

# ALBERTA LIVESTOCK & MEAT STRATEGY

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## 2008 – 2013 IMPLEMENTATION PLAN SPRING 2008



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### EXECUTIVE SUMMARY

#### OPPORTUNITIES AND CHALLENGES

The Alberta livestock industry faces many challenges; major change is required or Alberta's beef and pork sectors will downsize significantly. Short-term crisis funding from government will not solve the long-term issues the industry faces. Much of Alberta's livestock industry has been unable to adjust to these major challenges in a timely manner. Alberta's largest agricultural industry and the prosperity of rural communities are at risk. Government must act now to help create an environment to enable industry success.

Alberta Government financial support to the industry has been substantial, totalling over \$2 billion from 2002-07 in the case of the beef industry. Despite this, industry competitiveness has continued to erode.

There are two basic scenarios for how the Alberta beef and pork industries will evolve. One is that cattle/hog production and processing significantly downsize and serve mainly the domestic market. However, the domestic market is and will continue to be increasingly threatened by competitive imports. The other scenario is one where Alberta maintains its current size (or potentially grows) and competes on a global stage with a world class reputation for quality products.

The Alberta government believes that this industry has a bright future - *if it makes the necessary changes*. The government is prepared to invest in this future today by making targeted investments to help significantly improve long-term industry competitiveness and profitability.

In 2007, Alberta depended on export markets for 33% of its total beef production, down from 42% in 2002 (pre-BSE). Export dependency for pork was about 30% in 2002 and was 49% in 2007. Export markets are clearly key to the continued health of the beef and pork industries.

World meat consumption continues to grow at about 2% annually. While much of the growth will take place in emerging economies where income levels are increasing, developed economies are increasingly looking for differentiated, niche products where premiums are often paid. Food safety is a growing concern in most developed countries and consumers and retailers are increasingly aware of these issues. Access to some of these markets, such as Japan and Korea, remain restricted or closed to Alberta beef, but indications are that agreements are within reach that will once again allow imports of Canadian beef.

Alberta is well positioned to take advantage of these trends, if industry and government act together now. Competitors such as Australia and the United States are rapidly improving their own production systems and have developed marketing programs that have made them competitive on a global basis. Alberta must be prepared to match, and then exceed these competitors in order to carve out niche markets for Alberta products. The proposed vision for the livestock industry sees Alberta products setting the bar high and out-performing competitors in key export markets.

The industry's long-term success is dependent on major and systemic change, including:

- Shifting from a commodity orientation to one that is more focused on producing high-value differentiated products;
- Reducing dependence on the US market to mitigate risk;

- Significantly improving livestock industry strategic direction and governance; and
- Redirecting and refocusing government marketing funds to produce clear measurable results for Alberta exporters.

Government can be the catalyst for this major change, by:

- Redirecting government funding to initiatives that align with a strategy based on differentiation in target markets;
- Shifting emphasis to investments for longer-term systemic change rather than ad hoc payments focused on short-term issues;
- Aligning legislation, regulation and policy with a shared vision; and
- Making targeted investments in industry renewal through a sustained and strategic approach by Government.

### SUMMARY OF PRIORITY INITIATIVES

Eight priority initiatives have been developed to support major change in the livestock industry. These initiatives are designed to work together to achieve maximum impact. These efforts will re-energize the players, redirect limited resources to key priorities, revitalize livestock industry organizations, realize benefits from enhanced value chain relationships, and refocus efforts to achieve a competitive and sustainable industry.

1. **Shared Vision** - Advance a shared vision for achieving a global competitive advantage;
2. **Animal Health & Food Safety** – Strengthen on a foundation of animal health, food safety and public health;
3. **Alberta Livestock Information System** – Invest in the enabling infrastructure required to support information exchange in the livestock supply chain;
4. **Differentiation Initiatives** – Create an environment and infrastructure to enable industry to meet customer needs and capture added value;
5. **Marketing and Diversification Initiatives** – Redirect and refocus government funds to improve marketing effectiveness and lower marketing risk. Align government R&D funding with the livestock & meat strategy.
6. **Environmental Stewardship** – Provide a platform for leadership in environmental stewardship in the livestock sector;
7. **Cost Reduction and Regulatory Barriers Initiatives** - Reduce costs, streamline processes and enable “smart regulations”; and
8. **Industry Governance and Transition** – Facilitate the transition of the livestock industry to enhance effectiveness.

