THE NORTH EAST COTSWOLD
FARMER CLUSTER CIC

Building Long Term Capacity and Resilience in Our Local Meat Supply Chains

A report written for the North East Cotswolds Farmer Cluster to help identify opportunities and guide next steps

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1 EXECUTIVE SUMMARY

The Cotswolds, and its mixed farming landscape, is a rich larder of nutritious and sustainably produced meat (red, white and game), feeding a growing rural, peri-urban and urban population.

Sadly, this local farming and food system is under threat. One key concern is the loss of suitable abattoir and butchery facilities within the district.

The closure of Long Compton abattoir in early 2024, which had served farmers across Gloucestershire, West Oxfordshire, Warwickshire and beyond since the 1920s, was a critical blow. The closure of Long Compton stimulated this study led by the North East Cotswold Farmer Cluster.

There are numerous challenges but there are opportunities too. We could make more of our wild venison and add further value to our beef and lamb. We could do more to celebrate, nurture and promote our local producers and food entrepreneurs, and the importance of livestock to landscape recovery and healthy diets. We could collaborate.

This report focuses on what we, as a farming community and range of stakeholders, need and can do, to build long term capacity and resilience in our local meat supply chains.

This work also helped ensure that our local farmers and cluster group members had a voice in any future abattoir and supply chain developments, and offered direct and valued support to the Save Long Compton Abattoir Campaign, business planning and steering group activities.

The report highlights that the meat supply chain is complex with many stakeholders and stages. Intervention must match this complexity. It also recognises that local food chain resilience and capacity must be seen in the context of wider food strategies such as the National Food Strategy.

We believe that if we are to build a more resilient red meat supply chain in the North East Cotswolds we must ensure it has capacity and diversity across all the key elements of the system including production, processing, distribution, retail/wholesale and consumption.

To this end, seventeen recommendations are made. The report suggests that we should:

1) Support the Long Compton Abattoir new build campaign
2) Support our existing regional local abattoirs
3) Support the mobile abattoir concept across the region
4) Plan for the longer term and think big – a Cotswold Centre of Red Meat Excellence
5) Recruit and train new butchers and slaughterman
6) Promote enhanced butchery and added value
7) Develop the meat academy concept
8) Facilitate more collaboration across the sector
9) Develop a collaborative local marketing campaign and route to market project
10) Seek institutional dynamic procurement opportunities
11) Stimulate and supply local/regional venison markets
12) Improve the communication and cooperation between deer managers, dealers and processors
13) Develop and deliver new training opportunities for deer and venison sector
14) Seek specific funding to improve venison processing and retail infrastructure

15) Develop a Theory of Change to help stakeholders develop and monitor training and skills needs and impacts.
16) Develop and deliver knowledge exchange and skills programs across the supply chain
17) Support local food entrepreneurs and start ups

The North East Cotswold Farmer Cluster, and it's members and stakeholders, have an important role to play across all the recommendations. But where should effort be focused in light of limited capacity and funds?

It is suggested that in 2025 the steering group and leadership team consider ways it can best:

- Support the Long Compton Abattoir campaign (A1), local mobile abattoir activity (A3). and the Centre of Excellence concept (A4/B3).
- Foster collaboration and high impact supply chain networking events/fora (C1).
- Work with and promote existing local food networks such as Good Food Oxford (C2).
- Support better communication and cooperation between deer managers, dealers and processors (D2).
- Develop a Theory of Change (E1) and a suite of cross cutting supply chain themed knowledge exchange events (E2).
- Promote local farmers and food entrepreneurs (F1)
- Act as a funding bid lead and funnel for this body of work (cross cutting).

This report is non exhaustive. There is much to do. But hopefully this initial work can be used to facilitate further local discussion, prioritisation, collaboration and action.

2 INTRODUCTION

2.1 Setting The Scene

2.1.1 The Cotswolds Larder

The Cotswolds is a landscape with a mixed farming heritage. The region is renowned for its diversity of cropping, grazing livestock, poultry and pig enterprises, with wild and managed deer roaming the parks and woodland. The Cotswolds is a rich larder of nutritious and sustainably produced red and white meat, feeding a growing rural, peri-urban and urban population.

The diversity of farm enterprise in the Cotswolds leads to a mosaic of wildlife habitats benefiting farmland birds, invertebrates and flora. Low input cattle and sheep grazing systems are of particular note, delivering and supporting priority habitats such as species rich calcareous grassland, lowland meadow and wood pasture. Done well, these grazing systems can help rebuild soil health and sequester carbon too.

The heritage and beauty of this farmed landscape, coupled with a thriving entrepreneurial Cotswold food culture, brings consumer spend and tourism value. Our natural capital creates jobs and regional affluence.

2.1.2 A System Under Threat

Access to affordable and suitable abattoir and butchery facilities are crucial to the viability of our livestock farms, conservation grazing initiatives, meat businesses and our local food system

Farmers in the Cotswold area have benefited over recent years from access to a number of local abattoirs including J Broomhall Ltd (Stroud), Mutch Meats (Witney), Long Compton (Shipston-On-Stour) and Kings (Gloucester). These facilities have supported the processing and sale of beef, lamb, pork and goat, leading to a flourishing local meat eco-system.

While, poultry processing at local level is more problematic some have found ways to make it work and sell direct. More could be done. Similarly, the venison supply chain, led by game dealers and enterprising land owners, also has potential.

Sadly, our local abattoir facilities and the food system they support are under threat due to rising costs and regulation, and the lack of skilled labour and business succession.

In 1970 there were 1146 abattoirs licensed to slaughter red meat livestock species in Great Britain, by 2020 the number had fallen to 213 (ref). We have lost more since then, particularly the smaller local abattoirs that offer bespoke private kill and cut services, and those that can handle horned and over thirty month (OTM) cattle (often our rarer heritage breeds and conservation grazing animals).

Without these facilities, and the skills of the people that run them, it becomes increasingly unviable for farmers, butchers, farm shops and hospitality providers to supply locally reared meat and added value products direct to customers. We will also lose emerging opportunities to feed wholesale markets including retail, schools, colleges and the NHS. Pioneering and nature focused farmers developing regenerative farming and conservation grazing systems will lose their routes to market. Knowledge, livelihoods, businesses, rural communities, grazed habitats, livestock genetics, food provenance and food chains are all at risk too. Food miles will increase, and our push for net zero and effective landscape restoration will be hampered.

2.1.3 The Closure of Long Compton Abattoir

The loss of Long Compton abattoir in early 2024, which had served farmers across Gloucestershire, West Oxfordshire, Warwickshire and beyond since the 1920s, was a critical blow. This announcement, and the realisation that other local facilities are under similar threat, led to a flurry of activity to try and save the abattoir. The closure of Long Compton stimulated this study.

The Save Long Compton Abattoir Campaign was launched in December 2023 by a team of local farmers and stakeholders. The campaign attracted expressions of interest from over 450 people who wanted to invest over £3 million and support the campaign, plus a mortgage offer to help cover the purchase cost. It looked promising.

SAVE LONG COMPTON ABATTOIR

Invest in our farmers, livestock, landscapes & local food system

www.longcomptonabattoir.co.uk

Sadly, the Directors could not reach an agreeable settlement figure with the owner of Long Compton. Negotiations ceased in September 2024 and the presumption is that the abattoir will not reopen.

There is a Plan B. Save Long Compton Abattoir Campaign has shown there is need, private and public support and business opportunity. Plan B is to look at building a new abattoir in the North Cotswolds.

2.1.4 Considering Venison

The increasing abundance of wild deer in the region can have a negative impact on farming, hedge and tree planting success, and biodiversity. Conversely, venison is an undervalued protein source with a disparate and underdeveloped supply chain.

Alongside this study and abattoir work, a separate study on deer populations and management in the North East Cotswolds is being undertaken to analyse the current venison supply chain and make recommendations on how we can optimise existing deer larders, processing facilities and routes to market, and how we could create new opportunities.

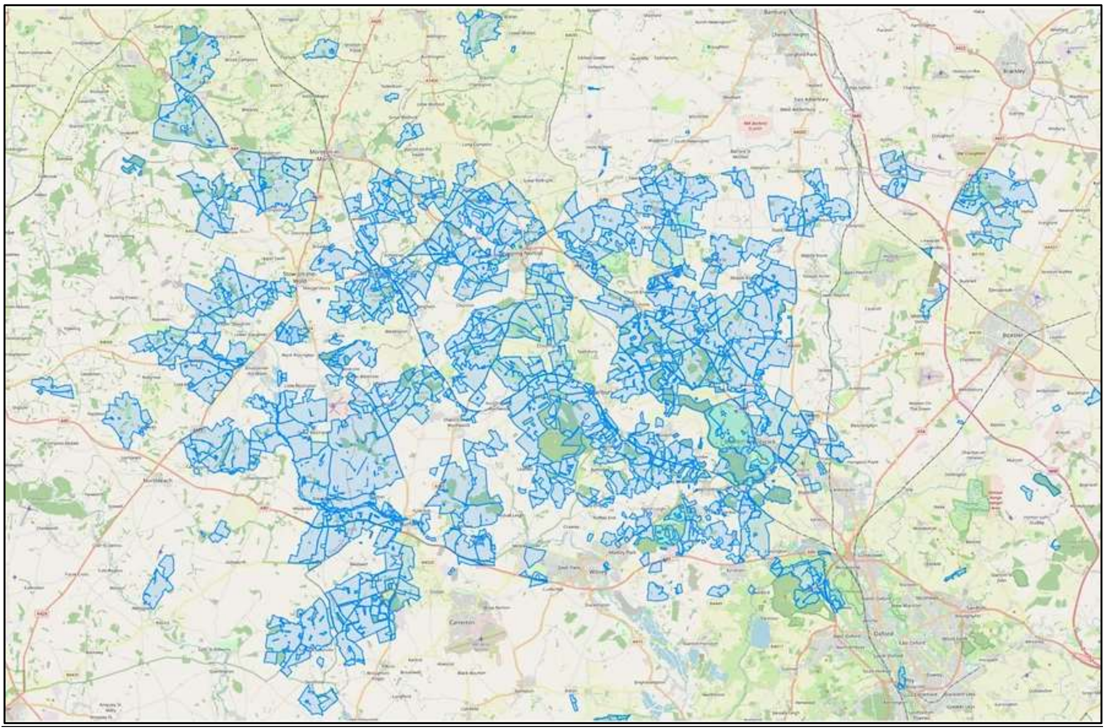
2.1.5 The North East Cotswold Farmer Cluster

The North East Cotswold Farmer Cluster (NECFC) is a group of farmers and landowners collaborating on a range of exciting environmental, economic and social projects. Our world is changing, and the cluster believes that we will be better prepared if farming and food stakeholders work together.

Together the NECFC members farm land stretching from the A40 in the south, northwards to Moreton-in-Marsh, and eastwards to Chipping Norton and Woodstock. To date, there are 150 farms covering 42,000 hectares in the cluster making it one if the biggest and influential facilitated groups in the UK. The NECFC is currently involved in a major Landscape Recovery project and delivering projects for farmland birds and soil carbon.

The North East Cotswold Farmer Cluster
<u>Vision</u> To lead landscape-scale regeneration of the farmed environment and local food networks in the North East Cotswolds through collaboration and knowledge exchange. **<u>Aims</u>** To grow into an inclusive and pro-active group of local farmers, growers, landowners, foresters and advisers who work and learn together to enhance the natural capital on their land, tackle the climate emergency and build more resilient food and farming businesses. **<u>Objectives</u>** 1) Improve the health of our soils. 2) Map, create, enhance and link priority habitats. 3) Support entrepreneurial thinking and the growth of a local food economy. 4) Make the most of future policy and access private investment and public funding opportunities. 5) Evaluate progress and landscape/farm level outcomes and outputs. 6) Foster community engagement/outreach.

Membership Coverage



See more here: www.cotswoldfarmers.org

2.2 This Report

This study and resulting report were coordinated by the North East Cotswold Farmer Cluster (NECFC) and funded by West Oxfordshire District Council (UK Shared Prosperity Fund).

The report focuses on what we, as a farming community and range of stakeholders, need and can do, to build long term capacity and resilience in our local meat supply chains.

It focuses on beef and lamb (the main output in the region), but also refers to pork, poultry and venison where applicable.

It aims to:

- Summarise the challenges and opportunities facing the sector
- Map current local abattoir and processing provision
- Gather information, opinion and needs from local farmers and key stakeholders
- Explore ways of building additional capacity and resilience
- Explore potential business models
- Consider the range of potential solutions
- Highlight private and public funding opportunities
- Guide decision making and stimulate action.

This work also helped ensure that our local farmers and cluster group members had a voice in any future abattoir and supply chain developments, and offered direct and valued support to the Save Long Compton Abattoir Campaign, business planning and steering group activities.

In addition, the NECFC ran a number of farmer facing events in 2024 aimed at fostering new skills in adding value, and sharing abattoir and report updates. The project team also represented the local community on the Abattoir Sector Group, spoke at a number of national events (including Groundswell, the Conservative Party Conference and Oxford Real Farming Conference) and gained media coverage about the abattoir situation, raising awareness of the issues and our local needs.

There remains much to do. But hopefully this initial work will nurture the next steps.

3 EXPLORING FOOD CHAIN RESILIENCE AND CAPACITY

3.1 Food Security or Food Resilience?

Using the1996 World Food Summit definition, food security is when all people, at all times, have physical and economic access to sufficient safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life.

Being self-sufficient, a popular policy focus of our farming unions, does not guarantee food security. It is just one part.

Professor Tim Lang points out in his book Feeding Britain (2020), that food security is a many-tentacled beast. It depends on an array of different factors, including the defence of supply lines (being confident they are not vulnerable to attack), the resilience of all parts of the food system, separately and combined (how quickly they can adapt in the face of sudden shocks), capacity (the skills and capabilities in the system) and control (how concentrated is ownership of the system and what risks might arise from high levels of concentration).

The concept of resilience considers how systems are able to adapt and move forward in the case of various and unforeseen disasters. Food system resiliency is the capacity over time to provide sufficient, appropriate, and acceptable food to all - even in the case of unforeseen disturbances.

Dr Charlie Taverner (Food, Farming and Countryside Commission, April 2024) outlines why we need to push beyond food security and talk more about resilience:

It's a lofty word, but it boils down to the idea that we should anticipate problems and be able to adapt in a positive, creative way. In concrete terms, building resilience means changing how we farm, from embracing more sustainable, regenerative or nature friendly approaches to shifting what food we grow and when and where works best. Crucially, it also means changes beyond farming. A resilient food system has transparent supply chains based on trust, reciprocity, and a diverse network of local infrastructure. It helps households to eat less heavily processed food, reduce their waste, and find quality, affordable produce. It needs all tiers of government to link food and farming to their plans for climate, nature, and growth, and make more considered decisions about how we put the country's land to the multiple uses we require.

The key elements of a resilient food system include the inputs, processes and outputs of the six key system stages i.e.

1) production
2) processing
3) distribution
4) retail/wholesale
5) consumption
6) waste management

Work by the University of Melbourne captures this well (see below). Opportunities to increase the long term resilience of their food system includes supporting diverse approaches to sustainable food production, such as protected closed-loop and regenerative food production. It also includes encouraging decentralised, diverse and local-regional supply chains, implementing circular food economies and ensuring equitable access to nutritious food through a Right to Food approach.

They also highlight further opportunities for strengthening resilience that apply across the entire food system, such as guaranteeing sustainable livelihoods, promoting food system networks and engaging people as food citizens.

