

**SCOTLAND
FOOD & DRINK
PARTNERSHIP**

SUSTAINING SCOTLAND. SUPPLYING THE WORLD.

**A strategy for Scotland's
food and drink industry.**





Scotland's food and drink industry is vital to our economic growth; it sustains our people and communities, and stewards our land and seas. Our farming, fishing, aquaculture, and manufacturing sectors are respected across the world for our craft, heritage, and sustainable processes. The food and drink we produce from our abundant natural resources is revered for its quality and unrivalled provenance stories. We're in a strong position.

Nobody can deny we have been through some turbulent years. But there has been one constant – our passion for producing the finest food and drink in the world. It's what fuels us to strengthen our resilience, grow our sales, improve our efficiency and competitiveness, and accelerate our journey to Net Zero.

I'm privileged to lead the Scotland Food & Drink Partnership, and I remain indebted to all those involved for their continued support and belief in what we do together. This new strategy will be our guiding light over the next 10 years as the Partnership works to support our recovery and growth.

It will be our framework for tackling the challenges the industry faces – and it will help us chart a path to further successes, domestically and globally. The strategy is the blueprint we look to in delivering the projects that make a real difference to our industry and to Scotland.

This strategy has been created with the people who drive our food and drink industry forwards every day. It's their commitment, talent, and passion – along with the quality of produce our natural larder allows us to create – that makes me very optimistic and excited for our industry's future.

This is our roadmap to capitalising on these advantages as we continue to sustain our nation – and supply those around the world with our finest food and drink.

Iain Baxter

Chief Executive, Scotland Food & Drink



Scotland has long been renowned globally for our exceptional natural resources, rich heritage, and culinary traditions. From our pristine waters to lush green pastures, our land is blessed with an abundance of high-quality ingredients. This provides the best possible foundation for the Scotland Food & Drink Partnership's new strategy that seeks to build upon our nation's strengths while embracing the challenges of the modern world.

The global food and drink sector is evolving at an unprecedented pace, with shifting consumer demands, technological advancements, and a growing focus on sustainability and well-being. Food security is again a key consideration, with our supply chains coming to the fore in terms of public consciousness and interest.

Our food and drink industry is an essential component of Scotland's cultural identity and a significant contributor to our economy. The strategy outlines measures to promote Scottish produce at home and internationally, showcasing our remarkable food and drink businesses and their culinary offering to wider audiences and markets.

Resilience is not only critical to our nation, but also to the food and drink sector. I want the sector to thrive and grow so that businesses and entrepreneurs can help feed the nation and provide employment and economic benefits, all across the country.

This strategy marks a pivotal moment in the development of the relationship between industry and public sector – a collaborative partnership that has served us all well but which we should seek to renew and refresh to propel Scotland's food and drink sector to new heights. I want to thank everyone who has contributed to its development. I am confident that by working together, we can realise the strategy's vision and ensure the future of a sustainable, resilient, and profitable Scottish food and drink industry.

This new strategy builds on the sector's strengths, while acknowledging current and future trends and challenges. Careful thought and urgent action is needed to respond, adapt and innovate to meet them. The Scottish Government continues to be committed to supporting delivery of shared aims in this strategy financially and practically, including our ambition to be a Good Food Nation and to be a healthier, happier and wealthier country in the future.

The sector's talent, knowledge, expertise and willingness to innovate and create means it is well placed to meet the strategy's ambitions and to thrive in the future.

Our food and drink sector is a real powerhouse: we want it to stay that way.

Mairi Gougeon MSP

Cabinet Secretary for Rural Affairs, Land Reform and Islands

GIVE THE WORLD A TASTE OF SCOTLAND'S FINEST

For more than fifteen years the Scotland Food & Drink Partnership has brought together industry, government, and government agencies. One group working for the benefit of Scotland's agriculture, aquaculture, fishing, and food and drink sectors.

The last few years have been difficult, but we remain committed to strengthening and growing our industry. We do this because our industry matters. Our success is vital to Scotland's economy, environment, and communities.

Our ambition? For Scotland to be the best place in the world to own, operate, and work for a food and drink business. We want to be renowned as a world leader in sustainable production and responsible growth. And as a country where resilient businesses can prosper across the entire supply chain.