Additionally, an engagement strategy outlines the sequence of steps that the government is prepared to take to engage with industry and facilitate the transition in the immediate and longer term.

### STRATEGIC GUIDANCE

Several principles guided the development of this plan:

- Focus on long-term competitiveness;
- Avoid creating market distortions;
- Improve information exchange and market transparency;
- Avoid short-term ad-hoc programs;

- Minimize the risk of countervail and WTO actions;
- Reduce unnecessary regulation and bureaucracy;
- Build enhanced capacity in industry and government;
- Create an environment for industry to successfully manage change; and
- Foster a profitable livestock industry that contributes to rural prosperity.

This plan assumes that existing farm income stabilization programs such as AgriStability and the Alberta Farm Recovery Plan continue to help mitigate short-term farm income issues while the industry transition process proceeds.

This plan focuses on actions that would enable the industry to create and extract maximum value from the competitive environment, leaving specific initiatives on marketing strategy and business plans to industry. Government's role is to help create an environment where industry can be successful. Ultimately, it is industry's decision whether to take advantage of the opportunities created. The Government of Alberta believes that the initiatives in this plan will help set the stage for long-term success.

This implementation plan considered other internal and external initiatives set forth by the Alberta government to create a globally competitive agri-food industry for the Province.

### OVERVIEW

#### BACKGROUND & CONTEXT

Within a short period of time several major factors critical to the livestock industry's competitiveness rapidly changed. These include unprecedented shifts in exchange rates, rapidly increasing grain prices and nation-leading labour costs driven by a booming economy. Furthermore and perhaps most significantly, many of these changes are completely outside the industry's control.

##### *Alberta Beef and Pork Industries*

The Alberta beef and cattle industry is comprised of over 20,000 farms that directly employ 19,100 Albertans. The Alberta pork industry is comprised of approximately 550 hog farms employing about 2,100 Albertans. The Alberta beef industry generates about \$3 billion annually in farm cash receipts and the hog industry contributes \$500 million in farm cash receipts. The meat products manufacturing sector directly employs a further 9,800 Albertans with annual red meat shipments totalling approximately \$4.2 billion. In 2007, Alberta exports of beef and live cattle totalled \$1.6 billion. In 2002 (pre-BSE), Alberta beef exports were \$1.6 billion or 32% of Alberta's total agri-foods exports. In 2007, Alberta beef exports had dropped to \$887 million, or 13% of total agri-food exports. Alberta exported approximately \$400 million of pork and live hogs in 2007.

Any significant downsizing of the industry would have a major impact on rural communities and in the towns and cities where the beef and pork industries play a major role in the local economy.

##### *Alberta Sheep and Lamb Industry*

There are 2,300 Alberta lamb producers with 80,000 breeding ewes, marketing 90,000 lambs annually, representing 15% of Canada's production. About 25% of the farms produce 75% of the lambs. Only one federally inspected slaughter processor is dedicated to lamb in western Canada. Lamb supply fluctuates by season. Shortages are filled through imports. About one half of the lamb consumed in Canada is imported. The estimated retail value of Alberta lamb in 2005 was \$33 million. Issues include: rising input costs, improving genetics, expanding domestic production and market differentiation.

##### *Alberta Bison Industry*

There are 930 farms in Alberta that produce approximately 50% (97,000) of the farmed bison in Canada. Currently there are two federally inspected abattoirs in Alberta. The total bison industry (slaughter and live exports) is \$27.8 million (2007). Markets are domestic, European Union and the US. Issues include: rising input costs, market access and product differentiation.

