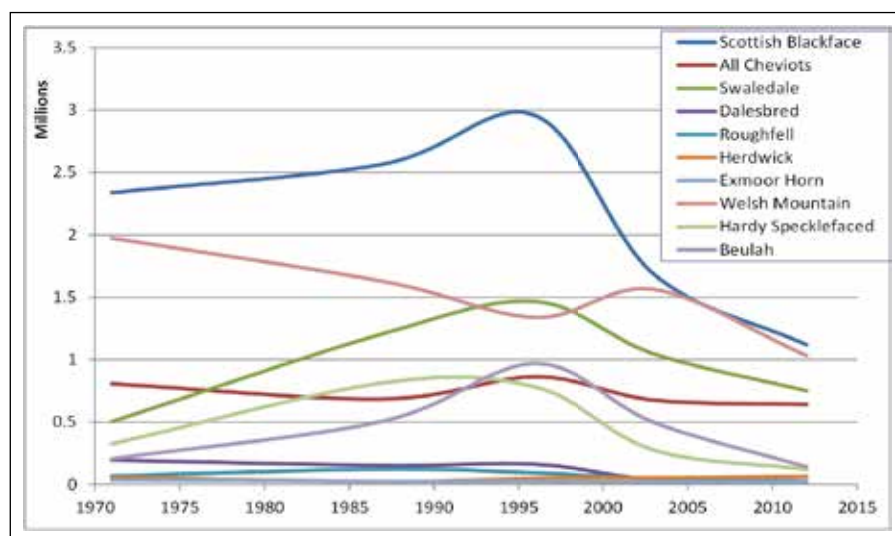


iv. *The structure of the UK sheep industry has changed over the past 40 years from a predominantly traditional stratified system, where different breeds were kept at different altitudes and interbred to produce the final finished lamb in the lowlands, towards a non-stratified one, where a few 'general-purpose' breeds are scattered in several ecological and altitude zones to directly produce finished lambs.*

The percentage of sheep numbers split between the two structures has changed over the last 45 years:

1971	1987	1996	2003	2012	
86	78	77	71	56	% Stratified system
14	22	23	29	44	% Non-stratified system

v. *Hill breed populations have declined quite dramatically over the past 40 years, as have other traditional UK Heritage breeds.*



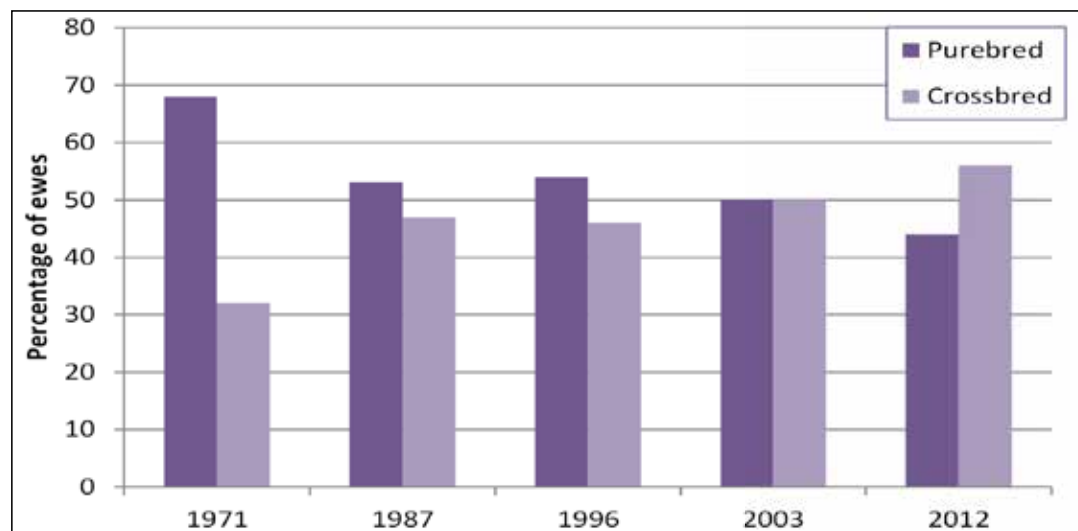
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## 2. The modern UK sheep industry *(continued)*

vi. *Pure-bred numbers are in decline, but several cross-breeds have been on the rise.*

Numbers in 000's

	1971	1987	1996	2003	2012
Border Leicester	12	28	13	5	4
Romney Marsh	294	217	159	165	201
Devon Closewool	127	51	6	7	4
Devon and Cornwall Longwool	290	28	4	2	2
Whitefaced Dartmoor	39	1	6	5	4
Greyfaced Dartmoor	33	4	3	4	4
Clun Forest	401	124	44	12	10
Dorset Horn	59	124	17	12	11
Kerryhill	209	47	2	13	10
Llanwenog	20	3	10	6	7
<b>Total</b>	<b>1,492</b>	<b>646</b>	<b>273</b>	<b>247</b>	<b>273</b>



Cross Breed numbers ('000)

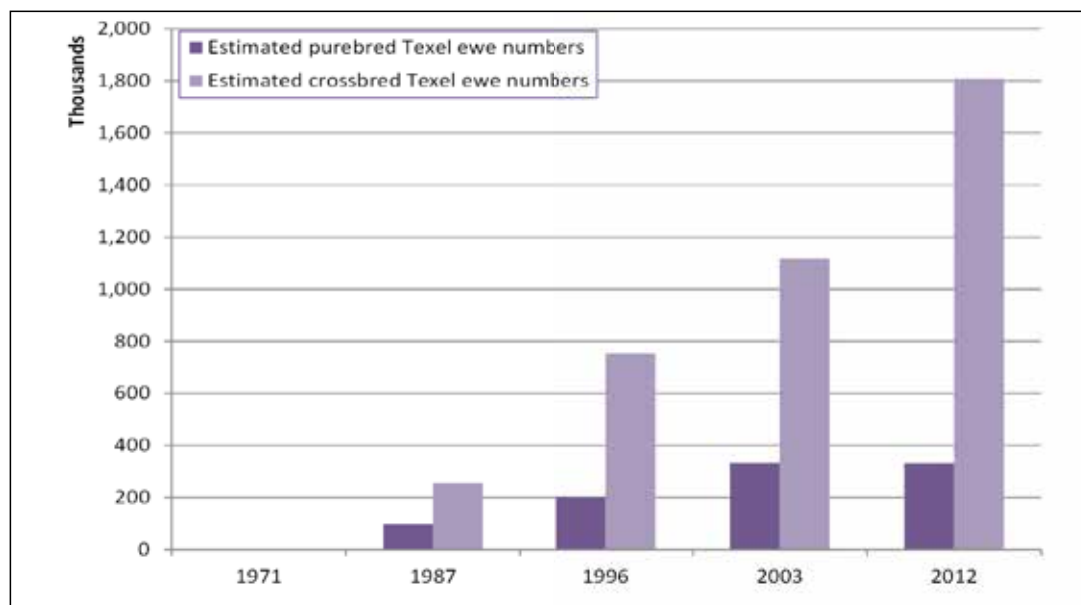
	1971	1987	1996	2003	2012
North Country Mule	311	3,233	3,809	1,915	2,094
Welsh Mule		370	631	738	330
Scots Mule		502	263	610	231
Greyface	214	332	156	212	90
Welsh Halfbred (HB)	304	410	250	130	28
Scottish Halfbred	590	346	162	100	19
Masham	406	249	162	56	32
Suffolk x Mule/HB type	550	603	495	590	622
Texel x Mule/HB type	0	32	220	307	862
Suffolk x Hill	154	182	115	81	154
Texel x Hill	0	25	28	92	76
<b>Total</b>	<b>2,529</b>	<b>6,284</b>	<b>6,291</b>	<b>4,831</b>	<b>4,538</b>

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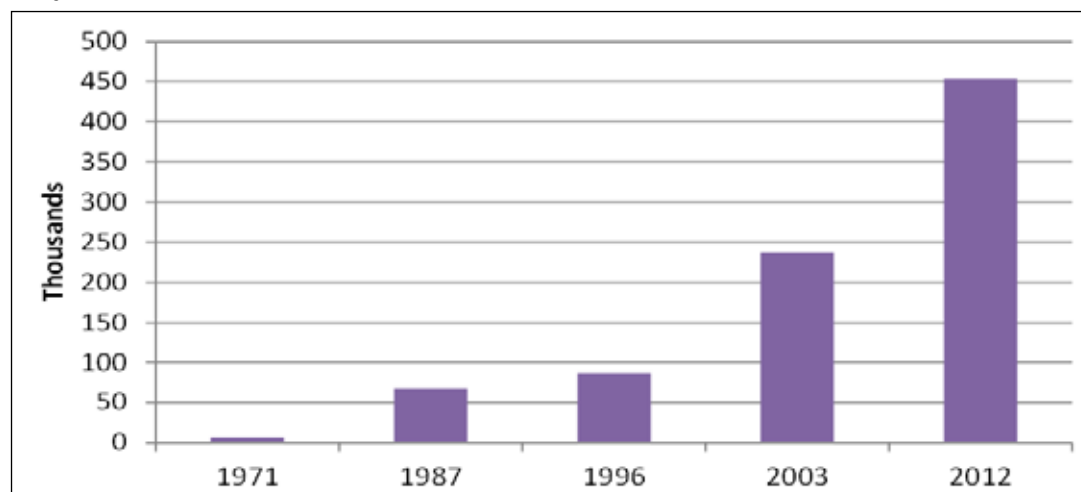
## 2. The modern UK sheep industry *(continued)*

vii. *A few breeds have seen dramatic increases in numbers, including the Texel and Lleyn:*

### Texel



### Lleyn



viii. *New breeds and composites are still appearing.*

New composite breeds are a continuation of breeding innovation that has occurred for centuries. However, there is some concern in the industry about recent such developments, especially if the ownership of these genetics is held by breeding companies with contacts, skills, and finance, to establish marketing relationships with national supply chains and/or supermarkets. Experience of such developments in other livestock sectors is that it can have sudden and far reaching effects on reducing genetic variety.

### b. The Threats

These changes have been interpreted by many as more “efficient” sheep production. However, there are dangers, two of which are particularly important.

*continued...*

## 2. The modern UK sheep industry *(continued)*

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### i. *The threat to the genetic viability of our native sheep breeds*

The UK has over 60 native breeds of sheep, the highest in the world. The decline in the commercial use of native breeds of sheep threatens the priceless genepool which they give us. Who knows what genetic traits will be needed in future, and which could disappear as populations of breeds shrink to genetically non-viable levels? No sheep breed can rest on its laurels and resist moving with the times, but all breeds carry valuable traits which need recognition and conservation. The future of heritage sheep breeds will be more secure if they succeed in the marketplace. With the consumption of sheep meat having fallen so dramatically in 50 years, NSA believes that the approach outlined in this proposal could help increase sheep meat consumption through a wider range and type of outlets, with a fresh offering that links sheep meat, landscape and culture, and builds further on the success that has been experienced by recently expanding breeds and mainstream markets.

### ii. *The threat to the landscape and communities of the uplands.*

The decline of stratification has reflected a decline in traditional sheep farming systems, which have developed and maintained many landscapes over hundreds of years. The intensification and 'increased efficiency' of farming enterprises such as pigs, poultry and dairy have changed these sectors beyond recognition. Sheep farming, particularly in the uplands, remains the final bastion of traditional farming systems in the UK, based largely on family farms. However, unlike other farming sectors which are less landscape-based, the decline of traditional sheep farming has more far-reaching impacts both on the cherished landscape of the uplands and other pastoral areas, and on the communities which still largely rely on traditional sheep farming for their survival.

Other serious problems facing the sheep sector include Brexit preparations, the longterm decline in lamb consumption and an increasingly aged profile of lamb consumers.

**It is these threats and problems which the NSA believes need addressing, and around which it has developed this scheme.**

## 3. Local Abattoirs

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One essential feature of a national scheme envisaged by this plan is the availability of local infrastructure in the form of abattoirs and cutting plants. A farmer's ability to find an abattoir able and willing to slaughter their animals, and to be confident that the carcass or butchered meat from their animals, including the offal, will be returned to them, is an essential element to establishing and continuing a meat marketing enterprise. This 'Private Kill' service is generally only available from smaller abattoirs.

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### 3. Local Abattoirs *(continued)*

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Over the past decade a third of the UK's small abattoirs have closed, and more continue to do so. Several swathes of the country are already bereft of Private Kill facilities, particularly in Scotland, Northern England and Northern Ireland. It was considered unwise to continue with the feasibility study until some progress was seen in stemming the tide of smaller abattoir closures.

Fortunately, this crisis in the sector is now being addressed by a number of organisations at present, particularly the Campaign for Local Abattoirs (CFLA) ([www.localabattoirs.com](http://www.localabattoirs.com)), who are in serious discussions with Defra and the Food Standards Agency amongst other government organisations, to find practical solutions to the crisis. Whilst government responses have so far been positive, at the time of writing this has yet to be translated into action. Nevertheless, it is considered that sufficient momentum has been developed that action will be soon be forthcoming.

A copy of the Sustainable Food Trust's report on smaller abattoirs (February 2018) "Good Life and a Good Death", which explains the problems surrounding the decline in smaller abattoirs, and thus the threat to the supply of fully traceable local meat, is available to download at <http://sustainablefoodtrust.org/wpcontent/uploads/2013/04/Re-localising-farm-animal-slaughter-low-res.pdf>.

### 4. Why should we more actively support the diversity of sheep products?

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If the diversity of sheep meat (as well as wool and skins) was commercialised, it could lead to a number of important benefits.

- **Enhance farm incomes**, particularly in upland areas and offer practical support for existing farmer/retailers;
- **A new market for 'out of spec' sheep meat**, which assists Standard Lamb consistency;
- **Support & encouragement for local supply chains**, and other local businesses, keeping more wealth within the local community;
- **Encourage young people** to enter or remain in farming by offering a new enterprise of direct retailing Heritage Breeds
- **Help ensure the financial and genetic viability of our traditional UK heritage breeds;**
- **Help maintain traditional farming systems** which have developed in harmony with the environment and created our iconic British landscapes.

## 5. Survey of opinions along the supply chain

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The aim of the survey relatively early in the project study was to gain opinions along the meat supply chain on the purpose and proposed method of implementation of the Heritage Sheep project.

The on-line survey was carried out between September 2017 and January 2018, using the Survey Monkey website ([www.surveymonkey.com](http://www.surveymonkey.com)). It was widely advertised through the NSA and other participating organisations. There were also a number of articles written in various publications to publicise the survey.

Most questions were tick-box answers, but also with space to give fuller, written answers. A total of 109 completed responses were received. A total of 161 responses were started on-line, but 52 respondents did not complete the survey. This was probably due in part to technical problems with the Survey Monkey website. The incomplete results were not used for this analysis.

The largest group of respondents was farmers, although there was a wide spread of other types of business along the supply chain. There was also a small number of 'other' interest groups, including people involved with education, government and consumers.

The results showed strong support for the project, and there was general consensus on most issues. Some very valuable comments were also received, which helped in the thinking of the project design.

A detailed report is attached as Appendix 1, and results of individual questions are included in the chapter 'Elements of the Heritage Sheep Scheme'.

## 6. The Flavour Principles Behind the Project

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### a. New Evidence

Promotional and marketing efforts for sheep meat currently concentrate largely on just one product, Standard Lamb. There may be regional differences, such as Welsh, Scotch and English, but that is where the differentiation ends. Meanwhile, sheep production has a gloriously diverse heritage.

The Heritage Sheep Project is based on the premise that different types of sheep meat carry particular flavour and texture characteristics. Yet this diversity of flavour is not currently available to the public in any volume. Increased availability and promotion of these classes of sheep meat could increase overall sheep meat consumption, without harming the Standard Lamb product. This is noticeably so amongst younger consumers, many of whom are particularly interested in the story behind their food, and the perceptible differences in flavour and texture between types of sheep meat and different breeds.

*continued...*

## 6. The Flavour Principles Behind the Project *(continued)*

The three characteristics which are assumed to affect meat flavour and texture are:

- age
- breed
- feed

Over the past year or two, the NSA has been exploring these characteristics at public tastings. So far this has consisted of comparing various ages of animal, and the eating experience of different breeds of mutton. The results from these trials are attached as Appendices 2 and 3 of this report.

As regards mutton breeds, three other trials on flavour and texture have been conducted in London, Edinburgh and Cardiff over the past 2 years, all of which gave similar differences between breeds as did the NSA tastings.

The Guild of Food Writers carried out one of the tastings in London in January 2017<sup>3</sup>. The conclusion of the meeting was *“The general response to the meat tasted was highly favourable with many expressing amazement at how different (tender, delicately flavoured) what we had tasted was to the general perception of mutton as a fatty, more coarsely flavoured meat. There was a general feeling that grass-fed mutton is a premium ingredient which deserves to be more widely written about and eaten.”*

In Scotland, the trial involved nine native breeds, and again significant differences in flavours were found between the breeds when mutton legs were cooked. In the Edinburgh work they were also able to identify certain flavour patterns that could be connected to each breed sample. The results were summarised by producing a ‘flavour graph’ of these patterns of flavour. The report<sup>4</sup> on the work states that *“We collated the top three tastes for each breed and put together a bit of a “breed flavour profile”, that could potentially be used by consumers who are interested in sourcing breeds based on their flavour profiles. After some feedback from farmers on how the information on texture may also be a valuable resource for them, we decided to add this as well.”*

The conclusions from these various trials were that in both breed of older animals and various ages of the same breed, there are perceptible differences in eating experience.

In addition, in all the trials the overall eating experiences were all very positive.

In the NSA mutton breed comparison tasters were asked to vote with their tasting pots whether overall, they liked the mutton. The voting was unanimously positive for enjoyment of mutton (see right).



*continued...*

<sup>3</sup> A report on the tasting can be found at <http://www.gfw.co.uk/2017-mutton-workshop-tuesday-31-january-2017/>

<sup>4</sup> Blog of the work in Scotland is to be found at [www.edinburghfoodstudio.com/blog/2018/10/1/mutton](http://www.edinburghfoodstudio.com/blog/2018/10/1/mutton).

## 6. The Flavour Principles Behind the Project *(continued)*

The third factor in affecting flavour of sheep meat is feed, and indirectly the countryside or landscape in which the animals are reared. Trials on this variable have yet to be completed, but many Victorian and later accounts confirm the differences in flavours which result from animals fed in different areas, such as for example the wild herbs of the uplands and the salt marshes.

“ Now press your face down and smell the turf. That’s Southdown thyme which makes Southdown mutton beyond compare.

From *Rewards and Fairies* by Rudyard Kipling (1910)

### b. Diversity in other Foodstuffs

There are now:

Over 700 UK cheeses

Over 2,000 UK breweries

About 360 UK gin distilleries

In contrast, most sheep meat is sold as ‘Standard Lamb’ – with only limited regional variations (Welsh, Scottish, etc.).

The current sheep meat market could be compared to the wine market of the 1950s and 1960s. At that time there was only a small handful of widely available wines. This has now exploded into thousands.

With increased interest in the story behind our food, and in exploring the diversity available, the time seems right to offer the consumer more choice in sheep meat.

The market for virtually every other foodstuff has diversified, whether it is whisky, bread or cheese. Only sheep meat relies almost entirely on a single product (Standard Lamb) for the vast majority of its sales and marketing effort. Whilst the number of producers making a marketing point about the ABC of their sheep meat is slowly increasing, more should be done to assist them and encourage others.



### c. Using the Diversity in Sheep meat Flavours to Expand the Market

As the age profile of sheep meat consumers grows steadily older, it is vital to encourage younger people to understand the pleasures of eating a variety of sheep meat.

*continued...*

## 6. The Flavour Principles Behind the Project *(continued)*

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Whilst perhaps not an obvious comparison, the expansion of the UK gin market is of interest. The largest age group currently drinking gin and tonic is not the over-60s, as used to be the case, but the 20- and 30-somethings. This is because of the blossoming range of gin varieties on the market, together with the availability of quality tonic water to mix with it. One gin specialist in Ludlow, Shropshire offers no fewer than 70 types of tonic water, and 200 brands of gin (Scotland alone now has 200 types of gin). Nevertheless, standard mass-market gin products such as Gordons still sell well – indeed, Gordon’s, which overtook Jack Daniel’s and The Famous Grouse to become the UK’s second-biggest spirit in 2018, and total UK sales of gin have grown by more than a third in the year to June 2018. So, the interest in the standard gin brands have been aroused by the increased consumer choice in the artisan varieties.

According to retail analysts Kantar, there have been a number of factors which have conspired to make gin a more popular choice with consumers, with the origins being the acquisition of (and subsequent marketing investment in) Bombay Sapphire. It established the notion that there was something you could ‘trade up to’ in gin, says Matt Woodhams, Director at Kantar Consulting. *“Gin was for the most part a standard category with no widely available mainstream premiumisation route. The beauty of the bottle, and the imagery and visual appeal around Bombay Sapphire, plus the marketing activation, gave it premium back bar appeal.*

*“The subsequent arrival of Hendricks, with its distinctive flavour, serve and positioning, and engaging marketing activity bringing the brand to life, added to the interest in premium gin, alongside renewed investment in what had been fairly dormant brands like Beefeater and Plymouth.”*

According to Kantar, younger people in particular are choosing to drink less but drink better – hence the interest in craft gins and other drinks, accompanied by some highquality mixers.

If interest can be aroused amongst younger people in the exceptional mix of flavours to be found in our native sheep meat, there is the opportunity to expand the market. With the choice of over 60 native breeds, together with choices of age of the sheep – lamb, hogget and mutton, and the diverse landscapes in which they were reared, there are plenty of different combinations for them to try.

The proven diversity of flavours of sheep meat, through age, breed and the countryside where the animals were reared, offers a great basis for a marketing strategy which also delivers on the stated aims of the British Heritage Sheep project.

The choice of flavours in sheep meat can be communicated to the public by using ABC:

- Age – lamb, hogget, mutton
- UK Heritage Breed – approx. 60 native breeds to choose from
- British Countryside/Landscape – e.g. Lake District, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.

*continued...*

## 6. The Flavour Principles Behind the Project *(continued)*

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Between them, these points of differentiation could offer a significant increase in consumer choice and develop interest in the diversity sheep meat, particularly amongst the younger consumers. See – Chapter on ‘Quantitative consumer analysis of attitudes to proposed project’

### d. Characterising the Flavour Differences in Sheep Meat

Another good model for what sheep meat could become is the whisky industry. As the sheep meat market has the major commodity product of Standard Lamb, so the whisky market has blended grain whisky. However, to complement that standard mass-market product, there have developed ever-more single malt varieties. And so it could be with sheep meat. As with single malts, so Welsh Mountain mutton from the Brecon Beacons, or Herdwick hogget from the Borrowdale Valley.

In malt whisky, the characteristic flavours derived from:

- Location
- Peat
- Fermentation
- Distillation
- Maturation
- Skill

It could be said that sheep meat flavours are determined by

- Age – lamb, hogget, mutton
- Breed – 62 to choose from
- Countryside/landscape and feed
- Carcass conformation
- Maturation – dry aging
- Skill

### e. Describing Flavours

In whisky tasting, four basic descriptors are used. These are:

- Smokey
- Delicate
- Light
- Rich

These enable any malt whisky to be plotted on a ‘Whisky Flavour Map’ (from malts.com)



*continued...*

## 6. The Flavour Principles Behind the Project *(continued)*

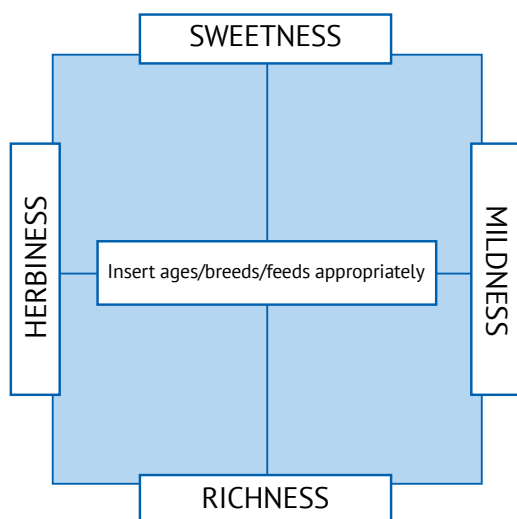


With some additional work, there seems no reason why this same approach could not be taken with sheep meat. For example, possible sheep meat descriptors could be:

- Sweet
- Rich
- Herby
- Mild

These could be plotted like the whiskies descriptors on a 'Sheep Meat Flavour Map'.

In the Guild of Food Writers tasting, other descriptors were suggested for the different breeds of mutton, including caramelly, velvety, nutty and treacle. Similarly, the Edinburgh work came up with various descriptors for the different flavours of breeds.



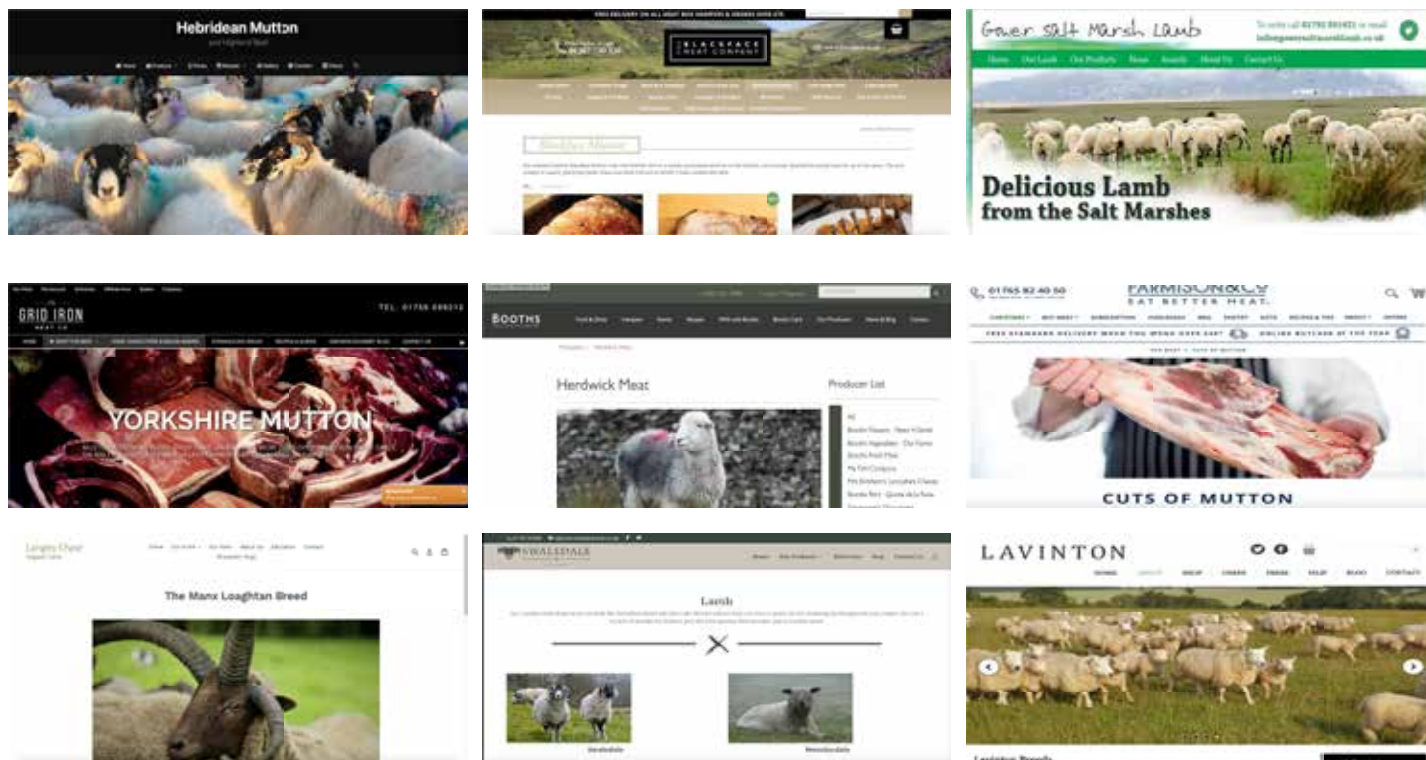
AHDB have expressed positive interest in developing this approach.

## 7. What the Project will Produce

The Heritage Sheep project, by close collaboration with all its stakeholders, will:

- i. **Set the scheme standards**
- ii. **Create a clearly recognisable Heritage Sheep brand**, for meat, (and potentially wool and skins) sold under the scheme.
- iii. **Develop a marketing system** to promote the diversity of sheep products (ABC - Age, Breed, Countryside) to consumers, producers, processors, and retailers/caterers.
- iv. **Register interested producers, processors, retailers and caterers** who fulfil the scheme's criteria.
- v. **Initiate an on-line marketplace** along the supply chain, assisting the meeting of buyers and sellers, both in live sheep and in the final meat products.
- vi. **Orchestrate public education and publicity to consumers** through PR and social media about Heritage Sheep meat and choice, This would primarily be done by participating organisations with consumer-facing communication, especially social media.

**Marketing the ABC of diverse sheep meat can be done**, and is already being, for example



The Heritage Sheep Scheme will support and assist existing producers who are interested, together with creating new opportunities for new entrants. It will also assist and benefit existing markets or producers, by publicising what they have been doing already to a wider audience.



## 8. Elements of the proposed Heritage Sheep Scheme

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### a. General Considerations

#### i. *Industry support*

The results of the industry consultation carried out in late 2017 (see Appendix 1) showed clear support for both the general approach of NSA's Heritage Sheep, and most of the detailed proposals.

#### ii. *Fitting within existing national strategies*

In terms of fit with various national and levy body led red meat strategies it is stressed that this is an alternative approach to optimising classic production efficiency, and offers a chance to also create market demand to support sheep diversity relating to landscape - in particular where the relationship between environmental and habitat management is reliant on particular sheep breeds and farming approaches.

### b. Legal structure

It is envisaged that the British Heritage Sheep Project (BHSP) should be a company limited by guarantee, incorporated for non-profit making functions, with no share capital and Members rather than shareholders.

The body will have a Board of Directors (which may or may not be representatives of the same entities as the shareholders).

The Members' liability will negligible as they simply undertake to contribute a predetermined nominal sum to the liabilities of THSP which becomes due in the event of THSP being wound up.

Companies limited by guarantee are most useful where there is no immediate need for capital to carry out the objects of the company and it is necessary or desirable to incorporate, limit the liability of members, and avoid the need to transfer a share every time a member leaves or joins.

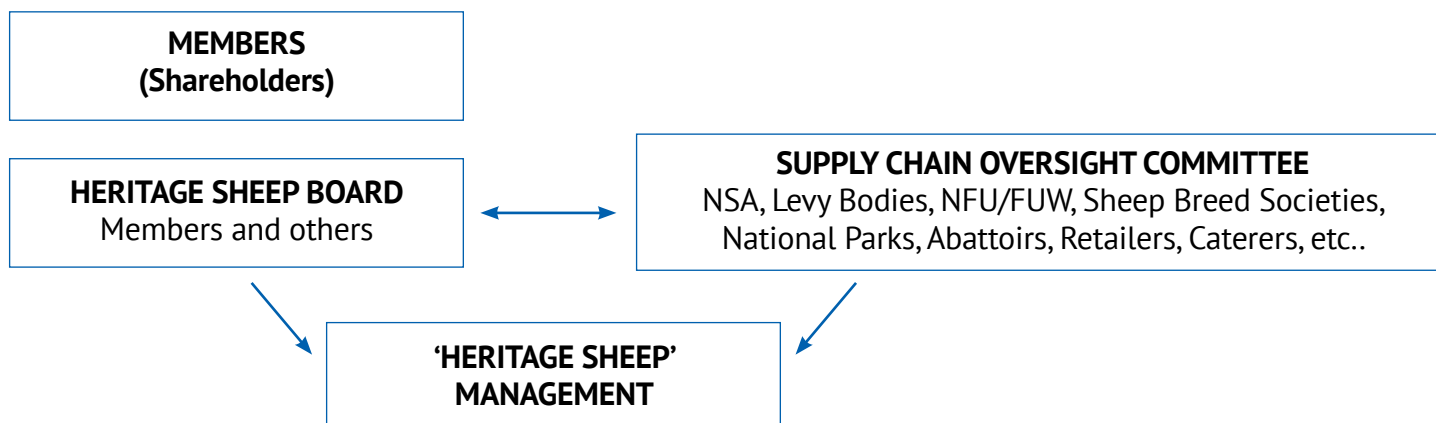
The Members will not make any contribution to the company's capital and the company's limited liability status, makes a company limited by guarantee an attractive vehicle for not for profit organisations such as trade/research associations or non-commercial project enterprises where no sharing of profit is contemplated (although profits may be distributed to members if this is considered to be appropriate).