LET'S BUILD ON OUR SUCCESS

Seven years have passed since we launched our Ambition 2030 strategy. A lot has changed in that time. The industry needs to recover and rebuild from the disruption and economic shocks of recent years. But many of the same market opportunities remain – and we're still well-placed to capture them.

A new approach will help realise our ambition. This document outlines a bold industry-led strategy that will guide us to address the issues that inhibit growth. At the same time, it will help us grasp those lucrative commercial market opportunities.

Our new strategy is broader in scope than before. And it's also more ambitious in setting out the challenges we look to overcome, and the opportunities we want to grasp.

This strategy supports the strategic direction of a number of Scottish Government strategies including the **National Strategy for Economic Transformation**, **Good Food Nation** and the three strategic missions set out by the First Minister. It's based on detailed industry research and mapping, consultation with businesses and stakeholders, and analysis of trends and competition at home and abroad.

Bold and ambitious, but grounded in realism given the scale of the challenge we face – this is a strategy fit for Scotland's food and drink sectors.



A STRATEGY ROOTED IN AMBITION

Scotland's food and drink products have grown in stature around the world over the last decade – there have been many successes. And while there are also fresh challenges, a strong appetite for Scottish produce remains.

Our plan over the next decade is to continue to be a powerhouse of the Scottish economy while staying firmly ahead of our competitors. To be a world leader in sustainable food production, to build our reputation as a world-class producer and, above all, to grow – profitably and responsibly.

Our ambitions are to:

- Seize an estimated £4 billion market opportunity for growth within the first five years to be a £20 billion industry by 2028.
- Increase profitability across the industry.
- Grow faster than any other major industry in Scotland.
- Grow faster than similarly-sized competitors.
- Remain the largest food and drink exporter in the UK.
- Attract and upskill a new generation of highly skilled professionals.
- Be one of the world's most environmentally sustainable food-producing nations.
- Secure record investment across our industry.



HOW WE'RE GOING TO REALISE OUR AMBITIONS

OUR VISION

“Scotland is the best place in the world to own, operate, and work for a food and drink business. The country is renowned as a world leader in sustainable production and responsible growth, where resilient businesses across the entire supply chain flourish and prosper”

OUR MISSIONS

Three overarching missions will help us realise that vision:

- **Be more resilient** – build a resilient, innovative, and dynamic industry that can better withstand and respond to market volatility, economic shocks, and supply chain disruption.
- **Be more growth focused** – build our brand, capability, and market activity so we can sell more food and drink into the right markets at home and across the world.
- **Be more sustainable** – build the capability and credentials of the industry, so it can embrace and benefit from the journey to Net Zero and having world-class environmental credentials.

Everything we do as a Partnership will support these missions, and we will prioritise activity based on the impact it will have on them. Our growth will come from focusing on three distinct areas: Scotland, the rest of the UK, and International markets.

£4 billion: that's the size of the market opportunity to be grasped within the next five years alone, as projected by our independent research and analysis. That's a 25% increase from £16 billion we estimate as the current industry turnover.

To make it happen, our actions and investments will be guided by market signals, trends, and demands.

AREAS OF FOCUS

To compete successfully in our markets, our businesses must come from a position of strength. When we spoke to businesses about their issues and ambitions, the same key themes came up again and again. So we built those into our strategy.

- Net Zero and the Environment
- Policy and Regulation
- Supply Chain Security
- People and Skills
- Technology and Digital
- Access to Capital
- Infrastructure
- Brand and Reputation

Our focus will be on addressing and making progress on these eight areas – if we get this right, these will be our enablers to growth. Businesses will be better placed to think big and thrive on the global stage.

SUPPORT FOR BUSINESSES AT EVERY STAGE

A connected long-term strategy is crucial. But we know every business is at a different stage of their recovery or growth journey after the challenges of the past few years. So, we must provide support at every level.

Through extensive engagement with businesses, we've identified three key points on that journey. Our interventions and activity will work to support businesses at each stage.