##### *Alberta Cervid Industry*

The 430 farms with elk in Alberta represent 45% of Canada's total farmed elk. Long term drivers are antler velvet and meat. CWD surveillance requires mandatory testing and traceability. Markets are US

and China for velvet and European Union and US for meat. Issues include: rising input costs, animal health and meeting market demand domestically and internationally.

There are 81 licensed deer producers in Alberta raising approximately 5,700 animals. Issues include: holding time required for mandatory chronic wasting disease (CWD) surveillance and testing. This is a small industry but it also faces rising input costs and animal health.

### ***Business Fundamentals are Deteriorating***

- Strong Canadian dollar eliminating the industry's historical cost advantage.
- Relatively high cost of feed.
- Restricted access to key export markets.
- Packing plants are operating under-capacity with the risk of downsizing within two years.
- Industry has been struggling to implement a systemic value chain approach.
- Lack of an integrated government policy framework.
- Lack of a shared industry vision.
- Industry inability to cooperate / work together effectively.
- Lack of product differentiation and ability to capture higher value markets.
- Over-dependence on the US market.
- Threat of continued US border actions.
- Shortage of affordable, abundant labour.
- Increasing environmental impact, animal welfare, and public scrutiny.
- Rising land and infrastructure costs.
- Commodity orientation of industry is experiencing pressure from cheaper competitors.
- Inability to attract the next generation of producers due to lack of industry profitability.

### ***Successful Transformation***

Successfully achieving transformation of the livestock industry will require a sustained and focused effort that will likely extend over several years. New understanding and commitment to new directions are built through ongoing, meaningful engagement with key stakeholders. A process that is strategically focused, sequenced and disciplined will build the capacity necessary for a high-performing, sustainable and self-reliant industry.

The likelihood of success is improved if the transition is rapid, comprehensive and managed in a coordinated and integrated manner. Government's role is to be the catalyst and initial investor for such a transition. Time is of the essence. To achieve maximum impact, these implementation plans should be executed as soon as possible and in their entirety in order to return the industry to competitiveness as soon as possible.

### ***Paradigm Shift Required***

The Alberta livestock industry is faced with the difficult task of repositioning itself from the uncompetitive model of today, to a much more competitive and sustainable model for the future. This can be accomplished by engaging affected stakeholders on the current conditions hampering the industry,

and proposing a new direction and model. Government leaders and staff will also need to understand the renewed vision and direction for the industry, make the required changes and provide the necessary supports to facilitate this transformation. Some of the key changes are outlined below.

### The Livestock Industry of Tomorrow

From... the livestock industry today		To... the livestock industry of tomorrow
Shared Industry vision lacking	➡	Alignment around a shared vision
Dependence on U.S. market	➡	Diversified export markets
Commodity focus	➡	Differentiated products
Under developed animal health & meat safety system	➡	Highly developed animal health & meat safety system
Focus on production efficiency	➡	Value chain focus on consumer
Limited information flow	➡	Information exchange across value chain
Agriculture as a lifestyle	➡	Agriculture as a value-adding business
Independent sector perspectives	➡	Integrated value chain perspective
Talk	➡	Action

### OVERARCHING COMPETITIVE STRATEGIES FOR THE LIVESTOCK INDUSTRY

Government can act as a catalyst to support and encourage the development of a new competitive model to enable industry success. The following overarching strategies are used to help guide the development of specific actions and initiatives in this implementation plan.

#### ***Build on a foundation of animal health, food safety and public health***

- Support the industry value proposition, stated as "*leadership in animal health and food safety*".
- Support national strategies, *Animal Health Act* and information sharing.
- Build disease diagnostic capacity, On-Farm Food Safety and its support of animal health surveillance for emerging and foreign animal disease.

#### ***Differentiate at the production/producer level***

- Enhance value chain information systems including genomics/genetics, production systems, traceability, supply chain alliances, branding, environmental stewardship, animal health and food safety, animal welfare, and other attributes.
- This strategy builds on Alberta's strengths and makes it difficult and costly for competitors to duplicate.