In terms of membership, any company may be a Member of the BHSP. However, an unincorporated association could not be a member - although a legal person who NSA Heritage Sheep – Feasibility Study Report November 2019 26 was a member of the unincorporated association could hold the membership on trust for all the members of the unincorporated association. Similarly, a partnership under English law does not have a separate legal personality and cannot be a Member of BHSP but an individual partner could be a member.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

### c. Management structure



#### *Board structure*

It is envisaged that the project will be controlled by a Board consisting of representatives of the members/shareholders as well as major funders of the project.

The Board will set overall policy for the project and fulfil the normal function of a board.

#### *Supply Chain Oversight Committee*

In addition to a conventional Board, it is proposed to establish an Oversight Committee consisting of a wider group of stakeholders, reflecting those along the supply chain.

Industry support for this project is essential for its success, and has so far been considerable, both in financial support of the feasibility study and moral support for the concept. Many of these organisations have skills and resources which could be helpful to the project, and also help in its sustainability.

The Committee could be:

- NSA
- Levy Bodies, AHDB, HCC, QMS
- Farmer Representatives (NFU, FUW, CLA, etc..)
- Sheep Breed Societies
- Rare Breeds Survival Trust (RBST)
- National Parks
- Abattoirs
- Retailers
- Caterers

The Oversight Committee will monitor the management of the project to ensure that the outcomes of the Board's policy decisions are achieved in a manner appropriate to the aims and objectives of the Heritage Sheep project.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

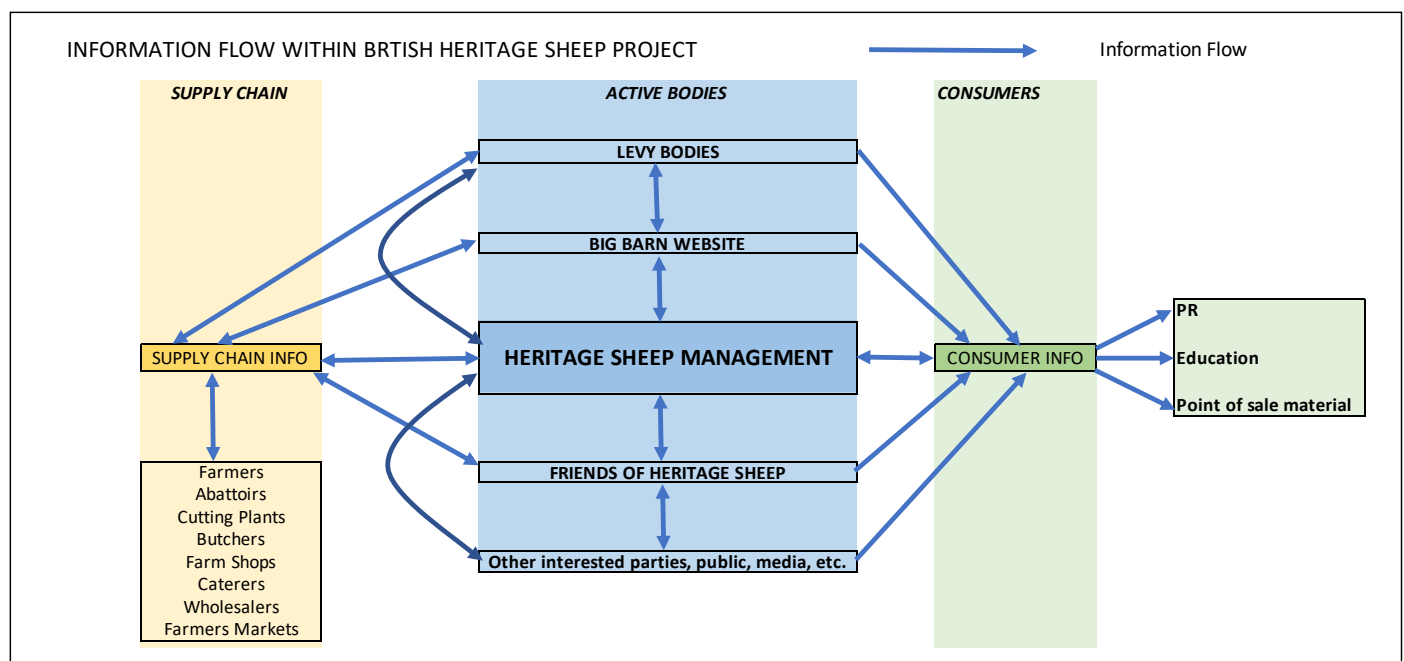
### d. Localisation

The Heritage Sheep Project has the advantage of being able to operate under a UKwide umbrella of rules and general policy, yet be operated as locally as is required – from a regional to a farm level. This means that organisations such as the Levy Bodies can assist with national marketing within the UK nations, whilst organisations such as National Parks can enable it to reflect the values of their own area, and individual farmers simply marketing their own farm brand can easily do so within the overall scheme.

### e. Information flow within the Project

Information is a vital element of this initiative. Large amounts of it need to be transferred between different parts of the supply chain as smoothly and efficiently as possible.

The diagram below gives an initial view of how the project would be structured to achieve that. It is important that the central management role actively keeps lines of communication flowing from supply chain to consumers and back. Between the two, specialist expertise from various participating bodies would enable information to flow, both technical, marketing and educational.



#### i. *Levy Bodies*

There would be two directions of information flow from the Levy Bodies – to the supply chain and to consumers. For the supply chain, such streams would be market information and production advice; whereas to consumers there would be general marketing messages, education about the subject and point of sale materials. These are all areas in which the Levy Bodies have many years of specialist experience.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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### ii. *Big Barn Website*

There will be a number of routes to market for Heritage Sheep, but it is intended that it will include [www.bigbarn.co.uk](http://www.bigbarn.co.uk). This is a well-established website which communicates between producers and consumers, and offers several important services which it would be expensive for Heritage Sheep to develop from scratch. BigBarn has indicated that they could offer a range of services to the Heritage Sheep project, including a directory of suppliers, and interactive map for consumers and the trade, a searching facility to source products, as well as a potential marketplace for livestock and wholesale. BigBarn is a Community Interest Company and has a database of over 7,500 food businesses across the UK, including over 570 who sell through an on-line Market Place of shops on the site (and elsewhere). These are plotted on an interactive map which enables consumers to find local sources of food. BigBarn's stated aim is to "Build local food systems to encourage local trade and reconnect people with where their food comes from."

### iii. *British Heritage Sheep Management*

One major management function is to ensure an efficient and smooth flow of information. It would rely mainly on other organisations to produce the information and disseminate it to the appropriate places.

### iv. *Friends of Heritage Sheep*

The idea behind this group is to garner public support for the idea of conserving native UK sheep breeds, landscapes, and rural communities by encouraging the buying of Heritage Sheep products. With this goodwill, social media could play a positive role in further popularising the Heritage Sheep project, and could act as a small but potentially growing source of future revenue.

Organisations which could join this grouping would be those with a large public membership, such as the National Trust and RSPB, RBST and other high-profile organisations such as The Duchy of Cornwall, The Wildlife Trusts and The Women's Institutes. Using their membership contacts, digital newsletters, social media and traditional magazines, they could explain the purpose and details of the project to a wide audience.

Organisations with large memberships and farmed land holdings should be encouraged to sign up to the Heritage Sheep scheme, promoting not only their own tenants' production, but also the overall concept of the scheme to raise awareness. This concept ties in with the RBST's remit, and therefore their expertise would be an obvious fit with this structure.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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### v. *The Supply Chain*

This consists of the following elements:

Farmers

Abattoirs

Cutting Plants

Butchers

Farm Shops/specialist food shops

Farmers Markets

Caterers

Wholesalers

### Types of Information

The key purpose of the scheme is to ensure free flows of information along the supply chain. This will consist of three main types.

#### i. *Technical Information*

Designed for producers and processors, this advice will be aimed at optimising the eating experience of the meat. It will include areas such as ensuring farmers are aware of the most beneficial point to market the sheep and how to put sufficient finish on an older animal. For processors it will be optimal hanging period and the most efficient butchery methods. It would also be helpful for the Meat Levy Bodies to develop an information pack for farmers considering embarking on a Heritage Sheep marketing enterprise. This could consist of 'Frequently Asked Questions' about setting up such a system, including cost indications. With a network of Heritage Sheep farmers, it would be relatively simple for some to act as mentors to new entrants.

#### ii. *Market Information*

The scheme will include an on-line marketplace, where producers can trade in stores or finished stock; where processors can source finished stock from producers, and where consumers can source retailers locally or by mail order, as well as local caterers. In addition, average prices and market reports will be available, based on Levy Bodies' market data. With a new specialist market such as this, there will be an initial lack of such data, and such as there is may be hugely variable. Nevertheless, with time, patterns and trends will develop and the service will become increasingly useful to the supply chain. Initially, pricing would be from existing markets.

#### iii. *Consumer Information*

For consumers, education about our native breeds of sheep and point of sale material, recipes, and the history and cultural context of the various native breeds, their ecological niche, and flavour attributes would all be very helpful.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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### Method of Dissemination of information

Information will be supplied through the project in a number of formats.

These will include

- websites, emails and paper technical information for the supply chain;
- website and email for market information;
- paper, website and email for consumer information.
- It is also envisaged that regular emailed newsletters will be sent to the supply chain and consumers.
- in addition, consumers will be encouraged to follow Social Media from not only the supply chain, but also from relevant membership organisations within the Friends of Heritage Sheep and the Oversight Committee.

### Registration and undertakings

In order for their produce to be eligible for the British Heritage Sheep scheme, each element involved in the supply chain would be required to register and make a signed undertaking to adhere to the rules of the Scheme.

### Advice

Industry participants would receive high quality technical advice on producing animals and meat to the highest possible standards of eating experience, supplied by the Levy Bodies and others, and skewed to slowergrowing breeds of sheep, and with a range of ages from lamb to mutton.

### Marketing advice and support

Those involved in marketing the meat would also receive a level of support with branded point of sale and other marketing advice. Again, much of this will be supplied by Levy Bodies.

### f. Markets and use of technology

Initially, finding markets will be a major function of the scheme, as will joining supply to demand. Use of IT should help this. The use of a dedicated “marketplace’ on the Big Barn website and elsewhere will help. It is intended that by use of innovative mobile and other technology, specialist marketing information can be made accessible to all stages of the supply chain, as well as an innovative system of traceability, based on Block-Chain technology. (see section on traceability below).

### g. Pilot Scheme - working with regional Tourist Boards and National Parks

One National Park (Brecon Beacons) is keen to carry out a pilot scheme combining the principles of the Heritage Sheep project, with tourist agencies and attractions, catering establishments and local markets. One purpose of the pilot scheme is to encourage tourists to ‘Eat the view’ whilst on holiday and be able, by way of mail order suppliers, to continue doing so at home.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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### **h. Scheme Eligibility Criteria**

As regards participants in the scheme, it is proposed that all should register, and make signed declarations as to what product or action they will be undertaking to supply.

As for the farming aspects of the scheme, several eligibility criteria were proposed in the industry consultation. In some cases, opinions were divided, whereas others were more clear-cut.

#### **These elements are:**

##### *i. How many criteria required?*

The main eligibility criteria for livestock to be sold under the scheme are Age, Breed and Countryside/landscape. The industry consultation found that the majority of respondents preferred the option where if lamb was involved, then Breed and Countryside would be required, but if hogget or mutton, then only one other criterion would be necessary. Others thought that all three criteria should be required.

\*This study concludes that **all three should be included** for all sheep meat products in the scheme.

Whatever additional pieces of information the individual supply chain chooses to include could be part of the information available to consumers via the QR code on the packet or menu.

##### *ii. Pureness of Breed*

The issue raised by the industry consultation is whether only purebred animals should be eligible, or whether single cross animals should be allowed. Whilst the responses showed a majority of respondents favoured purebred animals only, this is another aspect which requires a balance between opening the scheme to sufficient numbers of farmers, without falling below consumer expectations.

\*This study's view is that **pure or single cross of purebred animals** should be required for all sheep meat products in the scheme.

##### *iii. Animal diet*

Grass/forage-fed diets are becoming popular with consumers for a variety of reasons. Whether the scheme should stipulate a forage only diet was supported by 73% of respondents to the consultation.

\*This study concludes that with the diet stipulations being part of various other schemes (organic, PGI, PFLA), this should be a matter for the farmer and consumer to decide upon. Nevertheless, it would not be appropriate for an intensive sheep producer to be involved in a scheme which offers meat from traditional farming systems, which implies grass-fed systems. A minimum % of the diets of animals on participating farms should be set, possibly at 90% grass/forage.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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### iv. *Animal production system (Pasture fed, organic, etc.)*

76% of respondents supported the inclusion of the livestock production system as a criterion for the scheme. 22% considered that other certification schemes should be used. Smaller scale farmers may be excluded from this due to cost of certification.

\*This study concludes that with the proliferation of production systems, the consumer will judge this issue by other statements and logos on the packs, and that all such statements could be included on the QR code.

### v. *Food Miles*

Respondents were evenly split on whether this was an important issue.

\*This study believes that at this early stage, such an issue would be too complicated and expensive to include as part of the scheme, but that consumers can judge for themselves whether or not they wish to buy from the origin stated as part of the ABC. Potentially, it could be possible to include Food Miles information on the QR traceability code. (see section on traceability)

### vi. *Environmental sustainability*

Some respondents were keen not to add costs to the scheme, and others were concerned about the future of government environmental schemes.

\*This study concludes that whilst individual farms will be able to make claims about environmental sustainability, it is not considered a suitable requirement for all British Heritage Sheep. Again, individual supply chains could add such information on the traceability QR code.

### vii. *Meat quality*

Excluding the 'don't knows', 90% of respondents thought meat quality was important.

\*This study agrees that it is very important that consumers have a positive eating experience with Heritage Sheep products. A commitment to minimum maturation times for the meat should be included as a stipulation for eligibility, which could be enforced by a signed statement by the producer/retailer that the meat has been hung for the minimum period. As the project develops, this a=hanging period could be part of the Block-chain verifiable data included on the QR code. The levy bodies can help with advice and technical assistance on this issue of meat quality.

### viii. *Logo*

A logo for the Heritage Sheep scheme was considered vital by all respondents.

\*This study agrees with this view.

### ix. *Scheme ownership*

95% of industry respondents considered that the scheme should be owned by those in the sheep supply chain from farm to retailer/caterer. The proposed ownership and management structure will fulfil this requirement.

*continued...*



## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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### i. *Traceability, Inspections and verification*

The great majority of industry respondents did not consider that a new inspection and verification scheme was necessary, or affordable. A signed undertaking for those participating, backed up by Local Authority Trading Standards should be sufficient to ensure that only legitimate meat is traded under the scheme. However, this is not the most robust of systems, and could be open to misuse. The scheme would suffer greatly if the traceability system was found to be open to fraudulent use.

An electronic system of traceability would be more reliable. There are a number of options to choose from, the simplest and cheapest being a central database recording all transactions and information about animals and the meat. The information in the database could be stored in the i-cloud, relatively cheaply, and accessed by a normal computer. With such a system there is the danger, perhaps in extreme cases, of data being altered. A system based on block-chain technology would offer a much more reliable and secure system of traceability. Only recently have the costs and availability of such a system become cheap enough for it to be considered. Known as Distributed Ledger Technology, the system breaks down the supply chain into stages. In the case of Heritage Sheep this would be farmer, abattoir, butchery, packing and retail/catering. Once any piece of information is entered into the system, it cannot be changed. It can however be viewed by any organisation or individual who has been given authority by the supply chain.

An important issue is that of the ownership of the information. It is important that this is agreed at the start of the process, and binding agreements made to prevent any one part of the chain unreasonably dominating the others. In a short supply chain such as a farmer sending their sheep to a local abattoir, and having their carcasses or meat returned to them, most of the information will be originating from the farmer, who would maintain a high level of control over the use of the information. At the point where the meat is packed and labelled, a QR code would be printed onto the label, and a simple app produced for the consumer to scan the code and retrieve the ABC information and any other which is considered useful or necessary to the consumer. This could include how the sheep was farmed (organic or other certification schemes), its diet (such as grass fed), and potentially the food miles to the point of labelling.

Smaller abattoirs which offer the Private Kill service would be a vital part of this chain, and ensure that the identity of each carcass and its offal are maintained throughout the processing of the meat. It is to be hoped that the scheme will increase business to these vital local abattoirs. It would be possible for an app to be developed for farmers to simply input data about their animals via a smartphone, possibly also scanning the eartag. Such a system would require some development, but, according to experts, it would be relatively straightforward. Label printing would require some software development to take information from the supply chain and incorporate into a QR code.

*continued...*

## 8. Elements of the proposed Heritage Sheep Scheme *(continued)*

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The potential problem of a central database or a distributed ledger is the reliability of the information entered and stored there. The problem of 'rubbish in - rubbish NSA Heritage Sheep – Feasibility Study Report November 2019 34 out', or erroneous information inputted through human error, should be overcome by using the government's Livestock Identification Programme, or LIP, which has recently been launched and is due to include sheep in 2021. This would use a livestock identification number as the anchor for all other information, ensuring a verifiable basis for all the traceability data. This rapidly developing subject needs further research.

## 9. Quantitative consumer analysis of attitudes to proposed project

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If the scheme is to see significant buy-in by consumers, the project must excite the imagination and taste-buds of consumers. The study therefore put the general hypothesis of the scheme to a YouGov poll of 2,000 respondents in February 2019, with the help of AHDB.

### **Results of the YouGov survey**

Full details of the questions, replies and analysis of the responses are attached in Annexe 4 of this report. The crucial results are given below.

#### *i. Consumer Age*

From the survey, the age correlation for people who currently eat lamb is, as expected, mostly weighted to the older generation – 64% of the over-55s, compared with 21% of the 18-24s having eaten lamb in the last year. An average 55% of all survey respondents had eaten lamb in the last 12 months. The key question in the survey, asked of all meat eaters, not just current sheep meat eaters (number vii in appendix 4) was: "If you were buying meat, to what extent, if at all, would Age, Breed or Countryside be likely or unlikely to influence their purchase of sheep meat?" The results showed fairly consistent percentages across the age categories of consumers who would be either 'much more' or 'a little more' likely to be influenced in their purchase of sheep meat.

#### **Age of animal - more likely to buy hogget or mutton sheep**

18-24s 26%;  
25-34s 24%;  
35-44s 17%;  
45-54s 19%;  
55+s 22%.

#### **Breed - more likely to buy sheep meat on UK Heritage Breed**

18-24s 36%;  
25-34s 34%;  
35-44s 34%;  
45-54s 35%;  
55+s 39%.

*continued...*

## 9. Quantitative consumer analysis of attitudes to proposed project

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### **Countryside – more likely to buy on landscape**

18-24s 39%;

25-34s 38%;

35-44s 40%;

45-54s 45%;

55+s 42%.

The results demonstrated very encouraging levels of interest in the concept. In contrast to current trends of eating lamb, these results showed that the younger generations were more open to the idea of trying Heritage Sheep, compared with current lamb consumption patterns.

Currently, the over-55s were three times more likely than the 18-24s to eat Standard Lamb (64% against 21% - a difference of 43%). When offered the Heritage Sheep options, the differences between age ranges reduces to an average of 7%. This suggests that significant numbers of younger meat eaters are attracted by the proposal of a diversified sheep meat offering. This is a positive sign as a route to attracting younger consumers to eating sheep meat.

### ii. *All carnivores vs Lamb Eaters*

**Across all meat eaters** in the survey, those who were 'much more likely' or a 'little more likely' to be influenced in their purchase of Heritage sheep meat were, by the ABC categories:

**Age** – 'more likely' responses 22%

**Breed** – 'more likely' responses 37%

**Countryside** – 'more likely' responses 41%

In a cross-analysis looking at just lamb eaters' answers to the same question, the results were:

**Age** – 'more likely' responses 24%

**Breed** – 'more likely' responses 43%

**Countryside** – 'more likely' responses 49%

As sheep meat is only eaten by a minority of people, this shows that there is significant potential to not only increase sheep meat consumption in those who already eat lamb, but also a potentially greater number in those who do not currently eat Lamb.

### iii. *Conclusions*

The results of the survey demonstrate that the idea of Heritage Sheep meat is likely to achieve one of the aims of the project, which is to attract two new types of consumer – the young and meat eaters currently not eating sheep meat. A positive response to the idea of Heritage Sheep meat was fairly consistent across all age ranges, which is in stark contrast to trends over the past couple of decades, where Standard Lamb is perceived as a meat for older people, and relatively little interest amongst the young.

Secondly, the levels of interest in both current sheep meat eaters and those who eat all meat, not just sheep meat, were similar. This demonstrates the potential ability of the Heritage Sheep project's to widen the consumption of sheep meat by attracting those who currently do not eat sheep meat.

*continued...*

## 9. Quantitative consumer analysis of attitudes to proposed project

These figures assume that those interested in Heritage Sheep will be attracted by all three attributes of ABC. In fact, some people will only be attracted by one or two of these factors, which will increase the overall level of interest even further.

## 10. Cost projections

Cost projections show a total funding requirement of around £290,000 in total over the first three years of operations. Annual projected costs are £95,000. It is anticipated that the project should become self-financing after this initial three-year period. No income from activities has been assumed for the sake of these costings.

<b>Annual Recurring Costs (yrs 1-3)</b>		<b>£/annum</b>
Manager salary and on-costs		£40,000
Support advice/research		£10,000
mobile telephone calls	£40 per month	£480
Transport	15,000 miles @ £0.45 per mile	£6,750
Accommodation	15 nights @ £90 per night	£1,350
Manager's Expenses	£250 per month	£3,000
Office expenses	£200 per month	£2,400
Office rent	£400 per month	£4,800
Printing and publicity material	£250 per month	£3,000
maintenance of traceability system	£500 per month	£6,000
Exhibitions/shows	£500 per month	£6,000
Misc. Costs	5% of monthly total	£3,889

**total annual recurring costs £87,669**

<b>Capital Costs (year 1)</b>		<b>write-off (years)</b>	<b>Annual Depreciation</b>
Laptop	£2,000	3	£667
Brand and logo Design	£8,000	3	£2,667
Consumer research	£5,000	3	£1,667
printer & office equipment	£500	3	£167
Traceability system	£10,000	5	£2,000
Office furniture	£600	5	£120
<b>Total</b>	<b>£26,100</b>	<b>total annual depreciation</b>	<b>£7,287</b>

**Total Annual Costs £94,956**  
**Say £95,000**

### Cash flow

	year 1	year 2	year 3	<b>project total 3 years</b>
recurring costs	£87,669	£87,669	£87,669	<b>£263,007</b>
capital costs	£26,100			<b>£26,100</b>
<b>total cash required</b>	<b>£113,769</b>	<b>£87,669</b>	<b>£87,669</b>	<b>£289,107</b>

# 11. Financial viability and funding

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## a. *Financial viability*

The most difficult issue in planning a sustainable model for this project is that of financial viability. It is likely that neither the market nor the supply chain will be able or willing to provide the level of funding required for the project at least in the early years, and so alternative sources of funding will be needed.

## b. *General Funding*

Grant funding alone, whilst it may be secured for the early stages of the project (say 3 years), would not be a healthy basis for the long-term sustainability of the project. As a result, core project costs must be kept to an absolute minimum, and income 'in kind' from relevant organisations maximised to help financial viability. The assumption is for many of the functions of the scheme to be carried out by the industry partners in the project. Prominent amongst these will be the Meat Levy Bodies, who are well suited to provide a range of services. The added advantage of this is to enable regional variation of marketing.

However, even with such in-kind industry support and grant funding, it is likely that there will be a modest funding gap, to cover such items as a manager's salary, particularly for the first three years. The core activities are expected to be some £90,000 per year (see chapter above on Cost Projections).

Initial estimates of project costs over the initial three years shows a requirement of around £88,000/annum in recurring costs, together with capital costs in year 1 of some £26,000, producing a total cash requirement over the first three years of just under £290,000.

It is hoped that the initial funders of this study would be willing to back the scheme with funding, and that other organisations, especially from the Friends of Heritage Sheep group will be prepared to add to them. In addition, there will be a need for some grant funding.

## c. *Crowd Funding*

This project, with its many social, food and other non-financial goals would seem an ideal candidate for crowdfunding. According to 'UK Crowdfunding'

**([www.ukcfa.org.uk](http://www.ukcfa.org.uk))** *"crowdfunding is a way of raising finance by asking a large number of people each for a small amount of money. Traditionally, financing a business, project or venture involved asking a few people for large sums of money. Crowdfunding switches this idea around, using the internet to talk to thousands – if not millions – of potential funders. Typically, those seeking funds will set up a profile of their project on a website such as those run by our members. They can then use social media, alongside traditional networks of friends, family and work acquaintances, to raise money."*

*continued...*

## 11. Financial viability and funding *(continued)*

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According to UK Crowdfunding, there are three types of crowdfunding. The most relevant to Heritage Sheep is Donation/Reward Crowdfunding. In this case, people invest simply because they believe in the cause. Rewards can be offered (often called reward crowdfunding), such as discounts on buying products, regular news updates, free gifts and so on. Returns are considered intangible. Donors have a social or personal motivation for putting their money in and expect nothing back, except perhaps to feel good about helping the project.

### d. *Payments in kind*

As discussed elsewhere in this report, payments in kind would cover many of the activities of the scheme. Principal amongst these participants would be the Meat Levy Bodies, but other organisations particularly those with large memberships, may also help with promotion of the scheme through their various information outlets. These would include organisations with an interest in farming, conservation and rural economic development.

## 12. SWOT Analysis

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### a. Strengths

- There is widespread industry support for this initiative
- Whilst a novel approach overall, many elements are well established
- It could fundamentally change the sheep meat market by attracting younger consumers, attracted by the new choice of meat flavours, as well as meat eaters who currently do not eat lamb, thereby increasing the overall sheep meat market.
- It has a wide range of beneficiaries – farmers (particularly young farmers), the wider rural community, local retailers and caterers, consumer choice, the native sheep gene pool, traditional farming systems, the landscape, the environment, local abattoirs, etc..
- One of the National Parks is planning to adopt the Heritage Sheep system in a pilot scheme to test and develop the assumptions made.

### b. Weaknesses

- The overall plan is untried, although some farmers are independently marketing their sheep meat in the way being proposed.
- It depends on messages being passed from producers to consumers about the benefits of buying Heritage Sheep Meat.
- It assumes increased uptake from younger consumers (under 40s)
- It depends on the wholehearted backing from a range of organisations including the meat levy bodies
- It will initially be a niche market, but has the potential for a future higher volume market roll-out.

*continued...*

## 12. SWOT Analysis *(continued)*

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### **c. Opportunities**

- The sheep sector currently faces many problems which threaten its future prosperity. This potential scheme aims to help improve the outlook for the sector by expanding the market.
- The trials on sheep meat flavours already carried out have demonstrated genuine discernible differences in sheep meat flavours depending on age of the animals and breeds in older animals. This offers a new marketing and sales opportunity.
- The use of new technology in funding, communications, traceability and education.

### **d. Threats**

- The Heritage Sheep products would represent a premium product in a market which is already perceived as highly priced.
- The shrinkage of infrastructure in the form of local abattoirs able and willing to slaughter small numbers of farmers' livestock and return the carcasses or butchered meat (see section on abattoirs). This issue is being addressed by government and industry.

## 13. Lessons from Other Meat Marketing Schemes

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It has to be acknowledged that the UK meat sector does not have a very positive track record on successful farmers' marketing schemes. From village-level marketing to farming groups supplying supermarkets, there are many pitfalls for the unwary. It is therefore important to briefly reflect on why the Heritage Sheep Scheme should be a success when others have failed.

In the past, reasons for failure have been many and varied. At the small-scale end, local schemes tend to depend on a single dynamic individual to act as catalyst and leader. It also has to be said that farmers in the UK are not well-known for their collaborative spirit, and competition between farmers together with a lack of commitment have led to the downfall of some schemes.

When farmers have tried to set up collaborative marketing ventures in the large-scale mass market, the failure rate is dependent often on whether or not the market view the farmers as a threat to the status quo of established players. Many of these issues have been taken into account when planning the Heritage Sheep scheme. These issues include:

### **a. A wide basis**

This is not simply a commercial operation. The industry can see that the stakes are currently high in the sheep sector. The planning of the scheme has actively NSA Heritage Sheep – Feasibility Study Report November 2019 40 taken into account the reasons why it was initially developed – the genepool of native breeds, the landscape, support and enhancement for the rural economy, and so on. If the sector understands this background, and it needs to be widely repeated, it should aid commitment by all parties.

*continued...*

## 13. Lessons from Other Meat Marketing Schemes *(continued)*

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### **b. Buying and selling**

The Heritage Sheep scheme will not be directly involved in any trading, and thus no investment funds will be put at risk. It is an enabler of the market, not a participant. It will be in the commercial interests of the whole supply chain that the scheme is successful.

### **c. Spreading the Workload and Industry Involvement**

Involvement by supplying services in-kind to the scheme by many strands of the supply chain will mean that the workload and therefore costs of the central scheme will be minimised. Also, the more organisations and individuals which are involved and participate in the scheme, the greater the commitment along the supply chain. Equally however, it is greatly incumbent on the management and Board to ensure that all parties are kept on-side and involved, which requires an especially high level of communication and enthusiasm.

### **d. Few Threats to Existing Players**

It is hoped that as a major aim of the scheme is to expand the sheep meat market into new, differentiated products, there will be no fear by existing players in the sector that the scheme represents a threat. Indeed, by creating a premium element to the market, many existing players could benefit from it, as has been demonstrated in other food sectors.

## 14. Benefits to farmers and wider rural economies

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The list of potential beneficiaries from the project is long, and the NSA believes it could achieve the major benefits it initially aimed to achieve, namely:

- Conserving the genepool of sheep breed traits – by commercialising the UK's Native Breeds
- Adding value to sheep supply chains – by creating potential premiums for native breeds
- Enhancing landscapes - by making the landscape an essential part of Heritage Sheep marketing
- Helping rural communities – by creating potential new enterprises for young farmers, and adding value through a localised supply chain
- Protecting the environment – by making a marketing virtue of positive environmental practices.

However, the precise numbers of individuals potentially benefiting from the scheme has been hard to estimate. It has been shown from the consumer survey and taste tests that there is an appetite amongst the public for a scheme such as this. Therefore, if successful in expanding the market for Heritage Sheep, there will be significant opportunities for farmers to join the scheme and supply local retail and wholesale, as well as catering outlets and mail order markets. A number of large Box Schemes have arisen over the past decade, and these could offer an additional form of outlet. At least one of these has expressed interest in being involved in the scheme.

*continued...*



## 14. Benefits to farmers and wider rural economies *(continued)*

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Livestock farmers could add around 10%-15% net margin to their sheep enterprise, according to some sample farmers already selling their own livestock. For a farmer selling 300 sheep through the scheme per annum, this could add over £1,300 net margin to their business.

Capital costs for participating farmers could be kept low by having all the processing and packaging carried out by a local abattoir. There would be a need for some refrigeration, and the adaption of part of an existing barn for the operation. This could act as the catalyst for a small farm shop or local delivery enterprise by adding home-produced or local beef and pork, as well as other potential products. This would be more relevant for farms relatively close to urban centres, but for those in more remote areas, mail order systems are now relatively straight forward to establish.

Whilst it is initially envisaged that the supply chains for the scheme will be short from farmer to consumer, as the scheme develops, auction marts could benefit from involvement in acting as a marketplace for British Heritage Sheep supplies. This would require some time investment in implementing the traceability scheme, but the benefits could be significant, particularly for regional retailers.

Local abattoirs and cutting plants would benefit from an expansion in the market. For many local abattoirs, it is their Private Kill service (slaughtering and butchery for farmers to sell their own meat) which offers an opportunity for them to add value and throughput.