1. STABILISING TO SECURE FUTURE VIABILITY

Times have been tough. First there was the global pandemic and Brexit, and its ongoing consequences. Then the war in Ukraine, which fuelled an unprecedented cost of production crisis. Followed by relentless market pressures and changes to the regulatory environment.

Businesses are still navigating all of this. The next few years are likely to remain turbulent – for many the focus will be on stability and remaining viable.

We will focus on what we can influence to help these businesses stabilise in the short-term. That could be access to capital, margin recovery, or productivity gains. A stable environment means better foundations on which to build.

2. BUILDING FOR THE FUTURE

Many businesses have successfully navigated the challenges of the past few years – now they are laying the foundations for recovery. Building the industry's strength means increasing profitability so businesses can plan and invest in their future.

We can support this journey, whether that's through access to support and funding to stimulate investment, encouraging a supportive operating environment, or equipping businesses with the knowledge and resources to grow.

3. GROWING AND LOOKING FOR NEW OPPORTUNITIES

Some businesses are financially stable. They have secure supply chains and are poised to grasp growth opportunities in their existing markets and new ones.

We will support this by providing the latest insights and trends, facilitating new and lucrative commercial opportunities, developing commercial skills, and creating an operating environment that fosters growth.

HOW WE'LL MEASURE SUCCESS

We will focus on delivering real impact. And that impact needs to be measurable.

Our Delivery Plan will detail the specific programmes we'll use to make progress on our 'enablers'. Each programme will be composed of projects with measurable outputs and target outcomes for every level of delivery.

For the big picture, we'll use a range of strategic metrics to gauge progress:

- **Business confidence** – businesses feel they can grow, and their knowledge and commercial competency is increasing.
- **Resilience** – increase in businesses' ability to react, adapt, and recover to unexpected factors.
- **Productivity** – increase in Gross Value Added (GVA) and investment in research and development, leading to increased automation.
- **Reduction in emissions** – the industry is on track to achieve Net Zero by 2045.
- **New entrants** – the number of new businesses being created and the overall survival rate.
- **Industry growth** – increase in industry turnover.
- **Investment** – increased investment in critical areas of infrastructure.



STRENGTH IN WORKING TOGETHER

Scotland's secret ingredient? Collaboration. Our food and drink industry is bursting with innovative and tenacious producers, a dynamic support network supported by public funding, and a world-class research base – all working together to grow the sector.

This collaborative approach has allowed us to respond decisively and make good progress in many key areas:

- We've provided new commercial opportunities for business through a comprehensive market development programme, domestically and internationally.
- Grown our global footprint through our network of dedicated in-market specialists.
- The Knowledge Bank provided insight and market intelligence to identify the best opportunities to sell more, or sell more profitably.
- Built business capability through our flagship development programme, The Academy, to provide knowledge and commercial skills to support businesses at every stage of their growth journey.
- Created a cross-Partnership team to provide practical interventions to support the sector in making a just transition to Net Zero.
- Secured significant financial support from the Scottish Government for capital investment, to respond to Covid and Brexit challenges.
- Developed a deep understanding of our supply chains and where support is needed to drive growth.

But we want to do more:

- Attract and retain a highly skilled workforce.
- Embrace digital competence and maximise the vast opportunities of e-commerce.
- Drive investment in automation to improve productivity.
- Foster greater levels of innovation with links to Scotland's world-leading research and academic base.
- Develop stronger links with the primary production sectors, and facilitate fairer, more effective supply chains.
- Encourage a policy and regulatory environment that enables growth.
- Simplify and enhance the support landscape for food and drink businesses.

We'll continue to work side-by-side with businesses to tackle sector-wide challenges and create conditions for businesses to flourish across the supply chain.

STRENGTH FROM DIVERSITY

Scotland has a diverse natural larder and a broad business base. This creates more possibilities for collaboration. It also creates opportunities for greater growth and profitability.



FARMING AND CROFTING

Agriculture is the bedrock of our industry. Our farmers, growers, and crofters work hard to get the most out of our terrain and abundant rainfall to grow crops and rear livestock, and we have high standards of environmental safeguarding, animal welfare, and husbandry. Our relatively stable weather is in our favour. It means more reliability to produce food for domestic markets and for export to places where conditions might be more adversely impacted by the changing global climate. Ensuring our farmers and crofters have the right support is critical to underpinning a thriving sector.