#### ***Diversify markets***

- Reduce dependence on exports to the U.S.
- Strongly advocate to the Federal Government for enhanced market access in key export markets.
- Expand sales to markets that will pay premiums for differentiated products, or to markets that recognize and reward the value proposition.

- Optimize profitability by exporting specific products to those markets where total returns are optimized.

### *Enhance marketing effectiveness*

- Ensure marketing funds are being invested effectively and efficiently. Support long-term export sales initiatives.
- Link with international partners and create long-term relationships as part of their value chains.
- Support branded and source-verified programs to enhance value.

### *Foster effective business models*

- Encourage and invest in professional development and attract management talent to the industry.
- Support the development of value chain initiatives that serve to advance differentiation of products, diversification of markets and enhanced industry profitability.

### *Reduce costs and regulatory barriers*

- Reduce costs, streamline processes and enable “smart regulations” that add value, not detract from it.
- Take a leadership position with Federal and Provincial governments to help reduce costs and barriers to competitiveness.

### *Promote a strengthened supply chain*

- **Producers:** move from selling calves and hogs to selling traits and attributes.
- **Processors:** move from a cost perspective to providing valuable information and clearer market signals.
- **Exporters:** move from selling commodity meat to marketing differentiated, branded products.
- **Associations:** be more effective and facilitate industry change.

### *Government as a catalyst*

- Help create an environment for industry to be successful with industry remaining the driver.
- Make strategic investments in industry transition.
- Align government policies and programs to strategic priorities.

## SCOPE OF THIS PLAN

The Alberta livestock & meat strategy encompasses beef, pork, bison, cervidae, and sheep.

### AN ALBERTA LIVESTOCK & MEAT AGENCY

An Alberta Livestock and Meat Agency will be created and will report to the Minister of Agriculture and Rural Development. The Agency will be designed to include industry participation. Its purpose will be to support the livestock industry with a focus on directing funds, resources and programs towards strategic priorities.

The rationale for creating the Agency is to:

- Better position the livestock industry to capitalize on and achieve a shared vision and goals;
- Align and focus resources and funds toward strategic priorities;
- Better meet the needs of all livestock industry stakeholders;
- Facilitate industry transition; and
- Enhance efficiency and effectiveness while streamlining services and reducing costs.

Elements of the Alberta Agency and its key success factors will be adapted from the Australian Meat & Livestock Agency, which is internationally recognized as being highly successful and an example where industry and government work closely in partnership.

### THE BOARD

The Board for the Alberta Agency will report to the Minister and be comprised of independent directors. For the Agency to be successful, it is important that the Board composition be based upon specific competencies. Individual Board members will have diverse backgrounds and experience, not necessarily within the livestock and meat industry. Candidates would be chosen from a range of fields and endeavours, be recognized for high achievement, internationally experienced, and have demonstrated skills in providing strategic advice and direction. This governance model is expected to evolve as the industry and government partnership strengthens over time.