Independent retailers, butchers and caterers (such as pubs and restaurants) could add a point of difference for their businesses by stocking British Heritage Sheep meat products from local producers. Highlighting locally reared, named breed lamb, hogget or mutton could be an attractive item on menus, particularly for tourists. Indeed, tourists would be an excellent source of customers wanting to take home a box of British Heritage Sheep meat from their holidays direct from a farm, and a potential follow-up by mail order deliveries. Consumer literature about the scheme could enhance this opportunity for caterers and mail order suppliers to benefit from the British Heritage Sheep scheme.

Local employment through new retail and catering outlets, together with opportunities at local abattoirs and cutting plants through increased throughput would add additional benefits to local rural economies. On a wider basis, imaginative regional groups of farmers could adopt the British Heritage Sheep scheme to promote local indigenous sheep breeds, adding further to local economy benefits. The net economic effect of such marketing of livestock through the British Heritage Sheep scheme, compared with supplying the mass market through large abattoirs often many miles away, could be significant.

It is not anticipated that the Scheme would be aimed at supermarkets, at least initially. Practicalities would need to be ironed-out first, and farmers' marketing groups being able to offer sufficient volumes, quality and continuity of supply.

## 15. Export potential

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Once the system is fully tried and tested, there is also significant potential for branded British Heritage Sheep meat to be exported. When competing in markets such as the Far East or USA, a fully traceable and branded UK Heritage Sheep pack of say Southdown lamb from the South Downs National Park in Sussex will have more of an impact on the shelf than a generic pack of Australian or New Zealand lamb. As this report discusses, technology now exists to ensure a robust traceability system, which with imaginative packaging could produce a market leader in prestigious sheep meat to consumers, both domestically and overseas.

## 16. Conclusions – is the proposal feasible?

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As will be seen from the SWOT analysis, there are some caveats to the scheme, but the NSA do not think these are insurmountable, and the benefits outweigh these potential hazards. Much will hinge on support from the industry and in particular the Levy Bodies, together with other funders in order to launch the scheme. Continuing support amongst those organisations which would comprise the Oversight Committee and Friends of Heritage Sheep will be equally vital to the scheme's success. Results from consumer research shows significant support for the scheme from the general public, which should be an addition to, rather than compete with the existing Standard Lamb market.

The potential benefits of the Scheme are considered to be significant and widely spread. Support for the scheme has been considerable, including the whole supply chain, meat Levy Bodies, National Farmers Union and a number of other organisations and individuals. Assuming they continue to get behind the scheme, the NSA considers it has a good chance of success.

## 17. Next steps

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Assuming there remains good support for the British Heritage Sheep project, the next steps are:

- a. To collate a list of supporters of the scheme who would be interested in being involved with its implementation, and to take part in the shareholding and/or Board membership.
- b. The British Heritage Sheep company will need to be constituted and established. This would include a Board, which will need to:
  - i. **Funding** – to investigate the opportunities for grant availability, together with Crowd Funding mechanisms.
  - ii. **Recruitment of staff** – the Heritage Sheep staffing will, as discussed, be kept to a minimum, and initially a single member to act as manager. Some preparation will be required in recruiting the right staff, which will be vital to the success of the project.

## 15. Export potential

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- c. Once funding and staff are in place, it will be necessary for the Board to determine policies and a strategy for taking the project forward. These tasks will include:
- iii. A Marketing Strategy** – this will need planning and discussions with other interested parties, including Social Media, organisations' membership publications, etc..
  - iv. Traceability system** – decide on technology to be used and develop this as a trial as part of the Brecon Beacons project. Some funding should potentially be available for such a development via the government's Science and Technology Development Council.
  - v. Virtual marketplace** – Big Barn and other potential marketplaces will need to be examined in detail, both for farmer to farmer trading, as well as at other points along the supply chain, and a consumer-facing portal.
  - vi. Flavour grids** – the feasibility has established that there are genuine flavour differences between breeds using older animals. AHDB and others, including the Pasture Fed Livestock Association, have expressed interest in developing this concept, and this will require some preparation and planning.

## Appendix 1a - Big Barn Website details of potential arrangements with Heritage Sheep

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BigBarn has API technology and affiliate scheme that allows any website to have the BigBarn map and content and pay a commission on any trade. This means that Heritage Sheep suppliers can be listed on the map and appear on the Heritage Sheep website but also on all the 100+ other websites that promote the BigBarn map. As an example, to see this for the RBST: [www.rbst.org.uk/how-it-works](http://www.rbst.org.uk/how-it-works)

BigBarn would offer Heritage Sheep a section on their website to explain its purpose. Each participant in the Heritage Sheep supply chain would have the opportunity to have their own webpage on the site with password to make changes in the BigBarn admin system. Participants can also set up an on-line shop, and/or a link to an existing website.

### Retailers of Heritage Sheep meat products

The database on BigBarn is broken down into currently 15 categories, a new one of which would be 'Heritage Sheep'. Others include meat, fish, bakery and delicatessen. Suppliers can choose to be listed under any number of these categories.

The supplier has complete control over their on-line page and can fully edit their entry with a password. There are many opportunities for retailers to promote their products on the website to the 100,000 consumer users. These opportunities include:

- An on-line shop is available to all producers, and once products are loaded on to the site, orders and payments are taken, leaving the producer to send the goods to the customer.
- Each retailer listed also has a review section on their page for consumer comments.
- Access to a BigBarn 'Loyalty Card' with which suppliers can offer special deals to consumers.
- BigBarn's monthly newsletters are directed at consumers in particular geographical areas.
- There is a section for retailer-produced video recipes to promote individual products and suppliers
- Discounts on products and service including credit card machines & services, insurance, food equipment and packaging

Existing brick and mortar retailers can also use the site to promote their premises and products. They may wish to make offers to their existing and potential customers who would quote a code when visiting their shop for a discount or special offer.

### Farmers and others in the supply chain

Farmers, butchers' wholesalers, caterers and others involved in earlier links of the supply chain could use BigBarn to trade animals or other products. An important safeguard is that when signing up to the website a system would confirm that each supplier was a 'member' of the Heritage Sheep scheme to ensure authenticity. A 'key words' facility enables the tagging of individual entries where, for example, farmers had store lambs for sale. Prospective buyers of store lambs could therefore search the BigBarn

*continued...*

## Appendix 1a - Big Barn Website details of potential arrangements with Heritage Sheep *(continued)*

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website for “Suppliers of Heritage Sheep store lambs”. The search engine would then list initially up to 20 such suppliers, starting the list with suppliers who were geographically closest to the enquirer. Any transactions would be between the two individuals and would be free of commission.

### Attracting consumers and suppliers to BigBarn

Through various methods such as social media, newsletters and websites, organisations supporting Heritage Sheep could inform their members and supporters of the facilities at the BigBarn website, thus saving Heritage Sheep expenditure on expensive advertising. This would be in addition to the large numbers of potential customers for Heritage Sheep suppliers already using BigBarn.

### Costs of Big Barn

There would be no cost to Heritage Sheep to join BigBarn. This includes code to have the local food map on the Heritage Sheep website with just Heritage sheep members. If enough farmers opt in to the brand a special Heritage Sheep icon could be set up for the map and it could be promoted on BigBarn and other partner websites. There is a £40 small business/seasonal rate for just an icon and webpage on BigBarn, or a £120 retailer rate annual fee for suppliers to have a searchable icon and webpage and shop. 50% of these fees would be sent to Heritage Sheep. Retail sales made through the Big Barn website attract a fee of 6%, of which 2% would accrue to Heritage Sheep if sales came from the Heritage Sheep website. For smaller suppliers, or farmers who may only want to advertise store stock for example, annual fees would be negotiable.

# Appendix 1b - British Heritage Sheep Data Sharing - Blockchain or Database?

By Dr Tom Kirkham, Business Development Manager, Hartree Centre, Science and Technology Facilities Council

## Overview

Data stored within databases are centralised systems. They are often stored in a single place, managed by a single IT organisation on behalf of a trusted data processing organisation. Issues with this model are that databases can present a single point of failure in terms of availability, data manipulation and trust. The administrator of the database determines who can read, write and delete data.

Blockchain or Distributed Ledger are decentralised in that the data is stored in multiple places or nodes. These nodes combine to validate each other and enable the writing of data to the chain. Data within the chain is available to view by all nodes and is immutable. Issues in this model is that the requirement of distributed nodes means that more technically competent organisations are required, also transparency of all data in the chain is not always appropriate for some business models

## Distributed Food Supply Chain Example

Within supply chains often the business model of the larger partner (i.e. supermarket) dominate. This influences the rules associated with data management to often vendor specific systems such as Enterprise Resource Planning (ERP) systems. For partners in the supply chain this can add complexity and data visibility for business processes reduces transparency and often trust.

Blockchain is being used increasingly in supply chains within the food industry by organisations such as Walmart. The main attraction here seems to be that the system is easier to deploy as the writing of data to the chain is via simpler API calls outside of licenced enterprise software. This makes it easier to integrate numerous devices as the amount of sensors rapidly expand within supply chains. In addition, the transparency of the chain enables all parties to examine what is happening and adjust business process accordingly (i.e. for delays at parts of the chain).

## British Heritage Sheep project

In order to deploy a tracking system of sheep written to by partners a database is suitable. An IT provider can maintain it, and rules associated with it set by the National Sheep Association (NSA) who are trusted in the community. Sensors and devices can scale and write to this database with the NSA controlling who sees the data.

However, if the network of organisations writing to the database is likely to increase rapidly along with the number of sensors and devices a Blockchain could be more suitable. Also, if the NSA wants to keep the data neutral and therefore not under its control the Blockchain option is attractive. Finally, if greater

*continued...*

## Appendix 1b - British Heritage Sheep Data Sharing - Blockchain or Database? *(continued)*

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By Dr Tom Kirkham, Business Development Manager, Hartree Centre, Science and Technology Facilities Council

transparency is required within the network of data

the Blockchain is the better system as it enables all partners to see what is happening in the chain.



# British Heritage Sheep

## New Tastes from Old Traditions



Industry Consultation Results



# 1. Background to the Survey

The purpose of the survey was to gain opinions along the meat supply chain on the purpose and proposed method of implementation of the Heritage Sheep project. A full set of questions is given at the end of this report.

The on-line survey was carried out between September 2017 and January 2018, using the Survey Monkey website ([www.surveymonkey.com](http://www.surveymonkey.com)). It was widely advertised through the NSA and other participating organisations. There were also a number of articles written in various publications to publicise the survey.

Most questions were tick-box answers, but also with space to give fuller, written answers.

# 2. Results of the Survey

Total of completed responses was 109. 161 responses were started on-line, but 52 respondents did not complete the survey. This was due in part to technical problems with the Survey Monkey website. The incomplete results were not used for this analysis.



Too much pressure is being exerted by major supermarkets, AHDB, HCC and QMS on producing standard carcasses. They don't care about the breed so long as the carcass fits. We need to re-educate the consumer so that they understand the different tastes and textures of our traditional breeds and how this is influenced by the areas and methods in which they are reared.

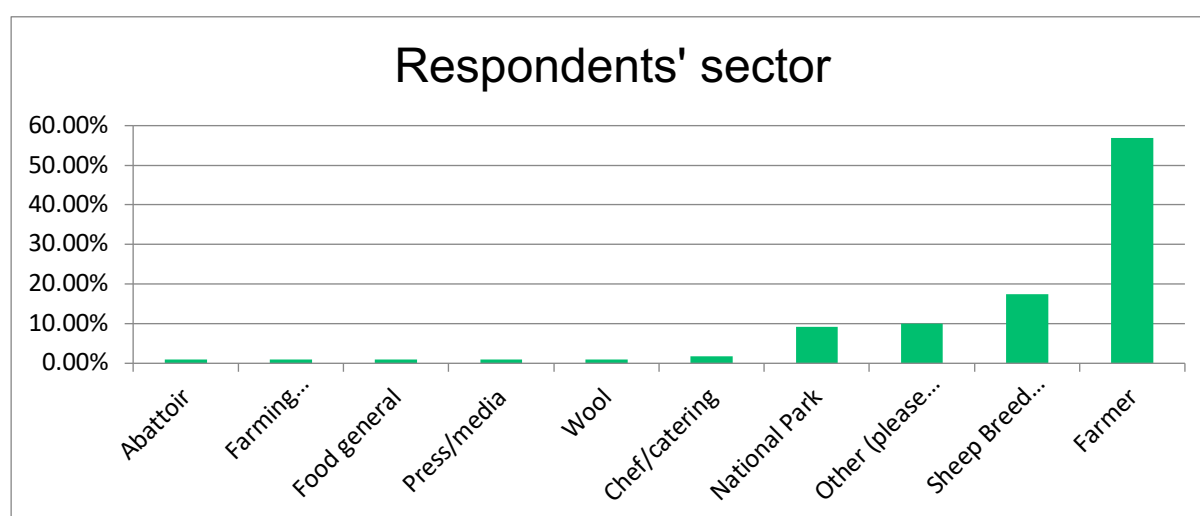
one farmer's response



## Background Information

**Questions 1-4 were gathering personal information.**

**Question 5 - Respondents by Sector**



continued...

## 2. Results of the Survey *(continued)*

The majority of respondents are farmers, although there is a wide spread of sectors. The 'other' sector includes people involved with education, government and consumers.



The idea of diversity and the inherent qualities of different regions will help promote the high quality of sheep meat. We need to create words like the Wine industry to promote the uniqueness of each region. The oyster lady has done this with oysters for "terroir" she has "Meroir" and she is an Osterelier like a sommelier in the wine world.

Survey Respondent



### **Q6: Do you already produce or sell Heritage Breed live animals, meat or other products?**

Of all people surveyed, over 60% were already involved in producing, processing or selling Heritage Sheep.

#### Farmers who Produce Heritage Sheep Breeds already

The next series of questions were only asked of those people who answered 'yes' to the last question. Most of the questions relate to the farming, processing and marketing of the animals and their meat.

### **Q7: Are you selling your animals or meat specifically as Heritage breeds?**

Only around 50% of those involved with Heritage Sheep are currently marketing them specifically by breed.

### **Q8: What proportion of your flock is heritage breeds?**

Of those who farm Heritage Sheep Breeds, most (70+%) have at least three quarters of their flock as these breeds. This suggests that most people who rear Heritage Sheep breeds are dedicated to doing so.



I want new experiences in a restaurant setting. I want to know this piece of meat is the real deal and in effect a piece of bleating rural UK history.

Respondent's comment

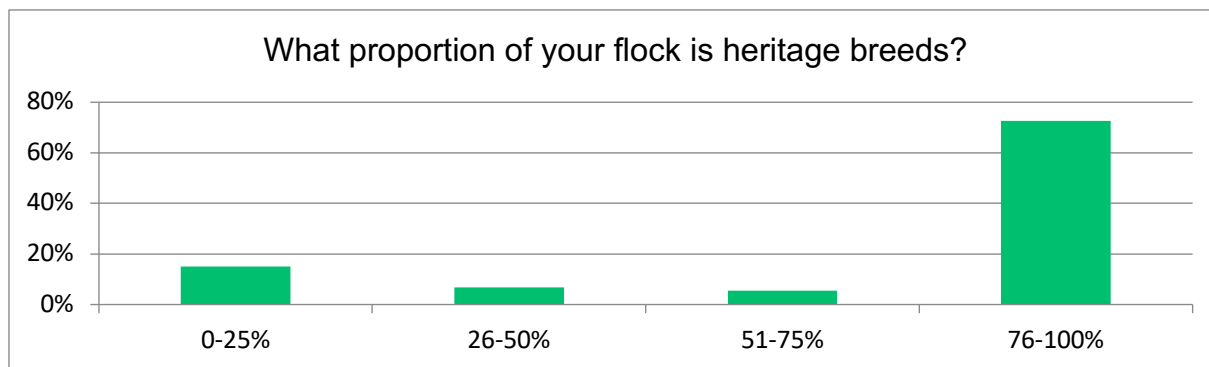


### **Q9: Would you increase your Heritage breed numbers if there was a better market for them?**

There would appear to be plenty of potential production in Heritage Sheep breeds if a specific market was available for them, with over 80% of farmers stating that they would increase their production if a suitable market was available to them.

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## 2. Results of the Survey *(continued)*



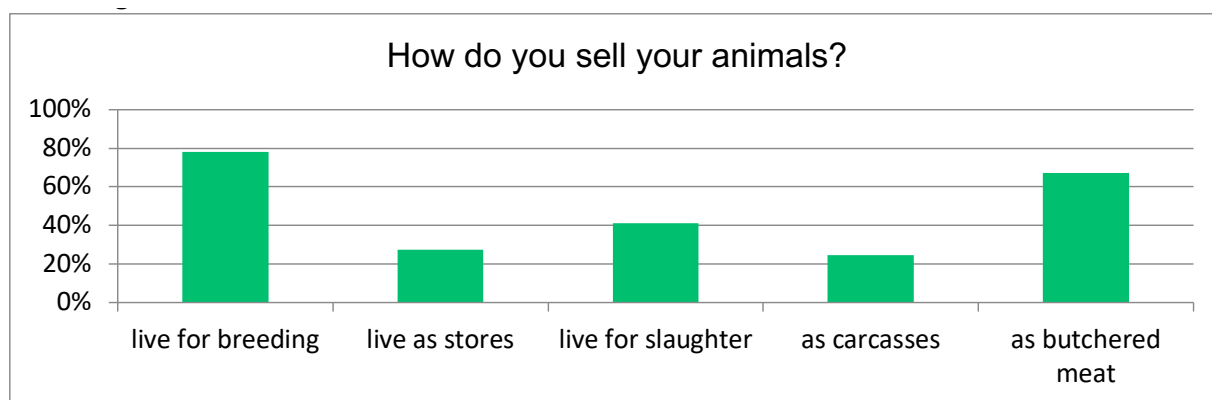
[We] discovered the lamb from the Shropshire is REALLY good and people say 'it tastes like lamb used to taste'. A local quality butcher says it's some of the best lamb he has ever tasted when he tried some. The local pub, with a farmer's son running it who really appreciates good food and flavours, really likes it to and has had quite a few and advertises the breed on the menu.

Survey respondent's comment



### Q10: How do you sell your animals?

Most heritage Sheep farmers sell their production live, with the largest group doing so for breeding. Most farmers have more than one market.



The second largest group (almost 70%) sells them as butchered meat.



We take them to a very small family butchers/abattoir only 15 minutes' drive away and they butcher them all for us. We think this is very important part in the selling process.

Farmer's comment from survey

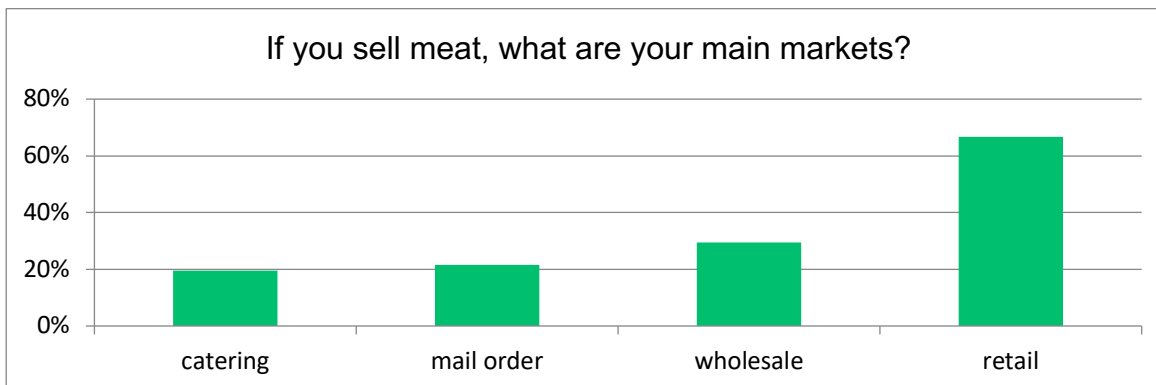


*continued...*

## 2. Results of the Survey *(continued)*

### Q11: If you sell meat, what are your main markets?

Many farmers sell through more than one market, but over 60% of farmers already selling their own Heritage Sheep meat do so to the retail market. 22% sell through mail order, almost 30% use the wholesale market and 20% sell through catering outlets.

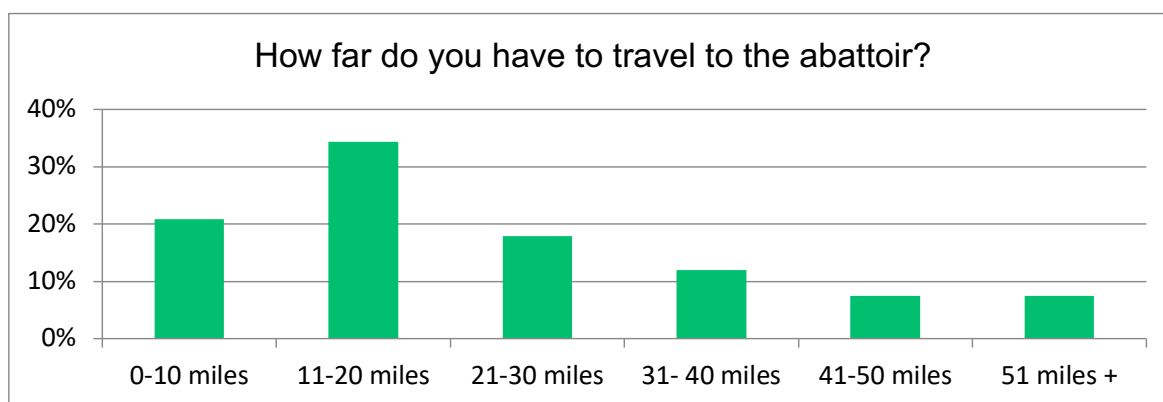


### Slaughtering and Butchery

The following questions are concerning the critical process of slaughtering, butchering and packing farmers' meat. The current crisis in small abattoirs, where 34% have closed over the past 10 years has highlighted the problems faced by many producer-retailers. For many the problem of long distances to suitable abattoirs and cutting plants mean that they cannot afford to sell their own meat. The following questions illustrate how far some farmers are prepared to travel to have their animals processed. Whether they fully cost this operation is not clear. Many other farmers are too far from a small abattoir to consider adding value to their livestock by selling the meat directly to the consumer, wholesalers or caterers.

### Q12: How far do you have to travel to the abattoir and butchery?

In selling their own meat, farmers normally do several journeys. From farm to abattoir, then home; from abattoir to carry carcasses to the butchery, and home; from the butchery to market.



The average distance farm to abattoir in the survey is 17 miles. The average round trip for the farmers in the survey is 34 miles. This must be doubled if they collect the meat from the abattoir, or bring it back to their farm for butchery, making a total of 68 miles.

*continued...*

## 2. Results of the Survey *(continued)*



Abattoir issues cause extra costs and time. There is no abattoir within 1 hour of home.

Farmer's comment from survey



### Q13 Where do you have your butchery and packaging done?

Only 2% of respondents said they had their own butchery, on-farm. 56% said they had the work done at the abattoir, and 42% said they had it done at a separate cutting plant/butchery. Some abattoirs offer a killing, butchery and meat packing service, but from the survey, only something over half had access to or used such abattoirs. There is additional cost in transporting the carcasses from the abattoir to a separate butchery.



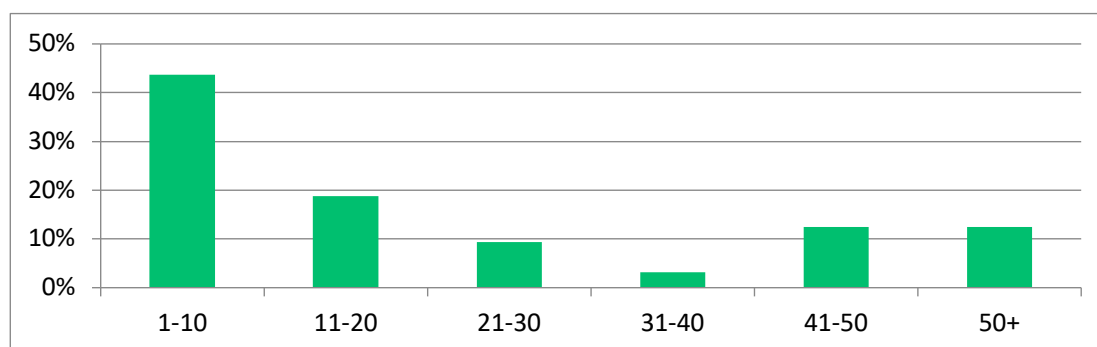
The limitation is really abattoirs. There is only one [available].

Farmer's comment from survey



### Q14 If you have the carcasses butchered elsewhere, not at the abattoir or your own facilities, how many miles does this add to your transport costs?

The average distance farmers travelled in the survey to the butchery is 21 miles. Each round trip is on average 42 miles.



### Total mileages travelled by farmers per batch of animals

For farmers who either have their own butchery or use an abattoir which offers a butchery service in addition to slaughtering, the average total distance travelled to have packed meat available on the farm is 68 miles.

For those who must travel to a cutting plant/butchery, the total distance is on average 110 miles.

At an assumed vehicle cost of £0.75p/mile, this amounts to £51 and £83 per load of animals. As most journeys are using 4x4 and trailer, there is an additional labour cost, either the farmer or driver. This could be say three hours at £12/hour, which is an additional £36 per batch of animals, making a total cost per batch of £87 and £119. Taking a few animals at a time, this transport operation is a significant cost to the farmer.

*continued...*

## 2. Results of the Survey *(continued)*



Lack of private kill slaughter houses is forcing small niche producers out of business. If we could have a mobile slaughter house such as I believe there is on Exmoor, several small scale producers would be able to continue. There is not a problem getting the meat butchered but just slaughtered.

Survey respondent's comment



### Marketing Heritage Breeds

#### **Q15: Please rank in importance your main problems in selling Heritage meat**

Respondents ranked their problems in selling Heritage meat as follows:

1. Finding a market
2. Getting a viable price for the meat
3. Regular demand
4. Continuity of supply
5. Killing/processing costs
6. Producing animals to required specifications
7. Meat distribution costs
8. Transport costs of livestock and meat

The first four points are symptomatic of an underdeveloped market, where finding customers, getting a viable price, and issues of balancing supply and demand are basic issues.

The major cost issues are killing and processing, distribution and transport. Again, low volumes in a small market would be obvious causes of these high costs. The ability for farmers to produce animals to the required specifications is partly due to management problems, but more likely refers to the standard industry criteria, required by supermarkets, particularly carcass weight, but also fat level and conformation. The point of Heritage Sheep is that eating quality is more important than size and shape of cut.

#### **Comments from Farmers**

##### **Heritage sheep do not fit the standard physical specifications of the mass market:**

“No market for horned lambs. Best price last year was £27/head”

“Difficult to plan ahead in terms of numbers. Market prices drop as April born Heritage lambs start to reach weight being slower growing than commercial breeds.”

“Lack of demand for small lambs”

*continued...*

## 2. Results of the Survey *(continued)*

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### **Lack of knowledge and awareness from consumers:**

“Lack of interest from the consumer”

“Lack of advanced advertising”

“More marketing of heritage breeds/environmental production.”

“Lack of awareness of magnificence of taste vs commercial breeds!”

### **Financial returns for Heritage Sheep:**

“Our sheep need to achieve a higher return/lamb as they are less productive.”

“Getting initial customer at higher price - once tasted lots of return customers”

### **Suggested improvements:**

“Bringing together local heritage breeders to provide better supply & market more effectively”

## Reactions to the Proposed Heritage Sheep Scheme

### **Q17 – Do you agree with the NSA’s analysis of the current state of the sheep sector, and the threats to it?**

An overwhelming 99% either wholly (78%) or partially (21%) agreed, with only one respondent disagreeing. In their comments, respondents raised other issues regarding the state of the sheep sector.

*“I think that reliance on grain based feeds, and on particular imported grains and soya is a major problem. I think that over fertilisation of fields is likewise a big problem.”*

*“We need a balanced management system for our habitat land which requires a mixture of sheep and large animals such as cattle or ponies. To many of one species does not bring the right conservation grazing regime for our hills and uplands.”*

*“The demise and closure of local slaughter houses is a major issue. Traceability and welfare issues too”*

*“In the Lake District there are additional threats from competing uses of land for rewilding, recreation and tenancy issues and most especially environment schemes which require removal of sheep from hills making farming less viable.”*

*“Heritage breeds can be significantly more profitable than from the new gene pool. This is because they can be managed with significantly less inputs.”*

*“My personal opinion is that fast finishing lambs has taken precedence over taste.”*

### **Comments by Heritage Sheep Producers**

*“We had a 10 year scheme with M&S for our Brecknock Hill Cheviots which sadly ended a few years ago and we have failed to establish something similar in the commercial field since. In the meantime this breed on the Brecon Beacons and Black Mountain has gone into serious decline”*

*“We used to sell Blackface Lambs direct to restaurants but demand dropped. In part due to price (restaurants would pay premium, put it on menu then buy cheaper alternative) and portion size with a lot of Traditional breeds being a little smaller. Also costs of haulage and processing were squeezing margins.”*

*“Three breeds, Cotswold, Leicester Longwool and Teeswater, all different flavour”*

*continued...*

## 2. Results of the Survey *(continued)*

### **Q18 Do you agree that sheep meat diversity offers an opportunity for expanding consumer choice and sales?**

Only 1% of respondents disagreed with this statement. 87% agreed completely, and 12% agreed partly.

### **Q19 Do you agree with the reasons given for encouraging diversity in sheep meat markets?**

90% agreed, 8% partially agreed and 2% disagreed.

### **Q20 Do you agree that the 5 actions given for developing diversity in sheep meat are valid?**

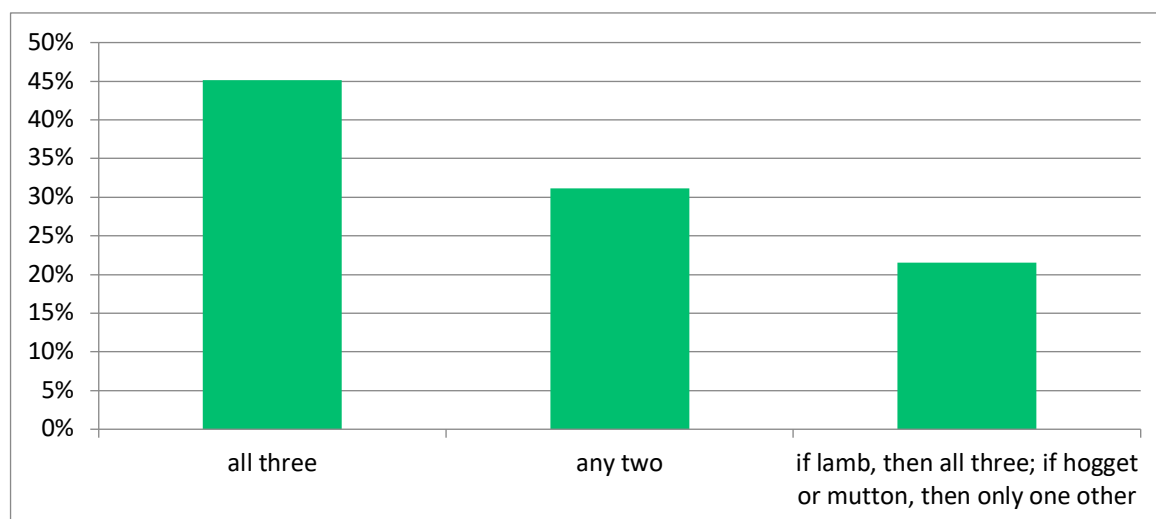
90% agreed fully, 9% partially, and 1% disagreed.

### **Q21 Do you agree with our definitions of eligibility criteria?**

There was slightly more divergence of views on this question, with 69% being in full agreement, 27% partially, and 4% disagreeing. There was some concern over the 'Countryside' criterion, with perhaps a misunderstanding that the proposal was that Heritage breeds had to be from their native landscapes. Also, concern about the use of the word 'hogget', which most consumers would not understand.