AQUACULTURE

Our aquaculture sector produces food that's desired across the world. It also has some of the most innovative technologies and sustainable practices. The sector provides high-value employment to some of the most isolated and rural parts of Scotland, as well as significant wider community benefit. Aquaculture is at the forefront of strengthening Scotland's international reputation, with our salmon exported to more than 50 countries annually. However, we face stiff competition from other international producers. While Scotland can't compete on scale, we can defend and grow our market share.



PROCESSING AND MANUFACTURING

Our food and soft drink manufacturing sector is Scotland's largest manufacturing sector, with everything from small manufacturers to global brands found on shelves and menus across the world. We're already embracing innovation to hit the highest levels of safety standards. But as automation evolves, the sector must attract skilled workers – they are vital if we are to continue innovating, producing at scale, and seizing fresh market opportunities.



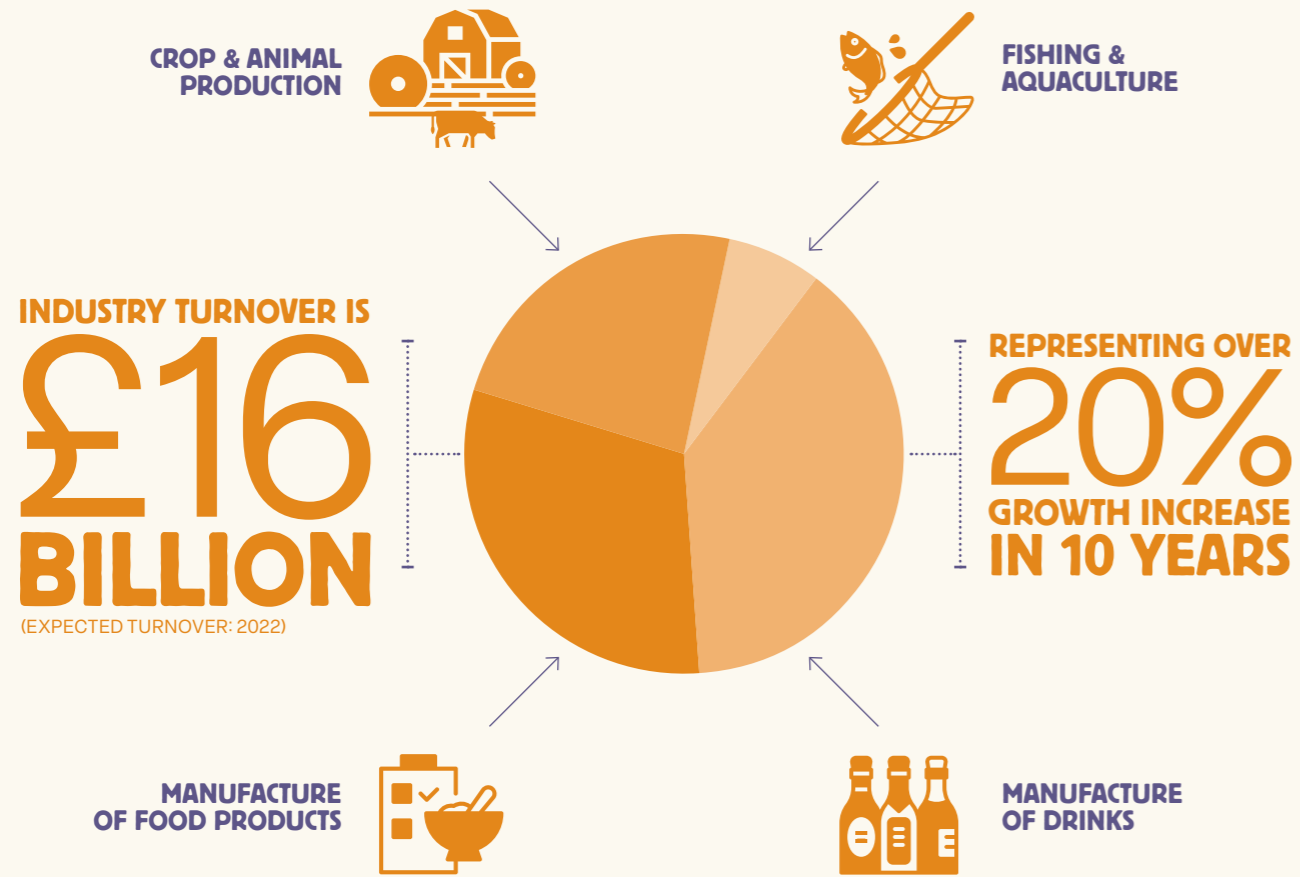
FISHING

Scotland has a rich fishing heritage, with generations of sea-faring communities the length of our coastline. It's easy to see why: our seas are among the most bountiful in the world. Our seafood sector is working hard to improve sustainability through modernisation and science-based initiatives, strengthening the reputation of Scottish seafood across the globe. And we can deliver more economic benefit to communities by retaining more value to our catch, bolstering the Scottish brand.



BREWING AND DISTILLING

Scotch whisky is our largest export. This global success has paved the way for craft distillers to fashion a range of quality products with unique flavours and stories. Scotland also has an equally proud history of brewing. Home to many creative breweries, we have become a renowned leader in craft beer. Success lies in continued investment and creating an environment for the industry to flourish – to take full advantage of opportunities for growth in domestic and international markets



£5.3 BILLION IN GVA



REPRESENTING A 12.5% GROWTH INCREASE IN 10 YEARS
(DATA FROM: 2020)

17,495 REGISTERED ENTERPRISES
(DATA FROM: 2021)



REPRESENTING 10% OF ALL REGISTERED BUSINESSES IN SCOTLAND



THIRD LARGEST SECTOR EMPLOYER IN SCOTLAND, EMPLOYING 129,000 PEOPLE ACROSS AGRICULTURE, FISHING AND AQUACULTURE AND MANUFACTURING
(DATA FROM: 2021)