### GOVERNANCE PRINCIPLES

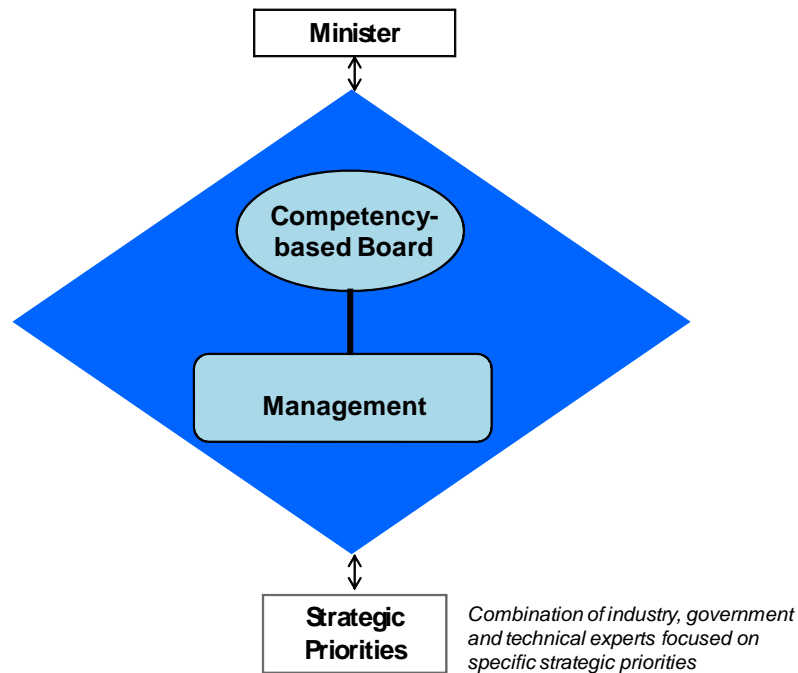
The model for the Agency is based upon the following governance principles:

1. Objective Leadership;
2. 'Oversight' separate from 'operations';
3. Competency-based;
4. Minimize potential for conflict of interest;
5. Flexibility for the future; and
6. Responsive and accountable operational support.

### ROLES AND RESPONSIBILITIES

The responsibilities of the Agency will be to focus, align and ensure effective implementation of programs, policies and initiatives directed to the livestock and meat industry (see Figure below).

**A Model for an Alberta Livestock & Meat Agency**



The primary roles of the new Agency are to:

- Act as a catalyst to transition to a sustainable competitive industry;
- Act as a coordinating entity for various government funds and resources to ensure they are aligned with the strategic direction;
- Ensure adequate performance metrics are in place for industry and government to measure success in achieving long term goals;
- Prepare an annual operational plan;
- Coordinate and/or fund activities and deliver programs that are consistent with the annual operational plan and strategic priorities; and
- Monitor, evaluate and report to the Minister on:
  - Activities that are coordinated and/or funded, wholly or partly, by the Agency; and
  - Performance of the livestock industry relative to agreed outcomes and benchmarks.

#### ALBERTA FARM RECOVERY PLAN II

The Alberta Farm Recovery Plan II (AFRP II) will be a direct decoupled payment minimizing market distortions in order to assist the industry to transition towards a risk managed system addressing animal health, public health and food safety concerns. It will also assist producers to transition to the new competitive model as outlined in this livestock and meat strategy.

The total payment is estimated to be \$300 million to be paid out in two instalments. The first payment will be immediate. The second payment will be made at a later date, will be contingent on cattle age verification and livestock premise identification; and industry and government establishing an appropriate measure of success for tracing animal movement. A producer must be farming in the 2007 calendar year to be eligible. Payment will be based on 2006 livestock information. For those who have submitted this information for AFRP, there will be no further information requirements for the first payment. Those who did not participate will have to complete an application form.

The payment is based on a feed proxy similar to what was used in AFRP I, taking into account animal breed, pounds gained and feed costs. Payments will be decoupled from AgriStability (formerly CAIS).

Compliance will be at an individual level and producers will be required to sign an authorization form that will allow AFSC access to their records. This authorization will allow AFSC access to the databases that house the information on age verification and premise identification to determine compliance. Therefore, if producer A has complied, that producer will receive the second payment. If producer B has not complied, payment will be withheld.

### PRIORITY INITIATIVES

Eight priority initiatives have been developed to achieve transition in the industry. These changes will re-energize the players, redirect limited resources to key priorities, revitalize livestock industry organizations, realize benefits from enhanced value chain relationships, and refocus efforts to achieve a competitive and sustainable industry.

#### 1. SHARED VISION

For the Alberta livestock industry to sustain and build upon its success in the increasingly competitive global market, the industry requires a shared vision and a long-term strategy. This vision provides the basis for the industry to be globally differentiated, enable the development of products that meet distinct Canadian and international customer needs, and enhance alignment across all elements of the supply chain.