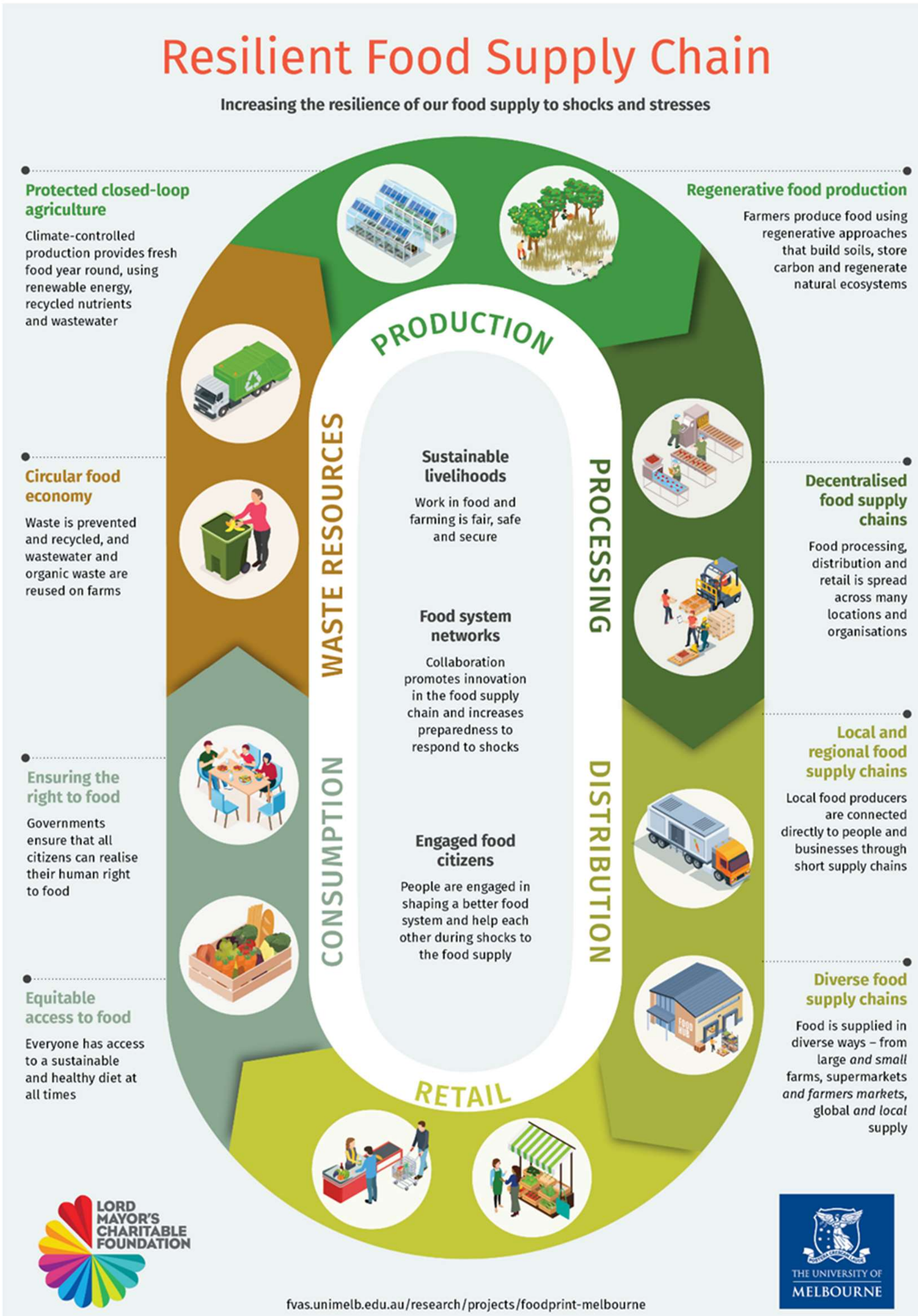


Fig 1 - Key attributes of a resilient food systems

Fig 2 - Taking action for a resilient food system

3.2 The National Food Strategy

Food chain resilience and capacity, at local and national level, must be seen in the context of wider food strategies such as the National Food Strategy led by Henry Dimbleby between 2019 and 2022. The report stated that *'transforming the food system will require change at all levels: structural, cultural, local and individual. But it is work that must be done. If we seize this opportunity, we can improve our health, protect our environment and build a better future for our children and grandchildren.'*

The challenge is profound and one faced head on by our community in the North East Cotswolds. The report highlights that '*the food system is about to be asked to perform a feat of acrobatics. In order to meet the UK's legal commitment to reach "net zero" emissions by 2050, the food system must first dramatically cut its own emissions: no small achievement in itself. On top of that, it must relinquish agricultural land to be used in ways that sequester carbon.'*

The National Food Strategy suggests that the food system of the future must meet the following goals:

1) Make us well instead of sick
2) Be resilient enough to withstand global shocks
3) Help to restore nature and halt climate change so that we hand on a healthier planet to our children
4) Meet the standards the public expect, on health, environment, and animal welfare

It concludes with four strategic objectives. The report says we must work to:

1) Escape the junk food cycle to protect the NHS.
2) Reduce diet-related inequality.
3) Make the best use of our land.
4) Create a long-term shift in our food culture.

While these objective do not speak directly to the need for resilience and capacity at local level, within the14 recommendations there are a number of suggestions that relate in part to our work in the North East Cotswolds and this report, including:

Make the best use of our land

- Recommendation 8 - Guarantee the budget for agricultural payments until at least 2029 to help farmers transition to more sustainable land use (with a focus agri-environment support, carbon sequestration and landscape scale work).
- Recommendation 9 - Create a Rural Land Use Framework based on the three compartment model.
- Recommendation 10 - Define minimum standards for trade and a mechanism for protecting them.

Create a long-term shift in our food culture

- Recommendation 11 - Invest £1 billion in innovation to create a better food system (including work to build an alternative protein and reduced red meat system).
- Recommendation 13 - Strengthen Government procurement rules to ensure that taxpayer money is spent on healthy and sustainable food (potentially linking into local supply chains).

The National Food Strategy is arguably lacking. Did the report miss an opportunity to fully tackle the tentacled food security beast? There is only limited acknowledgement of the power of local action and solutions, although the positive role of cluster groups is noted. While the funding of innovation is supported there is no push for more help for our local food infrastructure (mills, creameries, abattoirs etc.) or investment in production and processing skills e.g. farming and butchery. Similarly, the value of local food sales and entrepreneurship is ignored, and the role of local authorities is played down. Venison potential is missed.

It begs the question, should the North East Cotswold Cluster Group and its local stakeholders seek to influence food policy, particularly in light of a new Government and fresh eyes on the National Food Strategy and the Henry Dimbleby's new role at the Royal Agricultural University in the Cotswolds?

3.3 A Food Strategy for Oxfordshire

Good Food Oxfordshire (GFO) is a network of over 150 organisations, including local food businesses, farmers and growers, institutions, and community groups who have all signed the Oxfordshire Good Food Charter demonstrating their commitment to change. Working with partners they guide vision and strategy, advance policy, coordinate and support aligned activities and build public will through events and campaigns.

In 2021 Good Food Oxfordshire worked with a multi-stakeholder group to develop a strategy for Oxfordshire that aims to make healthy and sustainable food accessible and affordable, whilst improving the sustainability and resilience of the local food system.

Oxfordshire is facing real food challenges through the pressures of food poverty, the climate emergency, a diet-related ill-health crisis, and food supply issues. Working together, towards a coherent food strategy, the community believe they can push back against these pressures and deliver a vision in which everyone in Oxfordshire can enjoy the healthy and sustainable food that they need every day.

The food strategy identifies five areas for priority action:

1) Tackle food poverty and diet-related ill health.
2) Build vibrant food communities with the capacity and skills to enjoy food together.
3) Grow our local food economy through local enterprises, local jobs and local wealth creation.
4) Strengthen short, transparent local food supply chains.
5) Improve the health and sustainability of institutional catering.

Ensuring that 'food thinking' is embedded within existing policies and plans as well as developing new initiatives is critical to the success of the strategy.

GFO is a key local stakeholder for this body of work and the NECFC. Further opportunities for collaboration should be explored.

3.4 A Food Strategy for Gloucestershire

It has been recognised that taking a coordinated and strategic approach to food is important if Gloucestershire is going to become a more sustainable food place. It's a complex space.

There are many people and organisations in the county helping to make the county a more sustainable food place. Helping bring together some of this strategic work is the Gloucestershire Food and Farming Partnership (GFFP) who host the county's membership of Sustainable Food Places.

GFFP began in 2018 and through working in partnership with a range of organisations across the county they developed a Vision for Sustainable Food and Farming.

A number of county-wide consultations took place across 2023, and the learning from these events is currently being integrated into a county-wide Sustainable Food Action Plan, to help prioritise projects, convene partners, and turn the vision into reality.

Feeding Gloucestershire CIO is a multi-agency partnership, which was convened in July 2021. The aim of Feeding Gloucestershire is to work with organisations across the county to drive systemic change and build food security across all communities in Gloucestershire.

FGs aim is to partner with organisations across the public, voluntary and community and private sectors, including local and national food aid organisations; parish, town and district councils and Gloucestershire County Council (GCC)

This wide network contains a number of key local stakeholder for our body of work and the NECFC. Further opportunities for collaboration should be explored.

4 MEAT SUPPLY CHAINS

4.1 Overview

Red meat supply chains are complex. There are often 3 or 4 actors in the chain before meat reaches the consumer from the farm gate. The role of each actor must be considered. The chain can be simplified thus:

- Production - farmers, landowners and their suppliers, livestock.
- Livestock marketing channels - dealers, auction marts, co-ops etc.
- Slaughter and primary processing - slaughter, cutting and hanging.
- Transport and distribution - at all stages of the chain.
- Imports and exports - at national and local level.
- Secondary processing - adding value.
- Meat wholesale - catering and supermarkets.
- Meat retail - butchers, supermarkets, direct sales and online channels.
- Consumers - number, demography and trends.

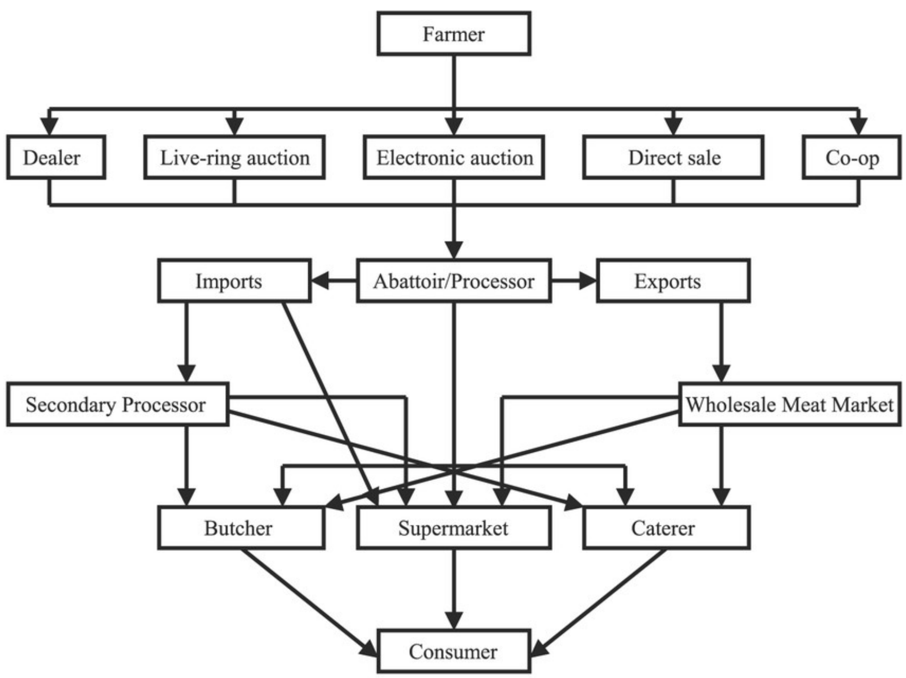


Fig 3 - A simplified red meat supply chain (source: British Food Journal)

The Red Meat Industry Forum (RMIF) describes the red meat supply chains as:

"a number of coordinated businesses which have to efficiently convert a naturally variable raw material (livestock), which takes a long time to reach maturity, via a complicated production process, into a whole series of end products, which need to be kept in a chilled environment and which have a limited shelf life, amidst fluctuating demand" (RMIF, 2003).

4.2 The UK Beef and Lamb Sector

Before seeking interventions that seek to build capacity and resilience in local red meat chains, one must consider the national and international market and sector trends.

The beef and lamb sector in the UK remains in relatively strong. According to AHDB data we are around 81% self-sufficient in beef - exporting 104,000 tonnes and importing 223,232 tonnes (including a large % of Irish beef and prime cuts). We are well supplied by lamb, having more than enough to feed our population, exporting 85,514 tonnes (particularly light lambs) and importing 48,390 tonnes (e.g. legs of lamb from NZ).

Fig 4 - The beef and lamb sector in the UK (source: AHDB)

Prices have been good of late and well above the 5 year average (although volatile at times) and enterprise gross margins have been mostly positive in recent years. However, periods of high pricing and a consumer still facing cost of living pressures has led to some protein substitution to cheaper chicken and pork, and imported beef and lamb.

Further analysis reveals some worrying deeper trends. Breeding cattle and sheep numbers are falling with the latest Defra census (2023) revealing that:

- The total sheep population declined by 4.3% year-on-year, now standing at 13.8 million head.
- The total cattle population saw a 2.0% reduction to 5.0 million head, driven by declines in the beef breeding herd.
- The most significant declines were seen in breeding female numbers, within both cattle and sheep populations.

The drivers for decline in numbers relate to poor or volatile net margins at farm level, disease impacts (such as TB, Schmallenberg and Bluetongue), staff and skills shortages, loss of land to other uses (solar, tree planting, agri-environment etc), weather impacts, transport costs, regulatory barriers and the loss of local abattoirs (making direct sales more unviable).

4.3 Market Outlook

What's the general market outlook for lamb in the UK? AHDB Market Outlook (June 2024) suggests that:

- Total sheep meat production is expected to fall by 3% to 278,000 tonnes in 2024.
- Retail and foodservice demand for lamb will remain pressured by consumer budgets despite the strong start to 2024, as consumption is set to decline by 1% compared to 2023.
- Imports have grown in the first quarter of 2024 but are expected to slow for the remainder of the year.
- Exports have seen a slight yearly decline in the first quarter of 2024 and are expected to remain in decline given our falling domestic production.

For beef (July 2024):

- Prime cattle slaughter is forecast to rise by 1% in 2024 overall to 2.06 million head. Cattle population data points to supply reductions in the final quarter of the year. Prime cattle slaughter in 2025 is forecast to reduce by a further 3% versus 2024.
- Combined with a 1% reduction in cow slaughter, UK beef production for the full year of 2024 is forecast at 903,000 tonnes, largely stable (+0.3%) versus 2023.
- Beef imports and exports are expected to remain above last year's levels by 4% and 2%, respectively in 2024.
- As at 1 December 2023, the UK breeding cow herd was 2% smaller than the year before. Both the dairy and suckler herds contracted, but the suckler herd drove the overall change. Subject to heifer slaughter levels, this points to longer-term domestic beef supply reductions.

4.4 Market Opportunities

What are the key market opportunities for lamb at national level? The AHDB suggest the following:

- Providing inspiration for tasty, easy to cook lamb dishes in a way that gives reassurance to consumers who may be less familiar with how to cook lamb
- Ensuring that lamb is present on menus to capture out of home dining occasions.
- Addressing health concerns by communicating the health benefits of lamb, such as being a good source of B12, iron and protein.
- Encouraging consumers with the right messaging in-store, online, on pack and in foodservice.
- In the longer term, look to maintain and build consumer trust, demonstrating where farming values (animal welfare, environmental stewardship, and expertise) are shared with consumers.
- Currently, 72% of the sheep slaughtered in England and Wales are killed according to halal processes (as well as 56% of the nation's goats, 5% of its calves and 4% of its cattle). This market will continue to grow.

Opportunities for the beef industry to improve demand are similar and include:

- For cheaper cuts, encouraging tasty and versatile beef dishes which play on value for money. Inspire using batch cooking and filling meals, coupled with retail promotional support.

- For more premium products, capturing meal occasions lost from more expensive proteins and the out-of-home market by inspiring treat dinners such as fake aways or restaurant quality dine-in recipes.
- Addressing health concerns by communicating the health benefits of beef, such as B12, iron and protein.
- Encouraging consumers with the right messaging in-store, online, on pack and in foodservice.
- In the longer term, look to maintain and build consumer trust, demonstrating where farming values (animal welfare, environmental stewardship and expertise) are shared with consumers.

4.5 The Venson Opportunity

Deer are a cherished part of our natural heritage, yet, there has been a growing recognition that certain deer species in certain areas can have a harmful impact on agriculture, forestry, natural regeneration and, at too higher densities, their own health.