EXPORTS OF SCOTTISH FOOD AND DRINK WERE VALUED AT £8.1BN
(DATA FROM: 2022)



£6.2BN WAS SCOTCH WHISKY EXPORTS

OUR STRATEGIC FRAMEWORK

VISION

Scotland is the best place in the world to own, operate, and work for a food and drink business. The country is renowned as a world leader in sustainable production and responsible growth, where resilient businesses across the entire supply chain flourish and prosper.

MARKETS

We will prosper from our businesses competing successfully in our three key markets: Scotland, the rest of the UK, and International.

MISSIONS

Our three missions will sharpen businesses' competitive edge in these markets, helping them increase resilience and grow in a way that is responsible and profitable.

Resilience

Build a resilient, innovative, and dynamic industry that can better withstand and respond to market volatility, economic shocks, and supply chain disruption.

Growth

Build our brand, capability, and market activity so we can sell more food and drink into the right markets at home and across the world.

Sustainability

Build the capability and credentials of the industry, so it can embrace and benefit from the journey to Net Zero and having world-class environmental credentials.

ENABLERS

UNLOCKING OUR FULL POTENTIAL

- Net Zero and the Environment
- Policy and Regulation
- Supply Chain Security
- People and Skills
- Technology and Digital
- Access to Capital
- Infrastructure
- Brand and Reputation

MISSION 1:

Build resilience

When we improve our ability to anticipate and overcome future shocks, we will give businesses a better platform for profitability – they will be more able to compete in key markets.

Food security is a priority. As a nation, we can strengthen our own supply chains while also looking at how we can support those beyond our shores. We'll build supply resilience to mitigate risks associated with climate change and improve supply chain efficiency, as well as looking at local infrastructure challenges.

Attracting more talent and developing skills will help solve labour challenges and provide employment opportunities in the island communities and rural regions. While making sure businesses have access to insights, funding, and a supportive policy and regulatory environment will be the crucial cornerstones for future success.

In a resilient sector, businesses will have the skills, capabilities, resources, infrastructure, and support mechanisms they need to navigate market cycles and challenges. But they will also have what they need to plan for growth.