### **Q22 How many criteria should be required for a piece of meat (minimum)?**

Excluding the 'don't knows', the two options of 'Three criteria' (Age, Breed and Countryside/landscape), together with 'If lamb then all three, if hogget or mutton, then only one other' accounted for 67% of responses, with 'any two criteria' being supported by 22% of those who chose an option. One response was "two of the criteria would open the eligibility to far more farmers." Another stated "You want to encourage farmers into the scheme and not make it too onerous. On the other hand generate enough cache/interest for the consumer. It needs to make the consumer feel they have something special and of real merit." A third was "Not true heritage without all three.", and finally "Probably needs some market research. The main thing is to keep it simple". Consumer research will be part of phase three of the project.

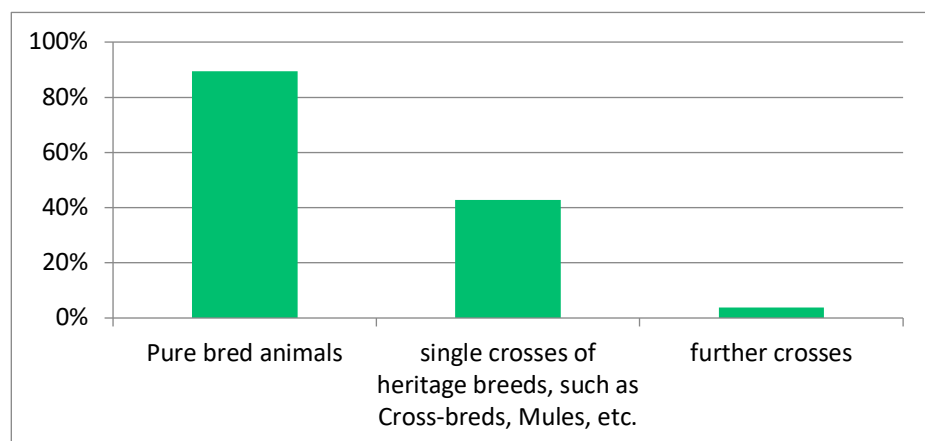


*continued...*



## 2. Results of the Survey *(continued)*

### Q23 Which of the following should be included in any scheme



The consensus seemed to be that pure-bred and single crosses were acceptable to be included in any scheme, but not further crosses.



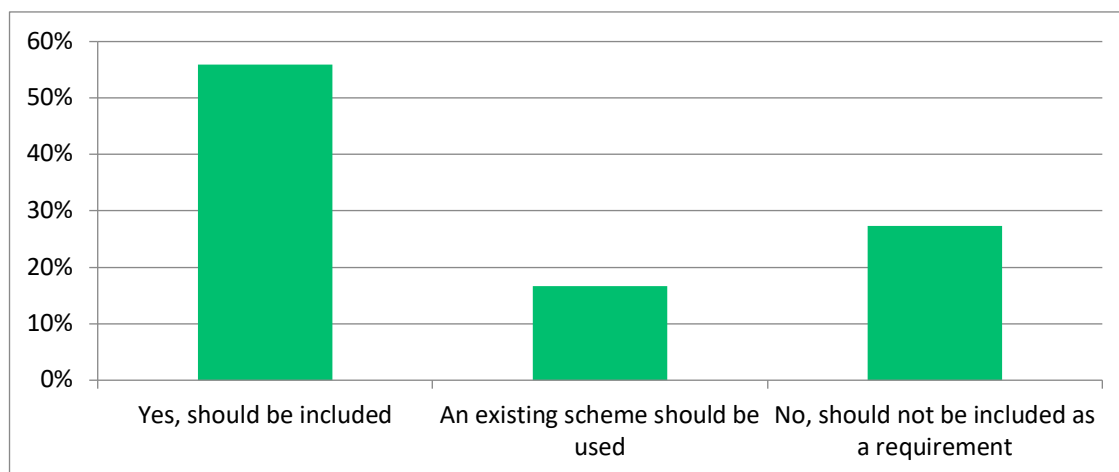
Particularly “traditional” crosses e.g. Masham

Survey response on Q23



### Q24 Should Animal Diet – e.g. grass/forage fed be included in the scheme?

A total of 73% of respondents, excluding ‘don’t knows’ considered that diet should be a criterion in the scheme, against 27% who said it should not. 13% thought that an existing scheme should be used.



### Comments on Diet as Scheme Criterion

*“Restricting farmers to a type of feed will have an effect on welfare and encourage cheating”*

*“Pasture fed, LEAF Marque and organic should all be considered”*

*“I’m a member of the public... I want to buy something special...It’s from a special place but it’s not been eating something all natural.... Hello.. am I missing something here...?”*

*“The ‘offer’ should be grass or pasture fed only.”*

*continued...*

## 2. Results of the Survey *(continued)*

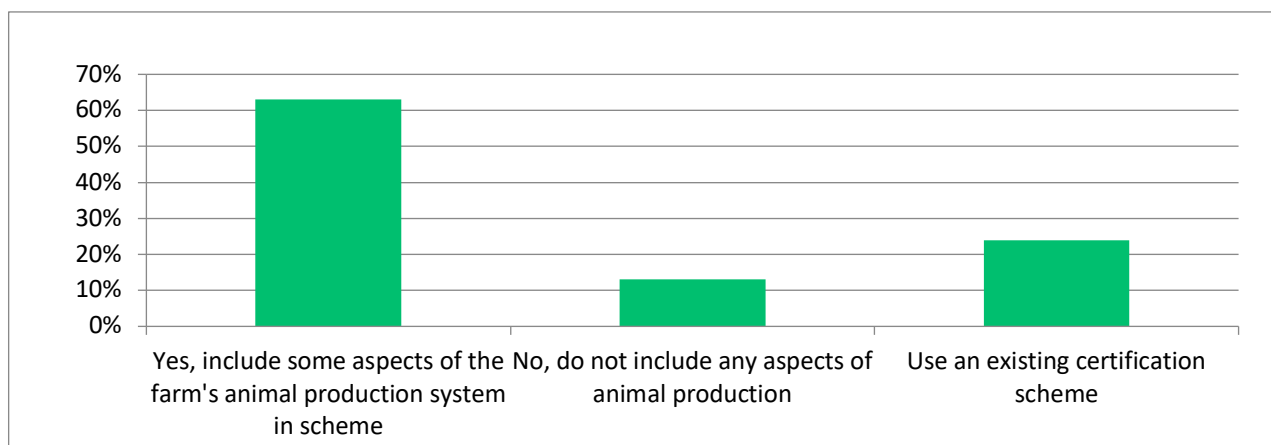
*“The ideal of grass fed only is attractive but on hill farms with a short growing season, is not really achievable”*

*“What they eat isn’t important”*

*“Should be included insofar as it’s an element, with a premium attached, but not as a mandatory requirement for all meat entering the scheme.”*

*“To get some of these breeds to a spec required by the market some supplementary feeding may be required”*

### **Q25 Should other aspects of animal production – animal welfare, animal housing, intensive production, veterinary medicines use, etc.. be included in the scheme?**



Excluding 'don't knows', 76% thought that the animal production system should be included in the scheme. 24% thought it should not.

### **Survey Comments on aspects of Animal Production as Scheme criteria**

*“It is too expensive for us to join a certification organisation, small farms would be excluded.”*

*“Animal welfare is a key marketing point to get across to consumers”*

*“costs of production and processing are prohibitive for these breeds already: don't add another cost.”*

*“Again, not a mandatory requirement for all meat entering the scheme, but a premium available for organic, FABBL, or whatever.”*

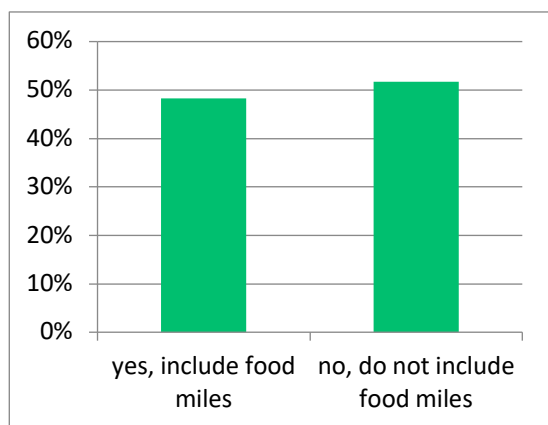
*“A complex question. I think there have to be some minimum welfare/environmental standards if the promise about the countryside is to be fulfilled. Otherwise the brand will be undermined at some stage when the details leak out. On the other hand as it gets more complex, fewer producers will sign up.”*

*continued...*

## 2. Results of the Survey *(continued)*

### Q26 Food Miles to be included in Scheme?

There was a majority (52%) in favour of not including Food Miles as a criterion in the scheme (excluding 'don't knows'). Some thought the food miles should be restricted in terms of live transport – as one respondent commented “Let the travelling be as meat”. However, many more considered that most farmers are subject to the distance to their nearest 'private kill' abattoir.



### Comments on Food Miles

*“While food miles are important, farming in isolated areas needs to have the same opportunity and support. Producers in the Orkneys for example really struggle.”*

*“Keeping food miles to a minimum is in everybody's interest but would be very hard to regulate. Maybe encouragement of Best Practice keeping them as low as practically possible.”*

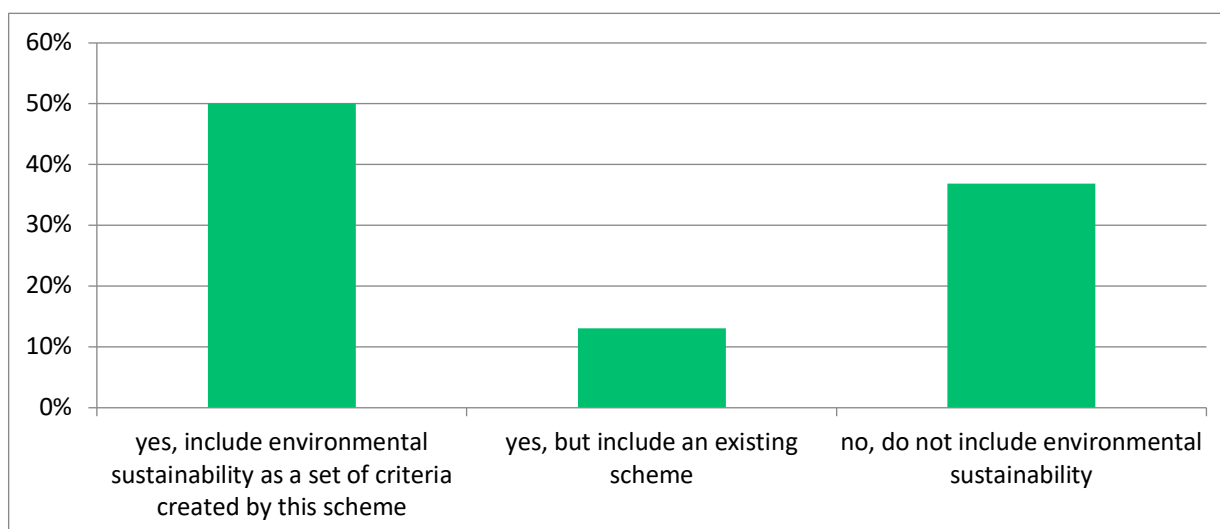
*“So few abattoirs these days it would be unfair to exclude flocks that would otherwise qualify but for distance to slaughter.”*

*“The biggest market in UK: London is a long way from traditional sheep areas!”*

*“Food miles are of concern and interest to many consumers/customers”*

### Q27 Should Environmental Sustainability be a criterion for the scheme?

Of those who commented, 63% thought Environmental Sustainability should be part of the scheme, with 37% disagreeing.



*continued...*

## 2. Results of the Survey *(continued)*

### Comments on Environmental Sustainability

*"This is really difficult as we are unsure of what schemes will be available or look like beyond 2020. It could add strength to the scheme to include ES criteria, but it should be kept simple if it is included"*

*"Again, don't add cost"*

*"Not clear if you mean government environmental scheme then a warning is that depending what your criteria are government schemes will be very different and frequently change - ensure the environmental criteria are selected for the right reasons - not because of short term funding"*

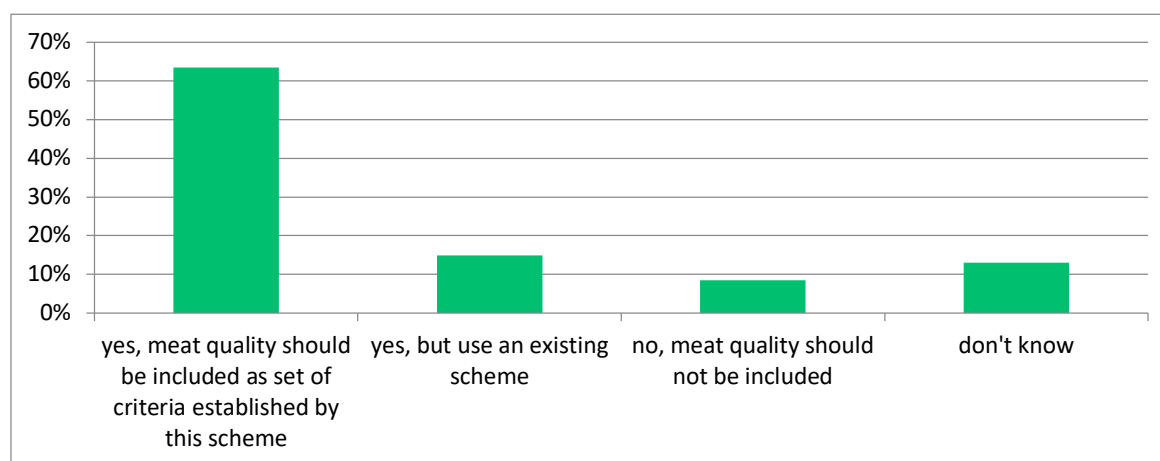
*"Needs something simple and tangible. Possibly won't impact all consumers decisions but is needed for the overall image of what's trying to be conveyed"*

*"Not using existing schemes as there are elements of competition to enter some schemes and smaller producers tend to be penalised"*

*"Complication? Water, Carbon, soil erosion...? Place and heritage are sufficient?"*

### Q28 Should Meat Quality be a criterion?

Excluding the 'don't knows', an overwhelming 90% said meat quality should be included, of which 17% thought it should be part of an existing scheme.



### Comments on Environmental Sustainability

*"Without meat quality being part of a scheme then its value is massively reduced"*

*"Enjoyment of the product is everything. It needs to be as good as possible. If people don't like it they won't buy it."*

*"Taste consistency is important if people have a bad experience of lamb then they are less likely to eat it again"*

*"Would need clear understanding of what quality means, how it is defined and how it is to be assessed. This is a complex topic and could be expensive to assess"*

*"Meat Quality has to be key to ensure the reputation of the scheme is kept high and is well valued by the British public"*

*"If you don't have this; you don't have a premium product"*

*"Paramount. There needs rigorous and vigorous quality control. In my opinion this is the most important aspect yet discussed"*

*continued...*

## 2. Results of the Survey *(continued)*

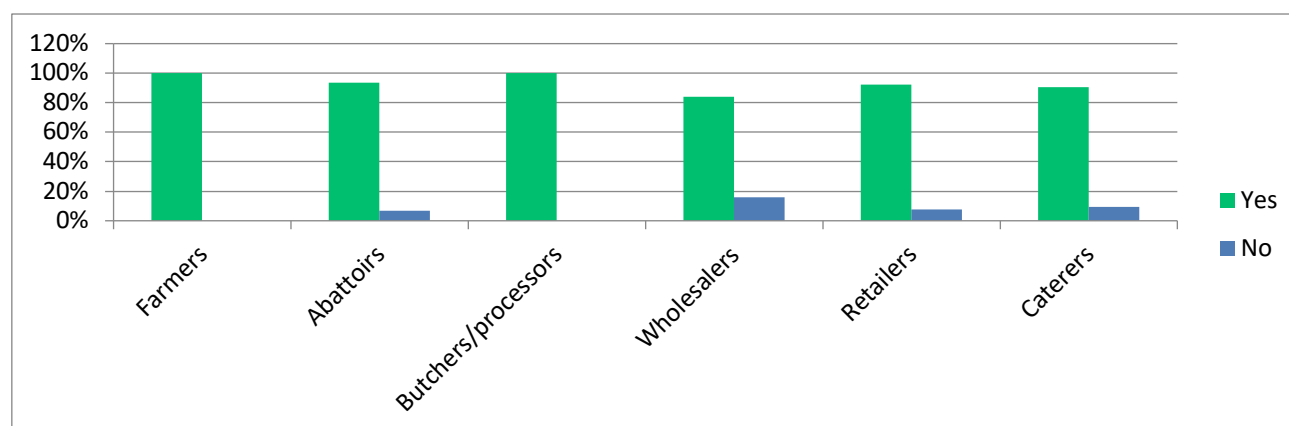
*“What are the criteria of quality? For example, fatty sheep isn't considered high quality by some butchers and the supermarket. This is part of the problem”*

*“Meat quality is what it is all about - like wine”*

*“I think there should be minimum hanging requirements set”*

### **Q29 Who should be eligible to join the scheme?**

Overwhelmingly, the respondents thought that all elements of the supply chain should be eligible to join the scheme.



### **Comments on who should be eligible to join the scheme**

*“Without everyone you cannot succeed”*

*“The more bodies/groups are part of the initiative, the greater the awareness and the higher the profile”*

*“However, if a farmer uses an abattoir/butcher who is not on the scheme to process his/her animal, then he/she should not be stopped from marketing the meat on this scheme”*

*“It is the product that should be branded not the businesses. So they can all sell branded product and use the brand in their communications but they cannot use the brand for their business as a whole. So Brecon Butchers selling Heritage Breed lamb, not Heritage Breed Butchers in Brecon”*

**Q30 How Would Products be described under the Scheme? Claims allowed under the scheme would be for example: “UK Heritage Sheep. Shropshire breed hogget from the Shropshire Hills AONB” or “Blackface breed mutton from the Cheviot Hills” (both descriptions include all three ABC criteria). Simply “Derbyshire Lamb” for example, would not be eligible.**

The overwhelming majority (86%, excluding ‘don’t knows’) agreed with the proposed system of describing products in the scheme.

*continued...*

## 2. Results of the Survey *(continued)*

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### **Comments on descriptions used for scheme**

*"As mentioned before the issue of 'lamb' as a designation for the very slow growing primitive breeds that aren't full grown until 3 years of age & aren't appropriate size/muscle-mass for slaughter without those few extra months of growing between 12 -18 months of age."*

*"It would not be sufficient to be known as "Wensleydale Lamb" as it confuses Geographical with Breed names. It is important to keep the Breed name at the forefront i.e. Wensleydale Longwool Breed Hogget to ensure it isn't mis-appropriated by modern breeds produced in a specific geographical area."*

*"There needs some detail. This enhances and stimulates the idea the consumer is getting a 'special' piece of meat"*

*"Not sure geographic location is as important as breed unless it drastically affects taste i.e. salt marsh"*

*"For simplicity, even a label like this would work: Age: Hogget Breed: Cheviot Countryside: Scottish Highlands"*

### **Q31 Is a new quality inspection and verification scheme needed for involvement with this initiative? We think no, if legally-binding written undertaking made by participants. Ultimate adjudicator is local Trading Standards Departments.**

Again, an overwhelming response (86%) was that a new quality inspection and verification scheme was not required.

### **Comments on verification Scheme**

*"Not sure you will get Trading Standards to do anything under current staffing and budget issues. You can have a legally binding agreement but at some point you will need to audit apply and potentially prosecute so I guess you do need an inspection and verification process"*

*"Must be some element of random inspection and disqualification. Can't see Trading Standards having the time."*

*"Make it as integrated and as simple as possible"*

*"PDO is a nightmare but we did experience rogue traders so needs better provenance and surely EID can help there we used holding number eg08 for Cumbria"*

*"You need not have a scheme per se but it wouldn't hurt to allow for a percentage of 'Farm experience visits' to ascertain if people are complying...unannounced...just to keep people on their toes. Some element of this does promote a customer's faith in claims made about the meat they purchase"*

*"Totally agree"*

*"I think there should be the threat of someone looking over your shoulder even if it is to assist and ensure certain criteria are complied with"*

### **Q32 Is a logo needed to show affiliation to the scheme?**

100% agreement that this is necessary.

*continued...*

## 2. Results of the Survey *(continued)*

### Comments on Logo

*"Absolutely.....goes on doors + windows...people walk through restaurant/shop doors and look at restaurant/butcher's shops windows and meat counters. I would make a really big play to the food service sector on this...to be able to use this marque on their restaurant door via an agreed usage of said lamb/mutton...verified by the producer they use...make it something everyone wants to be part of in foodie circles...The restaurant trade is always looking for the next new and interesting idea"*

*"But needs to be clear and easy to educate the public as to what it is and what it means"*

*"A recognisable, simple and bold logo is essential for this scheme"*

### Q33 Do you agree that this initiative should be owned by the sheep sector? (from farmer to retailer/caterer?)

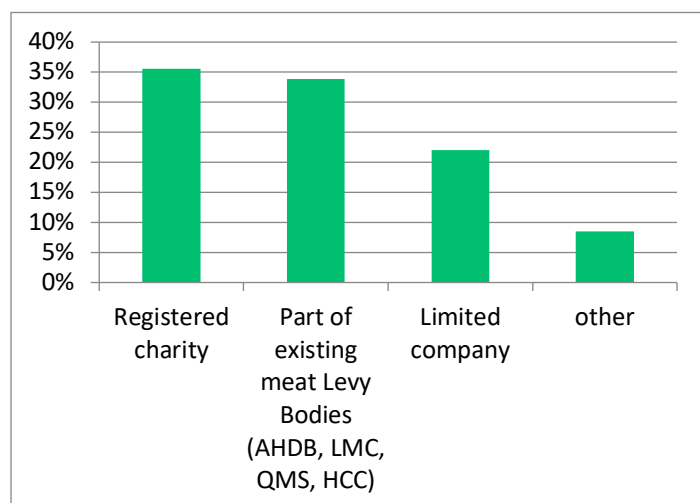
Again, overwhelming 95% of those giving an opinion agreed the scheme should be owned by the sheep sector.

### Comments on Ownership by Sheep sector

*"it needs to be a partnership involving producers, processors, customers, consumers and major players in land ownership sector"*

### Q34 How should the body overseeing this initiative in the long term be constituted?

This question caused some head scratching from respondents, with almost half saying 'don't know' (45%). Of those who expressed an opinion, the two favourite options were a registered charity and part of existing meat Levy Bodies.



### Comments on constitution of overseeing body

*"Use the existing cost base so as to not incur any more. Any cost has to come out of the final returns"*

*"Crikey, what is AHDB for?"*

*"A main thrust behind seems to be support for the rural community, sustaining the UK sheep sector and conserving heritage and associated sheep breeds. I personally feel setting it up as registered charity would be best."*

*continued...*

## 2. Results of the Survey *(continued)*

*“We formed our own Marketing Limited Company for our M&S scheme which worked well and might help as a pre-existing blueprint”*

*“I ticked part of existing levy bodies first, then decided I don't know enough. I'm pretty sure that a whole new body is probably not a good idea”*

*“To ensure that the initiative is not taken over by profiteers and ensure its integrity and viability it should be run by independent non-profit organisation. This is VERY IMPORTANT”*

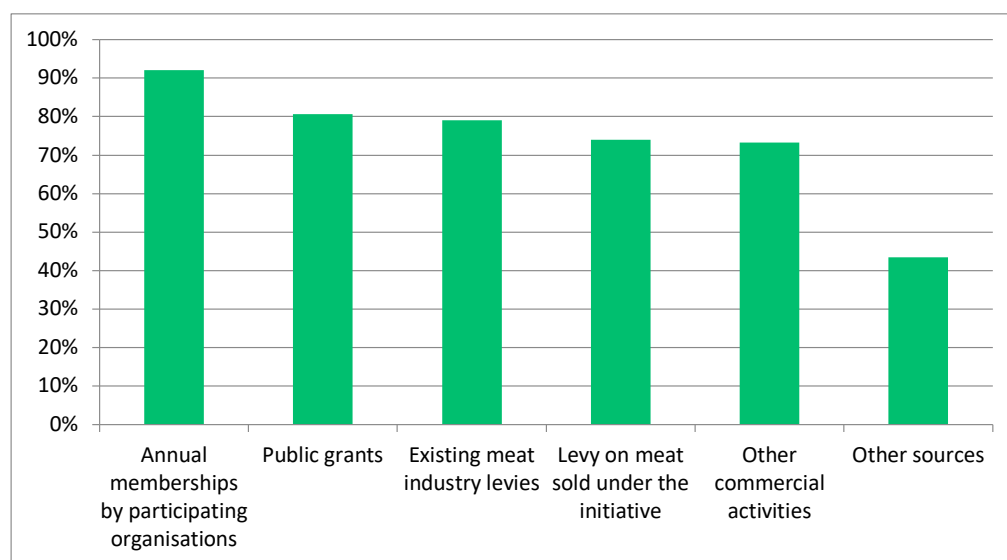
*“Consider whether the Steering Group guides the scheme but with one of the participating organisations acting as the accountable body rather than set up a new company - especially in the early years? Otherwise/later consider a not for profit organisation”*

### **Q35 Are you aware of any existing models of a structure which could be used for this initiative?**

A few suggestions were given here, including:

- Brecknock Hill Cheviot Marketing Co.
- Traditional Speciality Guaranteed – TSG- an EU designation, which identifies products of a traditional character, either in the composition or means of production, without a specific link to a particular geographical area.
- BSDA - British Sheep Dairying Association
- Peak District Environmental Quality Mark - Community Interest Company.  
[www.peakdistrict.gov.uk/looking-after/eqm](http://www.peakdistrict.gov.uk/looking-after/eqm)

### **Q36 To be financially sustainable, how should this initiative be financed? (you can agree with as many options as you like)**



The top three options voted for by 80% or so of those who responded to this question were:

- An annual subscription by participating organisations (92%)
- Public grants (81%)
- Existing meat industry levies (79%)

*continued...*



## 2. Results of the Survey *(continued)*

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### **Comments on funding**

*“To add further producer costs on meat after they already pay levy would seem unduly harsh”*

*“Costs cannot be such that it is more profitable to sell lambs through ordinary commercial markets”*

*“Each has a role to play - public funding and grants initially perhaps but long term, the job needs to stand on its own feet”*

### **Q37 General Survey Comments**

#### **Overall Comments**

*“I completely and utterly agree with your comments and support you without any hesitation whatsoever”*

*“UK leads the world in diversity of breeds and different environments. I don't know why the sheep meat sector isn't as prized as British cheeses for example. I suspect we need to get 'celeb' chefs on board and have some big campaigns. Sadly supermarkets will be key in getting to mass customers - they sell different varieties of all sorts of products but seem to be content to have little packs of meat with the least amount of flavour and the 'pappiest' texture as long as it's totally consistent.”*

*“All good, in particular the public education through a presence at shows, fairs and other food displays.”*

*“Provenance, flavour and nutritional benefits of slower grown, especially 100% pasture fed animals, and farming practices which can be linked to ecological benefits, offer many different product opportunities and a way of attracting younger, health and environmentally aware customers.”*

*“One of the most obvious ways to safeguard the sheep-meat industry in the UK is to localise branding, particularly of traditional breeds. If it were possible to promote sheep based on the A, B, C as noted there would be an opportunity to inform the public as to the importance of native breeds.”*

*“I do see a real opportunity to expand and develop an exciting new market for UK sheep meat. There's much work to do but I really feel that there could be interest around regionality and new ways with UK sheep meat. Looking ahead there's even possibilities in the US with the right marketing and brand awareness.”*

*“I think it is a really good idea - sort of what we are doing anyway - you are just making it more 'solid' and hopefully known about more ... which will benefit our sheep and local rural economy and landscape.... and help us to keep doing it.”*

*“Such a great idea. Should have done it 10 years ago!”*

*continued...*

## 2. Results of the Survey *(continued)*

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### **Labelling**

*“Proper labelling is critical. There is much variation in sheep meats and it should be promoted not denigrated. Like a fine wine there is some sheep meat that is perfect for everyone, if it’s labelled and sold that way. “The key is to attract a younger demographic back into eating lamb/mutton etc..”*

### **The Market**

*“This must be market led, which basically means you must persuade one major retailer to purchase lamb from a range of breeds, which will look, smell and taste different. It is not about producing a nice colourful leaflet. If you can meet their demands with such a varied product, then there is a chance to build scale by using their supply chains. Diversity is your strength.”*

*“There is growing awareness of the diversity of UK sheep meat. For this to really work the initial goal would need to be to consolidate the base. The issue is then taking this mainstream.*

*“These actions appear to be a logical step toward a more diverse and economically viable sheep sector. Engagement with retailers will be key in this instance. This schemes success will ultimately be dictated by their buy in. It would make sense to look in to premium pricing as a potential cornerstone of this scheme. Research by Quality Meat Scotland has shown that the most notable emerging market for lamb is that of young people who are buying for a smaller volume of a quality product as opposed to large volume purchasers.”*

*“This is a good proposal. However standard lamb is already considered to be expensive by consumers and adding additional tiers of differentiation should not lead to higher prices which put consumers off purchasing the product.”*

*“It could really help the smaller farms and producers countrywide who have a unique product with a route to market, rather than only large-scale commercial operations being viable.”*

*“Great idea, but it will be a challenge, given the dominance of the supermarkets.”*

### **Production Methods**

*“Cereal-based fattening systems must be excluded, together with rams and shed-finishing. You wouldn't want ‘Welsh Mountain lamb/hogget finished on citrus pulp silage.”*

### **Production Methods**

*“There needs to be support for this scheme across the whole industry. There will be those producers who have been proactive within this sector that may well have successful niche businesses. They would need to come on board and sign up. A unified approach is vital.”*

*“Across the meat sector, we need to learn from other success stories. Would the wine industry be successful if we only had red, white and rose? The cheese industry if the artisans hadn't found routes to market, thanks to people like Randolph Hodgson?”*  
*continued...*

## 2. Results of the Survey *(continued)*

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### **Sheep Breeds**

*“Diversity in sheep breeds is essential given the landscape differences across the UK and ignoring the range of breeds at the point of retail does a dis-service and does not help in guaranteeing a consistent product to the public. If all lambs are culled at 10 months there is a very real difference in meat quality and flavour between a Beltex and a Swaledale lamb. Utilising the range of sheep breeds at retail would allow us, as an industry, to make the most of the growing potential of the individual sheep as opposed to a one-size-fits-all approach as is commonplace now.”*

*“There is a place for standardized product, however diversity should be embraced.”*

*“The heritage breed aspect and providing stability for these remarkable breeds of UK sheep should be taken seriously.”*

*“Important to add that maintaining genetic diversity in our national flock is very important as we face increasing disease challenges, especially those imported or spreading as climate change allows disease vectors and conditions to spread north into UK. Borerays seem immune to footrot and scald. Who knows when in the future that will be an essential feature needed to be bred into other breeds in the UK? Plus all the varying immunities carried by other heritage breeds.”*

*“This [project] is vital - and [native breeds] also look fabulous in a field. We always tell walkers you are lucky to be seeing one of the oldest pedigree breeds in the UK, and it’s native to this area. It’s all part of supporting the local economy, which is vital. [We supply these Heritage breed sheep in our] local pub. They put it on the menu as ‘something special’ and it sells really well. They want some more ... and we have a market to sell them, so can keep more. We [then] increase the breed numbers. We started with just 3. Currently we have something like 200 on the farm. This adds to the success of the breed and increases the gene pool. We can get a more decent price, rather than taking them to the local market, where supermarket buyers only seem to want white head Texel type or black Suffolks.”*

### **Meat Flavours**

*“The different ages of sheep produce different flavours of meat.”*

*“I know from keeping five different breeds, that each has its own distinct flavour and qualities, mine are all kept on the same pasture and still retain these, the best example being the Manx Loaghtan renowned for its lean low cholesterol meat with fabulous flavour.”*

*“Mutton or older lamb is the way forward but needs the correct marketing, killing and cooking to produce a high-quality product.”*

### **Consumer Choice**

*“Greater Choice for the consumer + a better return for the farmer, particularly for those smaller breeds that are difficult to get to supermarket spec in one season.”*

*“It is imperative that potential consumers know that there are choices.”*

*continued...*

## 2. Results of the Survey *(continued)*

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*“Maximise the use of an animal before it is slaughtered and goes into the food chain. This will help to ensure that the cultural heritage of traditional hill breeds in the uplands is maintained, traditional sheep farming skills and knowledge retained and passed on.”*

*“New customers eager for variation in a product with provenance are where this needs to be pitched.”*

*“This is for the ‘aware’ consumer, someone open to trying something new. I’m always loath to suggest targeting one consumer demographic but the ubiquitous Millennials fit this description.”*

### **Feeds**

*“I think that there ought to be better education about the health benefits of pasture grown heritage breed meat.”*

### **Pricing**

*“This is a good proposal. However standard lamb is already considered to be expensive by consumers and adding additional tiers of differentiation should not lead to higher prices which put consumers off purchasing the product.”*

*“I stress the need to encourage people to pay for quality. A different approach would be for a higher quality branding to be developed, that stresses heritage, stresses increased welfare, fewer drugs, lower volumes, etc... Some people will pay more for that.”*

### **Q38 If you are a sheep farmer, would a successfully boosted marketing system encourage you to sell your animals as Heritage Sheep under the scheme?**

92% of respondents agreed that they would.