The Deer Management and Venison Project, led by the NECFC team in 2024, had two key objectives. It aimed to produce a landscape scale density map of the three species of wild deer found across the North East Cotswolds; fallow, roe and muntjac, and begin to survey the local deer managers to initiate a broader discussion on how to overcome the barriers to maintaining a healthy population and ensuring venison is valued as a healthy and sustainable source of protein.

Opportunities identified within this work included:

- Supporting the increased communication between deer managers and between deer managers and game dealers to strengthen the venison market.
- Focusing funding opportunities on increased training for deer managers to ensure the highest quality of produce.
- Focusing funding opportunities for the further processing of venison.
- The creation of a centralised game dealer or further processor, or a series of coordinated collection points, to reduce the burden and cost of taking deer to the game dealer
- The creation of a cooperative larder and cutting facility to ensure high quality produce and to open the door to further processing and selling direct to customers.
- A coordinated campaign on growing the local market in order to shorten food miles and increase the value of venison.
- A dedicated marketing campaign for muntjac, an invasive and small species of wild deer that is generally perceived as unprofitable due to the lack of meat.

4.6 Shortening The Supply Chain and Direct Selling

Direct sales of red meat to customers takes a small slice of the market share (XX%). It is however, a great way of adding diversity and resilience to a local supply chain and one that is popular with farmers and customers in the affluent North Cotswolds.

Selling direct to customers is about more than adding value and financial return at farm level. It is about the relationships with customers, food provenance, nutrition and enterprising spirit. Short supply chains offer farmers the opportunity to be price makers with autonomy and more control over the process.

Direct selling is good for local economies too. A recent study (*Farmer-Focused Routes to Market - An Evaluation Of Social, Environmental and Economic Contributions of Growing Communities*, New Economics Foundation, 2020) showed that for every £1 spent by customers on veg box schemes or farmers' markets, a further £3.70 is generated in social, economic and environmental value. Other studies have shown similar multiplier effects, suggesting that policies and funding at local and national authority level should favour and support such activity.

Direct selling is not easy and it's not for everyone. But its part of the solution. While many go it alone driven by autonomy there is also scope for more direct selling collaboration.

PASTURE FOR LIFE

The *Pasture For Life Direct Selling Tool Kit* (see extract below) is full of useful thinking on this subject and acts as a practical resource for those considering having a go.

THE PASTURE FOR LIFE DIRECT SELLING TOOL KIT
THREE APPROACHES TO DIRECT SELLING

If you've never tried direct selling before and would prefer to start with a lower cost and time investment we recommend you test your market with a simple setup. As you start to find out who your customers are and grow orders, you can reinvest your profits and take your set up to the next level. It helps to know your costs inside out. Choose the setup which you feel most comfortable with, and when you have a sense of the cost and time investment you can assess how well the enterprise works for you.

1- Testing the water: Low cost/time investment

The lean and simple approach. Test your market with a 'minimum viable product'. Consider what the maximum cost is that you can spend and write off; and try to make this back with your plan.

- ✓ Set up a simple information website, share product descriptions and prices, and a simple order form customers can fill in and submit which pushes order details into a spreadsheet OR set up a simple e-commerce website, write descriptions of your products, price them, add photos and take payments in advance.
- ✓ Email your website to your local friends, family and community, and ask them to forward on.
- ✓ Set up a social media channel you feel comfortable with.

- ✓ Ask your customers to come to the farm to pick up and pay by bacs or cash.
- ✓ If you don't sell everything, consider any local chefs/ restaurants/ other outlets you can sell to, and make sure you have enough freezer space in case you can't sell it.
- ✓ Collect feedback from your customers, get a feel for who they are, why they buy, what they want to see.

Minimum viable product is a box of meat. Boxes make it easier to sell the whole carcass, carrying less risk. Find an abattoir which can take care of the slaughter, butchery and packaging for you. Use a haulier to take your animals there - make sure it is within 2 hours so you can safely pick up the meat yourself in your car. If this goes well, look at the next level of cost/time investment.

2 - Growing your orders: Medium cost/time investment

When you have a better idea of your market, who wants to buy your produce and how they engage with you, think about scaling up your marketing and logistics.

- ✓ Take time to photograph your individual products and upgrade your website.
- ✓ Set yourself up with an email marketing software like Mailchimp so you can prepare nice emails to send to your potential customers.
- ✓ Scale up your social media activity - use it as a shop front.
- ✓ Offer card payments when customers come to pick up from the farm.

Adaptations to processing - do you need to create your own labels or change your cutting list based on customer feedback? If you are looking to change up your butchery then research what other options you have and consider how the meat will be transported there and back to you.

3 - Scaling up: High cost/time investment

When you have a good idea about your time and cost investment and the viability of your direct selling enterprise, consider investing in longer term infrastructure. Take time to build and update your website with juicy information.

- ✓ Add an area for people to sign up to your mailing list on the website and connect the form with your email marketing software so the signups automatically join your mailing list.
- ✓ Send regular email newsletters sharing about your products, recipes and special offers.
- ✓ Put more time into social media, really use it to tell your story.
- ✓ Partner up with other businesses to sell your products and theirs.

If you would prefer to butcher at home now is the time to look at these costs; the equipment is expensive and there is time involved in getting your kitchen set up and certified. Think about whether you want to offer delivery and what refrigerated transport you might need. Invest in resources you need if you want to scale up your supply: more fridges, freezers, space, staff etc.

5 THE DECLINE OF THE SMALL AND LOCAL ABATTOIR

5.1 Overview

The closure of small local abattoirs offering private kill services in the United Kingdom is major issue. It is probably the biggest barrier to the development of a resilient and sustainable red meat supply chains at regional level.

The following literature review aims to distil key insights from existing research, reports, and case studies, shedding light on the factors driving small abattoir closures and proposing targeted recommendations for intervention.

The literature suggests that current regulatory challenges, market dynamics, labour shortages and economic pressures play pivotal roles in small abattoir viability.

Considering the Government's future farming and food goals, the need for targeted capital and business development funding, alongside a more flexible regulatory environment and a proactive skills campaign will be needed if the existing network of facilities are to be saved and expanded upon.

5.2 Background

Small abattoirs are defined as slaughterhouses with fewer than 5,000 average annual throughput as LSU (Livestock Units) (APGAW, 2020). They tend to offer a 'private kill model' of slaughter, where the "butcher or producer will purchase slaughter services from the abattoir but will retain ownership of the animal and meat products with the potential to add value" (APGAW, 2020: 19). Small abattoirs offering private kill services have been deemed a "key link in the chain" for local producers (2020: 1) in a report labelled *The Future for Small Abattoirs* written by the All-Parliamentary Working Group for Animal Welfare (APGAW), and as "crucial to supporting the rural economy" in a recent Defra press release (2023). A study conducted by Franks and Peden (2021:iv) on the economic viability of small abattoirs found that the "closeness to the farm and abattoir animal welfare standards were key determinants of farmers' choice of abattoir for their private kill business", and therefore stress the importance of providence and locality. They suggest that consumers are becoming more aware of food miles and welfare, and linking locality with a positive credence, especially since the pandemic (Franks and Peden, 2021). The Sustainable Food Trust (SFT) similarly conclude that small, close-to-farm abattoirs offer "major animal welfare, environmental and economic benefits" (2018: 9) alongside societal advantages for the local community.

Despite this, small abattoirs have witnessed a tremendous rate of decline in the UK. Local Abattoirs R Key (LARK), an East Sussex AONB Working Group of farmers and producers, note that smaller abattoirs have closed at a rate of 84% since 1979. The Sustainable Food Trust observed that (as of 2018) there are only 249 red meat abattoirs in Great Britain, with just 90 of these slaughtering under <5000 LSUs per annum (APGAW, 2020). In contrast, large abattoirs (< 30000) grew by 38% between 2001 and 2017 to 44, as "processors consolidated operations" and benefitted from economies of scale (APGAW, 2020: 10).

AHDB figures (see below) show only 147 abattoirs remain in England with the smaller business handling less than 5% of throughput.

The SFT report A Good Life and A Good Death (2018: 9) argues that large abattoirs have prospered at the “expense of smaller abattoirs” and the resultant closures have meant further travel for farmers, a potential reduction in animal welfare, greater costs for slaughter and a weakening of local supply chains.

Type of abattoir	2021	2022	2023
All abattoirs	151	151	147
Killing cattle	124	124	121
Killing sheep	121	121	116
Killing pigs	87	86	84

Fig 5 – Abattoir numbers in England (source AHDB)

Size band (head)	Number of abattoirs	Total throughput (head)	Share of throughput (%)
1-1000	49	13,233	0.8%
1,001-5,000	31	73,306	4.4%
5,001-10,000	10	67,830	4.1%
10,001-20,000	3	47,991	2.9%
20,001-30,000	7	174,617	10.5%
30,001-50,000	8	311,556	18.7%
>50,000	13	981,437	58.8%
Total	121	1,669,970	100.0%

Fig 6 – Cattle abattoirs by size in England in 2023 (source AHDB)

Size band (head)	Number of abattoirs	Total throughput (head)	Share of throughput (%)
1-1,000	20	7,767	0.1%
1,001-5,000	27	59,266	0.6%
5,001-10,000	16	117,127	1.2%
10,001-20,000	10	132,801	1.3%
20,001-30,000	6	150,959	1.5%
30,001-50,000	3	98,625	1.0%
50,001-100,000	9	632,336	6.3%
>100,000	25	8,773,384	88.0%
Total	116	9,972,265	100.0%

Fig 7 – Sheep abattoirs by size in England in 2023 (source AHDB)

5.3 Reasons for Closure

The literature highlights various reasons for small abattoir closures, namely financial pressures, market insecurity and complex regulatory barriers. These three issues are explored under the subsequent headings.

5.3.1 Financial and Market Pressures

Multiple reports cite that small abattoirs often find themselves in a precarious financial position marked by significant operational costs and narrow profit margins, making it a constant challenge to achieve a break-even point. (APGAW, 2020; SFT, 2018; Franks and Peden, 2021). The SFT (2018: 18) notes that any profitability often relies on ancillary services like retail butchery, contract butchery and packing, which, despite a few "bright spots" in the independent sector, are in decline.

The literature also states that small abattoirs experience financial hardships due to their constrained size and processing capacity, often facing difficulties in competing with larger counterparts that enjoy the advantages of economies of scale (APGAW, 2020). There is a suggestion that small abattoirs have faced challenges under UK competition law within the slaughter and meat processing sector, where dominant players like Dunbia and Two Sisters hold a substantial share of the overall throughput, and remain unchallenged when acquiring smaller businesses (SFT, 2018). The SFT (2018: 17) argues that such market dominance ultimately leads to a "loss of jobs at other meat plants and a lot of additional food miles for meat, with inevitable environmental consequences".

To add to this, current rural business grants present challenges for small abattoirs due to demanding entry criteria, hindering their access to vital support (APGAW, 2020). The government criteria for capital payments under environmental schemes seem to favour farmers, overlooking the broader network of businesses, including small abattoirs, involved in delivering the end product (APGAW, 2020)

5.3.2 Regulation and Staff Shortages

The literature also highlights the disproportionate impact the overburden of regulation has on smaller abattoirs, in "both cost and management time" (SFT, 2018: 18). A Farmers Weekly article written by Jonathan Riley (2021) notes that small abattoirs face the "same amount of regulatory paperwork as a large batch", and the amount of paperwork needed was described as "red tape".

LARKs submission to the March 2023 EFRA hearing cites "excessive, burdensome, costly, regulation" as the most critical factor in the decline of the meat processing industry. They suggest that the greatest issue is the mismanagement of the role of Official Veterinarians (OVs) post-Brexit, where time is spent "meeting new trade obligations, such as issuing export health certificates" (Riley, 2021), rather than completing "compliance auditing and verification of standards" (APGAW, 2020: 39). LARK and the ASG both argue that the 5% flexibility rule for small abattoirs that exceed <1000 LSUs are not being enforced appropriately. If an abattoir surpasses 1000 LSU they must have a permanent OV, rather than post-mortem inspection. As a result, small abattoirs without a permanent OV find it sometimes difficult, or impossible to operate. LARK also suggest that Defra has failed to act on multiple recommendations to alter regulations associated with OV inspection, notably the 2007 Tierney report that argues the FSA must "adopt a more risk and evidence-based approach to the regulation of meat hygiene, meat inspection activities and enforcement". However, the APGAW (2020: 4) report disputes this argument, suggesting that OVs are “not a particular financial burden because the FSA discounts costs by up to 90% for small abattoirs”

Staffing is another barrier to operation. The SFT (2018: 18) noted before Brexit that “recruitment is also increasingly difficult”, and Jonathan Riley writing for the Farmers Weekly detailed that “post-Brexit policies had failed to recognise the skill and high level of training needed in the sector”. These combined have generated a critical reduction in skilled workers needed for the meat processing industry.

5.4 Sector Needs

The following section outlines the interventions posed in the literature that could to protect and enhance the role of small abattoirs in the UK. Broadly, the recommendations place the development of small abattoirs as “key to enable the evolution of a self-sustainable rural farming economy” (APGAW, 2020: 1). They target financial assistance, regulation, collaboration, and innovation. They are explored in the subsequent headings.

5.4.1 Financial Assistance and Market Regulation

The report by APGAW (2020) proposes the establishment of a short-term emergency fund for these abattoirs until legislative provisions, particularly those in the Agriculture Bill, are implemented. This fund, overseen by the relevant government body, should prioritise businesses with structured development and business strategies. Franks and Peden (2021: 331) support the idea of grant schemes which “could be designed to help safeguard and expand the private kill network”. They conclude that Defra has “opportunities to do things differently” (Franks and Peden, 2021: 331) post-Brexit and must take the chance to assist the sector.

To provide financial alleviation, the SFT (2018: 38) suggests classifying abattoirs as public goods to benefit from business rates that are “reduced or eliminated”. APGAW also emphasize the recognition of small abattoirs contributing to public goods, advocating their eligibility for capital payments within future agricultural support frameworks (APGAW, 2020).

The Abattoir Sector Group (ASG) have also submitted recommendations following the publication of the APGAW report. They also support Government funding through the Agriculture Act Ancillary Activity in England. In a softer support measure, they suggest that the Agriculture and Horticulture Development Board (AHDB) should “promote locally produced meat, linked to small scale producers and abattoirs, to consumers”.

The SFT (2018: 38) also champion the need for market regulation that does not assess “acquisitions, vertical integration and mergers between large meat companies “with “any consideration of the impact on the availability of private kill or animal welfare” to change.

5.4.2 Regulation

The SFT (2018: 38) proposes that the FCA must analyse the “use of derogations and practical implementation of meat hygiene regulations” to reduce the regulatory burden on small abattoirs. They also suggest that “regulatory provision could be made for small on-farm red meat slaughtering operations”, similar to poultry slaughtering (SFT, 2018: 38). There is also a suggestion by APGAW (2020: 5) that planning regulation could be altered to classify abattoirs as agricultural buildings “with respect to business rates and building control”.

LARK and the ASG suggest properly implementing the 5% flexibility rule, especially where "they are of most valuable to industry and regulators and sustain an adequate local abattoir network" (ASG, 2021).

APGAW propose a review of OV's job satisfaction and their role in the broader food system by independent experts. This review would explore how current technological and infrastructure measures could be integrated into small abattoirs alongside OVs to reduce costs while maintaining standards (APGAW, 2020).

5.4.3 Collaboration

The APGAW report suggests several approaches that integrate thought and practical solutions across the agricultural industry and government. It proposes a centralisation of data to improve accessibility, analysis and understanding alongside an online knowledge hub, encouraging careers and promoting provenance (APGAW, 2020). Central to this is the formal recognition of the Abattoir Sector Group, which was set up after publication in 2020, which as their website states, "provides a unified voice for the small and local abattoir sector… and to advise government on behalf of the industry" (ASG, 2023).

The SFT also advised similar, calling for an immediate task force to be set up to investigate why small abattoirs are going out of business (SFT, 2018). They also suggest the Task Force should be asked to "propose imaginative and substantive measures to prevent unfair competition and reduce financial and bureaucratic burdens on smaller abattoirs, whilst maintaining high hygiene and welfare standards" (SFT, 2018: 37). They outline a comprehensive list of recommendations for a proposed Task Force (*read* SFT, 2020 37-38).