MISSION 2:

Drive responsible growth

Growth means different things based on the size and sector of a business. Some may want to expand existing markets or capture new ones. Others may look to improve the health of products to allow them to remain competitive in existing and emerging markets, as health and wellbeing grows as a consumer priority. And there is always the option to optimise manufacturing efficiency and product quality, while reducing cost and waste, by developing robust formulations and efficient processes at scale. Or to make gains in productivity and margins by embracing technology and scientific know-how.

Our ambition for the industry is clear: make sure businesses are profitable and have the option to scale in a way that works for them. But this must be done responsibly and sustainably.

In a growing sector, businesses will have the support and tools to plan with confidence for the future. They will have access to the knowledge to navigate market cycles and challenges to sell more profitably – at home and abroad.

MISSION 3:

Lead the way in environmental sustainability

Every business' environmental journey will be different. Our Net Zero Commitment will provide the resources and mechanisms to tackle shared challenges across the supply chain, so businesses can invest their resources to meet market demands. Our expertise and resources can position Scotland's food and drink sector as a key partner for government, regulators, investors, suppliers, and customers.

Businesses will have access to the expertise they need to meet Net Zero and other environmental targets, so they remain competitive and capitalise on the market opportunity to sell sustainable, low-carbon food and drink.

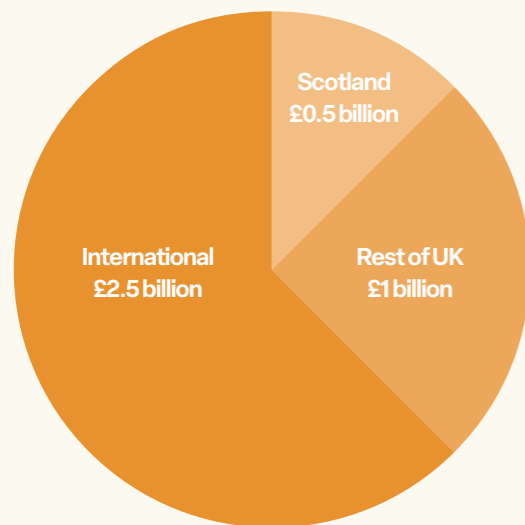
But we're also committed to addressing wider sustainability issues such as biodiversity, water use, and soil health. At the same time, we will support our organic and regenerative producers to find new markets.

Strong environmental credentials will strengthen our brand and reputation, giving us a competitive edge over global competitors.

GROWING OUR MARKETS: THE IRRESISTIBLE APPEAL OF SCOTTISH PRODUCTS

Scotland is already celebrated around the world. Known for exceptional quality and strong provenance credentials, it has premium appeal. But we're working to grow that reputation even further.

Our analysis shows a £4 billion market opportunity for us to capture across our markets within the next 5 years.



By autumn 2023, we will publish comprehensive market activation strategies for each of our three core markets: Scotland, the rest of the UK, and International.

Grounded in the latest market insight and intelligence, these strategies will:

- Support businesses by attracting new opportunities for them to grasp in existing markets, or extend their activity into new ones.
- Build capability to increase the portfolio of businesses with the ambition, resources, and capacity to maximise the market opportunities available to them.
- Grow our brand and reputation so we can amplify our presence in these key markets.





SCOTLAND

Our independent consumer insights show a growing demand for local products in local markets. Scottish consumers want to buy more Scottish products.

Visitors have a taste for Scottish produce too. With an increasing number of visitors coming to Scotland, we can unlock Scotland's food tourism potential. This could be powered by the burgeoning interest in agritourism – an area Scotland has already taken steps to capitalise on. There is local and global demand for quality food and drink with provenance, served alongside real and memorable experiences that capture the essence of the destination.

We're in a strong position, with a commitment to increasing local sourcing to give consumers and visitors easier access to local produce. This means more of our quality products on independent retailer and supermarket shelves, on bar and restaurant menus, in visitor attractions, and across the public sector. And our network of Regional Food Groups have the passion, ideas, and expertise to help support this across Scotland.



