

EXECUTIVE

SUMMARY

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South of Scotland Food & Drink Landscape Assessment

May 2025

Introduction

This Executive Summary accompanies the full South of Scotland Food & Drink Landscape Assessment report and a supporting toolkit. The toolkit includes a regional producer directory, a list of key support organisations, and a selection of case studies showcasing good practice and innovation in the region. Together, these outputs provide a tangible resource for the food and drink industry across the South of Scotland.

The foundations have now been laid through consultation, analysis, and mapping. With the evidence base in place, it is time to move from assessment to action—delivering strategic and coordinated initiatives to support growth, connection, and resilience across the sector.

1. Context & Collective Missions

This work follows the multi-stakeholder roundtable held in August 2024, where relevant partners identified collective missions and next steps for the South of Scotland food and drink sector. The roundtable reflected a strong spirit of partnership and a shared recognition of the region's potential.

Thanks to funding from South of Scotland Enterprise through the Small Producers Supply Chain Fund, which was launched in December 2024, this vital piece of work has been made possible. The assessment advances those discussions and provides a detailed analysis to guide future direction and delivery.

The South of Scotland Food & Drink Landscape Assessment was commissioned to understand and support the development of the region's food and drink economy, ensuring it can thrive through coordinated effort, strategic action, and sustainable growth. The assessment responds to the ambitions set out in the South of Scotland Responsible Tourism Strategy and broader Scottish Government goals around community wealth building, green economy, and place-based regeneration.

The work has been structured around five collective missions identified through engagement and analysis:

1. Strengthen local supply chains and improve access to local produce.
2. Create integrated food and drink experiences for residents and visitors.
3. Support skills, capacity and future talent within the sector.
4. Promote collaboration and connections across the supply chain.
5. Increase visibility and identity for South of Scotland food and drink.



2. Methodology & Outputs

An alarming 73% of businesses reported facing barriers in sourcing local produce, highlighting a significant challenge that undermines local supply chain resilience and market access.

This assessment involved extensive consultation with over **300** stakeholders through surveys, interviews, and two regional engagement events. The key outputs include:

- A comprehensive written report
- Market and product opportunity analysis
- Baseline mapping of food and drink businesses
- Case studies and examples of best practice
- Consumer research, including VisitScotland and TripAdvisor insights

Key survey stats include:

- 72% of respondents cited a need for improved collaboration
- Over 60% prioritised better access to local produce
- A majority of businesses were SMEs with limited capacity for growth without support

VisitScotland and TripAdvisor data highlighted:

- Rising interest in food and drink-led travel experiences
- Consumer demand for authenticity, provenance, and sustainability

3. Key Challenges

Despite strong foundations, there are several structural and strategic challenges:

- Fragmented collaboration across sectors and stakeholders
- A lack of coordinated direction and regional leadership
- Siloed working and duplication of effort
- Difficulty accessing local produce due to distribution gaps
- Limited awareness of South of Scotland produce among locals and visitors

This piece of work also required significant additional effort from the project manager due to limited cohesion and engagement from some stakeholders. While many contributed thoughtfully, others were less willing, highlighting a need for clearer structures, shared ownership, and a culture of collaboration across the region.

There is a clear need for a pan-South strategy, led in partnership, with tangible actions, quick wins, and long-term investment. Strategic leadership is essential to steer efforts and ensure delivery.

4. Repeating Themes & Strategic Needs

Across this report and parallel efforts, the following needs consistently emerged:

- **Dedicated Resource:** A regional coordinator or lead team to drive collaboration and deliver shared initiatives.
- **Sourcing Guide / One-Stop Shop:** A centralised tool to connect buyers, producers, and support services.
- **Improved Access to Produce:** Local food hubs (e.g., Galloway Food Hub model) should be scaled and piloted, starting in the Borders, to support B2B access and community distribution.
- **Infrastructure Support:** Shared facilities such as cold storage, delivery vans, and bottling equipment.
- **Route to Market Support:** Training, education, and support for producers on logistics, scaling, and customer connection.

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- **Meet the Producer FAM Trips:** Immersive visits to showcase what is made here and who is behind it.
- **Local Product Awareness Campaigns:** In schools, public procurement, and through visitor engagement.
- **Regional Identity:** Establish a food hero product (e.g., venison, haggis) as a signature of the region. Encourage eateries to feature this on their menus.
- **Sustainability Training:** Practical, clear guidance on actions, funding, and accreditation.
- **Quick Wins:** Support initiatives like food trails along the Coast to Coast cycle route or the River Tweed trail to highlight local producers and tasting experiences.
- **Biosphere Accreditation:** Explore rolling out this model across the region.
- **Cross-Border Collaboration:** Recognise that sourcing from Northumberland and Cumbria is practical and sustainable; build strategic links.
- **Youth Engagement & Skills:** Develop training pathways and storytelling for future generations.
- **Butchery & Abattoir Access:** Support for these foundational needs is critical.

5. Conclusion

This assessment has clearly shown that while the South of Scotland is full of passionate, high-quality food and drink producers and operators, there are barriers that hinder their full potential. Businesses are calling for support, coordination, and practical action.

To succeed, this sector needs regional leadership, investment in infrastructure, and a shared commitment to driving progress. Now that we've heard what the industry needs, the next step is to act boldly and collaboratively to make change happen.

We have the knowledge. We have the people. We have the passion. Now we need the direction, leadership, and collective will to drive this forward.