Starting in October, 2007, the Minister held a series of meetings with the livestock industry to seek their input in how to deal with the competitive challenges facing the industry. The Minister also challenged beef industry leaders to submit their plans and strategies to the Beef Industry Review Committee for consideration. The Government subsequently received input on a wide range of issues from key Alberta beef and pork associations and organizations.

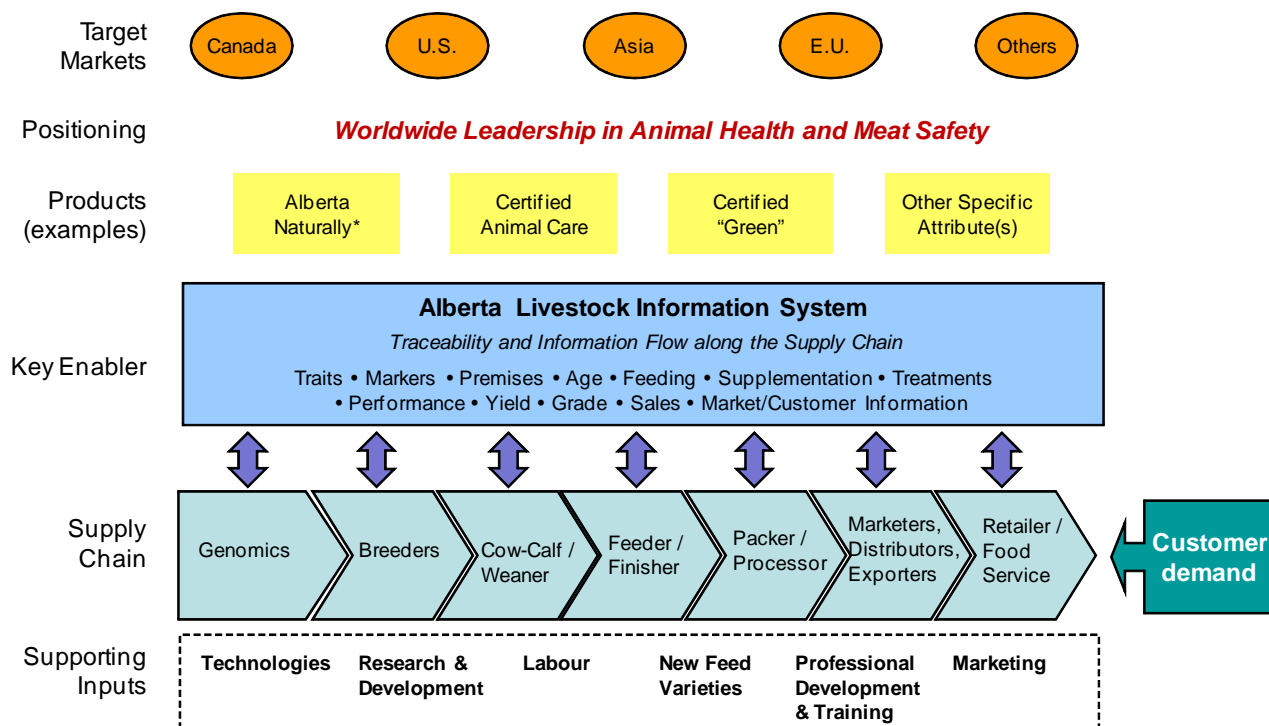
The Alberta livestock industry must develop a shared vision and a comprehensive strategy that is inclusive of key supply chain participants. Given that no comprehensive industry strategy currently exists, a vision has been proposed to enable the industry to return to competitiveness and profitability. The vision suggested is: *"Towards an internationally competitive industry that provides differentiated products to meet distinct customer needs"*. The Figure on the following page presents a proposed model for the overall Alberta livestock industry.