REST OF UK

The wider UK opportunity for our food and drink businesses is immense. But we're not selling as much as we could. With an expected population of seventy million by 2033 and favourable location and logistics, the rest of the UK is one of our biggest potential growth markets.

But it's also a diverse and complex market to crack. It's highly competitive and often subject to the same 'local loyalty' that governs consumer purchases in Scotland. However, it's a market where Scotland already has a strong reputation. For many UK consumers, Scotland's food and drink offers unequalled quality. It's right that we focus significant effort on a market that offers growth for all our sectors.



INTERNATIONAL

Scottish products travel the world – from Beijing to Brussels, Delhi to Detroit – with Scotch whisky and salmon the global trailblazers. The overall picture is certainly a success story, but we're still only scratching the surface of the vast global potential for exports.

Changes to the trading environment have brought more challenges and complexities, and global competition is increasing. But we can't lose sight of the facts that premium markets offer lucrative returns for producers.

Europe remains our biggest market but we need to export to a broader range of markets, offering a broader range of products. Our global network of in-market specialists provide superb support and insight to the industry and help kickstart many influential relationships.

Over the next decade we will make the most of our networks, expertise, and reputation – using our remarkable platform to capitalise on the potential that awaits in export markets.



UNLOCKING OUR POTENTIAL: EIGHT ENABLERS FOR GROWTH

Scottish products have a global cachet. There is a huge appetite for our products and a high level of trust in our quality, value, and provenance. It's a powerful starting position. How can we capitalise on that?

Our industry-wide consultations and research uncovered several interlinked themes. By understanding these, we will support Scotland's food and drink businesses to compete more successfully and profitably than ever before.

By making progress on our eight 'enablers', we can unlock our potential to convert new market opportunities.





1. NET ZERO AND THE ENVIRONMENT

We're fully committed to our Net Zero journey, building on the efforts already taken to maintain our high environmental standards. Our Net Zero Commitment sets out how our industry will meet targets by addressing the challenges and opportunities offered throughout the food and drink supply chain by a just transition to Net Zero.

The market for sustainable produce is significant. We will put Scotland in the best position to capture those opportunities.



5. TECHNOLOGY AND DIGITAL

Investing in technology, automation, and data can do a lot for our industry. It can make our businesses more productive, more competitive, better placed to cut emissions, and less vulnerable to labour shortages. Digitalisation paves the way to new customers. And innovation drives new product development, which can mean grasping new market opportunities or improving dietary health through recipe reformulation.

But for Scotland's businesses to benefit from innovation, they first need access to technology, and the expertise and capital to invest in it. We have some of the world's most technologically advanced companies and world-leading academics and researchers right here – and they're ready to support growth.



2. POLICY AND REGULATION

It's vital that we have a policy and regulatory environment that continues to foster the growth of our industry. It must also underpin our global reputation for animal welfare, food safety, traceability and quality and, in many cases, our health credentials.

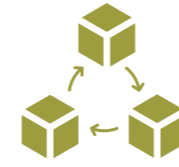
We can't do that alone. We need to encourage Scottish and UK Governments to collaborate more extensively with the industry to develop policy and regulations. This would help foster an environment that promotes further growth for all businesses, while safeguarding quality and safety for customers.



6. ACCESS TO CAPITAL

On the back of unprecedented challenges, many businesses exhausted their financial reserves. Now faced with increased operating costs and a squeeze on margins, many are in a vulnerable financial position.

This places significant pressure on their ability to operate sustainably and prevents investment in their workforce, infrastructure or innovation which could speed up recovery. It's essential we look for solutions that provide businesses with more access to working and investment capital – empowering them to make those necessary investments in the future.



3. SUPPLY CHAIN SECURITY

Commodities prices. Packaging and CO2 shortages. Haulage vehicle stops and checks. Disruption at ports and harbours. These are just some of the hurdles our industry has had to negotiate in recent times. There's more we can do to safeguard ourselves from the worst impacts and respond more effectively to disruptions and instability.

Working together across sectors will be a start. Finding commonalities, vulnerabilities, and opportunities for collaboration will be key to supply chains that are better connected, mutually beneficial and more secure. Backing this with investment will be vital.