5.4.4 Innovation

The literature also utilises future innovations, such as mobile abattoirs, as a response to abattoir closure. The SFT (2018) suggest that mobile abattoirs represent a promising approach to address concerns related to animal welfare and the quality of meat by enabling on-farm slaughter. This is further backed by APGAW (2020: 5) who note that mobile abattoirs could "help support the wider meat production chain and improve financial viability of small or rural businesses where there is a low geographical density of abattoirs". However, both express logistical, regulatory, and infrastructure concerns (SFT, 2018; APGAW, 2020).. Currently, the development of a mobile abattoir is around £800,000, and must require a Food Standards Agency approval for the unit and each farm it visits (James, 2023). Consequently, the mobile abattoirs' successful adoption depends on addressing these challenges first (SFT, 2018; APGAW, 2020).

6 NORTH EAST COTSWOLDS ABATTOIR SURVEY

6.1 Reaching Out

In early 2024, in response to the closure of Long Compton, we undertook an online survey of cluster members and other stakeholders who operate in the region. We invited local farmers, graziers, butchers, slaughterman, retailers, wholesalers, chefs, food campaigners, policy makers and funders to engage. All views were welcome and the survey was snowballed. We wanted to know more about:

- The impact of the closure?
- What killing, processing and distribution facilities do people need to sustain and grow their business?
- What other help do people need?
- Ideas that could help us build long term capacity and resilience in our local meat supply chains?

The survey finding have helped shape the recommendations in this report.

6.2 Survey Headlines

The main headlines arising from the survey are summarised below. More detail can be found in Appendix 1.

6.2.1 Demographics

- Total respondents: 161
- Around 25% are members of the North East Cotswold Farming Cluster. 75% are not.
- Nearly 80% identify as "Farmers (with land)."
- 34% of respondents were from the Cotswold District Council postcodes.

6.2.2 Abattoir Usage Patterns

- Approximately 38% use their local abattoir regularly/very regularly
- 18,243 head a year processed by the respondents
- Average animals sent per year: Cattle (21), Sheep (123), Pigs (31), Goats (25), Deer (1), Poultry (5).

6.2.3 Preferred Abattoirs

- Long Compton is preferred by 71% of respondents.
- Key factors: Proximity, good service, and relationships.
- Others used included Mutchmeats (Witney), Broomhalls (Stroud), Farmers Fresh (Kenilworth), Kings (Gloucester), Drurys (Wotton Bassett) and Stiles (Chippenham).

6.2.4 Services Utilized

- Focus on "Kill Only" or "Kill and Cut" services.
- 21% also seek added value services
- Limited use of comprehensive services; delivery less emphasized.

6.2.5 Certification and Assurance

- Around 50% not farm-assured; ~ 40% Red Tractor, 25% organic, 16% Pasture for Life
- Other certifications mentioned: biodynamic farming, RSPCA assured.

6.2.6 Abattoir Expenditure

- Costs vary widely; mean average: £3,746.51.
- Top customer £100,000 year
- 65% are willing to pay more (10% to 30% more) for
  - ✓ better butchery services
  - ✓ improved packaging
  - ✓ longer hanging times
  - ✓ more personalized cutting options
  - ✓ better communication with customers.
- Just 2% think abattoirs are too expensive already and there's not enough margin in it for the farmer.

6.2.7 Impact of Abattoir Closure

- Concerns: Increased costs, animal welfare, and business viability.
- Potential reassessment of business models; ceasing farming discussed.

6.2.8 Responses to Abattoir Closure

- Proactive responses include seeking alternatives and relocation.
- Emotional responses include distress and uncertainty.

6.2.9 Long-Term Abattoir Needs (5 to 10 years)

- High value on enhanced processing, cutting, and added value services.
- Mobile abattoir services are highly valued.
- Moderate importance on coordinated livestock collection, meat/carcass delivery, and specific needs for speciality breeds.

6.2.10 Interest in Cooperative Ownership

- 84% express interest in learning more about cooperative ownership.

6.3 What Did People Say?

Hearing people's concerns and fears regarding the loss of their local abattoir was important part of the survey. The following comments help bring the data to life.

"Our small farm shop would struggle and we would lose income opportunities and a connection to our local community. We would be solely reliant on selling through live markets."

"Devastating. We will have to go to Gloucester or much further north so this will significantly increase travel time and costs and be detrimental to our animals' welfare and the quality of our meat."

"We will seriously consider winding down the business."

"Might give up livestock rearing."

" I rear sheep for a number of reasons but when I choose to send some to the abattoir for meat the quality of their death is AS important to me as their quality of life. Long Compton is a 15 minute drive from most of my grazing which means less stress for the animals in transport. The abattoir itself is small and well run, again instrumental in ensuring the best possible end to the lives of the animals I choose to take there."

"We would have to stop having our English Longhorn cattle as without Long Compton we would not have an abattoir that would accept cattle with wider horns, so the breed would become more vulnerable."

"We will have to find another abattoir - but the only ones suitable are twice the distance from us, and much less flexible to our needs."

"It would totally cripple me."

Fig 8 – Sustainable Food Trust 2022:The Benefits of Local Abattoirs (extract from the Long Compton Business Plan)

7 LOCAL ABATTOIR OPTIONS

It is evident that the major barrier to building more resilient red meat supply chains in the North Cotswold area is the lack of a local abattoir that can kill, hang, process and add value for our farming community and consumers. What are our local abattoir options going forward?

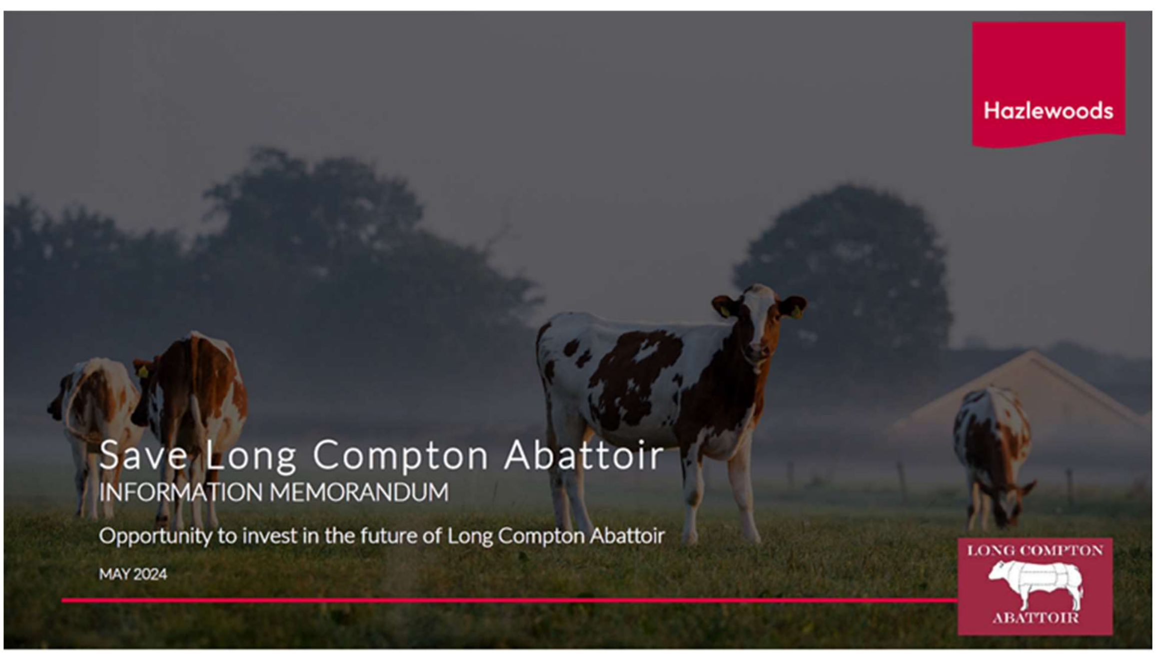
7.1 Save Long Compton Abattoir

Long Compton abattoir had served farmers across Gloucestershire, West Oxfordshire, Warwickshire and beyond since the 1920s. Its loss in January 2024 was a critical blow for many.

We fully respect the owner's decision to close Long Compton. On paper the business was viable but lack of succession, ageing facilities, tight margins, increased regulation and the loss of skilled labour took its toll. The village center site also brings challenges as well as long term change of use and development potential.

The closure and the realisation that other local facilities are under similar threat, led to a flurry of activity to try and save the abattoir. The Save Long Compton Abattoir Campaign was launched in December 2023 by a team of local farmers and stakeholders. A passionate steering group was formed with representatives from the farming and retail community, the NFU, local authorities and the NECFC/this project.

A business plan, that showed business viability and growth potential, and an investment summary was written, supported by respected accountancy firm Hazlewoods. Negotiations commenced (with help from agents, Sheldon Bosley Knight) with the aim of purchasing the whole freehold site, running and improving the abattoir for the benefit of all.



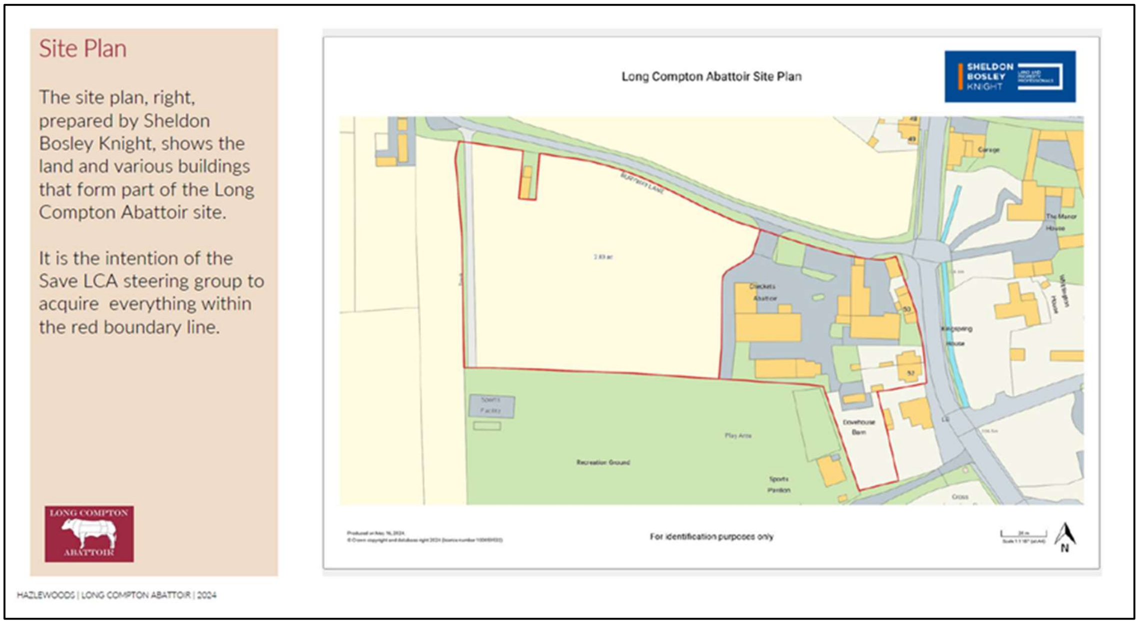


Fig 9 – The Long Compton Abattoir site (extract from the Long Compton Business Plan

Two new Long Compton companies were formed (a holding company and an abattoir company) led by three Directors – John Weaver (farmer), Chris White (farmer) and Claire White (vet and abattoir consultant).

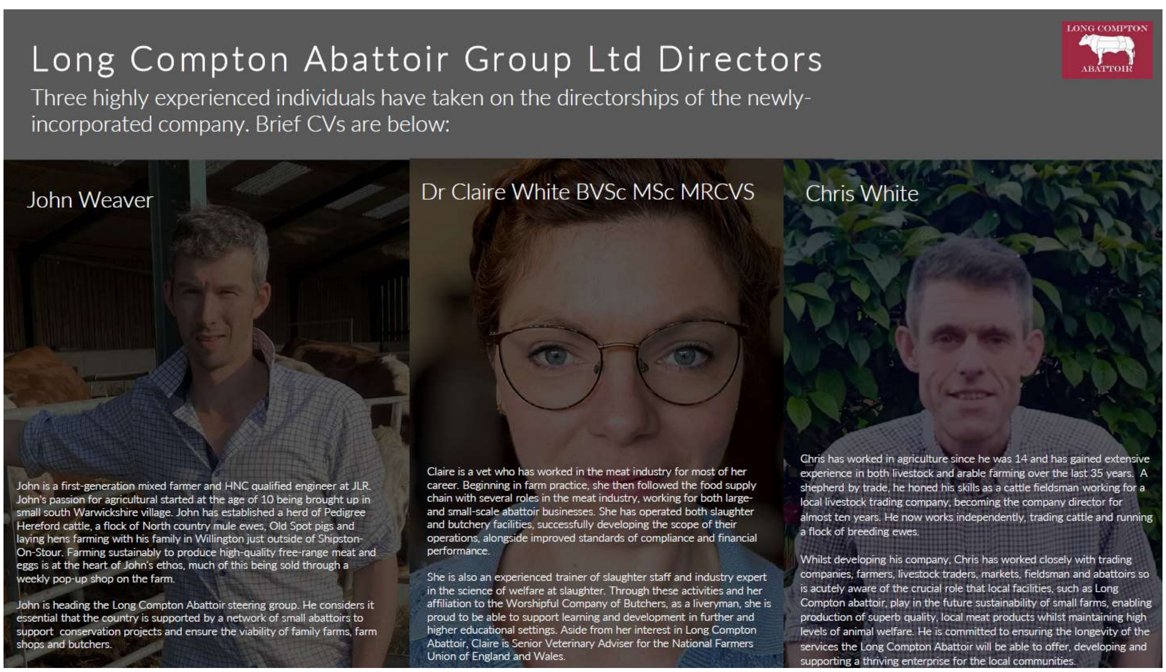


Fig 10 – The Long Compton Abattoir Group Directors (extract from the Long Compton Business Plan)

The campaign attracted expressions of interest from over 450 people who were willing to invest up to £3 million and support the campaign, plus a mortgage offer from Oxbury Bank to help cover the purchase cost. It looked promising.