### **Q39 As a consumer, would such a scheme encourage you to buy Heritage Sheep meat?**

83% agreed they would, with a further 14% saying that it would depend on the price charged. 3% said they would not be encouraged to buy Heritage Sheep meat.

### **Comments on Consumer reaction**

*“I think there is a massive potential with this scheme and, if executed correctly, there is an opportunity to reap significant rewards for sheep producers.*

*I would urge those involved with this initiative that strong branding, well- executed marketing, and overall simplicity are essential for its success.”*

*“One wishes you every success”*

*“It is not just a marketing scheme but a whole new approach to selling sheep meat. The wine world has its own language and quality awards so can the sheep meat industry”*

*continued...*



# British Heritage Sheep

## New Tastes from Old Traditions



Results of Breed-based Sheep Meat Tastings

## Background

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Do you think you could taste a difference between a slice of roasted Welsh Mountain and a slice of Lleyn breed of mutton? As part of the Heritage Sheep feasibility study currently being carried out by the National Sheep Association (NSA), a taste test was carried out at the Welsh Winter Fair in November 2017. Show-goers were asked for their comments on eating differences between samples of mutton from three different Welsh breeds of sheep.

The NSA work is looking at a scheme to raise the public and market profile of non-standard sheep meat, which can be summarised as ABC:

- Different sheep **A**ges produce three products – lamb (up to one year old), hogget (1 to 2 years), and mutton (over two years old).
- the UK is alone in having over 60 British native Heritage Sheep **B**reeds (the most of any country);
- and the unique **C**ountryside or landscape which produces them (often reflecting the feed available to the sheep).

Currently, most promotional work on sheep meat is focussed on one product, the Standard Lamb. However, like with most foodstuffs these days, there is in fact a wide diversity of sheep meat, but the public are not generally aware of it. We have become familiar in recent years of the variety of types of foods such as bread, beer, cheese or whisky – we now have more cheese varieties than the French – yet who but the most dedicated foodie will have heard of Suffolk breed Salt Marsh mutton from the Gower, or Swaledale hogget from the Yorkshire dales?

This diversity of sheep meats offers much greater consumer choice than that which widely exists at present, and has the ability to create new markets, without diminishing the importance of the Standard Lamb product. In particular, examples such as gin, which is now the UK's favourite spirit, has risen in popularity due to the engagement of so called Millennials, who enjoy trying different artisan varieties of gin. When sheep meat is considered, not only is overall consumption declining fairly rapidly, but the age profile of those still eating it is predominantly older age groups. If the diversity of sheep meat could capture the imagination of the younger consumers, this would be a welcome boost for sheep producers, and would produce a longer-term impact, assuming they continued to eat sheep meat as they became older.

The NSA see the potential for a more diverse sheep meat market much as the whisky sector. Like the sheep farmers' Standard Lamb, whisky producers supply a standard mass-market product, blended grain. The difference is that in addition, whisky producers also have a wide range of malt whiskies. These vary according to the distillery location, ingredients and environment, and many people enjoy trying different labels, each with their own subtle differences in flavour and character, and categorised by terms such as Light and Floral, Fruity and Spicy, Rich and Rounded or Full-bodied and Smoky. Just such a descriptive system could be applied to older sheep meat, perhaps using descriptors such as Sweetness, Richness, Herby and Mildness. However, before that, it needs to be demonstrated that there are indeed breed differences in eating qualities.

*continued...*

## Background *(continued)*

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There is good scientific literature support for the influence of both age and landscape (in terms of the feed species it produces) on sheep meat flavour, but the only modern research on the impact of sheep breed on eating experience has been on lambs which, like veal compared to beef, have not yet fully developed particular breed characteristics of flavour and texture which can be found in the older hogget or mutton.

The Victorians, who were great enthusiasts for mutton believed that all the ABC factors affected the eating experience, and would talk passionately about their favourite age of animal, breeds and landscapes.



The difference in the quality of the flesh of various breeds is a well-established fact, not alone in flavour, but also in tenderness.

Mrs Beeton, 1864



The quality of the mutton varies much in the different breeds. In the large, long-haired sheep it is coarse-grained, but disposed to be fat. In the smaller, and short woolled breeds, the flesh is closest grained and highest flavoured;

John Lawrence, 1809



Do not treat all mutton in the same way. The mountain breeds never put on fat like the Lowland mutton, and the spicy thyme and herb fodder of the hills makes them much the best mutton obtainable.”

Dorothy Hartley 1954



According to a writer in 1840, one of Princess Diana’s ancestors, Lord Spenser ‘... for mutton to be consumed for his table, keeps Welsh sheep two years in Althorp Park, and thus has meat of the finest flavour.’ Fans of the Downland breeds also debated the various merits of the breeds, as one writer in 1913 observed of the Shropshire breed ‘Butchers commend the breed for its quality and flavour, and in comparing it with its rival, the Southdown, contend that while quality is equal, the Shropshire has the advantage in the heavier weights attained.’ The discussion was endless.

In the past year, at least three meetings have been held in London, Edinburgh and Abergavenny, where different mutton breeds have been compared. Anecdotally, all three have shown significant differences in eating experience between the breeds. In London, a meeting of the Guild of Food Writers offered its members the opportunity to sample several different mutton breeds. There were gasps of surprise and joy at the variations between the breeds.

However, until the NSA tasting at the Winter Fair, there had not been a systematic tasting of different mutton breeds, with an analysis of the various attributes of the meats.

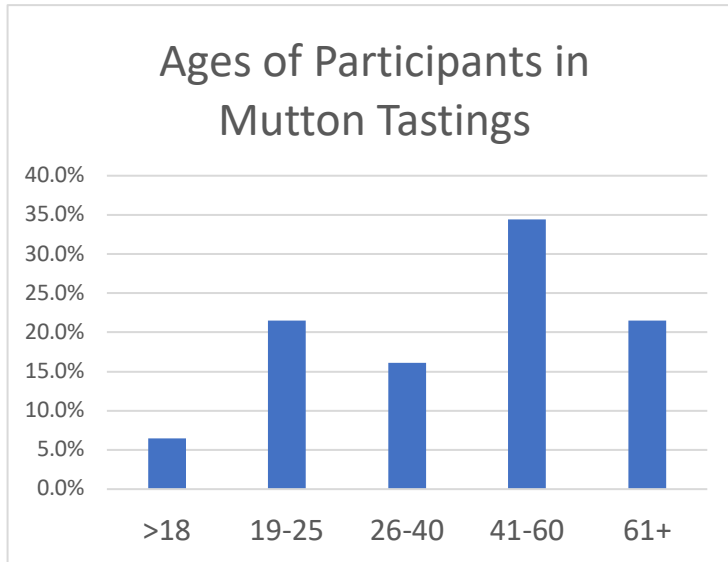
## The results *(continued)*

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Over the two days of the tastings, 99 people were interviewed face to face on the samples.

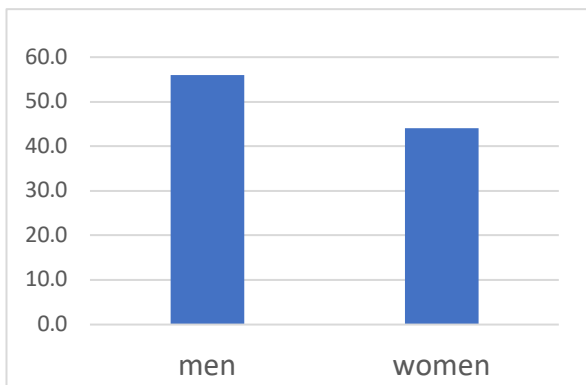
### **Ages of participants**

There was a generally good spread of ages.



### **Gender of Participants**

Although there was a majority of men interviewed, it was only on a ratio of 55%:45%.



### **Scores on Breed Tastings**

Below are graphs showing the frequency of scores given for each breed when tasters were asked about tenderness, juiciness and sweetness of each sample.

*continued...*

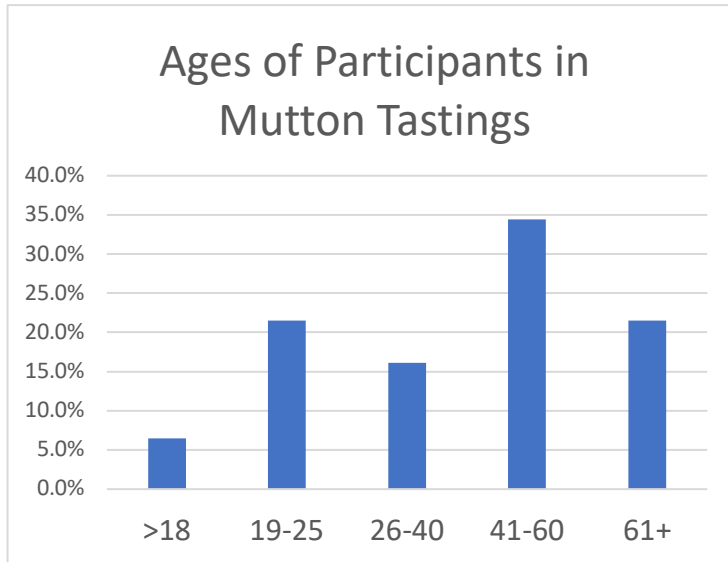


## The results *(continued)*

Over the two days of the tastings, 99 people were interviewed face to face on the samples.

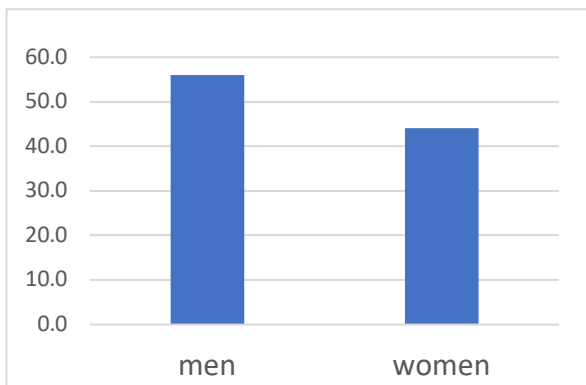
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### Gender of Participants

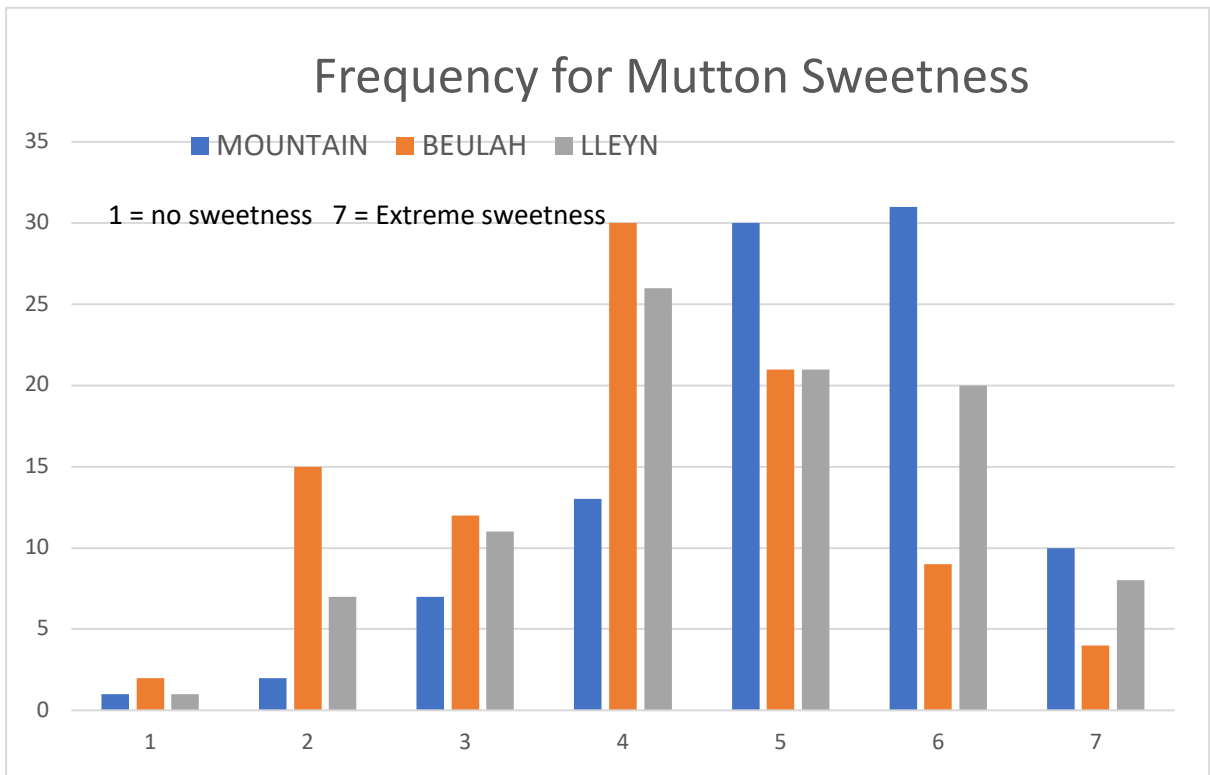
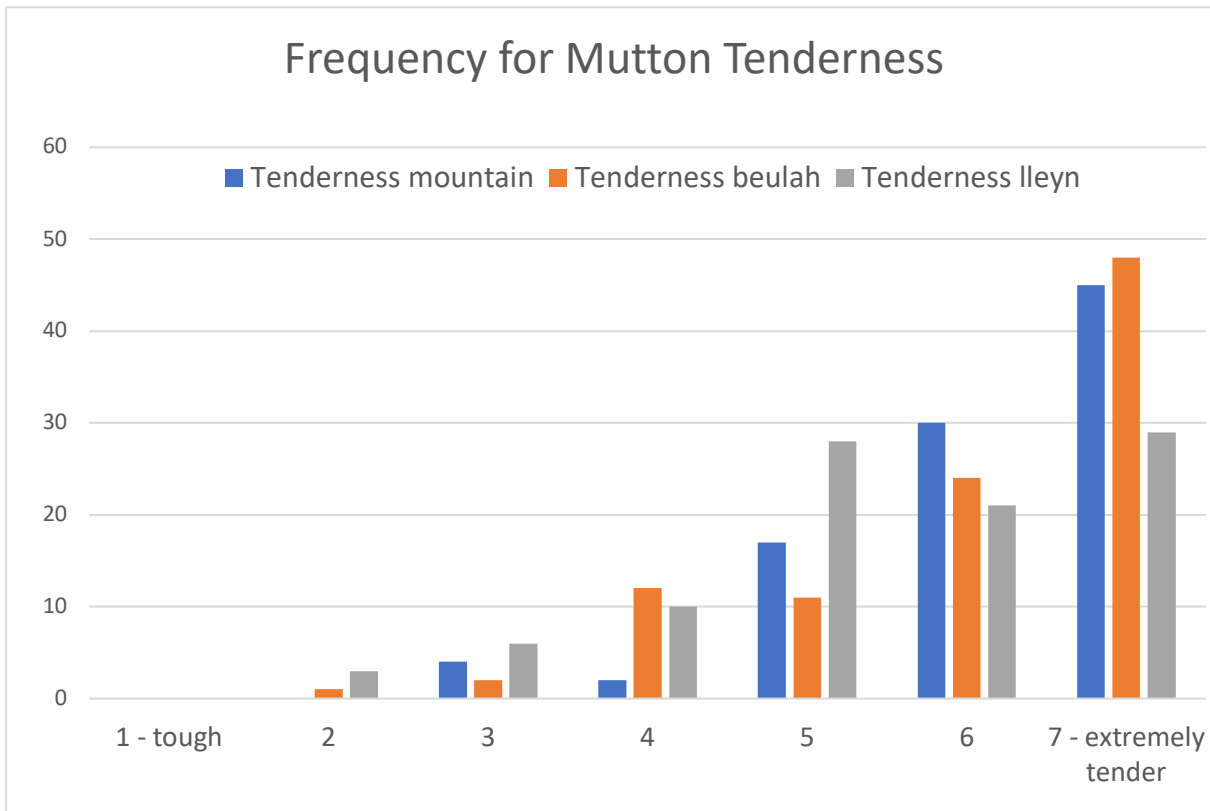
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### Scores on Breed Tastings

Below are graphs showing the frequency of scores given for each breed when tasters were asked about tenderness, juiciness and sweetness of each sample.

*continued...*



*continued...*

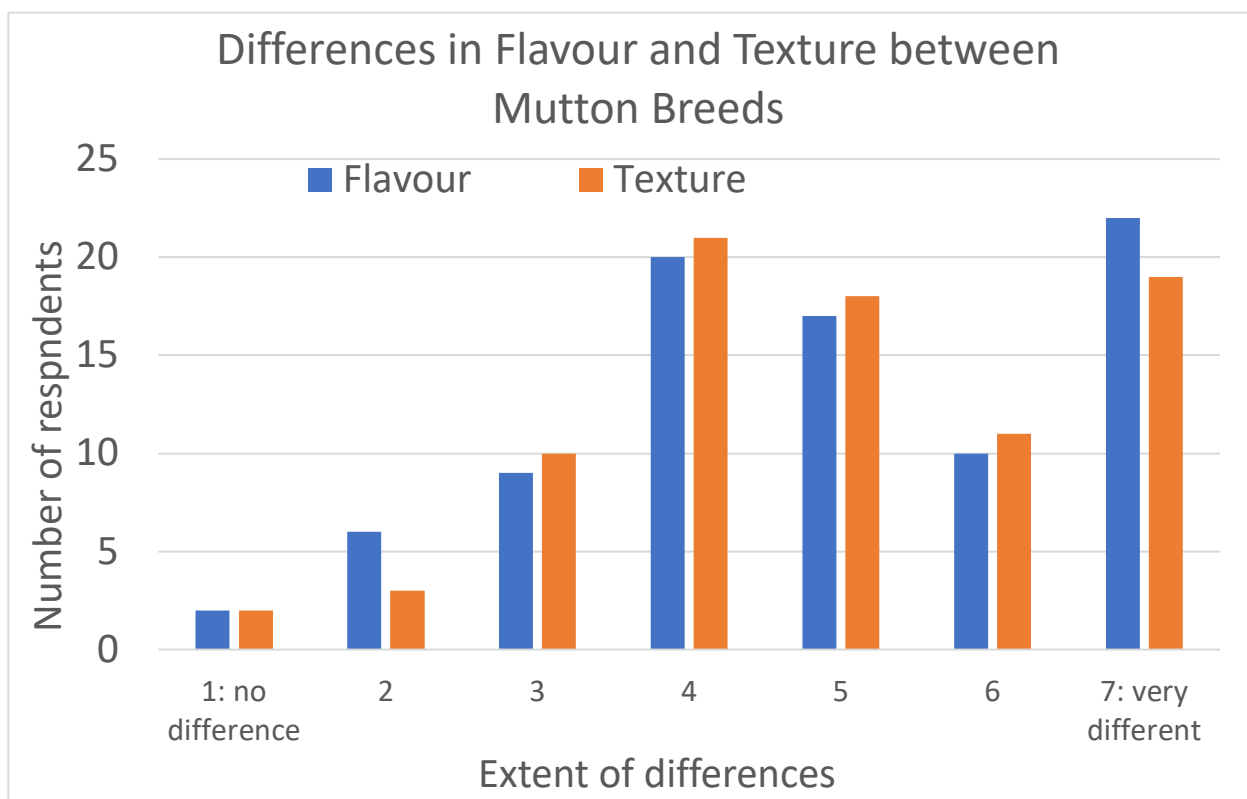
## The results *(continued)*

There was a good degree of difference between the breeds on Tenderness, Juiciness and Sweetness scores across the breeds. The overall consensus was that all the breeds had high levels of all three attributes

### The Degree of Difference in Eating Quality Between the Three Breeds

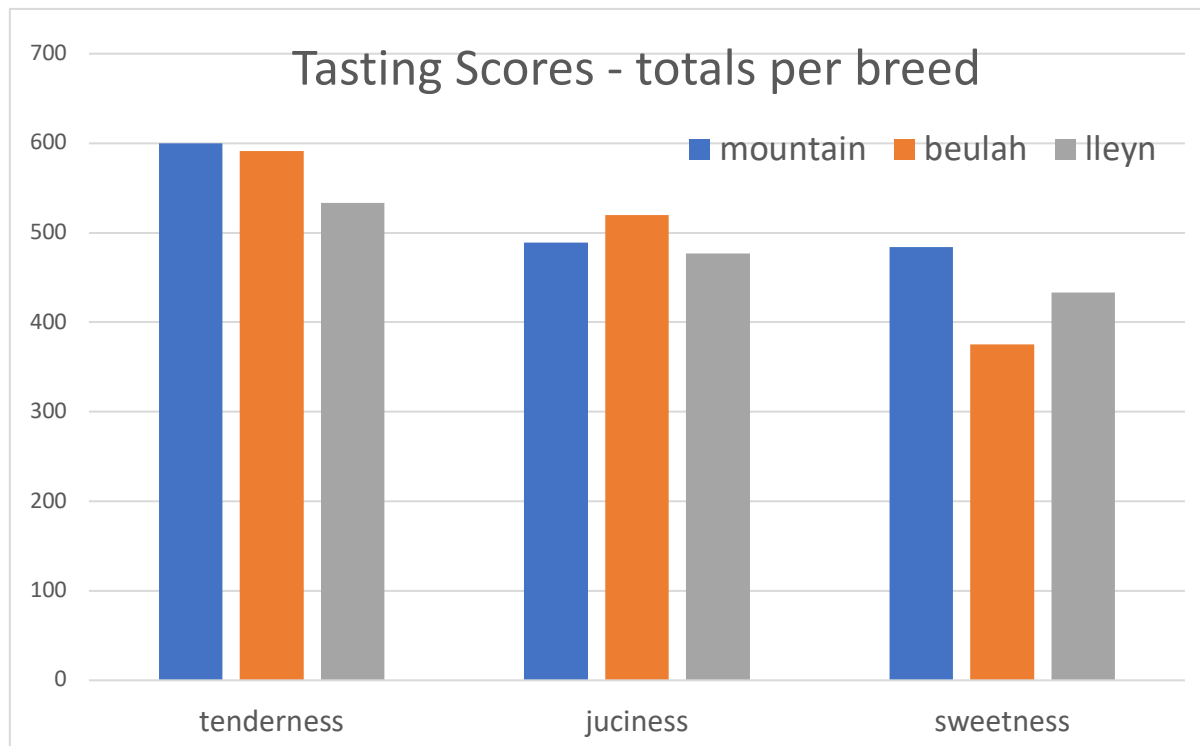
The purpose of this exercise was not to rank the breeds as one being better than another, but to gauge the degree of differences BETWEEN the breeds.

This is demonstrated on the graph below, which shows that the majority of respondents thought there were significant differences between the breeds, with many saying that the differences were extremely large. This finding is in line with anecdotal results from the tastings carried out elsewhere.



*continued...*

### Comparison of breeds



Whilst the NSA tasting exercise was not aimed at ranking the breeds, the results were particularly interesting in a couple of regards.

Firstly, the opening lines of the poem 'The War-song of Dinas Vawr' by Thomas Love Peacock (1785-1866) are:

*The mountain sheep are sweeter,  
But the valley sheep are fatter;  
We therefore deemed it meeter  
To carry off the latter.*

Throughout the Victorian period, UK mountain breeds of sheep were highly praised particularly for their sweetness, as per Peacock's poem. The analysis of the NSA tastings clearly demonstrates the strong favourite for sweetness was the South Wales Mountain. Indeed, the mountain breed also scored the highest for tenderness. The graph of differences between the breeds on flavour and texture above also shows significant differences between the breeds, sufficient to say that it should be possible to categorise breeds by taste traits, just as are malt whisky varieties. This has significant implications for older sheep meat marketing, as it demonstrates that breed differences in older sheep are real. Further than that, it corroborates the views of Victorian writers that some breeds excel in certain attributes. Surely the Victorians would not have been surprised.



# British Heritage Sheep

## New Tastes from Old Traditions



Results of Age-based Sheep Meat Tastings

# 1. Background

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As part of the NSA Heritage Sheep project feasibility study, tasting trials were carried out at the NSA Sheep Event in Malvern in July 2018. Visitors were given samples of lamb (under 1 year old), hogget (1 to 2 years old) and mutton (over 2 years old) to compare for their eating qualities.

## **a. The Samples**

It was important to remove as many potential factors which could produce differences in the eating experience, other than age. As a result, a number of selections and actions were taken:

- animals sourced from the same breed (Shropshire)
- animals reared on the same farm on the Welsh Borders
- all samples used the same cut (leg)
- all legs cooked in the same way by one chef at the same time in the same oven
- all samples were served cold.
- All the meat was hung at a butchery - two weeks for the mutton, ten days for the hogget and a week for the lamb.

The mutton animal was 4 years old.

## **b. The serving**

Paper plates were marked 1,2 and 3, (where 1 was hogget, 2 lamb and 3 mutton) and the samples were placed by the appropriate number on each plate.

## **c. The questions**

The visitors were asked to complete a form (attached) for the tasting. This asked their gender and age, and required a judgement about the tenderness, juiciness, sweetness, 'Sheep meat flavour', and degree of fattiness or greasiness of each sample. It then asked how much difference there was between the three samples in terms of flavour and texture. All these characteristics of the eating experienced were to be scored between 1 and 7, with 1 being a poor experience (tough, dry, etc.) and 7 being excellent (melt-in-the-mouth, very juicy, etc.). Finally, they were asked which sample they preferred overall.

## 2. Results

---

### a. The Tasters

27% were women, and 73% men.

Ages were:

Up to 18 years: 3%

19-40: 18%

41-60: 24%

61+: 55%

The total number of tasters was 38.

### b. The Tasting Results

All scores on scales of 1 to 7, with the higher the number the better the experience.

	Lamb	Hogget	Mutton
Tenderness	5.3	5.9	4.6
Juiciness	4.4	4.5	3.8
Sweetness	4.4	4.6	3.8
'Sheepy' flavour	4.5	4.4	4.0
Fattiness/greasiness	5.2	4.9	4.5

When asked 'How much difference was there between the samples, with 1 being none and 7 being a huge difference, results were 4.2 for flavour and 4.5 for texture. This suggests a significant difference between the meat from different ages of sheep. Finally, the visitors were asked overall, which was their favourite meat? Both lamb and hogget scored 43% and mutton 14%.

## 3. Conclusions

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A caveat on these results is the fairly low numbers of respondents (38). The NSA intends to repeat the process at a later date with a larger sample to check the results. Nevertheless, the tasters were unanimous in saying that there were significant differences in the eating experiences between the lamb, hogget and mutton. This would be in line with expected results, and would confirm the strong Victorian view that the flavour of sheep meat increases in complexity and depth with the age of the animal. It also ties in with the NSA's previous results on differences between breeds of mutton, which were also found to be significant, in a larger tasting trial with over 100 participants.

Of particular interest from these results is the result from the question what was your favourite sample? Only 43% said lamb, and yet to most consumers this is the only type of sheep meat they are offered by the mass market. It certainly indicates that there is a significant market potentially available for older sheep meat.

This confirms the basis of the NSA Heritage Sheep project.