7. INFRASTRUCTURE

Transport hubs, physical and digital connectivity, and rural accommodation are vital parts to a successful industry. Where we can, we must support or influence critical local infrastructure.

We must also advocate that wider national infrastructure activity – such as transport, housing and broadband – meet the needs of the sector. This is vital given our geographical footprint in all corners of Scotland, and the part we play in local communities.



4. PEOPLE AND SKILLS

Our industry is the third largest sector employer in Scotland and the biggest manufacturing employer. However, the sector continues to experience significant staffing shortages. It's due to a combination of labour supply challenges, fierce competition from other industries, and a scarcity of skills.

To attract and retain talent, we need to be seen as an industry of choice – but this remains one of our biggest challenges. We need to build a compelling proposition around the diverse range of jobs and careers available within the industry. While automation and technology may help, they cannot replace the value of experienced and dedicated individuals. Getting the right people with the right skills into the sector, in the right numbers and locations, is essential to boost productivity and drive growth.



8. BRAND AND REPUTATION

Scotland's food and drink story plays a significant role in shaping our country's growing reputation across the world. Our Land of Food and Drink brand has played a key role in capturing market growth. But we must evolve and strengthen this brand to support the next phase of our journey.

We will inject greater levels of investment to compete with well-resourced competitor nations. This will lead to a deeper appreciation of the excellent food and drink we offer – overseas and on home soil.

A ROADMAP TO 2033: DELIVERY FOR NOW AND THE FUTURE

This strategy will only bring about positive change if it's matched with investment and a bold plan for delivery. To make that happen we've created a new, programme-led approach to delivery. This strategy is a framework from which our detailed delivery and activity plans will be developed and continually reviewed.

Our Delivery Plan will address the key themes outlined in this strategy and encompass wide-ranging programmes of activity. The goal: to help businesses of all sizes and sectors at every stage of their journey.

The strategic programme will be managed by Scotland Food & Drink, bringing together the right partners to deliver the right projects at the right time.

It will build on the progress made on existing initiatives and commitments, such as the Scotland Food & Drink Partnership's Recovery Plan, Food Tourism Scotland Action Plan, and our Net Zero Commitment.

Our Year One Delivery Plan sets out how the Scotland Food & Drink Partnership will begin to deliver the strategy. Further delivery plans will be published at key points over the coming years.



OUR COMMITMENTS

As we've developed this strategy and designed our delivery model to support businesses across Scotland, we've identified a set of inter-dependencies. These will be critical in enabling us to execute the programme and achieve our vision.

STREAMLINED SUPPORT LANDSCAPE

We've undertaken an extensive review of the support landscape. What did we find? There is much support available for businesses, but it can be tricky to access. Sometimes this support doesn't work to deliver core strategies, and sometimes it duplicates effort. We can do better.

We will make a number of key recommendations to simplify and improve support. These recommendations will be delivered through our programmes.

GOVERNANCE

To make sure we deliver, we're changing our approach. Scotland Food & Drink will continue to lead the Scotland Food & Drink Partnership – and in doing so will strengthen its structures and processes. All elements of the delivery plan will have named organisations as delivery leads. And each element will have robust reporting mechanisms.

COLLABORATION

We will strengthen our existing collaboration networks. We aim to work with key sector organisations and bodies – in Scotland and overseas – that can offer best practice, expertise, and support.

MEASURING SUCCESS

We will judge our success by a set of pre-defined measures. If our activity is not having the desired impact, we will act swiftly and decisively to maximise impact with the funds we have.

TRANSPARENCY

We'll report regularly on the progress of the activity programmes – this will help to build confidence and engagement. We're committed to a transparent approach, and we will publish an annual report summarising our progress.

CONSULTATION PROCESS AND ACKNOWLEDGEMENTS

This strategy was developed by the Scotland Food & Drink Partnership with input and guidance from an advisory board made up of representatives from across the Partnership.

We have carried out extensive consultation with stakeholders across the whole supply chain, bringing together the views of more than 150 businesses and organisations. Our sincere thanks to all who contributed.



The ability to deliver this ambitious strategy is made possible thanks to the commitment of the Scotland Food & Drink Partnership.





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