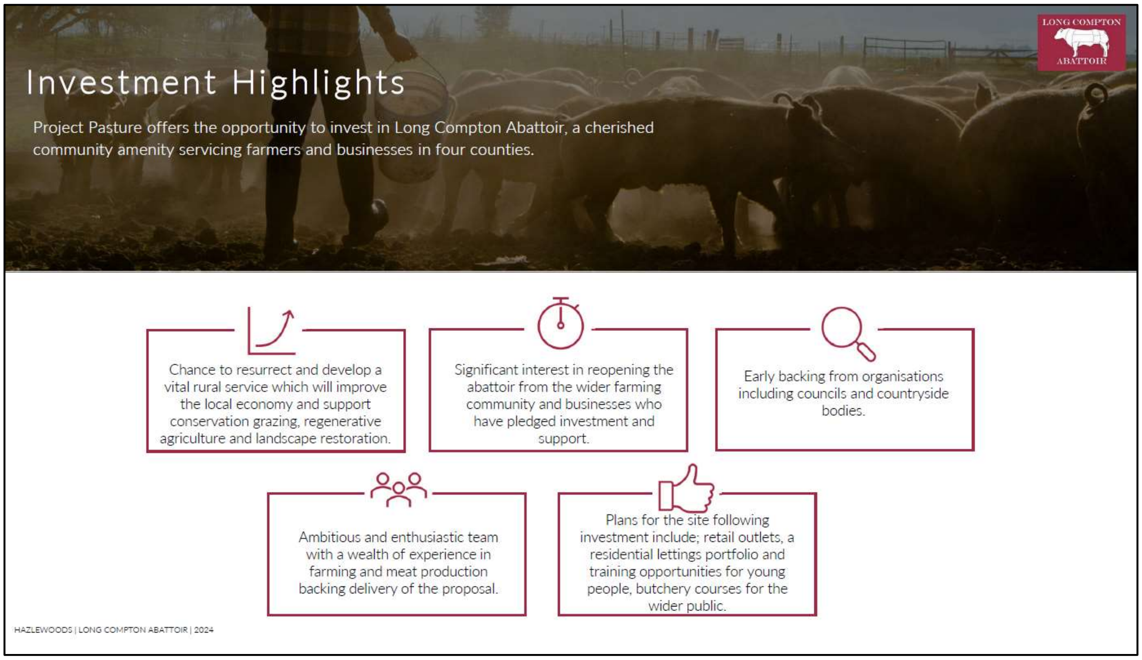


Fig 11 – Long Compton Abattoir Investment Highlights (extract from Long Compton Business Plan)

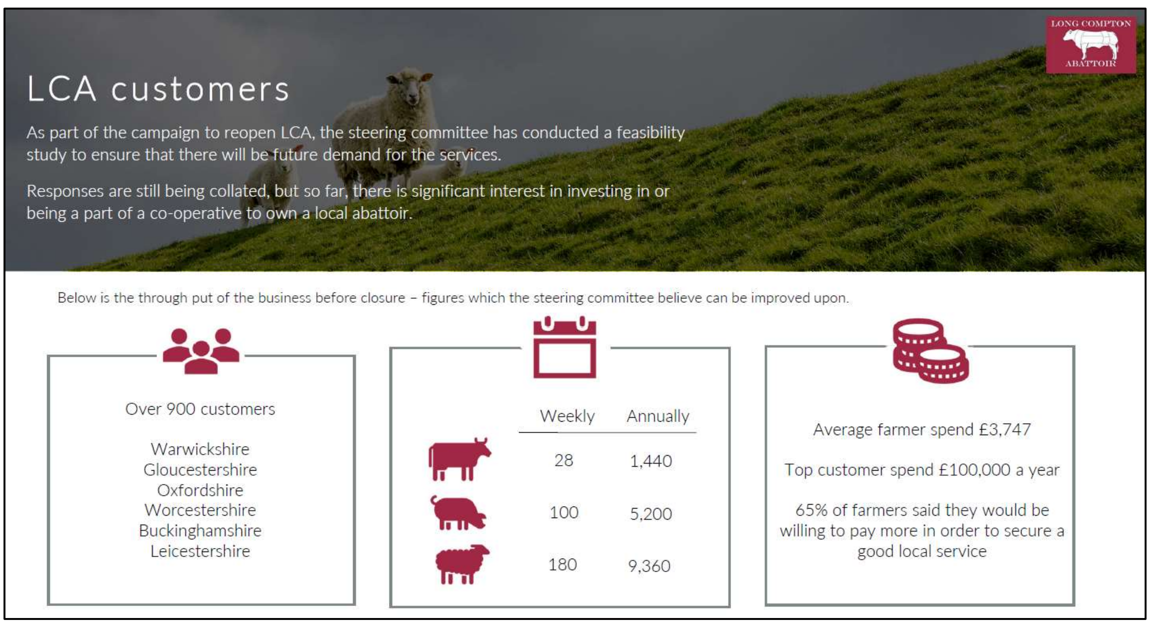
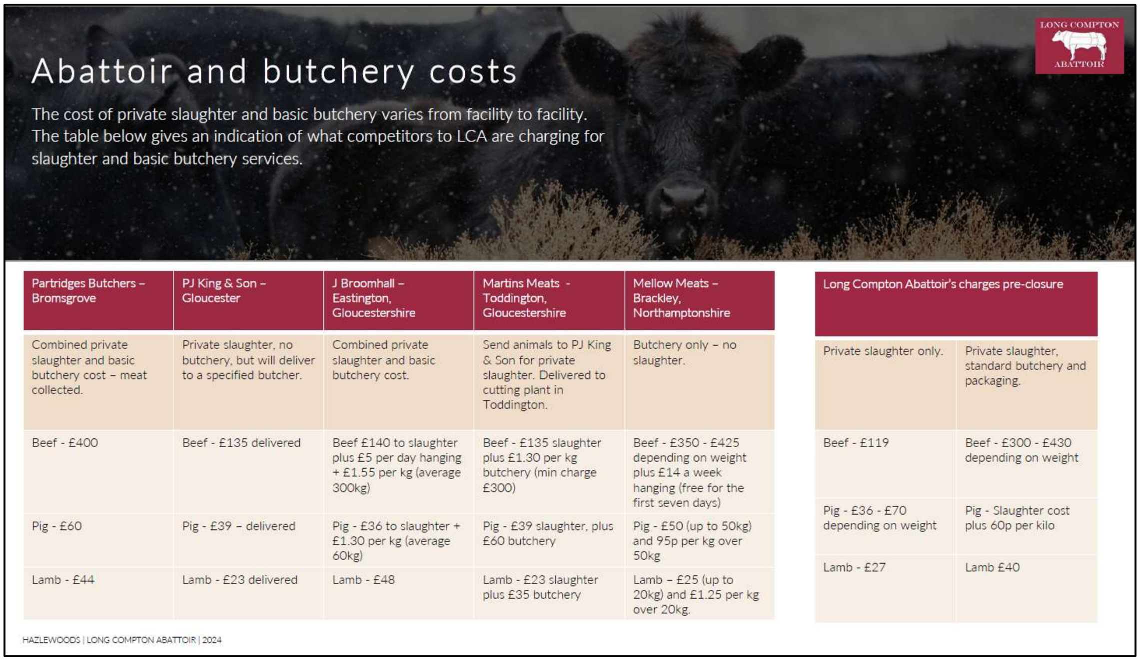


Fig 12 – Long Compton Abattoir customer summary (extract from Long Compton Business Plan)



Partridges Butchers – Bromsgrove	PJ King & Son – Gloucester	J Broomhall – Eastington, Gloucestershire	Martins Meats - Toddington, Gloucestershire	Mellow Meats – Brackley, Northamptonshire
Combined private slaughter and basic butchery cost – meat collected.	Private slaughter, no butchery, but will deliver to a specified butcher.	Combined private slaughter and basic butchery cost.	Send animals to PJ King & Son for private slaughter. Delivered to cutting plant in Toddington.	Butchery only – no slaughter.
Beef - £400	Beef - £135 delivered	Beef £140 to slaughter plus £5 per day hanging + £1.55 per kg (average 300kg)	Beef - £135 slaughter plus £1.30 per kg butchery (min charge £300)	Beef - £350 - £425 depending on weight plus £14 a week hanging (free for the first seven days)
Pig - £60	Pig - £39 – delivered	Pig - £36 to slaughter + £1.30 per kg (average 60kg)	Pig - £39 slaughter, plus £60 butchery	Pig - £50 (up to 50kg) and 95p per kg over 50kg
Lamb - £44	Lamb - £23 delivered	Lamb - £48	Lamb - £23 slaughter plus £35 butchery	Lamb – £25 (up to 20kg) and £1.25 per kg over 20kg.

Long Compton Abattoir's charges pre-closure	
Private slaughter only.	Private slaughter, standard butchery and packaging.
Beef - £119	Beef - £300 - £430 depending on weight
Pig - £36 - £70 depending on weight	Pig - Slaughter cost plus 60p per kilo
Lamb - £27	Lamb £40

Fig 12 – Long Compton Abattoir competitors (extract from Long Compton Business Plan)

Sadly, over the summer of 2024, the Directors could not reach an agreeable settlement figure with the owner of Long Compton. After all the time, effort and thought that went into the campaign and process the team were reluctant to walk away but ultimately they felt the asking price posed too much of a risk for all involved.

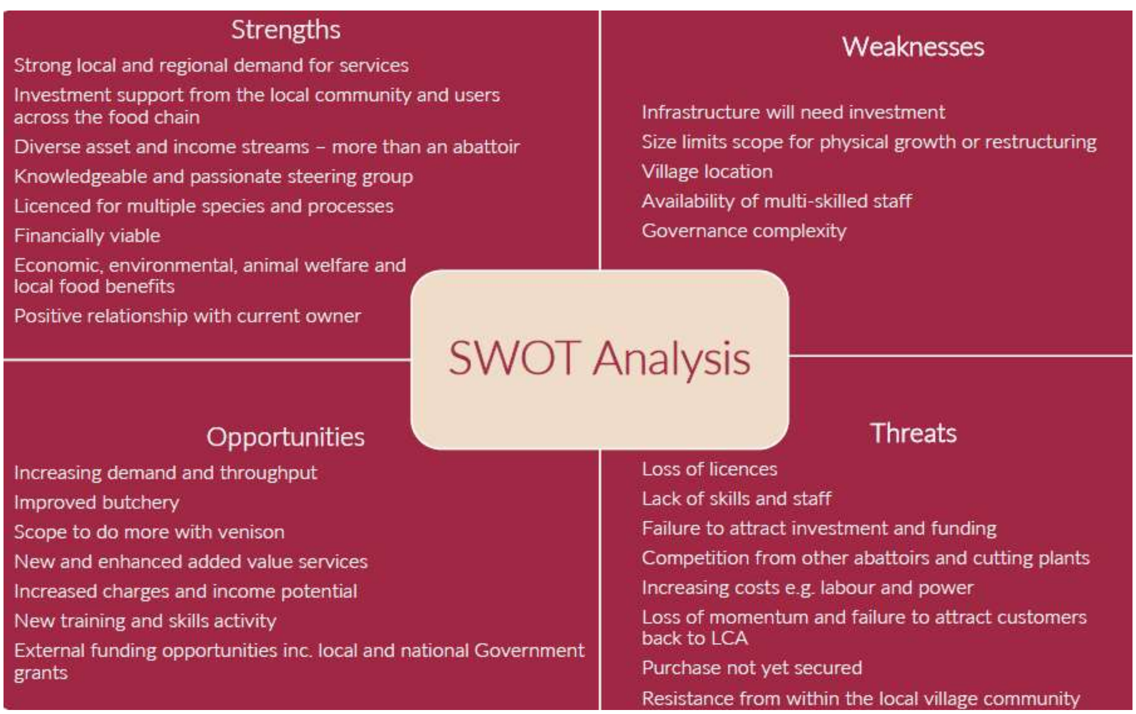


Fig 13 – Long Compton Abattoir SWOT (extract from the Long Compton Business Plan)

One key issue encountered was that the FSA approvals for the abattoir business were voluntarily surrendered by the owner during the negotiations. The surrendering of the licenses meant the new owners would have required complete FSA reapproval of the site, with substantial upgrades and cost implications to become operational again.

Negotiations ceased in September 2024 and the presumption is that the abattoir will not reopen.

A number of key lessons have been learnt from which the team can build. The LCA campaign has shown that:

- There is strong demand for an abattoir in the North Cotswolds.
- A well-run and efficiently designed operation could be financially viable.
- Proceed with caution if considering investing in an existing older abattoir – consider all options.
- An diversified abattoir that offers added value, white label, training, retail/wholesale, experiential and other services is likely to be more resilient .
- Potential investors exist from across the supply chain.
- Animal welfare and food miles are important issues to supporters but heritage, landscape restoration and food system thinking adds leverage to campaigns too.
- There is local authority and Government support available – although tapping into this is not always easy.
- Significant regulatory barriers and costs exist but they can be overcome.
- Finding skilled workers and affordable local housing will be key.
- Good communication with stakeholders and governance is important.
- Campaigns need passionate leaders and volunteers – find your local champions.
- Timely advice and professional negotiations are needed – no win/no fee options are useful here.
- Feasibility and development funding is needed at the outset to facilitate capacity building, business planning, investment appraisal, valuation, due diligence, design, planning and community engagement etc.

7.2 Build a New Abattoir

Plan B is to build a new abattoir in the North Cotswolds. Although this will take time and former Long Compton customers will struggle for an extended period, a new well designed and strategically situated facility is now considered to be the better option in the long run.

The Long Compton team have communicated to stakeholders that the next steps are to:

- Hold a steering group meeting for all those that have helped with the Long Compton Abattoir campaign so far plus any new and willing stakeholders who to want to get involved. Aiming to reset and look forward. (November 2024 - date and venue TBC).
- Support the North East Cotswold Farmer Cluster with their adding value event (November 11th - FarmED).
- Organise a larger stakeholder and workshop event for all those that want to know more about our emerging plans. We shall also workshop ideas and solutions at this event. (Jan/Feb 2025 - date and venue TBC).
- Visit a number of new build abattoirs to gather further insight (winter 2024/25)
- Scope out potential sites (winter 2024/25)
- Secure funding for the development work, build and initial operating costs (spring 2025)

- Update the business plan/costings (spring 2025)
- Work with planners to design and build our preferred option (2025/2026)

The Directors are currently looking at a number of potential sites with existing agricultural buildings and yard space. They are interested in locating others with excellent access, power and water, space for expansion etc. and have asked stakeholders to come forward with proposals.

Strategically, building a facility within an existing farming hub such as Cirencester Livestock Market (currently hosting the market, Mole Valley, Claas etc.) would make sense. However, Cirencester is currently deemed too far south from the Long Compton demand. But what if one or more our other regional abattoirs (Gloucester, Stroud, Chippenham, Witney) closed? Cirencester would then be in the middle of the demand hotspot. Long term planning is advised.

Ideally, if the Directors can secure a site and the funds to plan and complete in one building phase they would. But it is also worth considering a phased build starting in 2025 starting with a licensed lairage/livestock collection center to assist with collation and transport to existing regional abattoirs. They could then add a butchery facility so that deadstock could be brought back for cutting and value add, with the more complex and costly abattoir and waste handling facilities coming next.

The Association of Independent Meat Suppliers (AIMS), the UK's largest trade body for abattoirs across the red meat and poultry sectors, on hearing the plans to build a new abattoir they have offered the LCA team advice and support. A number of useful thoughts have been offered initially:

- Offer a Halal service. Halal is the world's biggest "food brand" and Islam the world's fastest growing religion. The market for Halal lamb and mutton is increasingly important. Stunned Halal is possible in the UK, contrary to popular belief.
- The branding opportunities associated with the Cotswolds National Landscape are significant. Develop a Cotswolds Lamb and Cotswold Beef brand.
- Ensure that every farmer sending stock to the abattoir has a Vet Attestation. This way, items such as the 1/5th quarter will have value with consolidators into export markets.
- Join AIMS. They offer advice and a grant finding service. AIMS is also currently working on a new assurance scheme which will reduce the administrative burden that schemes such as Red Tractor place on farms and processing businesses. They are due to 'soft launch' in November with a full operation launch after Easter 2025. This will reduce costs and improve efficiency along the early stages of the supply chain.

7.3 Support Our Existing Regional Abattoirs

Before making significant investment in a new abattoir consideration should be given to supporting the facilities that still exist. Where are they located? Can we help them survive and thrive? Are any looking to grow or relocate? What additional capacity do they have?

The following tables summarises the main regional abattoir options open to farmers in our catchment. This table is not an exhaustive list – some farmers are going even further afield.

None of the options listed are ideal. Most are a considerable distance away or do not kill and cut all species. Capacity is limited in some whole others face an uncertain future. Not all take horned or over thirty month cattle, or are organic and PfL accredited.

Abattoir	**J.Broomhall Ltd**	**P J King & Son**	**F Drury and Sons**
Place	Stroud (Gloucestershire)	Gloucester (Gloucestershire)	Wotton Bassett (Wiltshire)
Species	Bovine Caprine Ovine Porcine Wild Ungulates	Bovine Caprine Ovine Porcine	Bovine Caprine Ovine Solipeds
Private Kill	YES	YES	YES
Private Cutting	YES	NO	YES
Miles from LCA*	42	44	45
Time from LCA*	1 hour 15 mins	1 hour 10 mins	1 hour 12 mins
Additional Capacity	Very Limited	Yes	Yes
Comments	A popular small abattoir with high street butchery shops. Organic and PfL approved. Limited room for growth. The medium term future is uncertain when the partners retire. A long drive for those in the north of our catchment.	A good slaughterhouse used by many in the area. Good for OTM cattle. No cutting options but they can deliver to private cutting plants and butchers.	A well-established abattoir with an onsite butchers shop and delivery service. Used by a number of farmers in our catchment.

Abattoir	**Mutch Meats Ltd**	**H F Stiles & Son Ltd**	**Foyles**
Place	Witney (Oxfordshire)	Chippenham (Wiltshire)	Cinderford (Gloucestershire)
Species	Bovine Caprine Ovine	Bovine Caprine Ovine Porcine	Bovine
Private Kill	YES	YES	No
Private Cutting	YES	YES	No
Miles from LCA*	20	56	55
Time from LCA*	36 mins	1 hour 32 mins	1 hour 25 mins
Additional Capacity	Potentially	Yes	None
Comments	A well known local abattoir which has been used by a number of farmers in our catchment. Capacity for taking on more is currently unknown.	A popular abattoir used by a number of farmers in our catchment. Too far for some in our catchment although coordinated transport could be organised.	Once used by many but not doing private kill now. Could it again in the future?