**About You** (circle one) - Male or Female

Age: up to 18 19-40 41-60 61+

## **SAMPLE 1**

Tenderness:          *1=very tough*    1 2 3 4 5 6 7    *7=melt-in-mouth*  
Juiciness:                  *1=very dry*     1 2 3 4 5 6 7    *7=very juicy*  
Sweetness:             *1=no sweetness*    1 2 3 4 5 6 7    *7=very sweet*  
Sheep meat flavour *1= v. strong* 1 2 3 4 5 6 7    *7 = none*  
Fatty/greasy                 *1= very*    1 2 3 4 5 6 7    *7 = not*

## **SAMPLE 2**

Tenderness:          *1=very tough*    1 2 3 4 5 6 7    *7=melt-in-mouth*  
Juiciness:                  *1=very dry*     1 2 3 4 5 6 7    *7=very juicy*  
Sweetness:             *1=no sweetness*    1 2 3 4 5 6 7    *7=very sweet*  
Sheep meat flavour *1= v. strong* 1 2 3 4 5 6 7    *7 = none*  
Fatty/greasy                 *1= very*    1 2 3 4 5 6 7    *7 = not*

## **SAMPLE 3**

Tenderness:          *1=very tough*    1 2 3 4 5 6 7    *7=melt-in-mouth*  
Juiciness:                  *1=very dry*     1 2 3 4 5 6 7    *7=very juicy*  
Sweetness:             *1=no sweetness*    1 2 3 4 5 6 7    *7=very sweet*  
Sheep meat flavour *1= v. strong* 1 2 3 4 5 6 7    *7 = none*  
Fatty/greasy                 *1= very*    1 2 3 4 5 6 7    *7 = not*

## **How much difference was there between the samples**

**- a little (1) or a lot (7)?**

Flavour:    1 2 3 4 5 6 7

Texture:    1 2 3 4 5 6 7

**Overall, which sample did you prefer (circle one)?    1    2    3**





# British Heritage Sheep

## New Tastes from Old Traditions



Questions in YouGov Consumer Survey

## The questions posed to consumers were:

---

**i. Thinking about household grocery shopping, which of the following statements best applies to you?**

- I am the sole grocery shopper in my household
- I am in part responsible for grocery shopping in my household
- I am not responsible at all for grocery shopping in my household
- Which, if any, of these best describes your usual eating habits?
- Vegan (do not eat dairy products, eggs, or any other animal product)
- Vegetarian (do not eat any meat, poultry, game, fish or shellfish)
- Pescatarian (eat fish but do not eat meat or poultry)
- Meat eater (eat meat and/or poultry)
- Flexitarian (mixed diet, mainly vegetarian and eat meat occasionally)
- Other
- Don't know

**ii. Thinking about meat and products containing meat that you have bought in the last 12 months (i.e. since February 2018). Which, if any, of the following have been included in food that you have purchased for either yourself or others to eat (including pieces of raw meat)? (Please select all that apply. If you have not purchased any type of meat product in the last 12 months, please select the "Not applicable" option)**

- Beef
- Lamb
- Pork
- Chicken
- Other
- Don't know
- Not applicable - I have not purchased any type of meat product in the last 12 months

**iii. (Asked of carnivores only) In general, how often would you say you personally eat lamb? (Please select the option that comes closest. If you have never eaten lamb, please select the "Not applicable" option)**

- Every day
- 1 to 6 days a week
- Once every 2 to 3 weeks
- Once a month
- Once every 2 to 3 months
- Once every 4 to 5 months
- Once every 6 months
- Once a year
- Less often than once a year
- Don't know
- Not applicable - I have never eaten lamb

*continued...*

## The questions posed to consumers were:

---

iv. Before taking this survey, were you aware the following are all types of sheep meat?  
(Please select one option on each row)

**Lamb (i.e. sheep younger than 12 months)**

- Yes, I was aware
- No, I wasn't aware

**Hogget (i.e. sheep between 12 and 24 months)**

- Yes, I was aware
- No, I wasn't aware

**Mutton (i.e. sheep older than 24 months)**

- Yes, I was aware
- No, I wasn't aware

v. Have you EVER eaten any of the following types of sheep meat? (Please select one option on each row)

**Lamb (i.e. sheep younger than 12 months)**

- Yes, I have
- No, I haven't
- Don't know/can't remember

**Hogget (i.e. sheep aged between 12 and 24 months)**

- Yes, I have
- No, I haven't
- Don't know/can't remember

**Mutton (i.e. sheep older than 24 months)**

- Yes, I have
- No, I haven't
- Don't know/can't remember

*continued...*

## The questions posed to consumers were:

---

vi. For the following question, even if you do not eat lamb, hogget, or mutton, we are still interested in your opinion. By "eating quality", we mean the flavour and texture of the food. Would you agree or disagree with the following statements? (Please select one option on each row)"

**The eating quality of sheep meat can vary depending on the age of the sheep**

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

**The eating quality of sheep meat can vary depending on the breed of the sheep**

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

**The eating quality of sheep meat can vary depending on the type of landscape where the sheep was reared (i.e. where it was raised)**

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

vii. For the following question, please imagine you were going to buy meat... To what extent, if at all, would each of the following factors be likely or unlikely to influence your purchase of sheep meat, or would they make no difference? (Please select one option on each row)

**Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)**

- Much more likely
- A little more likely
- It would make no difference
- A little less likely
- Much less likely
- Don't know

*continued...*

## The questions posed to consumers were:

---

### **UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)**

- Much more likely
- A little more likely
- It would make no difference
- A little less likely
- Much less likely
- Don't know

### **British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)**

- Much more likely
- A little more likely
- It would make no difference
- A little less likely
- Much less likely
- Don't know

**viii. For which, if any, of the following meals would you actively choose to purchase sheep meat specifically based on age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape for any meal in particular, please select the "Not applicable" option)**

### **Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)**

- Lunch
- Midweek meal
- Weekend meal (excluding Sunday roasts)
- Specifically for a Sunday roast
- Special occasions (excluding Sunday roasts)
- Other
- Don't know
- Not applicable - I would not choose based on this for any meal in particular

### **UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)**

- Lunch
- Midweek meal
- Weekend meal (excluding Sunday roasts)
- Specifically for a Sunday roast
- Special occasions (excluding Sunday roasts)
- Other

*continued...*

## The questions posed to consumers were:

---

### **UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)**

- Much more likely
- A little more likely
- It would make no difference
- A little less likely
- Much less likely
- Don't know

### **British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)**

- Much more likely
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- It would make no difference
- A little less likely
- Much less likely
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**viii. For which, if any, of the following meals would you actively choose to purchase sheep meat specifically based on age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape for any meal in particular, please select the "Not applicable" option)**

### **Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)**

- Lunch
- Midweek meal
- Weekend meal (excluding Sunday roasts)
- Specifically for a Sunday roast
- Special occasions (excluding Sunday roasts)
- Other
- Don't know
- Not applicable - I would not choose based on this for any meal in particular

### **UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)**

- Lunch
- Midweek meal
- Weekend meal (excluding Sunday roasts)
- Specifically for a Sunday roast
- Special occasions (excluding Sunday roasts)
- Other
- Don't know
- Not applicable - I would not choose based on this for any meal in particular

*continued...*

## The questions posed to consumers were:

---

### **British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)**

- Lunch
- Midweek meal
- Weekend meal (excluding Sunday roasts)
- Specifically for a Sunday roast
- Special occasions (excluding Sunday roasts)
- Other
- Don't know
- Not applicable - I would not choose based on this for any meal in particular

**ix. In which situations, if any, would you actively choose to purchase sheep meat specifically based on either age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape in any particular situation, please select the "Not applicable" option)**

### **Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)**

- For home dining (i.e. for myself and/or family at home)
- When hosting others (e.g. a dinner party)
- At a restaurant
- In a take away
- At a food market or truck (i.e. street food)
- Other
- Don't know
- Not applicable - I would not choose based on this for a particular situation

### **UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)**

- For home dining (i.e. for myself and/or family at home)
- When hosting others (e.g. a dinner party)
- At a restaurant
- In a take away
- At a food market or truck (i.e. street food)
- Other
- Don't know
- Not applicable - I would not choose based on this for a particular situation

*continued...*

## The questions posed to consumers were:

---

### **British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)**

- For home dining (i.e. for myself and/or family at home)
- When hosting others (e.g. a dinner party)
- At a restaurant
- In a take away
- At a food market or truck (i.e. street food)
- Other
- Don't know
- Not applicable - I would not choose based on this for a particular situation

*continued...*





# British Heritage Sheep

## New Tastes from Old Traditions



Results of YouGov Consumer Survey



## Heritage Sheep

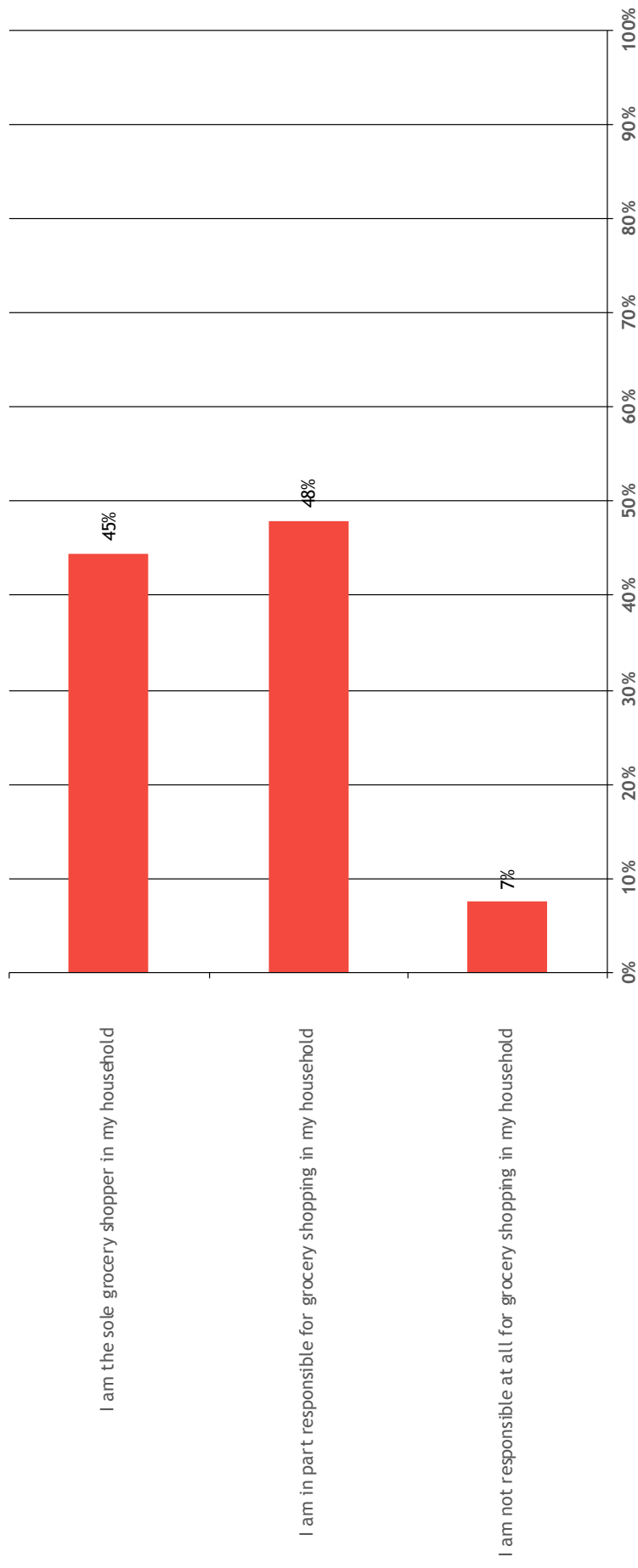
Conducted by YouGov on behalf of National Sheep Association

Fieldwork Dates: 20th - 21st February 2019



# Heritage Sheep

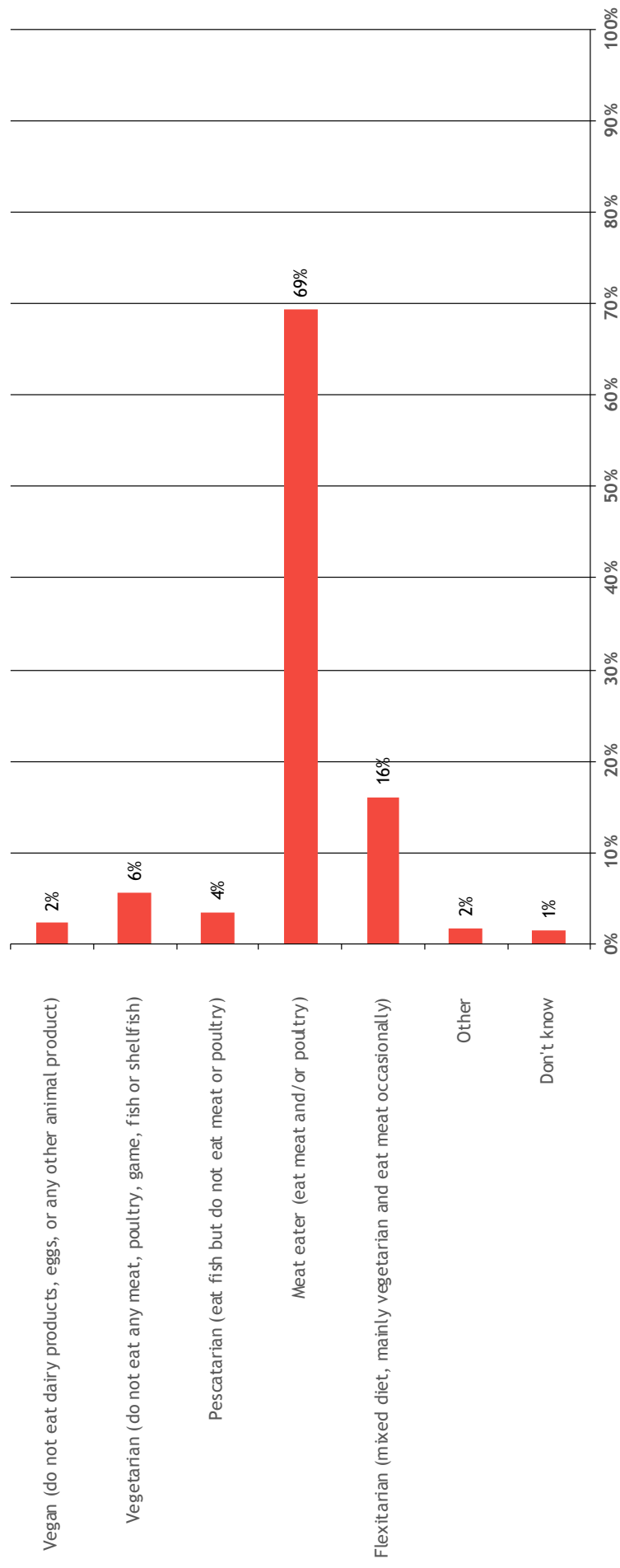
*bixdemo\_mainshopper. Thinking about household grocery shopping, which of the following statements best applies to you?*



Unweighted base (1999)

# Heritage Sheep

*diet\_identity\_2018. Which, if any, of these best describes your usual eating habits?*

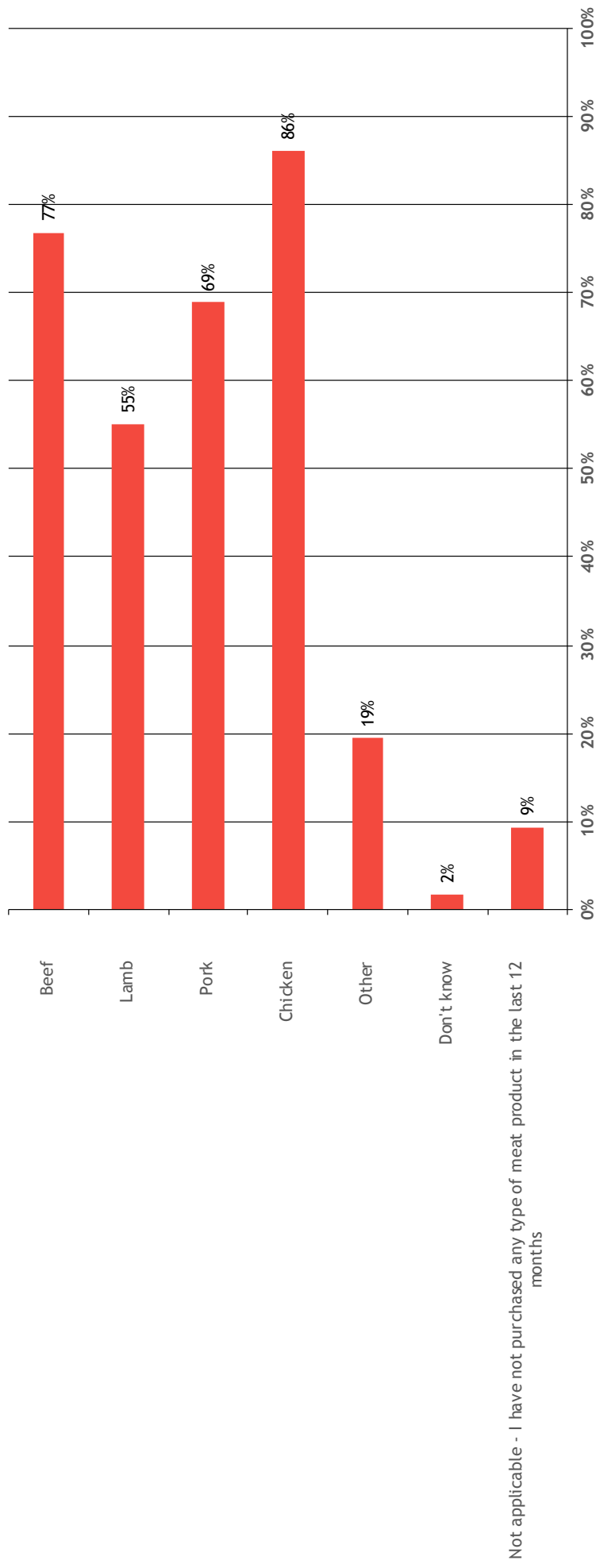


Unweighted base (1999)

# Heritage Sheep

*jhs\_q3. Thinking about meat and products containing meat that you have bought in the last 12 months (i.e. since February 2018)...*

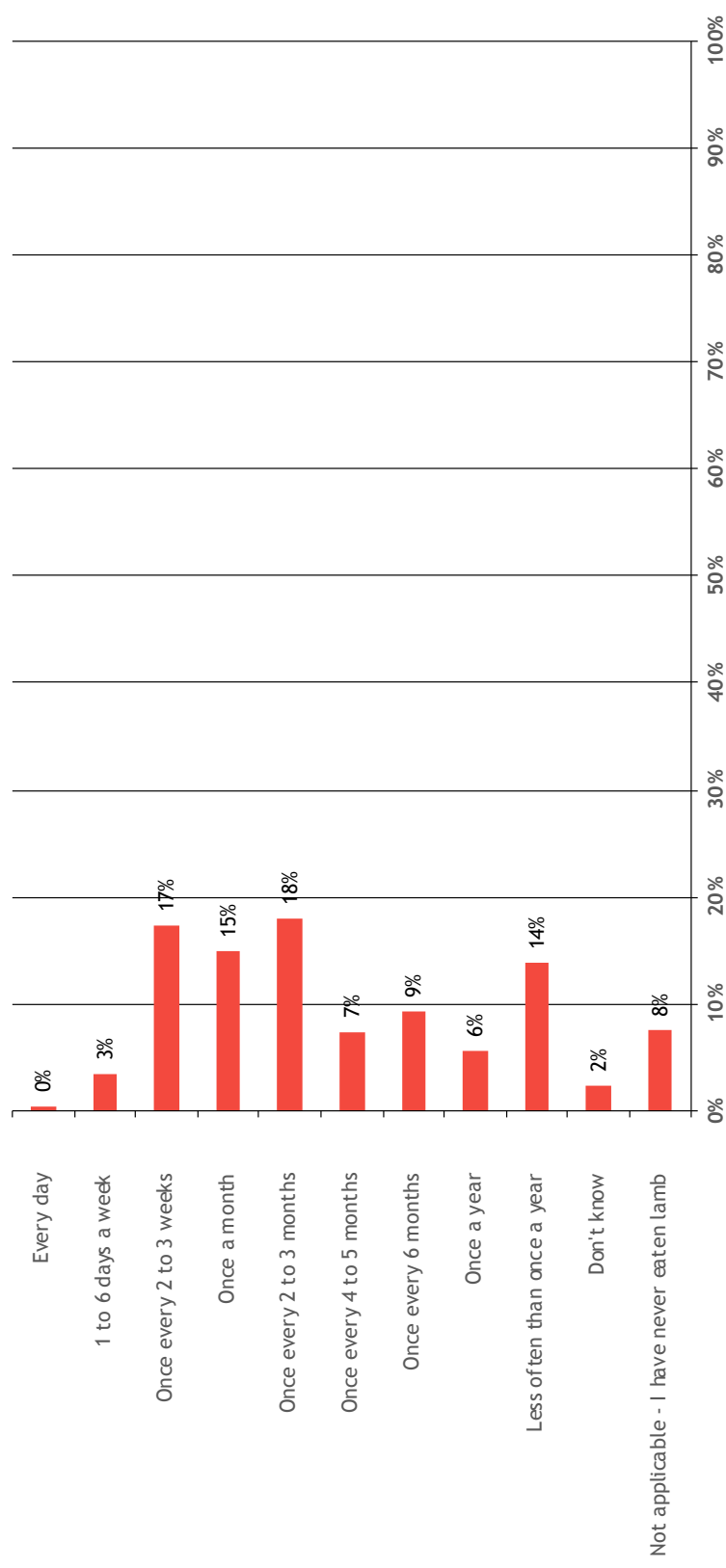
*Which, if any, of the following have been included in food that you have purchased for either yourself or others to eat (including pieces of raw meat)? (Please select all that apply. If you have not purchased any type of meat product in the last 12 months, please select the "Not applicable" option)*



Unweighted base: All GB Adults (1999)

# Heritage Sheep

*jhs\_q4. In general, how often would you say you personally eat lamb? (Please select the option that comes closest. If you have never eaten lamb, please select the "Not applicable" option)*



Unweighted base: All GB Adults who do not identify as Vegan, Vegetarian, or Pescatarian (1779)

# Heritage Sheep

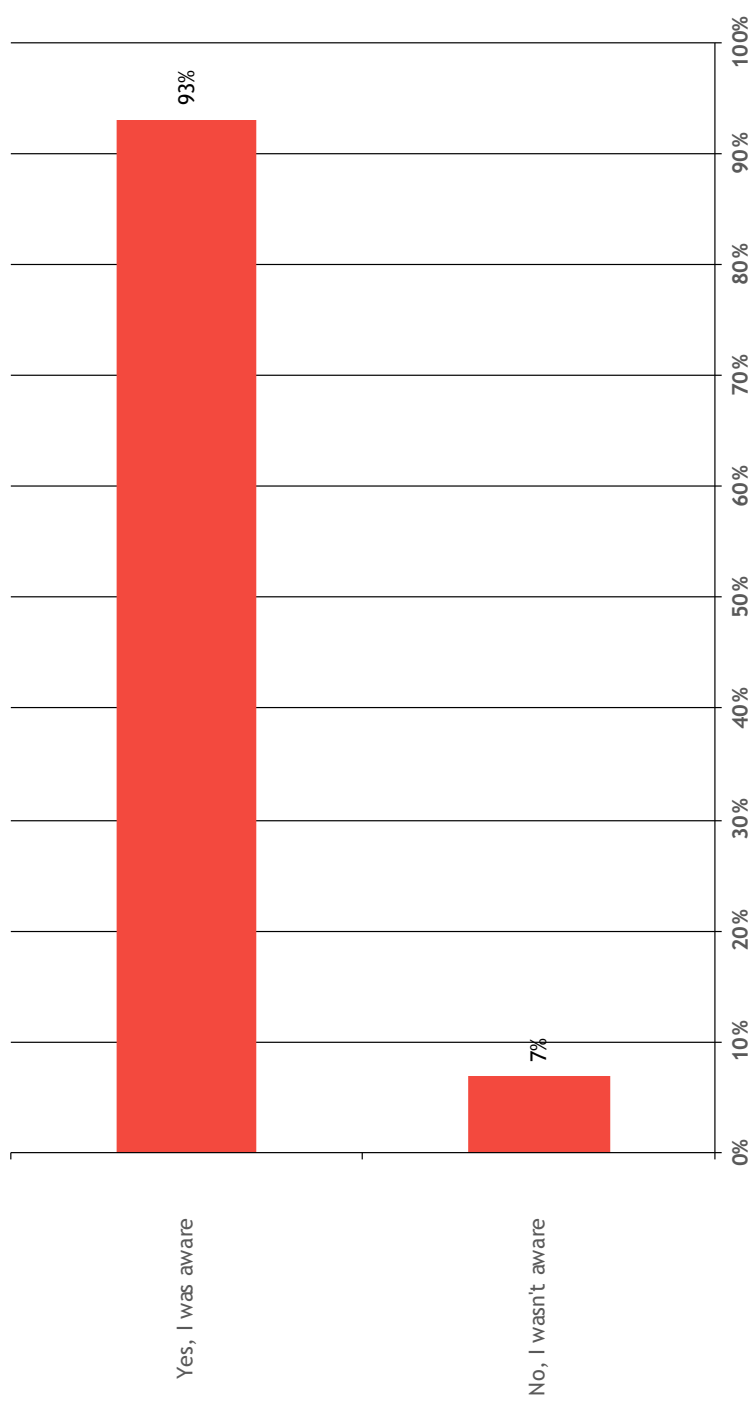
jhs\_q6. Before taking this survey, were you aware the following are all types of sheep meat? (Please select one option on each row)



Unweighted base: All GB Adults (1999)

# Heritage Sheep

*jhs\_q6\_1. Before taking this survey, were you aware the following are all types of sheep meat? (Please select one option on each row) - Lamb (i.e. sheep younger than 12 months)*

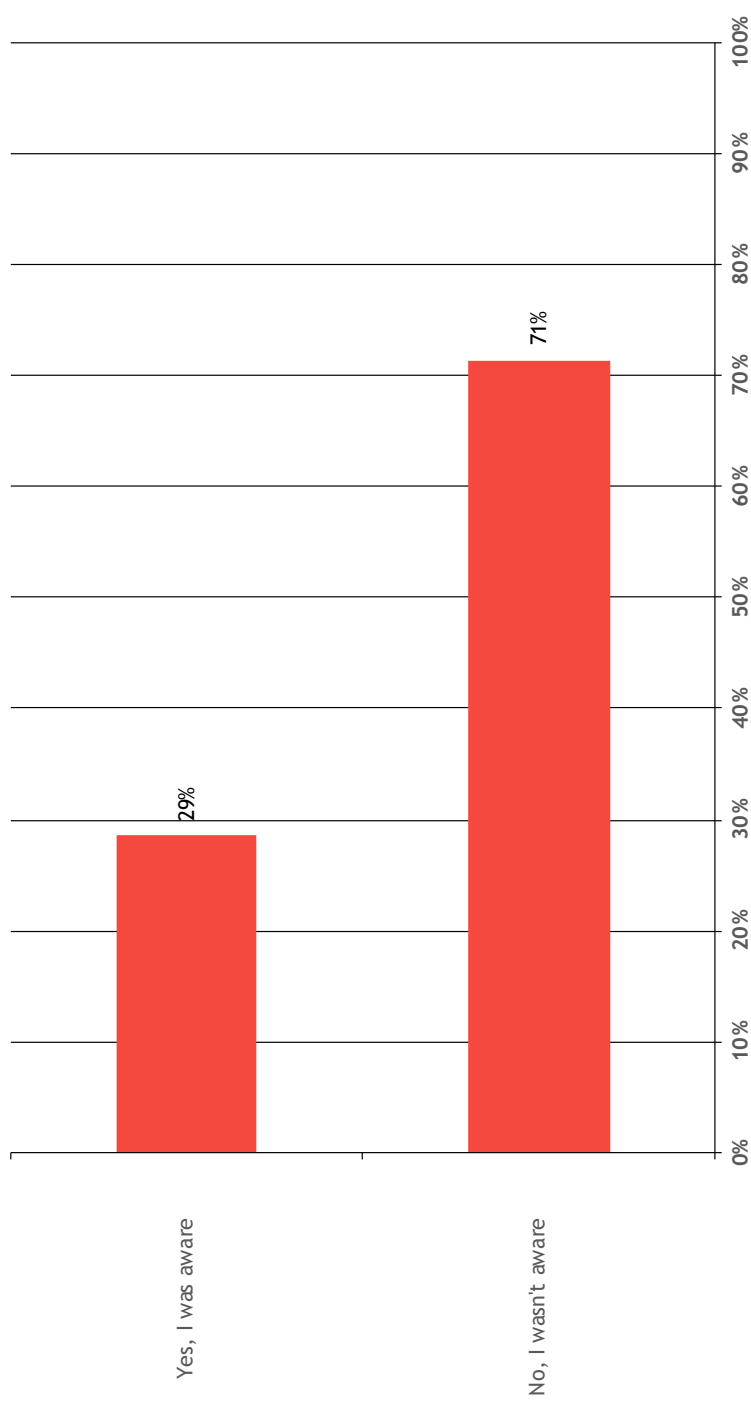


Unweighted base: All GB Adults (1999)



# Heritage Sheep

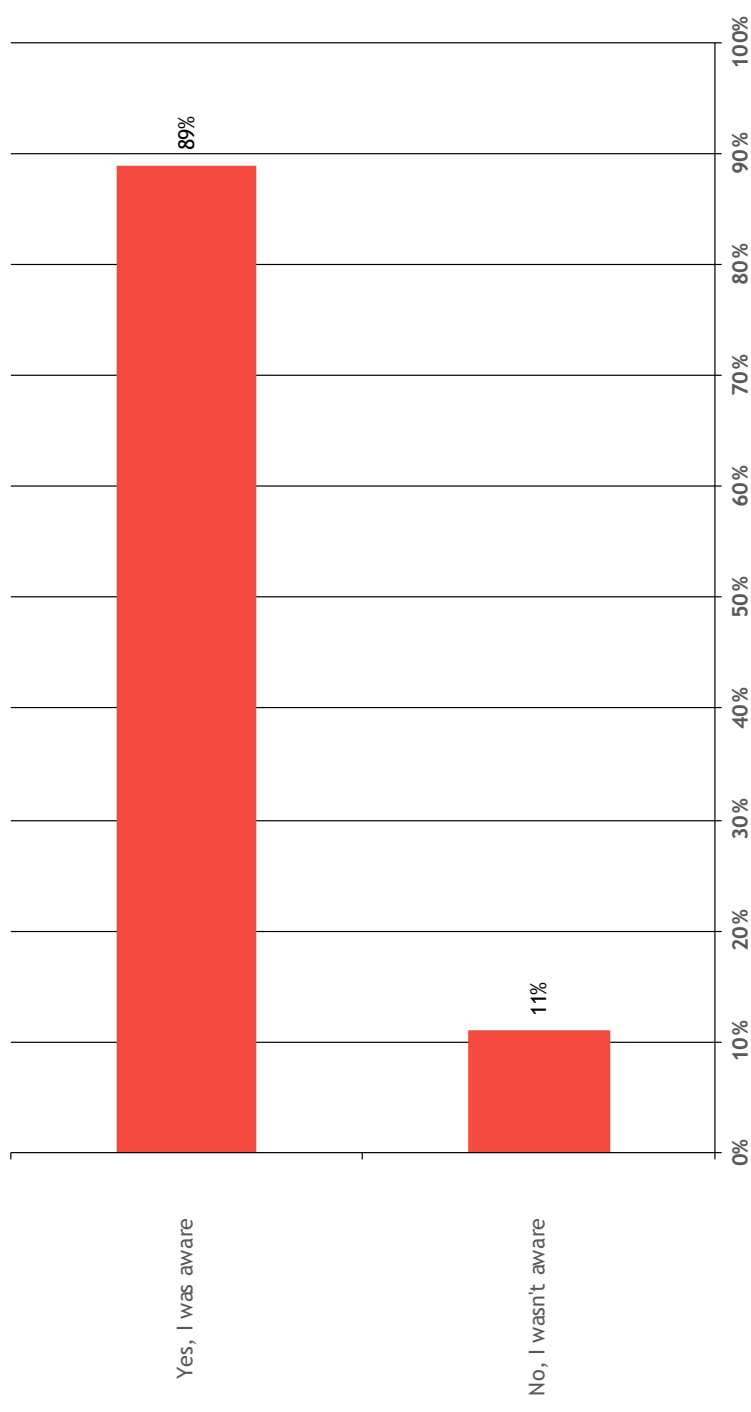
*jhs\_q6\_3. Before taking this survey, were you aware the following are all types of sheep meat? (Please select one option on each row) - Hogget (i.e. sheep between 12 and 24 months)*



Unweighted base: All GB Adults (1999)

# Heritage Sheep

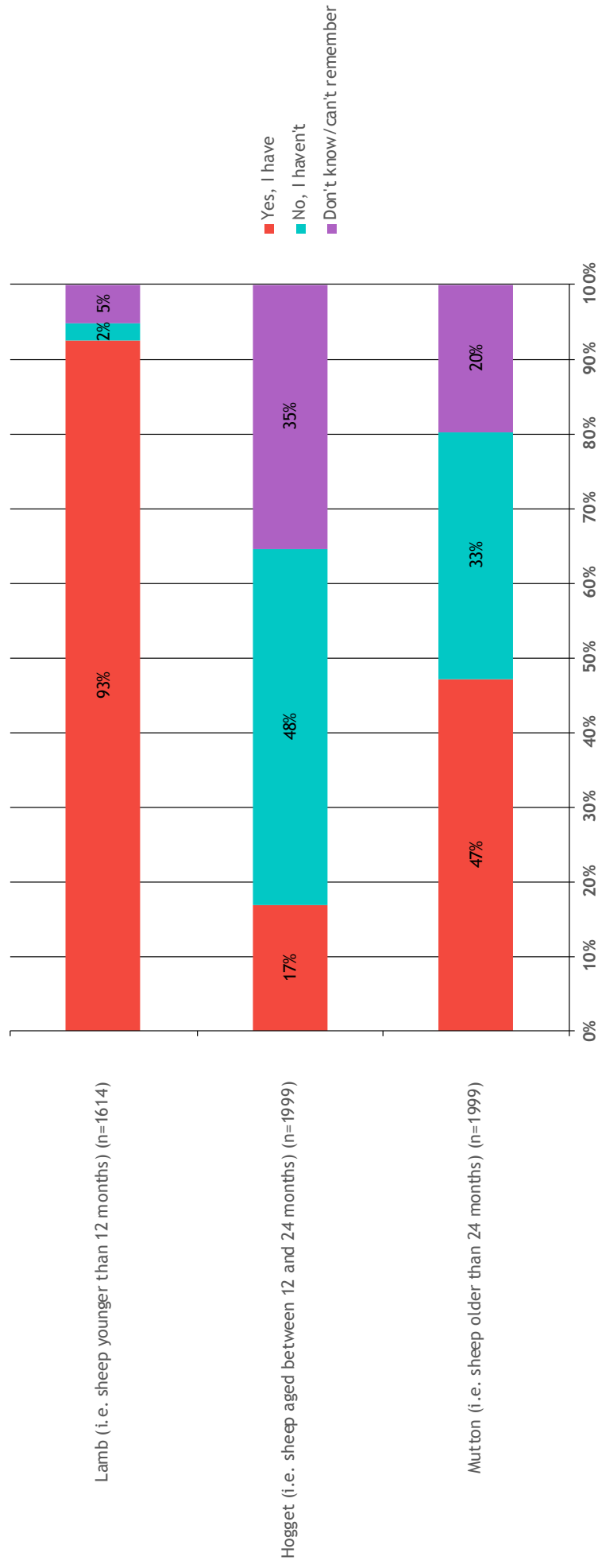
*jhs\_q6\_2. Before taking this survey, were you aware the following are all types of sheep meat? (Please select one option on each row) - Mutton (i.e. sheep older than 24 months)*



Unweighted base: All GB Adults (1999)

