

British Heritage Sheep

- New Tastes from Old Traditions

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

Foreword and Executive Summary

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FOREWORD

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

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

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

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

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

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

British Heritage Sheep is indeed new flavours from old traditions.

Phil Stocker
Chief Executive



Executive Summary

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

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

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

The UK Sheep Industry

Over recent decades the UK sheep industry has been challenged to increase its efficiency by following examples seen in other livestock sectors. This challenge, part of which is a concentration of genetic resources, and an aim to 'compete against global commodity trading', is based on a desire to maximise efficiency of production. Yet sheep farming is already recognised as being different to most other livestock sectors in that it is virtually exclusively land-based and extensive in nature, and is expected to deliver multi-functional outcomes.

Two major threats to sheep farming, resulting from the aim of maximising textbook efficiency, have been identified as being particularly important. These threats affect two valuable aspects of sheep farming.

The threat to the genetic viability of our native sheep breeds

AHDB-funded research has shown a dramatic decline in the commercial use of traditional native breeds of sheep, seriously threatening the sheep industry's genepool. This concern extends well beyond the existing rare and endangered breeds and includes many breeds that are still considered as mainstream. These changes are occurring often without full realisation and industry acknowledgement of what is happening.

All breeds carry valuable traits which need recognition and preservation in an uncertain world which includes climate change. Many have been bred for their ability to thrive in particular locations without the aid of purchased inputs. The future of all native sheep breeds will undoubtedly be more secure if they succeed in the marketplace and are not simply kept for aesthetic or historical interest.

The threat to the landscape and communities of the uplands.

The intensification and 'increased efficiency' of farming enterprises such as pigs, poultry and dairy have changed these sectors beyond recognition. Sheep farming, particularly in the

uplands, although increasingly in lowland cropping land as well, remains the final bastion of traditional farming systems in the UK. The sector is based largely on family farms and still provides employment and business opportunities for new British entrants. The abandonment of traditional sheep farming has particularly far-reaching impacts both on the landscape of the uplands and other pastoral areas, and on the communities which still largely rely on traditional sheep farming for their survival.

Other serious problems facing the sheep sector include

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

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

Other background aspects

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

In view of current uncertainties surrounding future export markets it seems sensible to maximise the UK domestic market, whatever the final Brexit outcome may be.

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

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

Genuine Taste Differences to Promote

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

The NSA carried out several criteria-based taste tests at events such as the Royal Welsh Show. Other organisations, including the Guild of Food Writers and the Pasture Fed Livestock Association have also carried out more informal trials in recent years, all with similar results. There was a very real perception that flavours and textures varied between lamb and older animals, and between different breeds of mutton (over two years old).

These genuine differences are important. Not only do they enable the perceptible differences between ages and breeds to be a useful marketing tool for a new way to market sheep meat, but to take this further, they offer the opportunity to start developing 'taste grids' which differentiate and categorise the various eating qualities of the different breeds. This follows the development of such flavour grids in many other foods and alcoholic drinks. A YouGov survey found that this type of approach would be highly attractive to two groups of people which would have a significant impact on the sheep sector, namely the young and those people who eat meat, but do not currently eat sheep meat.

The Basis of the Scheme

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

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

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

Countryside would be specific UK landscapes and environments.

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

The scheme will:

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

Participants in the scheme

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

Legal structure of the scheme and management

It is proposed that the scheme will be a company limited by guarantee, incorporated for non-profit making functions, with no share capital and Members rather than shareholders. The body will have a Board of Directors (which may or may not be representatives of the

same entities as the members). The Members' liability will be negligible as they simply undertake to contribute a predetermined nominal sum to the liabilities of the British Heritage Sheep company which becomes due in the event of it being wound up. In addition to a conventional Board, it is proposed to establish an Oversight Committee consisting of a wider group of stakeholders, reflecting those along the supply chain. Policy will be enacted through managerial and coordinating activity from the project's small management team. Technical and administrative support being supplied 'In Kind' by bodies such as AHDB, HCC, National Farmers' Union, breed societies, and large landowners such as National Parks, etc.. Finally, the Friends of Heritage Sheep grouping will consist of interested parties who have the ability to communicate directly with consumers through their public memberships.

Innovation and Technology

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

Funding the Scheme

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

Widening the Scheme

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

Future Action

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

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