Abattoir	**Joseph Morris**	**T G Sargeant & Sons**	**Farmers Fresh**
Place	Lutterworth (Leicestershire)	Uttoxeter (Staffordshire)	Kenilworth (Warwickshire)
Species	Bovine Caprine Ovine Porcine	Bovine Caprine Ovine	Ovine
Private Kill	YES	YES	YES
Private Cutting	YES	YES	TBC
Miles from LCA*	47	77	28
Time from LCA*	1 hour 20 mins	1 hour 47 mins	42 mins
Additional Capacity	Potentially	Potentially	YES
Comments	A popular small abattoir with high street butchery shops. A long drive for most in in our catchment.	A respected local abattoir and butchery. Too far for most in our catchment unless coordinated transport could be organised.	Just sheep. Used by some already. Halal assured.

Fig 14 – Regional Abattoirs Summarised

*distance and drive time based on Google Maps.

Until we can find a better local solution we should continue to support our regional abattoirs. We should:

- Keep using their services
- Have open discussions with the owners about our needs and their capacity/plans – maybe start a regional forum working with AIMS?
- Where killing capacity exists but cutting/processing capacity is tight – encourage the use and growth of other options e.g. private butchery facilities
- Organise shared (and legal) livestock transport and carcass/cut meat delivery to reduce cost and time input
- Support growth and succession planning
- Ensure any new developments cause limited competition and displacement
- Lobby Government and push for cost control (VO charges), fairer regulation, grant funding etc.

7.4 Support a Network of Mobile Abattoirs

Slaughtering animals as close to the point of production as possible is a critical part of ensuring the highest standards of welfare, sustainability and traceability. Mobile abattoirs are more common in Scandinavia, France, Australia and New Zealand. Can mobile facilities help fill the gaps in the UK created by the closure of so many small and local static abattoirs?

There are many benefits of a moveable slaughtering unit. These include:

- Animals will not have to endure the stress of transport or livestock markets
- Meat is fully traceable for the consumer
- Reducing stress improves meat quality.
- Meat has a lower carbon footprint due to reduced transport emissions
- The welfare and environmental credentials provide a marketing advantage
- Local employment
- Abattoir moveability/flexibility.

There are challenges and compromises too:

- Larger you get less moveable/flexible it becomes
- Time taken to pack up and move
- Lorry needed to move the unit
- Limited internal space
- Limited throughput
- Additional infrastructure needed – lairage, hanging rooms, cutting rooms, vet and staff rooms, waste disposal etc. Additional costs range from £50K to £250K depending on the existing site facilities and intended end use.
- Good access and yard space needed
- Costly
- A depreciating asset
- Cost per animal slaughtered is high
- Very few tested designs exist in the UK – FSA approval and enhanced support needed.

Mobile abattoirs, if they took off, could be seen as competition for static ones, old and new, potentially adding to the closure rate. Alternatively they should be seen as one part of the solution within a diverse ecosystem of facilities.

7.4.1 The Fir Farm Moveable Slaughter Unit

Troubled by the loss of small abattoirs and a desire to slaughter animals on-farm, Jane Parker and the team at Fir Farm in Gloucestershire working with the Sustainable Food Trust and Andy Gray of Elston Farm in Devon, started to research the potential of mobile abattoirs in 2018. Although mobiles had been tried before in the UK no working model existed.

They eventually chose a design by Cogemat, an Italian company with 50 years' experience in the industry. It was built and shipped to the UK in 2021 where it went through a rigorous inspection and licensing process. It has been licensed and operational since summer 2022.

Photo: Courtesy of Fir Farm

The Mobile Slaughter Unit (MSU) is seen as a prototype from which others can learn from. It continues to undergo testing and improvements. Fir Farm have recently applied to the government's Smaller Abattoir Fund to help with the constructing lairage on the farm and waste/cutting/processing 'docking' facilities. It is envisaged that the MSU will remain sited at Fir Farm for the farms own use with occasional moves to other suitable docking sites.

The Fir Farm Moveable Slaughter Unit – Lessons Learnt
What does the MSU contain? The unit is a 40-foot-long standard shipping container mounted on its own self levelling road trailer, it includes its own power generator, water heater, drainage system, hydraulic system, and air compressor. Although the manufacturers designed the unit to meet EU legislation, they applied the Italian interpretation of the legislation, based on the Italian breeds, sizes of stock and climatic conditions. Some modifications were therefore needed before use in the UK. These included: • Drover's race – required to ensure operator safety. • Stronger ramp end stop (chains were used in the original design). • Gut tray needed raising to ensure safer and easier green offal inspection. • Provision of additional electrical connections to allow a mains supply from adjacent buildings, to eliminate the need for the generator. • Modifications to beef dressing line to accommodate larger UK breeds of cattle. • Separate bleed rail for sheep and pigs. • UV equipment sterilisers to ensure efficient sterilisation and reduce running costs. **What is the throughput?** The unit is still being tested; however, a conservative estimate is that 5 cattle, 35 sheep or 25 pigs per day would be necessary to make it cost-effective. It is thought that 50-60 sheep per day would be possible depending on the set-up and facilities on-site. The unit can handle sheep and pigs more easily than cattle due to the limited space. **What are the external requirements for the location where the MSU is sited?** As the unit is moveable, it does not have the satellite functions of lairage, gut room, chilling and processing attached in the same way as a static abattoir. Any of these areas external to the unit need to be licensed by the FSA. The following additional facilities are required: • Potable water supply and electricity (3 phase for pig equipment). • Covered lairage and walkways – to include potable water, CCTV and adequate space and lighting to carry out ante mortem inspection. This can be a section of an existing barn providing it meets regulatory requirements. • Detainment pen with its own drainage, water and separate access for any suspect animal pending re-inspection. • A concrete hard standing area with drainage to aid cleansing and disinfection. • Facilities to dispose of washing water – this can be a tank or mains sewer, or the water can be spread on land providing the correct license is obtained. • Guts and by-products – the mobile unit does not contain its own gut room due to space limitations. Having a small gut room adjacent to the unit would be ideal as this would enable more of the animal to be used. • Chiller – on a mobile unit, as with some small abattoirs, the chilling space is the most limiting factor and can create a bottleneck that restricts production. The MSU chiller can only accommodate 5 cattle (or sheep and pig equivalent). Ideally, an on-site or additional mobile chiller would be available to continue carcase chilling to +7oC.

- Facilities for the Official Veterinarian (OV), including a nearby toilet.
- Further site requirements include adequate fencing to prevent escape of livestock, suitable access for a 40ft articulated lorry as well as the ability to restrict access should a notifiable disease be suspected.

How is the MSU moved?

An articulated lorry is used to tow the MSU.

What sort of license does the MSU need?

The MSU is currently subject to the same licensing requirements as any other red meat slaughterhouse. One difference is that the site and facilities and the MSU must be approved together. Currently the location cannot be approved without the MSU being present.

Does the MSU need a CPH number?

A County Parish Holding (CPH) number is required for the mobile unit and a separate number is needed for the licensed area, to correctly report the movement of livestock. The RPA have given assurances that applications for CPH numbers will be expedited swiftly and will not have any impact on the farm's RPA payments.

What are the costs of an MSU?

Base costs for the unit in 2020-2021 were £250k, plus further improvements. This cost may be higher now; however, it would still be significantly less than the cost of a new static abattoir. Running costs and typical charges are still being worked out as the unit is currently undergoing rigorous testing and improvements.

Grant funding may be available to support with the build costs. The Fir Farm project received RDPE funding via the Growth Programme for 40% of the capital costs.

Further information is available at www.firfarm.co.uk/mobile-slaughter-unit

What might the future operational or business model look like? Fir Farm's view is that hub sites, which include the additional facilities such as lairage, chill room and cutting room, would be the most viable option for moveable units. These could be set up, run, and shared by farmer-led groups such as the NECFC. An MSU could then move between several farmer hub sites, shared by the surrounding farmers, rather than each individual farm needing to become licensed and provide the correct facilities. Another option is to use the MSU as a static modular unit as it could provide a more affordable way of establishing a new abattoir or of avoiding the costs of a rebuild. This could work well in locations that already have FSA approved chillers, processing, and butchery facilities. The LCA team should consider this option.

7.4.2 Other Mobile Options

Other mobile options exist – some bigger and some smaller. None have been tested as yet in the UK although some farmer led groups are currently considering them.

Further investigation is needed to rule these options in or out. Funding will be required and FSA support and legislation flexibility will be needed.

KFG (Finland) - mobile truck transported slaughter

KFG offer a number of larger transportable options costing from £250,000 to £750,000. They would be ideal for larger sites. Can consist of 2, 3 or 4 articulated units.

- World's leading slaughtery transported by truck
- European Union-certified and Halal-compliant.
- Improved animal welfare and meat quality due to decreased animal transportation needs.
- Slaughtering capacity of 10-30 cattle/camels or 35-50 sheep/lambs per 8 hours.
- The mobile slaughtery consist of a bleeding and slaughtering unit, a cold storage for carcasses and staff area.
- Constructed in Finland with service-agreement and all spare parts manufactured in-house.

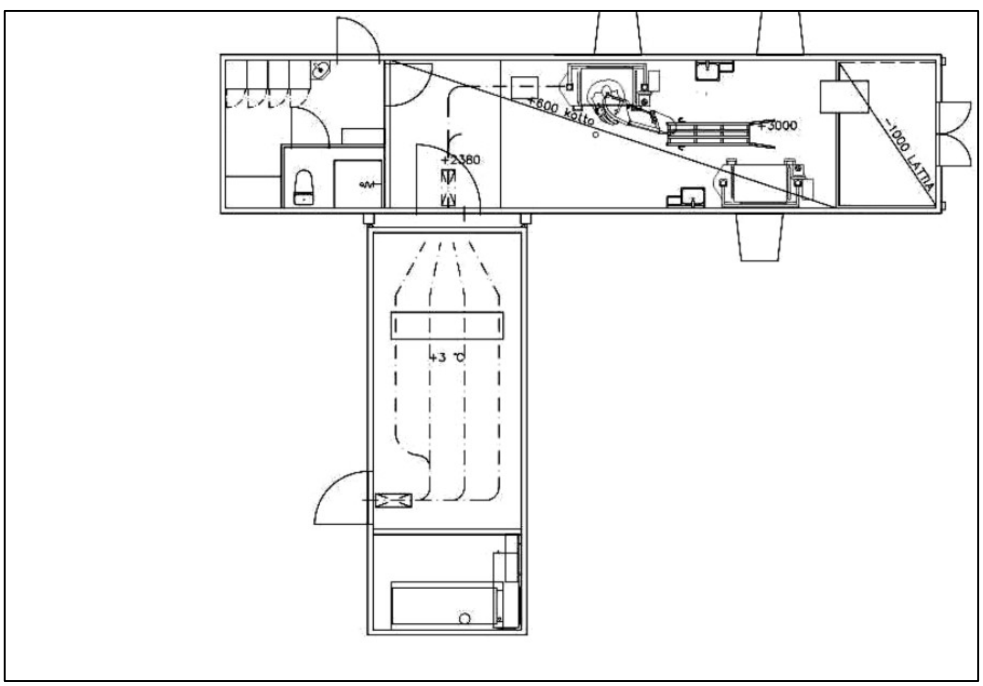


Photo: Courtesy of KFG

The Simon Cutter Model

Local farmer, Simon Cutter, has been looking at a smaller and more flexible unit based on a lorry back with fold out sides, crane and detachable chiller/hanging units.

- Much smaller scale and more moveable - 30 foot x 10 foot
- Ideal for smaller farms and lanes
- 2 men - 10 cattle, 50 sheep or 20 pigs per day – depends on chiller capacity
- Can comes for a day on smaller farms – kills, cools, cuts and leaves.
- £175K+

Additional needs would include processing, waste handling, a welfare unit for the vet etc costing £50K to £150k depending on existing site facilities and intended end use/scale of operation.

7.5 Think Big – The Cotswold Centre of Red Meat Excellence

A number of stakeholders have suggested we need to think big. If we can't do it in the Cotswolds we can't do it anywhere!

Consideration should be given to developing a pioneering and state of the art larger scale abattoir with associated high welfare lairage, cutting plant, processing/adding value facility, white label production space, butchery and hospitality training academy, a catering arm and retail outlet. Innovate and use technology. Draw on the experiential bringing the public in. Celebrate great meat production and local food. Base it on a working farm showing the farm to fork red meat chain. Build a hub/funnel for other local produce too including fresh vegetables, salad, grains and dairy from the district. Ensure poultry and venison are included too.

Maybe the new Long Compton could grow into this over time? A diversified abattoir business would be more resilient and offer more to the local economy and consumer. The concept was included in the business plan showing intent and aspiration. Further feasibility work is now needed.

Fig 14 – Long Compton Abattoir Opportunities
(extract from the Long Compton Business Plan)

7.6 The Value of Adding Value

Which ever abattoir option, or set of options is developed, the value of adding value must be emphasised and built into the business and training model. Adding vale can help make a small farming or processing business more profitable and resilient, and increase the local food multiplier effects.

Below is an indicative example shared by Rich Summers (The Free Range Butcher) at the projects' abattoir event at FarmED in March 2024. It highlights how we can turn a 350kg R4L native breed beef carcass into £7500 worth of product, increasing the margin per animal by 600%.

Table X - Adding Value Potential	
Standard Route to Market	**Optimised Product Range – Direct Sales**
Beef animal sold direct to an abattoir or processor at £5.00/Kg/Deadweight = £1,750.00	28.280 Kg Prime Steak £38/Kg = £1,075 13.460 Kg Offal £11/Kg = £148 12.941 Kg Charcuterie £ 55/Kg = £712 1350 x 250g Ready Meals @ £3.10 = £4,185 192 x 250g Cooking Tallow @ £3.00 = £576 216 x 250g Bone Broth @ £3.75 = £810.00
Revenue = £1,750	**Revenue = £7,505**
Average Rearing cost = £1,000 Adding Value Costs = £0	Average Rearing cost = £1,000 Adding Value and Marketing Costs = £2000
Gross Margin = £750	**Gross Margin = £4505**

We should encourage more knowledge exchange work on adding value and support facilities that can offer this service.

8 A SELECTION OF LOCAL STAKEHOLDERS

Within the complex North East Cotswolds red meat eco-system there are numerous stakeholders. Many have been contacted, surveyed, interviewed or reviewed as part of this project.

There are too many to map accurately within the scope of this work but below (in no particular order) are some examples of key stakeholders (in addition to the NECFC and local abattoirs already discussed) and the role they do/can play in preserving and building a resilient local meat supply chain. We have also highlighted a relevant need or opportunity for selected stakeholders to help guide us to our future priorities.

Paddock Farm – Farmers, Butchers and Retailers
Lower Brailes - Oxfordshire
www.paddockfarm.fm

Paddock Farm, led by new entrants Jon and Nick Francis, is home to a herd of 100% pasture-fed Hereford cattle, a herd of Tamworth pigs, a flock of free-range chickens and a market garden growing no-dig vegetables.

The farming system incorporates regenerative farming techniques which recognise soil as their most important asset and aims to regenerate soil and ecosystems whilst producing delicious food.

Top quality meat from the farm, plus occasional carcasses from other local farmers who share the Paddock Farm ethos, is sold direct from the butchers shop in Lower Brailes, to other local farm shops and to catering establishments. They ship across the region and country.

Jon and Nick were regular customers of Long Compton Abattoir. They now go further afield adding substantial time, cost and food miles to their supply chain.

Need: A new local abattoir that offers excellent lairage and killing services (cattle, sheep and pigs)

ASSOCIATION OF aims INDEPENDENT MEAT SUPPLIERS

The Association of Independent Meat Suppliers (AIMS), the UK's largest trade body for abattoirs across the red meat and poultry sectors.