# Heritage Sheep

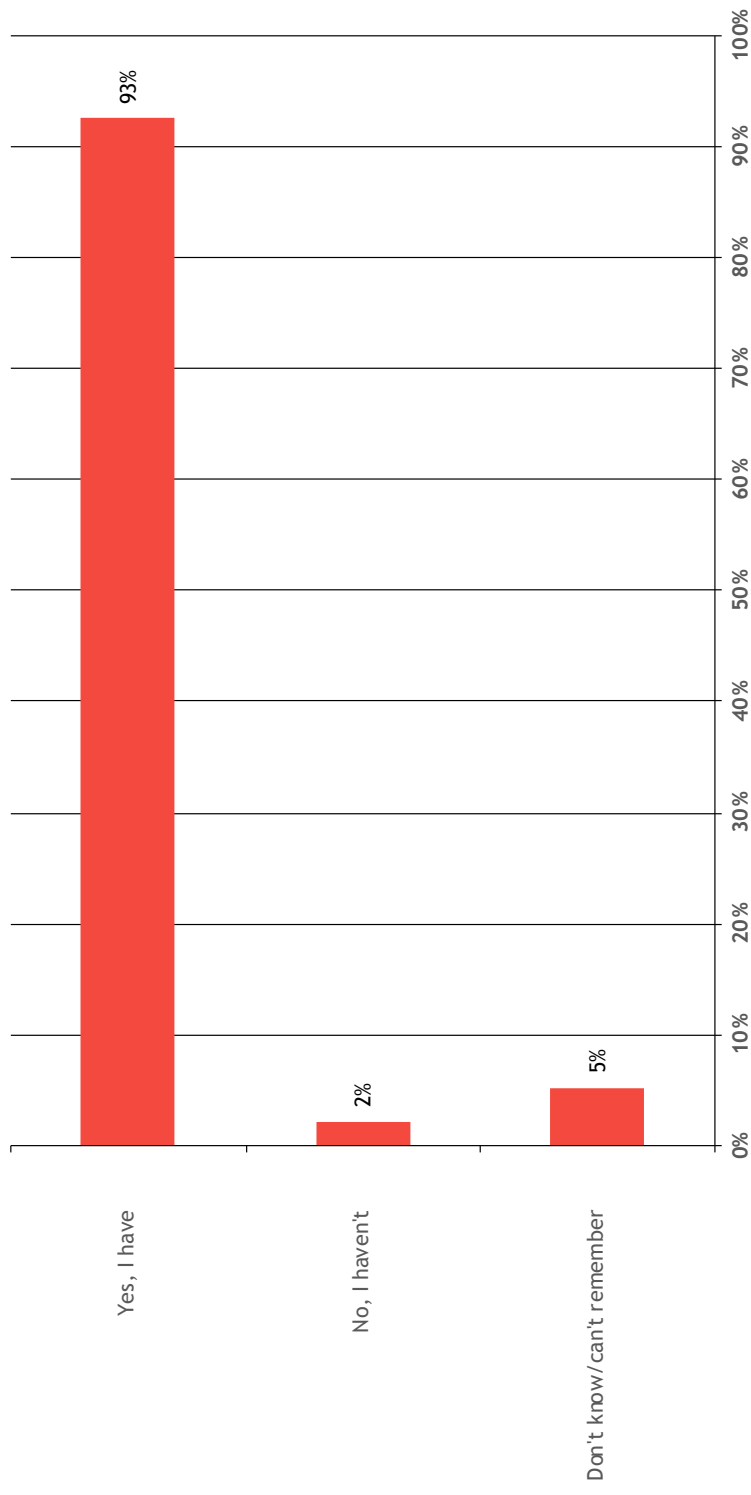
jhs\_q5. Have you EVER eaten any of the following types of sheep meat? (Please select one option on each row)



Unweighted base: All GB Adults

# Heritage Sheep

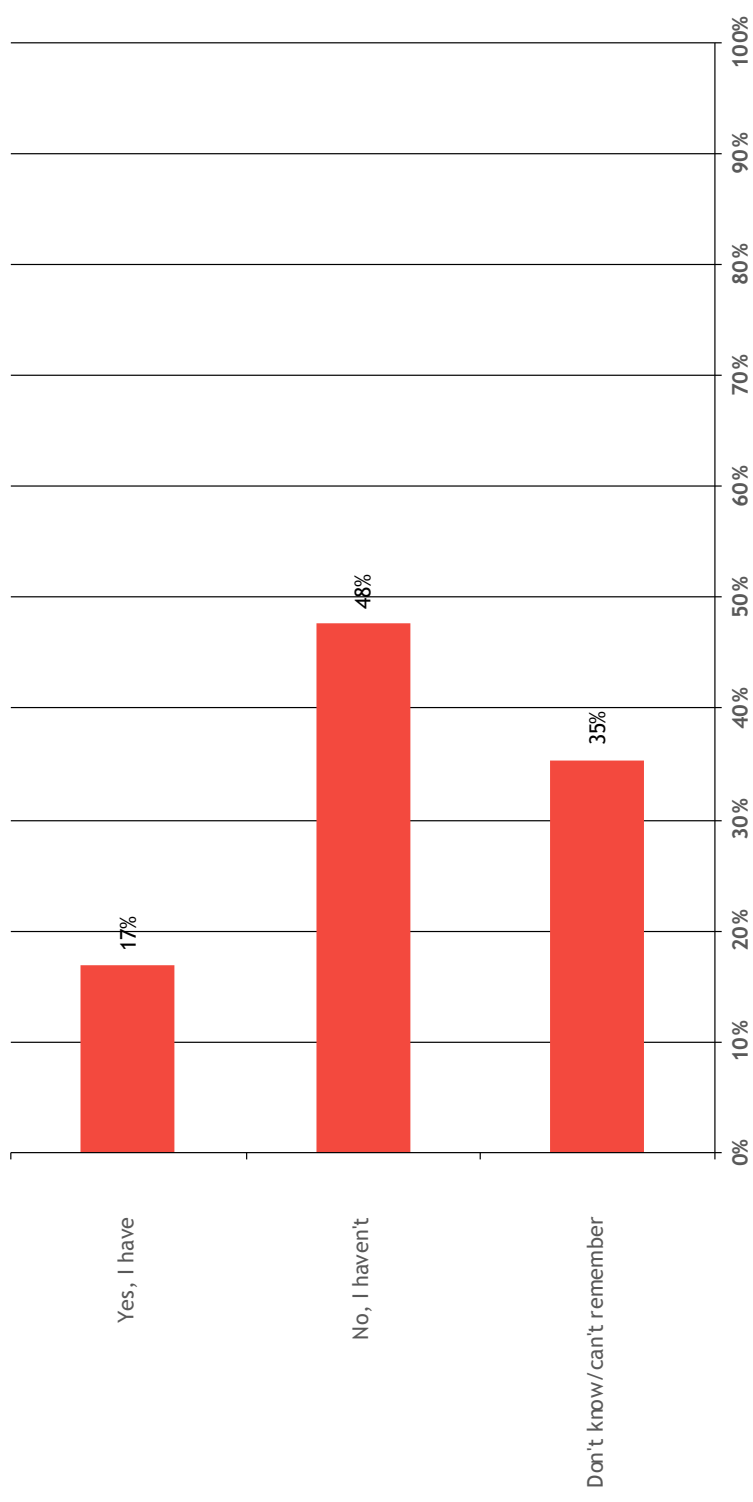
*jhs\_q5\_3. Have you EVER eaten any of the following types of sheep meat? (Please select one option on each row) - Lamb (i.e. sheep younger than 12 months)*



Unweighted base: All GB Adults (16 14)

# Heritage Sheep

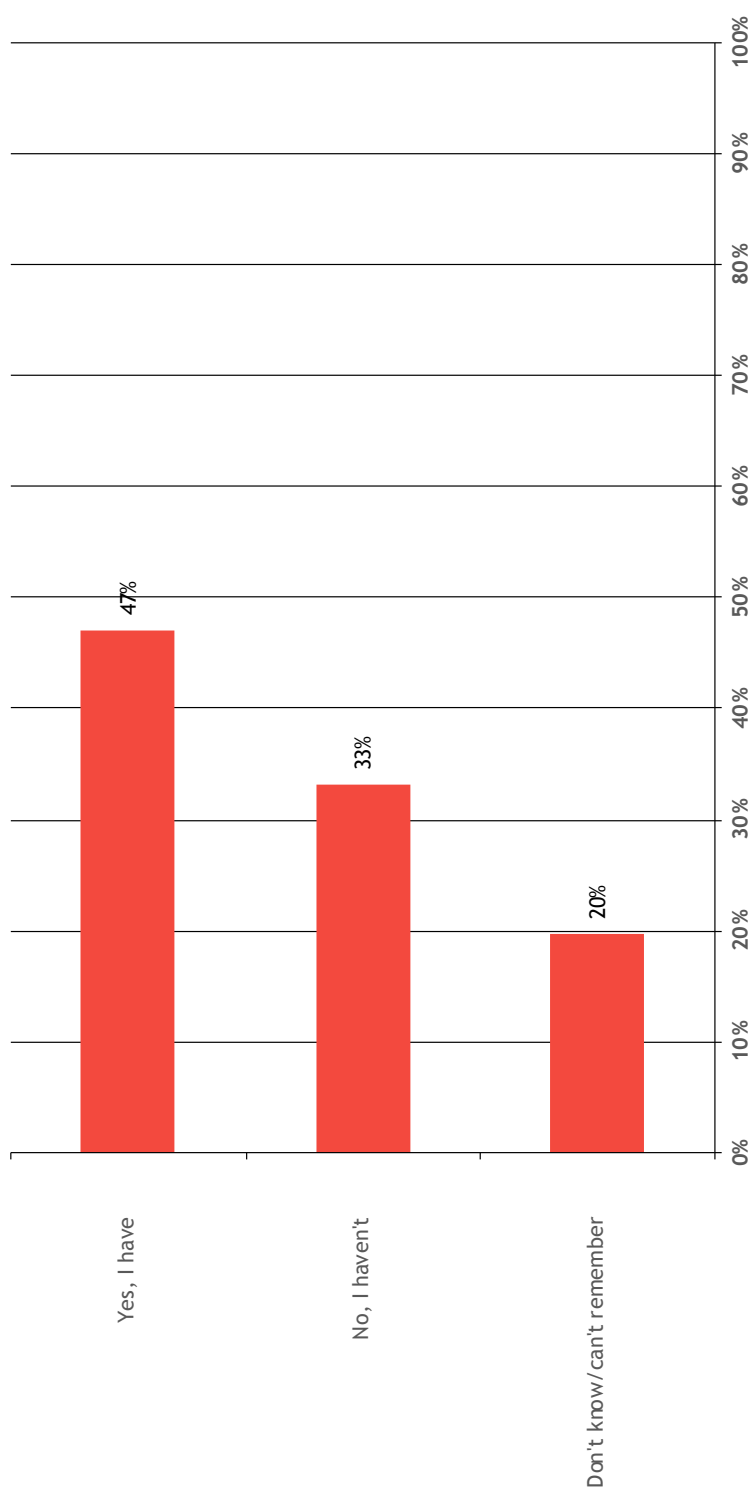
*jhs\_q5\_1. Have you EVER eaten any of the following types of sheep meat? (Please select one option on each row) - Hogget (i.e. sheep aged between 12 and 24 months)*



Unweighted base: All GB Adults (1999)

# Heritage Sheep

*jhs\_q5\_2. Have you EVER eaten any of the following types of sheep meat? (Please select one option on each row) - Mutton (i.e. sheep older than 24 months)*

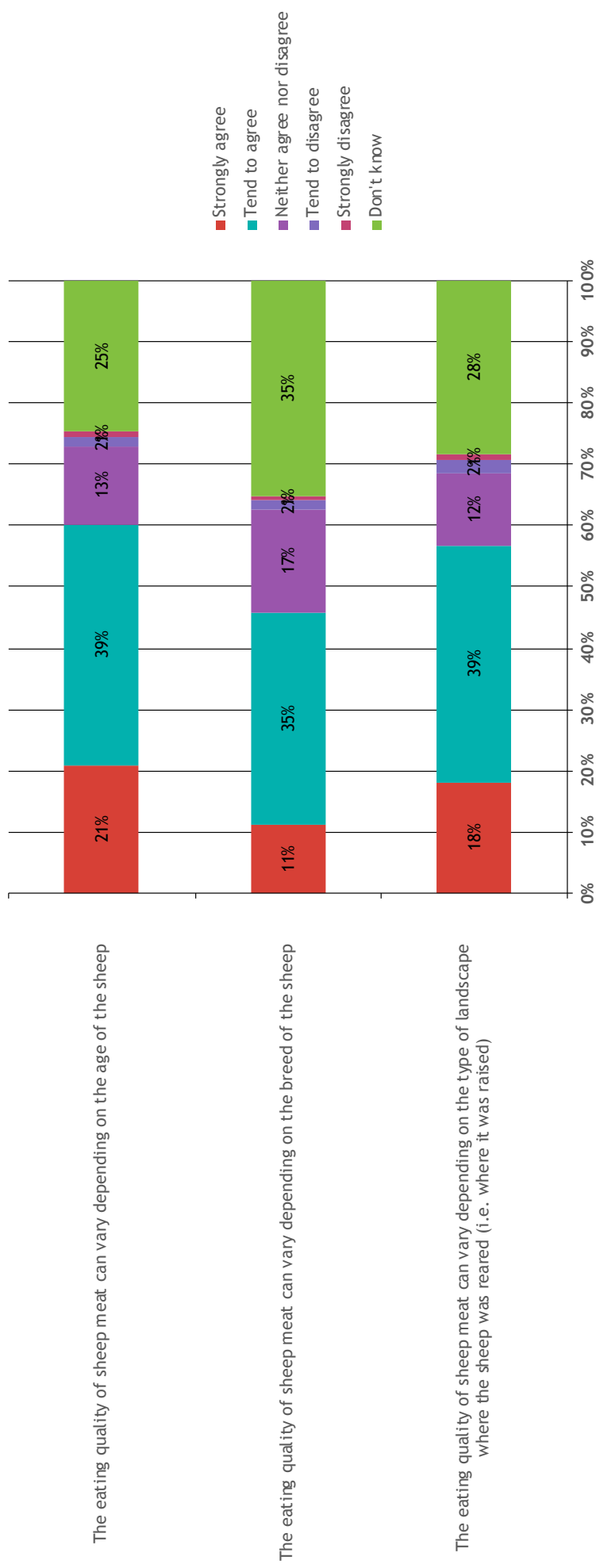


Unweighted base: All GB Adults (1999)

# Heritage Sheep

jhs\_q7. For the following question, even if you do not eat lamb, hogget, or mutton, we are still interested in your opinion. By "eating quality", we mean the flavour and texture of the food.

Would you agree or disagree with the following statements? (Please select one option on each row)



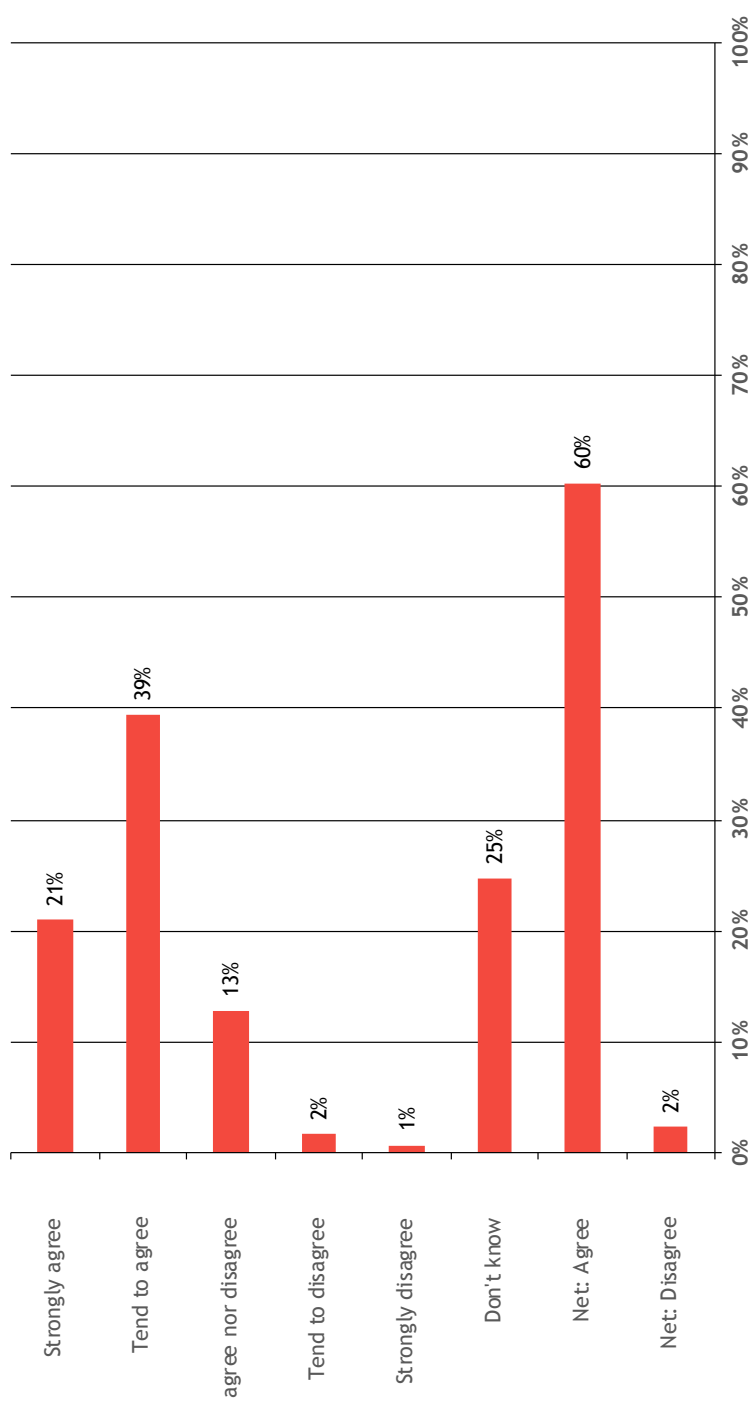
Unweighted base: All GB Adults (1999)



# Heritage Sheep

*jhs\_q7\_1. For the following question, even if you do not eat lamb, hogget, or mutton, we are still interested in your opinion. By "eating quality", we mean the flavour and texture of the food.*

*Would you agree or disagree with the following statements? (Please select one option on each row) - The eating quality of sheep meat can vary depending on the age of the sheep*



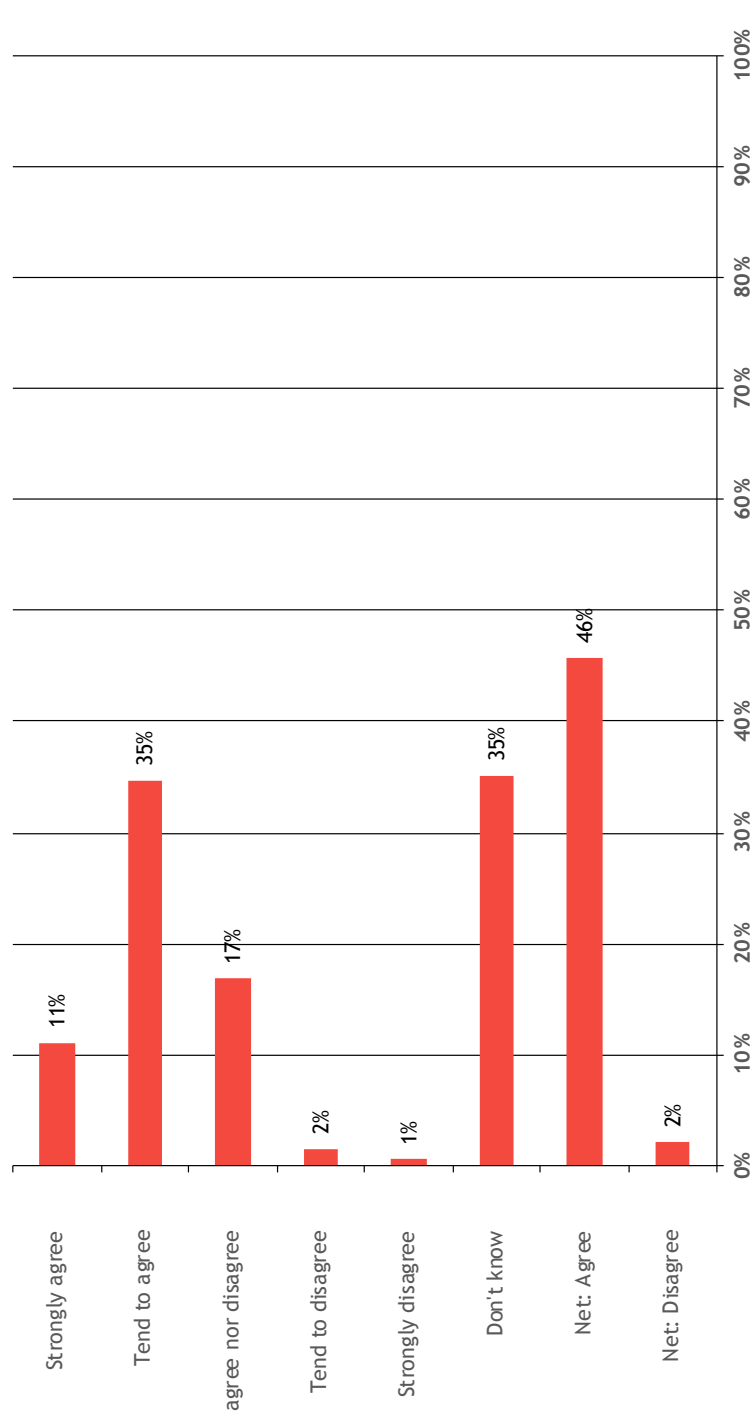
Unweighted base: All GB Adults (1999)



# Heritage Sheep

*jhs\_q7\_2. For the following question, even if you do not eat lamb, hogget, or mutton, we are still interested in your opinion. By "eating quality", we mean the flavour and texture of the food.*

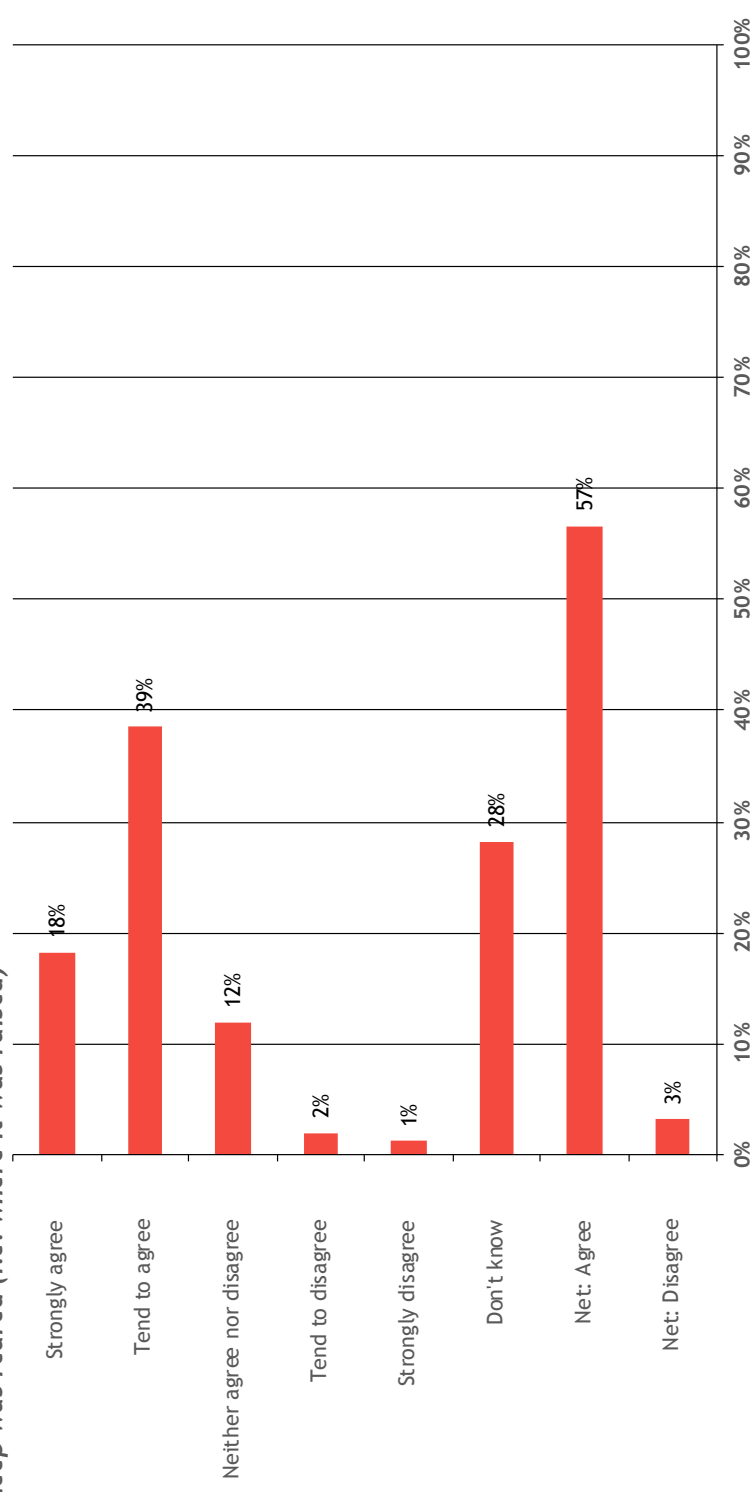
*Would you agree or disagree with the following statements? (Please select one option on each row) - The eating quality of sheep meat can vary depending on the breed of the sheep*



# Heritage Sheep

*jhs\_q7\_3. For the following question, even if you do not eat lamb, hogget, or mutton, we are still interested in your opinion. By "eating quality", we mean the flavour and texture of the food.*

*Would you agree or disagree with the following statements? (Please select one option on each row) - The eating quality of sheep meat can vary depending on the type of landscape where the sheep was reared (i.e. where it was raised)*



Unweighted base: All GB Adults (1999)

# Heritage Sheep

jhs\_q8. For the following question, please imagine you were going to buy meat...

To what extent, if at all, would each of the following factors be likely or unlikely to influence your purchase of sheep meat, or would they make no difference? (Please select one option on each row)

Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)

UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)

British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)

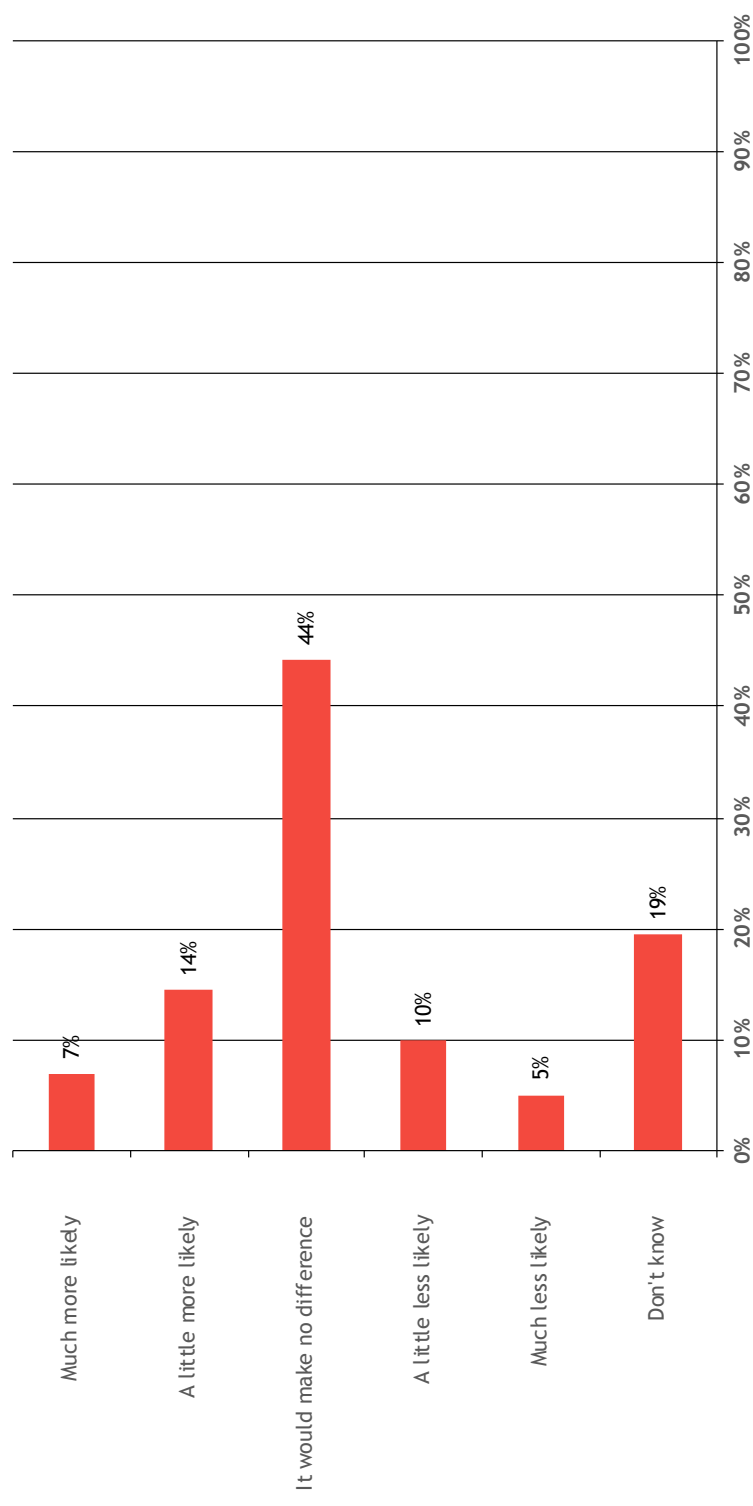


Unweighted base: All GB Adults who identify as vegan, vegetarian, or pescatarian (1779)

# Heritage Sheep

jhs\_q8\_1. For the following question, please imagine you were going to buy meat...

To what extent, if at all, would each of the following factors be likely or unlikely to influence your purchase of sheep meat, or would they make no difference? (Please select one option on each row) - Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)

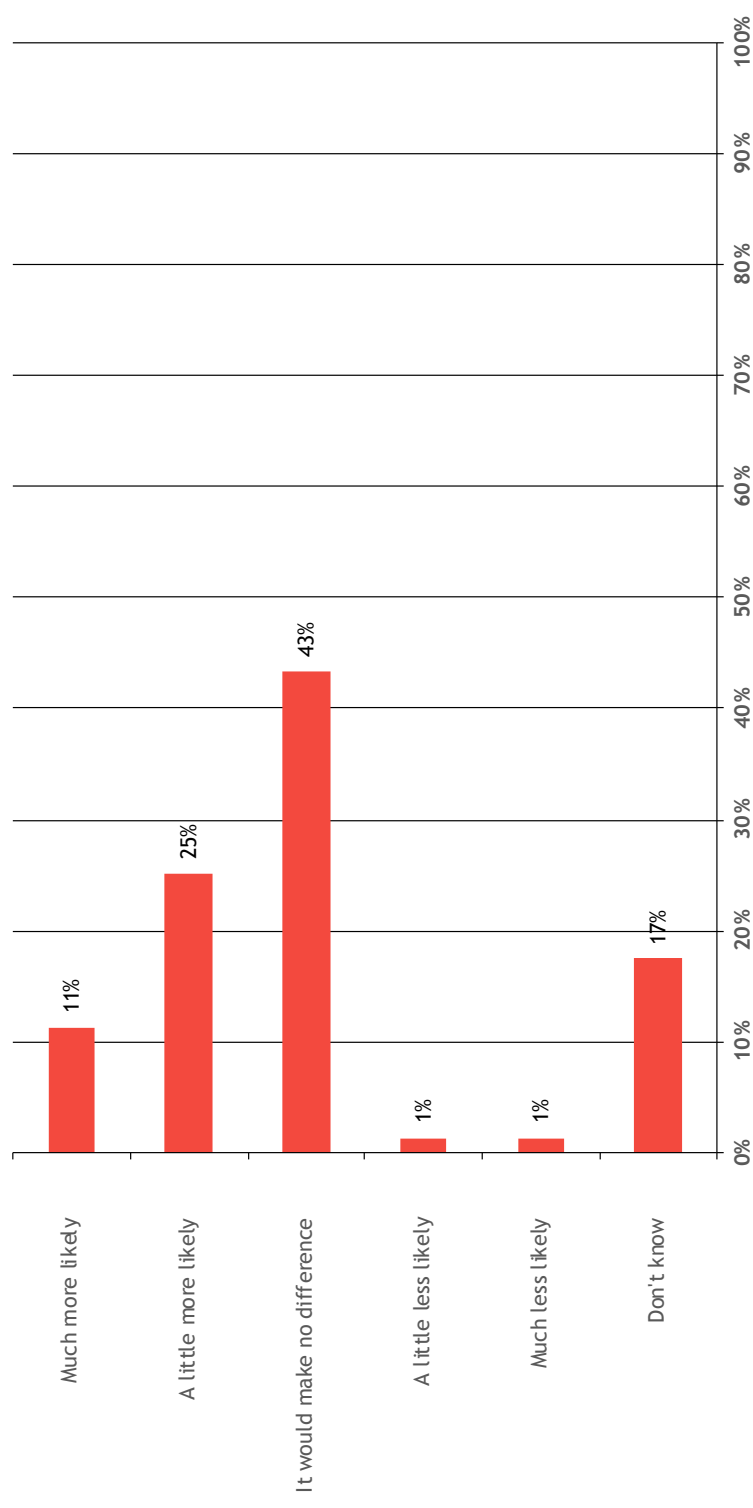


Unweighted base: All GB Adults who identify as vegan, vegetarian, or pescatarian (1779)

# Heritage Sheep

jhs\_q8\_2. For the following question, please imagine you were going to buy meat...