The proposed vision and model has been built on the value proposition: *"Worldwide leadership in animal health and meat safety"*. This recognizes that Canada and Alberta should further strengthen the solid foundation that has already been established in animal health and meat safety and use it as a platform from which to further differentiate and market Alberta livestock products.

The vision proposes creating an *"Alberta Livestock Information System (ALIS)"*, a robust mandatory traceability system integrated with a broader, industry managed information system. ALIS would aggregate key data from across the full supply chain and build upon Alberta's existing advantage in traceability. The result would be to help position Alberta as a global leader in systems that ensure animal health and food safety throughout the supply chain.

### Proposed Shared Vision and Model for the Alberta Livestock and Meat Industry

"An internationally competitive industry that provides differentiated products to meet distinct customer needs"



## 2. ANIMAL HEALTH AND FOOD SAFETY

To create an innovative competitive advantage, Alberta must take a lead in animal health and food safety in the livestock industry. Alberta needs Canadian food safety standards to provide customers food safety assurances. Industry expects prion research to be directed towards efforts to eliminate and mitigate the threats of BSE/CWD and Scrapie. Validated surveillance and monitoring of health status of Alberta animal livestock populations is critical in order to access international markets.

- 2.1 **Food Safety Systems** - Set specific standards for testing for pathogens, adoption of preventative food safety systems and pro-active detection of food safety hazards.
- 2.2 **Transmissible Spongiform and Encephalopathy (BSE, CWD and Scrapie) Mitigation** - Work within the Alberta Prion Research Institute and industry to develop recommendations for funding a TSE eradication and / or mitigation technology initiative in Alberta.
  - a. Develop a scenario-based plan (with industry academic and government participation) describing the opportunities and threats associated with implementing TSE eradication and / or mitigation technologies in the province.
  - b. Study the cost/benefit and efficacy properties of suitable TSE eradication and / or mitigation technologies.

- 2.3 **Animal Health** - Support leadership in animal health and livestock safety through the development and improvement of animal health surveillance infrastructure, bio-security measures and animal health insurance programs:
- a. Advocate for an effective national farmed animal health strategy, which includes a national animal health surveillance plan;
  - b. Improve Alberta animal health surveillance, diagnostic and veterinary infrastructure;
  - c. Ensure Alberta legislation in the *Animal Health Act* provides risk mitigation for the threats to the livestock industry that are not covered adequately by Federal legislation;
  - d. Support regionalization and compartmentalization (i.e., zoning) initiatives for emergency management and foreign animal disease outbreaks by CFIA;
  - e. Provide incentives for bio-security improvements and on-farm food safety adoption in the industry including identifying compensation for high risk provincially reportable diseases;
  - f. Reduce the availability of over-the-counter non-prescription animal health products that put Alberta livestock access at risk in international markets.
  - g. Support the development of industry-led animal health insurance programs; and
  - h. Work with the insurance industry to promote the reduction of farm insurance premiums based on the use of best practices in animal health.

### 3. ALBERTA LIVESTOCK INFORMATION SYSTEM

The Alberta Livestock Information System (ALIS) will be a robust mandatory traceability system integrated with a broader, industry managed information system. This system would aggregate key data from across the full value chain and build upon Alberta's advantage in traceability and age verification. ALIS will be an information system where all members from the value chain contribute information, and information can be extracted by all members. By allowing all of this information to be shared, value can be added. The result would be to help position Alberta as a global leader in systems that ensure animal health and meat safety throughout the supply chain.