National coverage

www.aims2001.co.uk

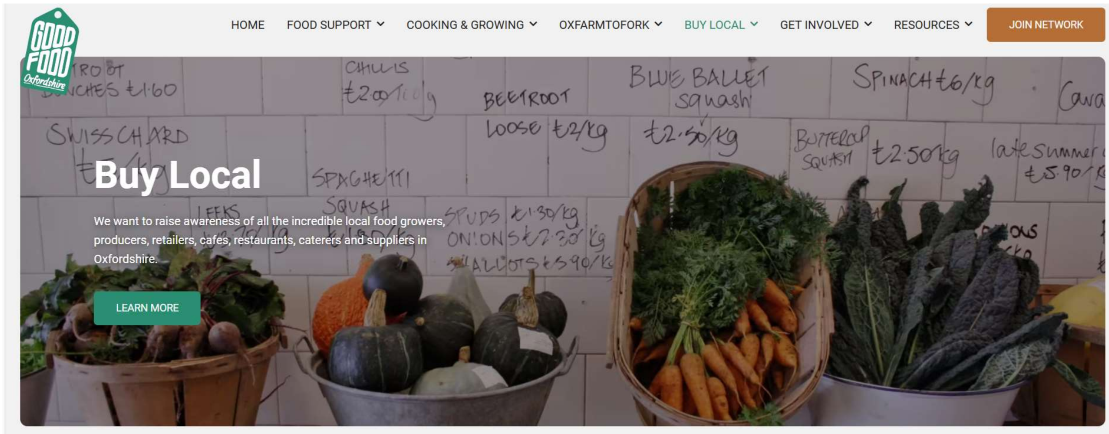
Role: Supporting and advising stakeholders in the meat supply chain

Good Food Oxford – Campaigners and Coordinators

Across Oxfordshire

www.goodfoodoxford.org

The GFO vision is that everyone in Oxfordshire can enjoy the healthy and sustainable food that they need every day. To achieve this vision they aim to identify, catalyse and support actions by individuals and organisations that promote a fairer, healthier and more sustainable food system for Oxfordshire.



GFO is a network of over 150 organisations, including local food businesses, farmers and growers, institutions, and community groups who have all signed the Oxfordshire Good Food Charter demonstrating their commitment to change. Working with partners they guide vision and strategy, advance policy, coordinate and support aligned activities and build public will through events and campaigns.

One key activity is OxFarmToFork which enables Oxfordshire's institutions (colleges etc) to buy fresh produce (and some meat) directly from local agro-ecological food producers.

Need: More support for the GFO OxFarmToFork initiative including funding, expertise and producers.

FarmED

The FarmED mission is to provide learning spaces and events that inspire, educate and connect people helping them build sustainable farming and food systems that nourish people and regenerate the planet.

FarmED is at the heart of the NECFC and our food system work.

Shipton Under Wychwood

www.farm-ed.co.uk

Role: Delivering and hosting knowledge exchange events that support a more diverse and resilient local food system

Rich Summers – Butcher, Curer, Teacher, Consultant
Across the UK
www.summersandco.uk / www.gamechangercharcuterie.co.uk

Rich has worked in the British meat industry for over 30 years and gained an appreciation of the finest quality British livestock and game along with an admiration for those who dedicate their time to producing it.

Drawing upon his experience as a butcher, charcutier, slaughterman and occasional stockman he has developed a forensic knowledge of ethically farmed and humanely slaughtered livestock and the importance of how these factors influence meat quality and in turn, a healthy and balanced human diet.

Rich helps producers develop a range of innovative, value added products ranging from cured and cooked meats, pies and ready meals, smoked meat products along with salamis and whole muscle air dried meats. He also a trainer and consultant.

His latest venture involves delivering training and product for the Game Changer Venison Charcuterie Academy working out of Sheepdrove.

Role: Delivering training and advice on high spec butchery and adding value to red meat

Pasture for Life – Farmer Organistion
Across the UK
www.pastureforlife.org

Pasture for Life promote the unique quality of produce raised exclusively on pasture, and the wider environmental and animal welfare benefits that pastured livestock systems represent. They offer members pasture fed accreditation, knowledge exchange and mentoring through their farmer network. They are also campaigning for clearer labelling of meat. Many farmers in the Cotswolds region are involved with the PfL.

Role: Supporting the branding and routes to market for pasture fed beef and lamb

Bruern Farms - Farmers, Food Entrepreneurs and Retailers
Bruern - Oxfordshire
www.bruernfarms.co.uk

Bruern Farms, led by Henry Astor, are passionate about three things: rebuilding a healthy ecosystem, growing wholesome nutritious food and building a vibrant community.

As well as milling their own heritage grains, the farm shop and café serve food from the farm - from sourdough and seasonal veg, to saddleback pork, wild venison and English long horn beef.

Henry is also working with GFO supplying produce to Oxford Colleges.

Need: Collaboration and support to launch a Cotswold cooperative and brand for meat and other locally grown produce

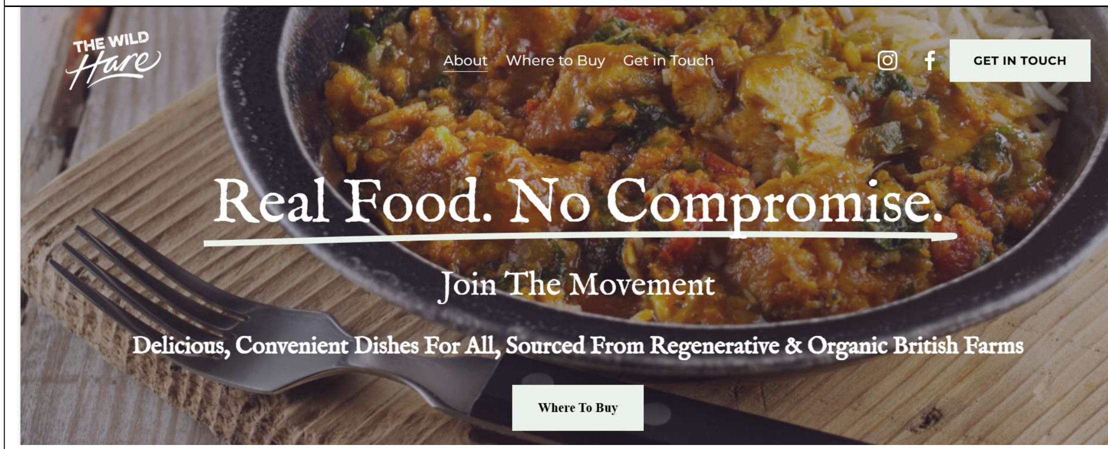
OINK – Butchers And Farm Shop
Whelford – Cotswolds
www.oinkbutchery.com

Marcus and Poppy set up Oink in 2022 with the firm belief that top-quality, British meat should be available to anyone. With produce directly from the family farm near Cheltenham, they promise quality and honesty. We also run Oink event catering and offer private butchery services (all species) to other local farmers and small-holders:

- Full butchery to client specifications
- Packaged and labelled ready for retail or the freezer
- Specially designed labels with artwork or logos
- Hanging space in dry ageing fridge
- Collection from abattoir and delivery back to farm
- Friendly, professional and honest service - lasting relationships are important
- Sausages and burgers making
- Boxing up

Role: Delivering meat cutting and added value for local farmers

The Wild Hare – Ready Meals and Sustainability Champions
Cotswolds/UK wide
www.thewildharegroup.co.uk



The Wild Hare concept was born in the Cotswolds. Local food entrepreneur, Dominie Fearn, has created a brand, ethos and suite of recipes with a difference, now selling via Ocado, Abel & Cole and Cotswold Fayre. All the main ingredients in her nutritious and tasty ready meals are sourced from regenerative and British farms. Each farm is monitored and supported through transition.

Dominie originally launched using Cotswold beef and lamb. But fragmented supply chains and business growth led her to source from other regenerative farms across the UK.

Role: A premium customer for locally reared and regenerative produce

The Public House Group
Cotswolds/London
www.publichousegroup.com

There are approx. 38,000 pubs in the UK, this carries a lot of purchasing power.

The Public House Groups' mission is to reconnect pubs back to UK farmers and food producers.

They believe that pubs can be key players in creating a mindful food system within the UK. Using British forward-thinking farms and producers we can reduce the impact on our environment and strengthen the British food economy by promoting the use of fresh, seasonal produce. PHG are building a direct-from-source supply chain with these farmers and producers.

The Group run pubs in London and the Cotswolds. They also manage the market garden at Bruern.

Coming soon….The Public House School – a comprehensive training program focusing on every part of hospitality including food sourcing.

Need: A coordinated supply of great produce from the local area

Love British Food

Love British Food aims to effect change in the way that food is sourced. One of the leading organisations advocating a strong 'Buy British Food' message. And the only organisation working with those responsible for sourcing food in our schools, hospitals and other public sector organisations to make British food their preferred supplier of choice. They also host a Local Food Directory.

www.lovebritishfood.co.uk

Role: Promoting sustainable supply chains and facilitating collaboration with institutional buyers such as the NHS

There are many others, including:

Abattoir Sector Group	Industry Body
Abingdon and Witney College	Skills and Training
Conygree Farm	Farmers And Direct Sales
Cornbury Park/Howdens	Farmers And Caterers
Cotswold Livestock Marketing	Livestock Marketing And Haulage
Cotswold National Landscape	NGO
Cotswolds Beef	Farmers And Direct Sales
Daylesford Organics	Farmers And Retailers
DeerBox (Mike Robinson)	Direct Sales
Ethical Butcher	Butcher/Retailers (London)
Fir Farm	Farmers, Direct Sales and MSU
Food Standards Agency	Regulation and Inspection
Jeremy Clarkson/Didley Squat	Farmers And Direct Sales
Jesse Smiths	Butcher/Retailers (Cotswolds)
Local Authorities	Policy and Strategy
Martins Meats	Farmers and Butchers
Mellow Meats	Butchers and Retailers
Old Farm	Farmers And Direct Sales
Oxford Colleges	Institutional Food Buyers
Primal Meats	Retailers
Pudlicote Farm	Farmers And Direct Sales
Royal Agricultural University	Research and Education
Sainfoin Centre	Education
Sandy Hill Farm	Farmers And Direct Sales
Sustainable Food Trust	NGO
Todenham Manor Farms	Farmers And Direct Sales
Willowbrook Farm	Farmers And Direct Sales (Halal)

9 RECOMMENDATIONS

If we are to build a more resilient red meat supply chain in the North East Cotswolds we must ensure it has capacity and diversity across the key elements of the system including production, processing, distribution, retail/wholesale and consumption. The following recommendations cover interventions that cut across these themes.

9.1 A:Abattoirs

A1) Support the Long Compton Abattoir new build campaign, helping with:

- Governance and communication
- Business planning and feasibility studies
- Land acquisition
- Design and build
- Funding and investment
- Staffing
- Skills
- Operations
- Routes to market

A2) Support our existing regional local abattoirs.

- Use their services
- Have open discussions with the owners about our needs and their capacity/plans
- Consider starting a regional red meat forum working with AIMS
- Where killing capacity exists but cutting/processing capacity is tight – encourage the use and growth of other options e.g. private butchery facilities
- Organise shared livestock transport and carcass/cut meat delivery to reduce cost and time input
- Support growth and succession planning
- Ensure any new developments cause limited competition and displacement
- Lobby Government and push for cost control, fairer regulation, grant funding etc.

A3) Support the mobile abattoir concept across the region.

- Share and expand on the lessons learnt from Fir Farm
- Back and nurture any new proposals for mobile units in the region
- Investigate the feasibility of 'docking stations' on farms for mobile abattoir use

A4) Plan for the longer term and think big.

- Consider building a strategic central Cotswold facility within an existing farming hub.
- Explore the creation of a pioneering the Cotswold Centre for Meat Excellence (working title) – a state of the art larger scale abattoir with associated high welfare lairage, cutting plant, processing/adding value facility, white label production space, butchery and hospitality training academy, a catering arm and retail outlet.

Key stakeholders include: LCA Directors, abattoir owners, local authorities, Defra, FSA, farmers, butchers, retailers, wholesalers, NFU, Sustainable Food Trust, Abattoir Sector Group, AIMS and investors.

9.2 B:Butchery and Adding Value

B1) Recruit and train new butchers and slaughterman.

- Develop and promote apprenticeships
- Support labour pools
- Ensure any new local abattoir project and mobile units offer rewarding pay levels, good working conditions and access to affordable local housing

B2) Promote enhanced butchery and added value.

- Develop and run training courses on adding value
- Share enhanced cutting specs

B3) Develop the meat academy concept

- Ensure that great butchery and adding value is at the heart of LCA and/or Cotswold Centre for Meat Excellence concept

Key stakeholders include: LCA Directors, Butchers, slaughtermen, AIMS, National Craft Butchers, trainers, colleges (Abingdon and Witney), farmers, retailers….

9.3 C:Collaboration

C1) Facilitate more collaboration across the sector

- Organise a supply chain networking event/forum
- Facilitate new supply chain relationships
- Feed the farmers' voice into local food policies and strategies

C2) Develop a collaborative local marketing campaign and route to market project

- Develop a new integrated Cotswold meat brand or coop
- Make more of existing local food directories
- Support Good Food Oxford's work and the OxFarmToFork initiative

C3) Seek institutional dynamic procurement opportunities

- Look for opportunities to channel and supply the public sector (NHS, schools, prisons etc).

Key stakeholders include: Local authorities, Good Food Oxford, Love British Food, Gloucestershire Food and Farming Partnership, Oxford Colleges, Partners In Purchasing, Pasture for Life, Public House Group, CNL, farmers, processors, caterers and the hospitality sector.

9.4 D:Deer and Venison

D1) Stimulate and supply local/regional venison markets

- Launch a local/regional venison campaign
- Develop a dedicated marketing campaign for muntjac

D2) Improve the communication and cooperation between deer managers, dealers and processors

- Facilitate communication between deer managers, dealers and processors
- Map and link communal deer larders
- Streamline carcass collections

D3) Develop and deliver new training opportunities for deer and venison sector

- Deer management
- Stalking
- Processing and adding value

D4) Seek specific funding to improve venison processing and retail infrastructure

- Create a cooperative larder and cutting facility to ensure high quality produce.
- Public – Defra, CNL, Local authorities.
- Private – landowners and supply chain stakeholders.

Key stakeholders include: Landowners, stalkers, abattoirs, butchers, wholesalers, retailers, buyers, trainers, Game Changer Venison Charcuterie Academy, British Deer Society.

9.5 E:Exchange of Knowledge

E1) Develop a Theory of Change to help stakeholders develop and monitor training and skills needs and impacts.

- Identify the knowledge gaps and needs
- Develop a monitoring and evaluation framework

E2) Develop and deliver knowledge exchange and skills programs across the supply chain

- Adding value
- Benchmarking
- Marketing
- Food entrepreneurship
- Selling direct
- Butchery
- Slaughter skills
- Consumer focused events

Key stakeholders include: Colleges, Sector Skills Councils, FarmED, trainers, educators, mentors, funders.

9.6 F:Food Entrepreneurship

F1) Support local food entrepreneurs and start ups

- Nurture, link and supply existing business
- Promote local farmer producers and food businesses
- Organise food focused events bringing local business and consumers together
- Source and share funding opportunities

Key stakeholders include: Existing business, new entrants, colleges, FarmED, funders.

9.7 The Role of the North East Cotswold Farmer Cluster

The North East Cotswold Farmer Cluster, and it's members and stakeholders, have an important role to play across all the recommendations listed above. But where should effort be focused in light of limited capacity and funds?

It is suggested that in 2025 the steering group and leadership team consider ways it can best:

- Support the Long Compton Abattoir campaign (A1), local mobile abattoir activity (A3). and the Centre of Excellence concept (A4/B3).
- Foster collaboration and high impact supply chain networking events/fora (C1).
- Work with and promote existing local food networks such as Good Food Oxford (C2).
- Support better communication and cooperation between deer managers, dealers and processors (D2).
- Develop a Theory of Change (E1) and a suite of cross cutting supply chain themed knowledge exchange events (E2).
- Promote local farmers and food entrepreneurs (F1).

The Cluster can act as an important funding bid lead and funnel for this body of work.