To what extent, if at all, would each of the following factors be likely or unlikely to influence your purchase of sheep meat, or would they make no difference? (Please select one option on each row) - UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)

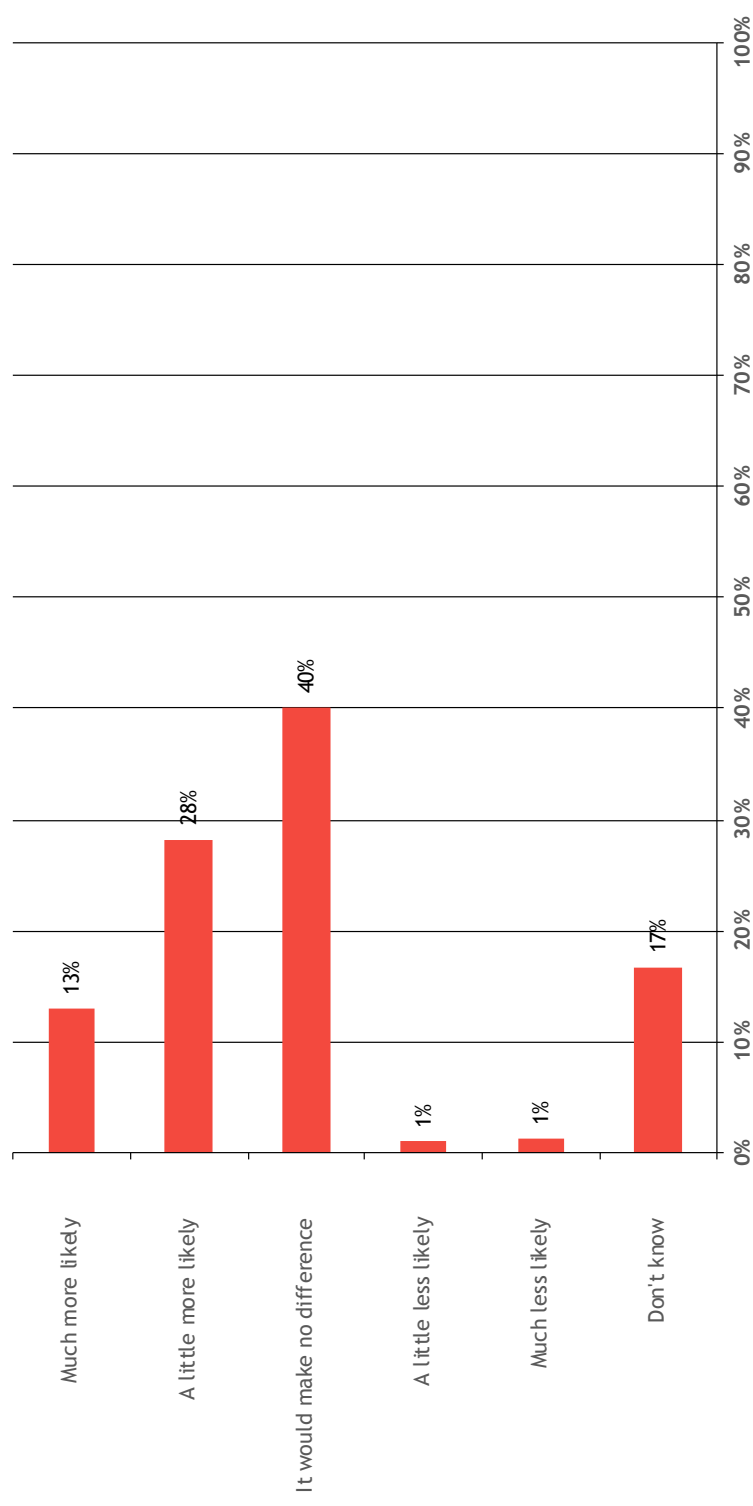


Unweighted base: All GB Adults who identify as vegan, vegetarian, or pescatarian (1779)

# Heritage Sheep

jhs\_q8\_3. For the following question, please imagine you were going to buy meat...

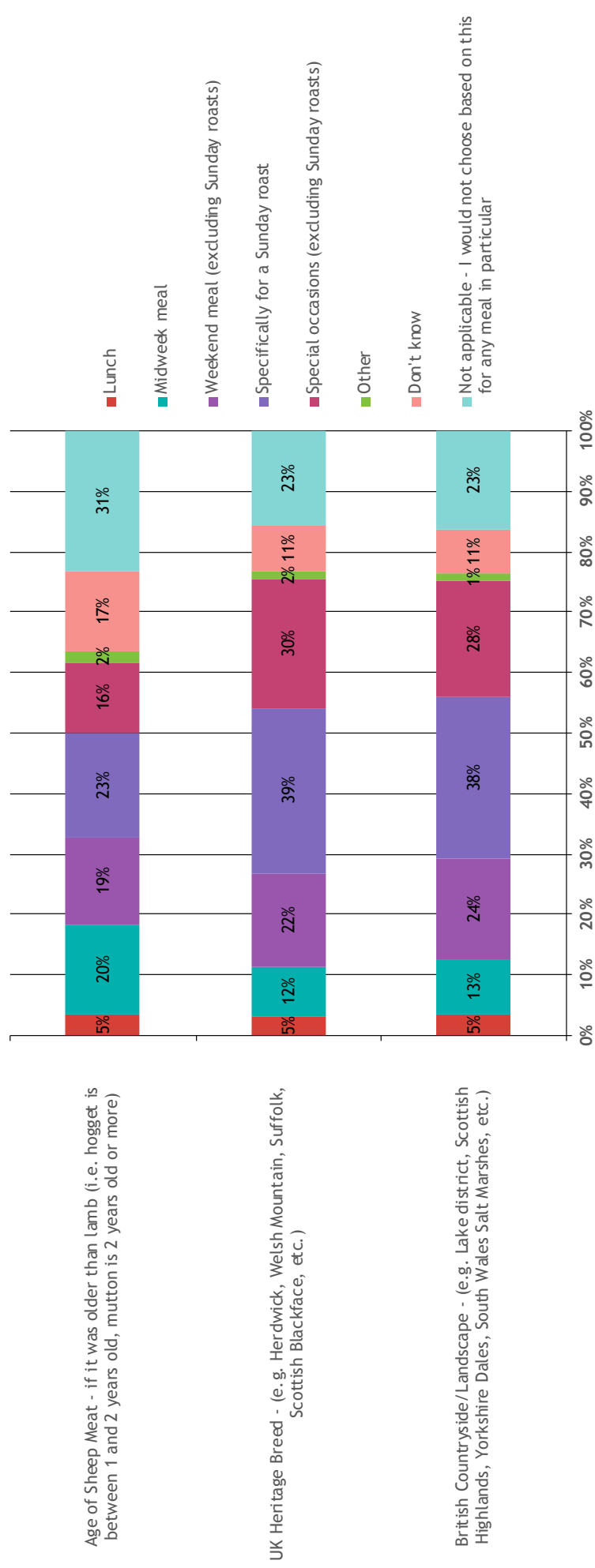
To what extent, if at all, would each of the following factors be likely or unlikely to influence your purchase of sheep meat, or would they make no difference? (Please select one option on each row) - British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)



Unweighted base: All GB Adults who identify as vegan, vegetarian, or pescatarian (1779)

# Heritage Sheep

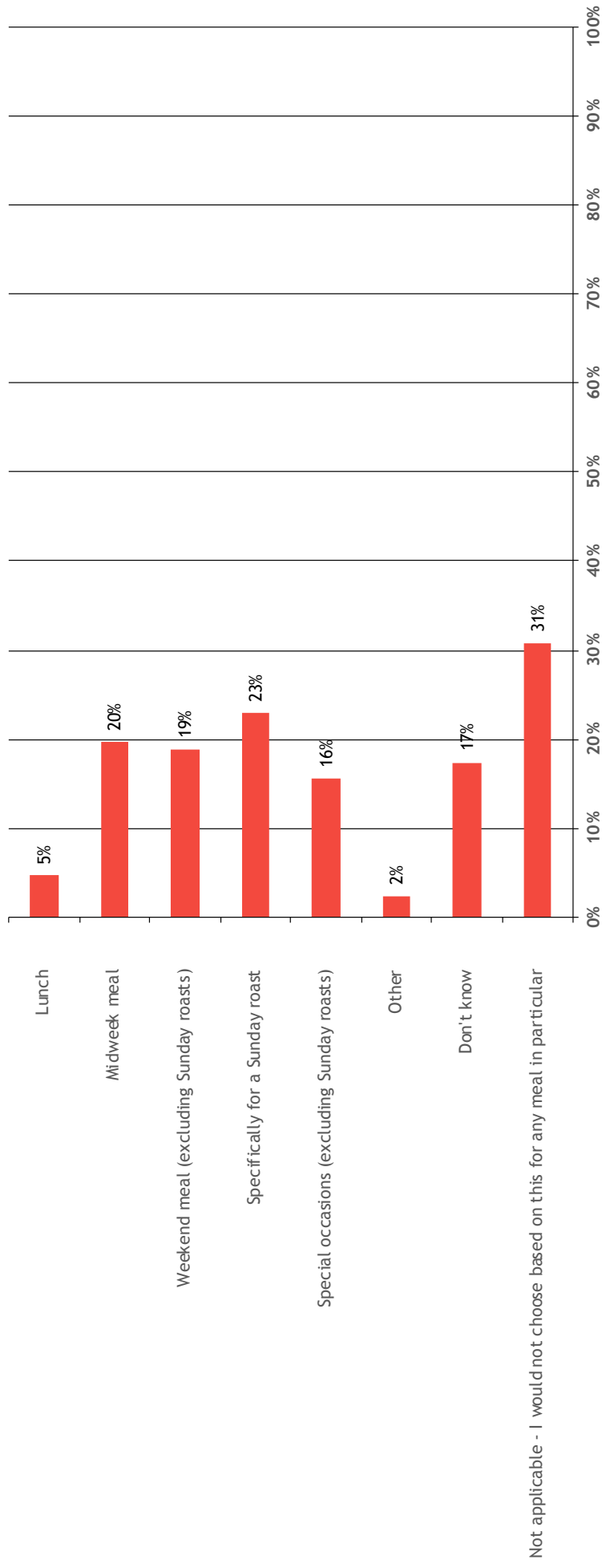
jhs\_q9b. For which, if any, of the following meals would you actively choose to purchase sheep meat specifically based on age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape for any meal in particular, please select the "Not applicable" option)



Unweighted base: All GB adults who are more influenced to buy sheep meat by age, breed, or landscape (863)

# Heritage Sheep

*jhs\_q9b\_1. For which, if any, of the following meals would you actively choose to purchase sheep meat specifically based on age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape for any meal in particular, please select the "Not applicable" option) - Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)*

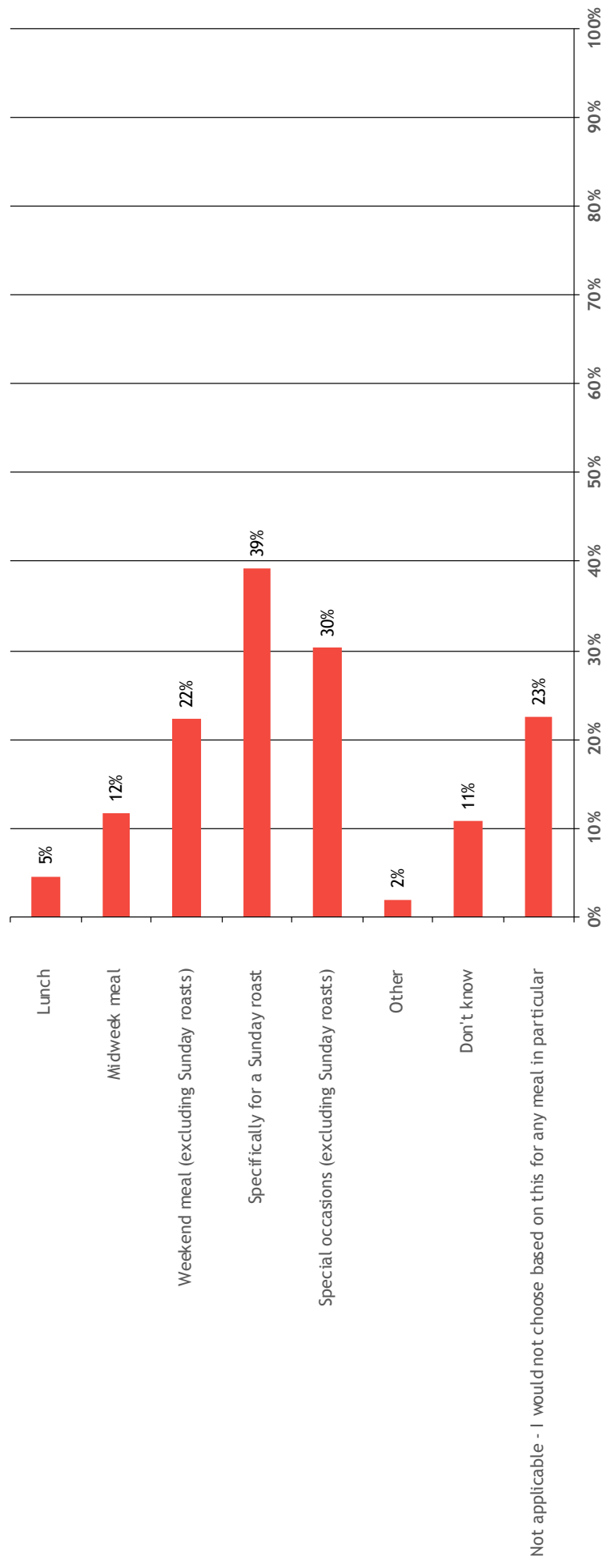


Unweighted base: All GB adults who are more influenced to buy sheep meat by age, breed, or landscape (863)



# Heritage Sheep

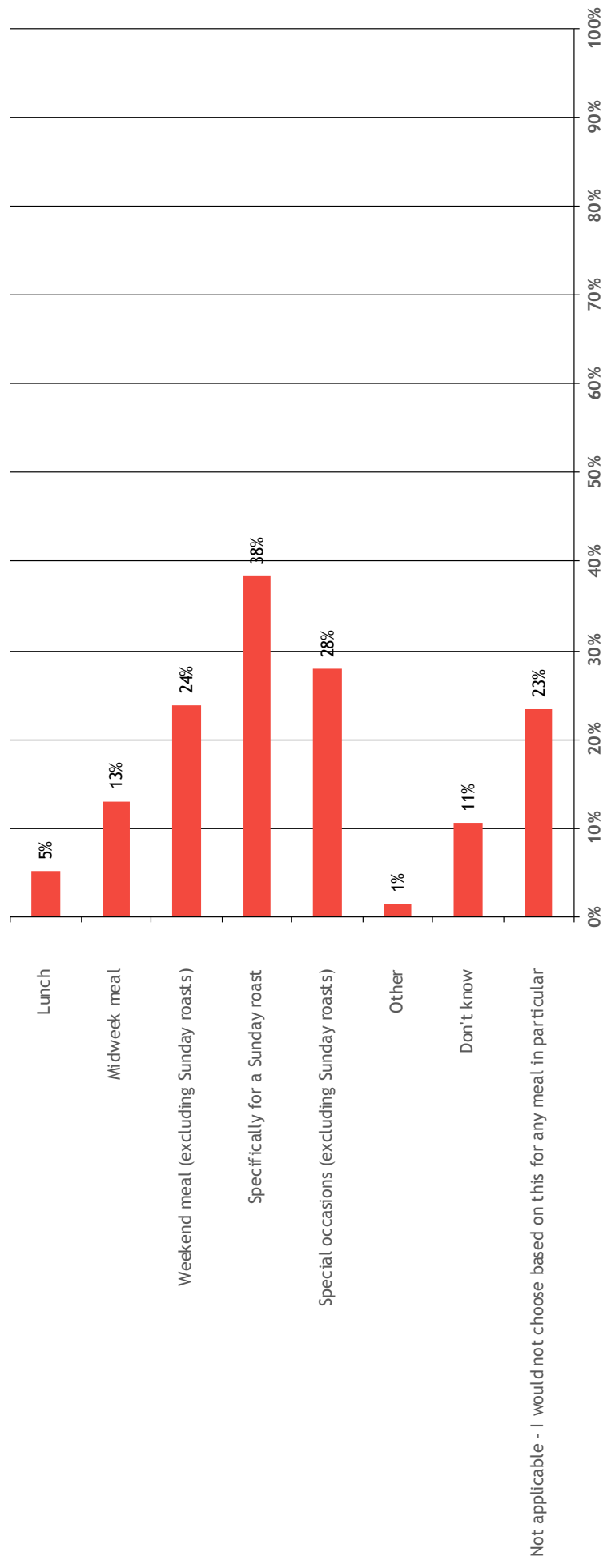
*jhs\_q9b\_2. For which, if any, of the following meals would you actively choose to purchase sheep meat specifically based on age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape for any meal in particular, please select the "Not applicable" option) - UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)*



Unweighted base: All GB adults who are more influenced to buy sheep meat by age, breed, or landscape (863)

# Heritage Sheep

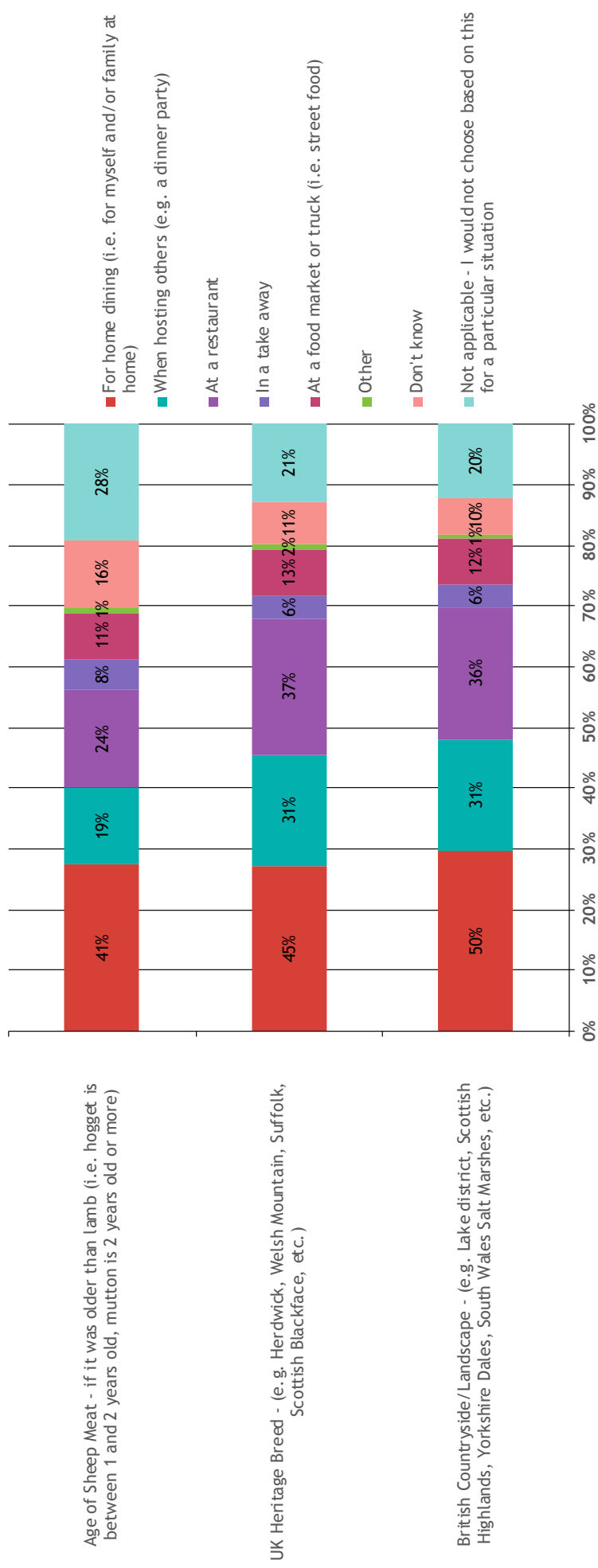
*jhs\_q9b\_3. For which, if any, of the following meals would you actively choose to purchase sheep meat specifically based on age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape for any meal in particular, please select the "Not applicable" option) - British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)*



Unweighted base: All GB adults who are more influenced to buy sheep meat by age, breed, or landscape (863)

# Heritage Sheep

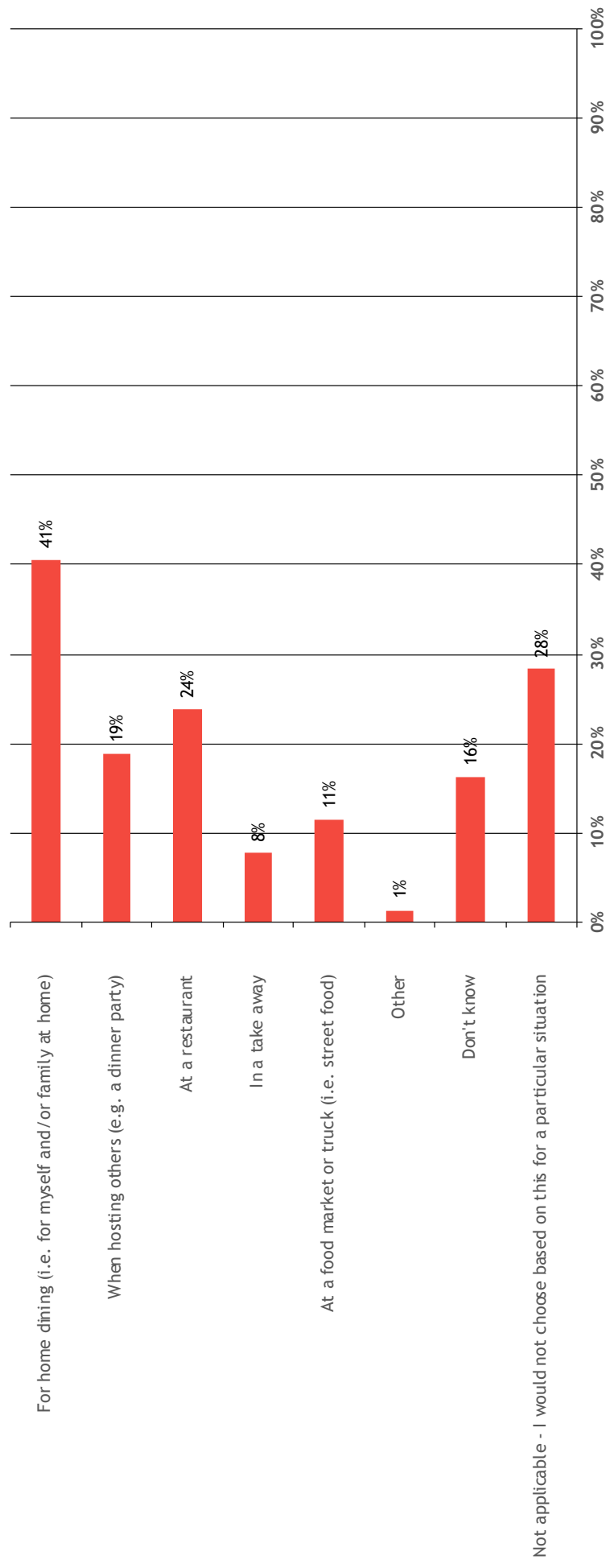
*jhs\_q10c. In which situations, if any, would you actively choose to purchase sheep meat specifically based on either age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape in any particular situation, please select the "Not applicable" option)*



Unweighted base: All GB adults who are more likely to buy sheep meat by age, breed, or landscape (863)

# Heritage Sheep

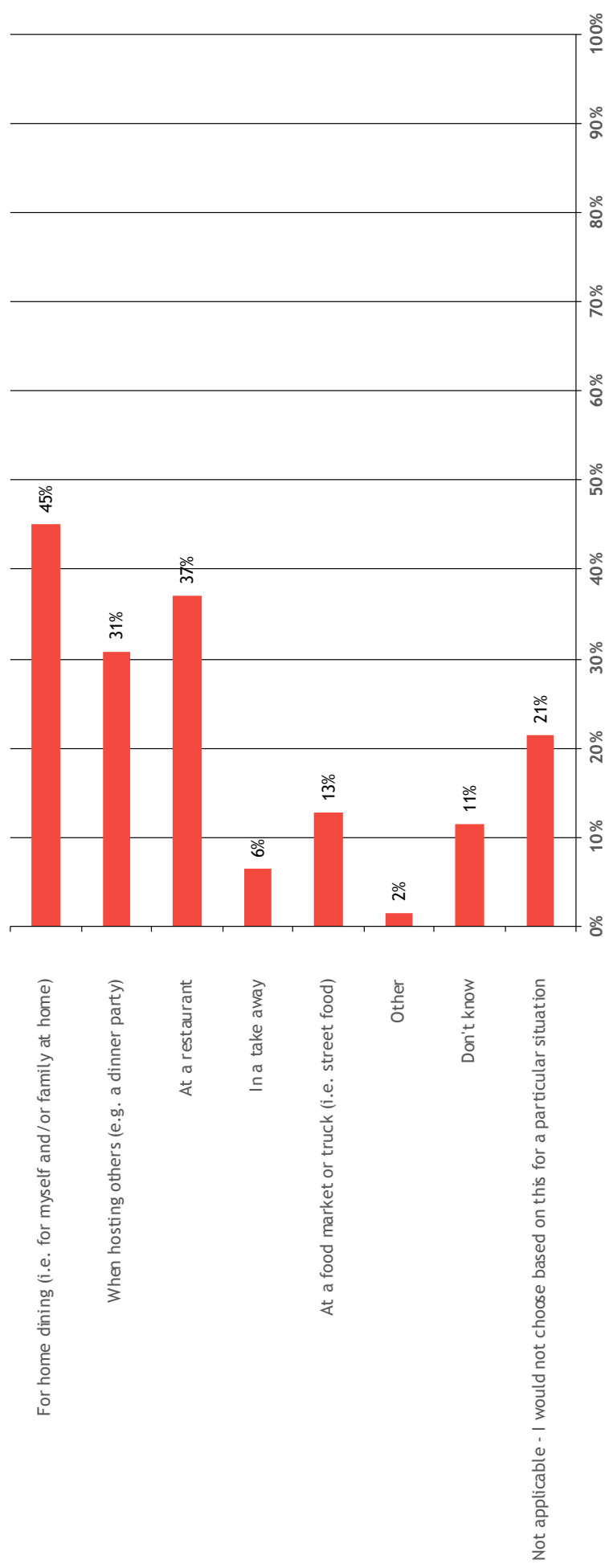
*jhs\_q10c\_1. In which situations, if any, would you actively choose to purchase sheep meat specifically based on either age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape in any particular situation, please select the "Not applicable" option) - Age of Sheep Meat - if it was older than lamb (i.e. hogget is between 1 and 2 years old, mutton is 2 years old or more)*



Unweighted base: All GB adults who are more likely to buy sheep meat by age, breed, or landscape (863)

# Heritage Sheep

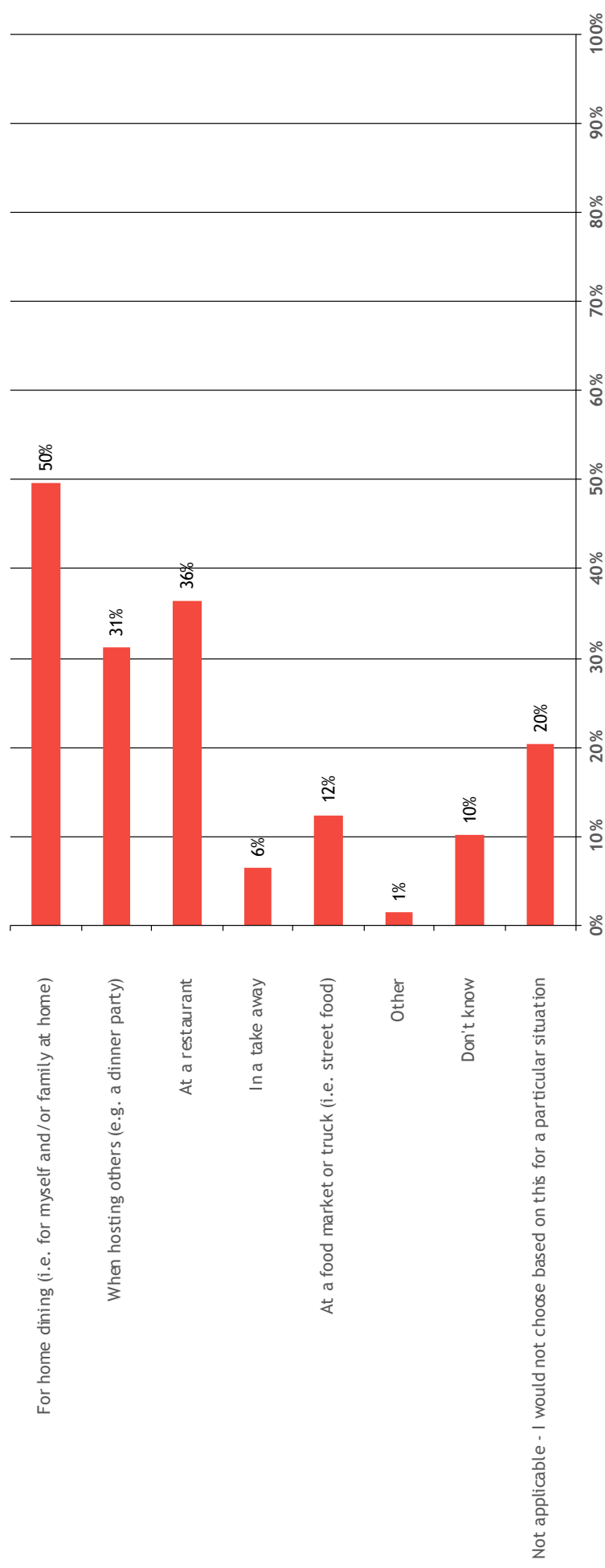
*jhs\_q10c\_2. In which situations, if any, would you actively choose to purchase sheep meat specifically based on either age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape in any particular situation, please select the "Not applicable" option) - UK Heritage Breed - (e.g. Herdwick, Welsh Mountain, Suffolk, Scottish Blackface, etc.)*



Unweighted base: All GB adults who are more likely to buy sheep meat by age, breed, or landscape (863)

# Heritage Sheep

*jhs\_q10c\_3. In which situations, if any, would you actively choose to purchase sheep meat specifically based on either age, breed, or landscape where they were reared? (Please select all that apply on each row. If you wouldn't choose based on age, breed, or landscape in any particular situation, please select the "Not applicable" option) - British Countryside/Landscape - (e.g. Lake district, Scottish Highlands, Yorkshire Dales, South Wales Salt Marshes, etc.)*



Unweighted base: All GB adults who are more likely to buy sheep meat by age, breed, or landscape (863)





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