END

10 REFERENCES

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11 APPENDIX

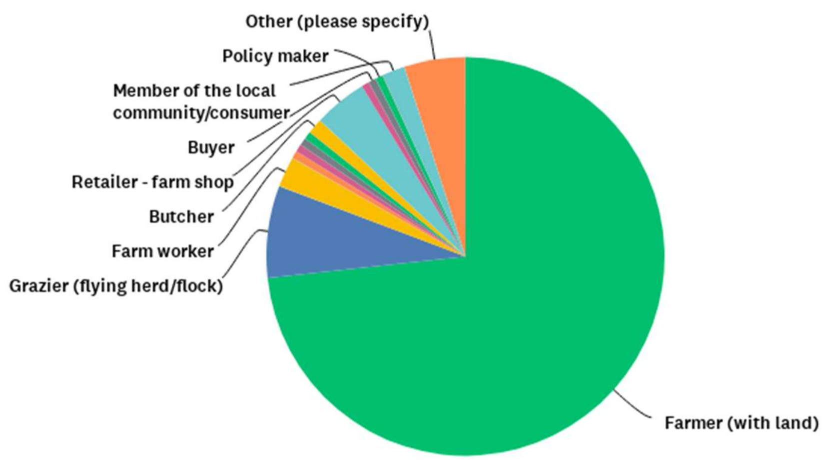
11.1 Appendix 1 - Analysis of the Northeast Cotswold Farmer Cluster Abattoir Survey

The online survey ran from December 2023 to March 2024. 161 responses were received. The following analysis was undertaken in March 2024.

Q6 - Are you a member of the North East Cotswold Farming Cluster?

The respondents were predominantly from outside of the North-East Cotswold Farmer Cluster with 75% replying "No".

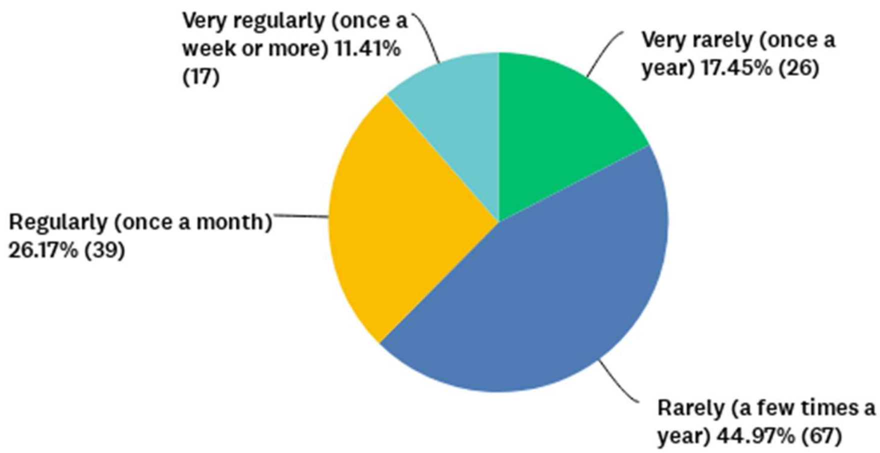
Q7 - What is your main role in the local meat supply chain?



The respondents overwhelmingly classified themselves as "Farmer (with land)" - just below 75%. The second highest, Grazier, only made up just above 7.5% of the respondents.

Interestingly, 7 respondents identified as members of the local community. This demonstrates the importance of providence in meat slaughter to various stakeholders, even those at the end of the supply chain.

Q9 - How often do you use a local/small abattoir for private kills?



Just under half (45%) of the respondents only use their local abattoir a few times a year for private kills. Around 18% use their local abattoir very rarely (once a year). Around a quarter of the respondents use their local abattoir regularly (once a month), but very regularly (once a week or more) was the least frequent, with 17 respondents (11.41%).

Q11- How many animals do you send in a typical year?

There were 85 responses to this question. The total number of beasts sent per year from all the respondents is 18,243. They have been sorted into the mean average number of livestock per year by type :

- Cattle – 21 (100 respondents)
- Sheep – 123 (108 respondents)
- Pigs – 31 (73 respondents)
- Goats – 25 (21 respondents)
- Deer – 1 (14 respondents)
- Poultry – 5 (13 respondents)

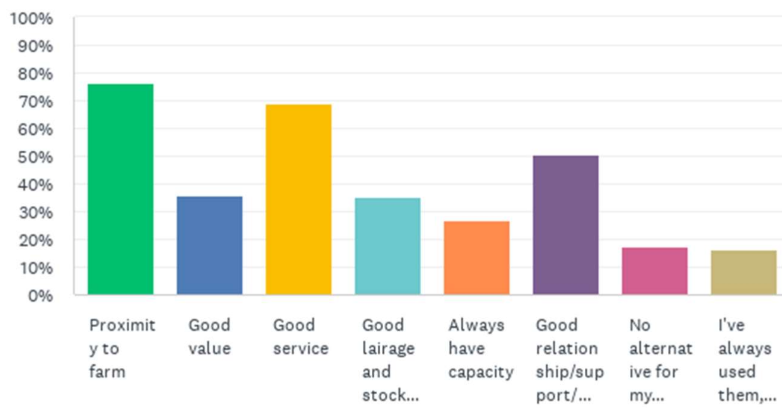
Q12 - Which abattoir do you use the most?

Long Compton was mentioned most frequently, with around 106 of the respondents claiming they use the abattoir for private kill, most often exclusively. Long Compton therefore provides 71% of the private kills for those surveyed. After Long Compton, the next most frequently mentioned abattoirs in the provided responses are Mutchmeats, Farmers Fresh and Broomhalls. Additionally, there are various other abattoirs mentioned sporadically, such as Kings, Evans & Son, Dury, Morris of South Kilworth, Wootton Organic, and Hf Stiles.

Some respondents mention changes in their usage of abattoirs over time. For example, one respondent mentions using Long Compton until a certain point, then switching to Mutchmeats. This suggests that factors such as location, quality of service, or changes in business needs might influence the choice of abattoir.

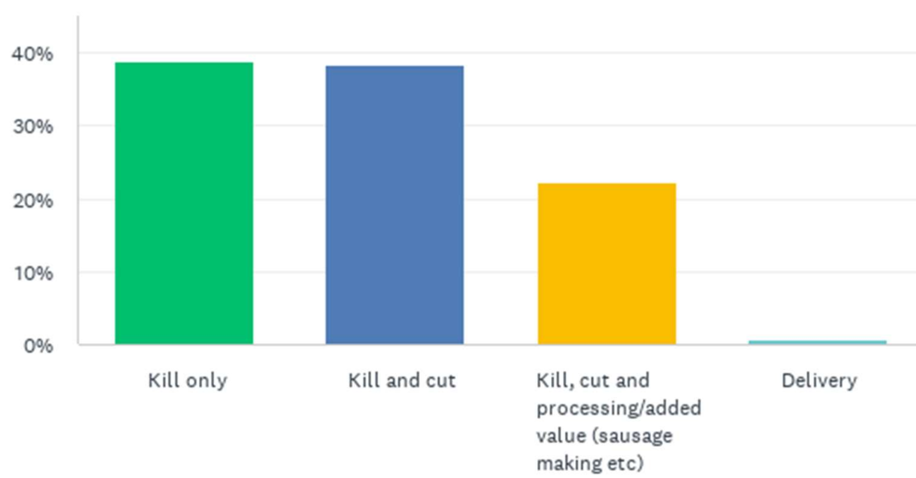
Some respondents mention using private slaughterers or on-farm slaughter for their needs, indicating a preference for customized or specialized services.

Q14 - Why do you use your preferred abattoir?



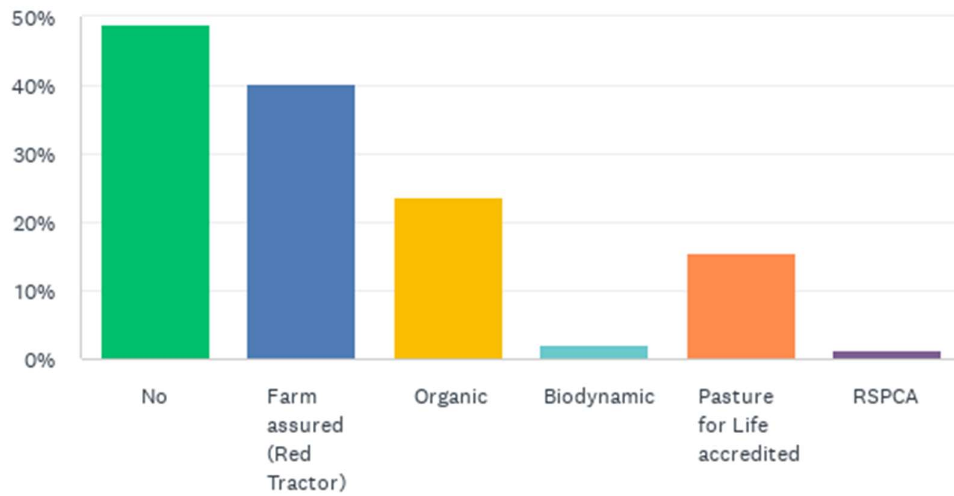
Three-quarters of respondents (76%) chose their preferred abattoir based on its proximity to their farm. A high percentage of respondents, 68%, value good service when selecting an abattoir. Half of the respondents, 50%, consider a good relationship with the abattoir, along with support and advice, as an important factor. Only around one-third of respondents (35%) prioritize good value when choosing an abattoir. This is matched in choice by good lairage. In less frequently selected options, the data also highlights slight importance of individual needs, value, and historical loyalty in the decision-making process – but remain far less crucial than those mentioned prior.

Q15 - What services do you use the most?



While a significant portion uses the abattoir for "Kill Only" or "Kill and Cut" services, both 38%, there is also notable engagement in more comprehensive services involving processing and added value (just over 20%). The limited mention of delivery services (1 respondent) suggests that, for the surveyed group, the focus is more on the processing and handling of meat at the abattoir rather than direct delivery to end consumers.

Q16 - Are you farm assured?



A slight majority of respondents ~ 50% indicated that they are not farm-assured. However, there were a lot of respondents (~40%) who mentioned being farm-assured, specifically through the Red Tractor scheme, and approximately one-fourth of the respondents (~25% mentioned having organic certification. Additionally, there is a high representation of other certifications, most notably Pasture for Life, as well as some mention biodynamic farming, and only one respondent is RSPCA assured.

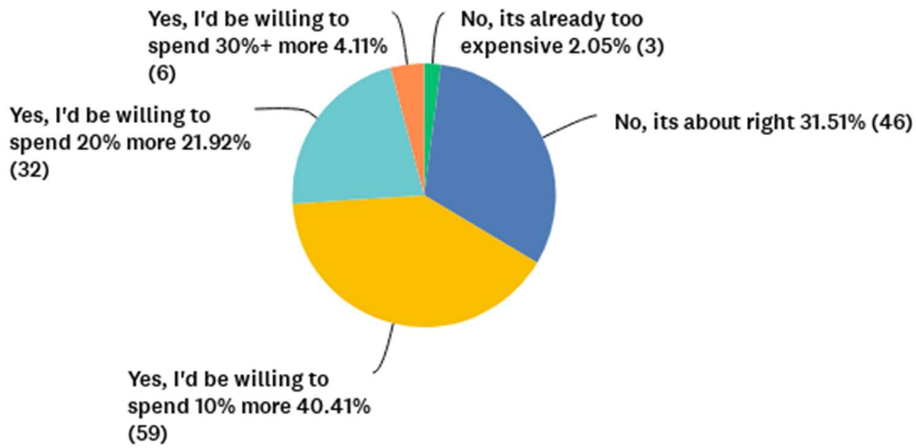
Q18 – How can your current abattoir services be improved?

The most common suggestion for improvement for the Long Compton abattoir is to stay open. This sentiment is expressed multiple times throughout the responses, indicating a strong desire among respondents for the abattoir to remain operational. Other suggestions for improvement include better butchery services, improved packaging, longer hanging times for meat, more personalized cutting options, and better communication with customers.

Q19 - What is your average abattoir cost/spend each year?

The reported amounts vary from as low as £75 to as high as £100,000. The mean average of all the responses is calculated to be £3,746.51. This omits those who responded with general terms like "n/a," "not sure," or "unknown."

Q20 - Would you be willing to spend more for an improved abattoir service? Presuming you send the same number of animals per year as currently, which statement below do you most agree with?



Only three respondents claimed that the current cost of their abattoir service was currently too expensive. A reasonable proportion, 31%, argued the cost of their abattoir services was about right at its current price. A significant portion of respondents (~60) expressed a willingness to spend more, either 10% or 20%, indicating a general openness to paying additional costs for an improved abattoir service. However, there is only a relatively small percentage (4.11%) willing to spend 30% or more. This suggests that there might be a threshold beyond which the cost becomes less acceptable to the respondents.

Q21 What will be the impact on your business if your current abattoir closes?

The potential closure of the current abattoir in Long Compton raises significant concerns among respondents, encompassing increased costs, challenges to animal welfare due to longer travel distances, and potential impacts on business viability. It is made clear that the current abattoir plays a crucial role in ensuring the quality and traceability of meat products, and its closure might lead to a reassessment of business models, reductions in livestock production, and even considerations of ceasing farming operations altogether. It was also made evident that there are apprehensions about the reliability of alternative abattoirs – especially in terms of distance and animal welfare - as well as the broader impact on the local community, including potential disruptions to local nutrient-dense food availability.

Interesting quotes:

"Our small farm shop would struggle and we would lose income opportunities and a connection to our local community. We would be solely reliant on selling through live markets."

"Devastating. We will have to go to Gloucester or much further north so this will significantly increase travel time and costs and be detrimental to our animals' welfare and the quality of their meat."

"Massive!! Only one abattoir left in Hampshire. And it's only just in the county as it is! With out consideration and support for the industry and infrastructure to support the abundance of small farmshops. They will all be forced out of business."

"Seriously consider winding down the business."

“Might give up livestock rearing."

"It would be devastating. I rear sheep for a number of reasons but when I choose to send some to the abattoir for meat the quality of their death is AS important to me as their quality of life. Long Compton is a 15 minute drive from most of my grazing which means less stress for the animals in transport. The abattoir itself is small and well run, again instrumental in ensuring the best possible end to the lives of the animals I choose to take there.”

Q22 - What will you do if your current abattoir closes?

Many respondents express a proactive approach in their answers, intending to seek alternative abattoirs to ensure the continuity of their operations. Some consider making significant changes to their livestock rearing practices and may contemplate ceasing trading, while others consider relocating their businesses to different locations. Emotional responses, such as distress and uncertainty about the future, are also evident. A few farmers explore innovative solutions like mobile services, but financial considerations play a crucial role in decision-making, with concerns about potential cost impacts.

<u>Interesting quotes:</u>

“We would have to stop having our English Longhorn cattle as without Long Compton we would not have an abattoir that would accept cattle with wider horns, so the breed would become more vulnerable."

"Be forced to travel much further to find high quality, high standard of abattoir, which would struggle to be cost effective. Or solely sell through live markets."

"We will have to find another abbatoir - but the only ones suitable are twice the distance from us, and much less flexible to our needs."

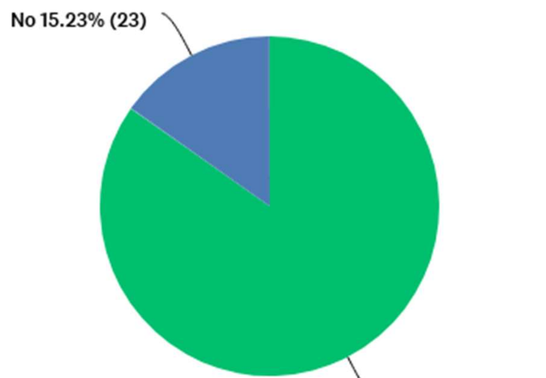
"It would totally cripple me."

"Don’t know. It’s vital."

Q25 - Considering your abattoir needs - which of the following would be most valuable to you in the longer term (5 to 10 years)

- Stakeholders prioritize better facilities and capacity enhancements. This was number one.
- There's a strong interest in enhanced processing and cutting capabilities. (2)
- Access to added value services like charcuterie is valued. (3)
- Both nearby and on-farm mobile abattoirs are seen as beneficial. (4)
- Coordinated livestock collection and delivery are moderately important. (5)
- A local meat brand and supply chain coordination are desired. (6)
- Access to butchery training and trained staff is important. (7)
- Affordable accommodation for abattoir staff is recognized but ranked lower in priority. (8)

Q26 - If there was an opportunity to join a stakeholder partnership or cooperative to own/part own a local abattoir, would you be interested to learn more?



An overwhelming majority, ~ 84%, of respondents, expressed interest in learning more about the opportunity to invest or be in part of a cooperative to own a local abattoir.