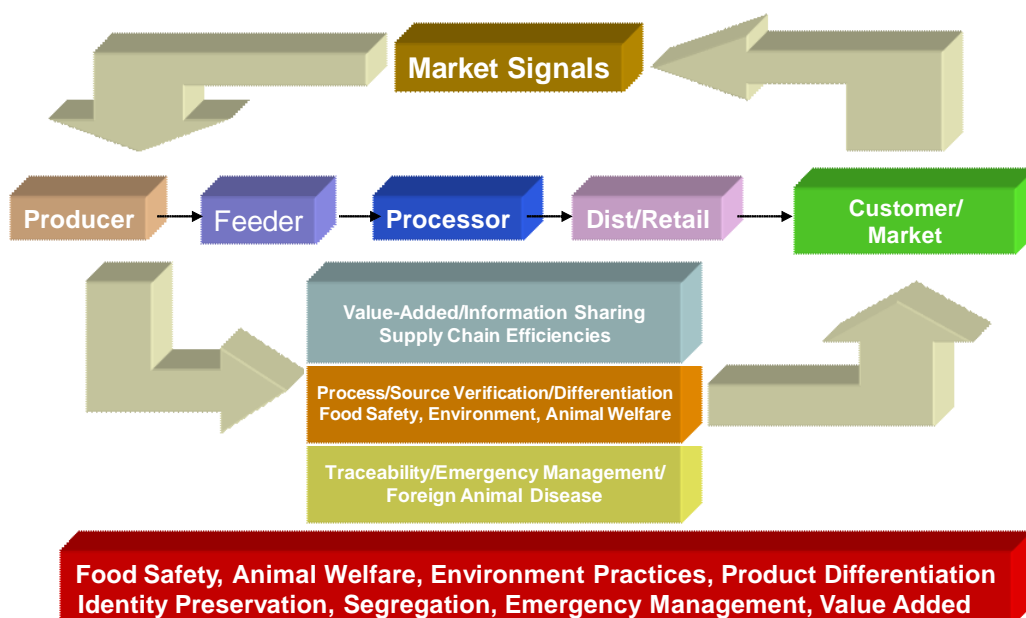
ALIS will foster an "information highway" across the supply chain, facilitating the development of unique and differentiated products that are driven by and designed to meet distinct customer needs. As needs evolve, the enhanced flow of information will enable the Alberta industry to respond more quickly to market signals, providing it with a potentially decisive advantage relative to global competitors.

ALIS is considered to be a 'public good'; of benefit to all supply chain participants and therefore a legitimate and necessary investment for government. Many Alberta industry leaders accept and acknowledge that the elements described in this vision are critical to enhancing Alberta's long-term competitive advantage. The Agency will provide oversight to the design and operations of this information system. Industry and government will work together to determine the most appropriate and effective way to manage this system.

The ALIS approach is contingent on building a comprehensive traceability system for emergency management of such issues as foreign animal disease outbreaks. The system would have the capacity

to be augmented to provide value-added industry information transfer. Many initiatives will be addressed in concert with the traceability proposal, and source and attribute-verification (see Priority Plans 3.2, 4.2, 4.3 and 4.4). Refer to Appendix A for dates of implementation.

Alberta Livestock Information System



- 3.1 **Alberta Livestock Information System Development.** Invest in the development of an Alberta Livestock Information System (ALIS) to help create value across the chain.
- 3.2 **Traceability** - Invest in and strengthen the livestock Traceability System (including cattle age verification), starting with cattle and hogs. This system will form the basis for enhanced emergency management and foreign animal disease preparedness and contribute to product differentiation.

#### 4. DIFFERENTIATION INITIATIVES

Key to the industry's future success will be competing with superior, differentiated products tailored to specific customer needs and addressing high value markets internationally. Alberta must create a framework so that new livestock products can be undisputedly recognized and certified thereby enhancing value and customer choice. Alberta must also reduce its current 80% dependency on the US market by developing demand in other export markets. Refer to Appendix A for dates of implementation.

- 4.1 **Livestock Genomics** - Genomics promises a new era of tailoring beef characteristics to meet market needs. Strategically invest in a provincial genomics lab, making it available to livestock, dairy and equine sectors to support value creation initiatives and support industry adoption. See Priority Plans 3.1, 3.2, 5.1 and 5.3.

- 4.2 **Alberta Branded Livestock Products.** See Priority Plans 3.1, 3.2, 4.1, 4.3, 4.4 and 5.1.
- Develop in consultation with industry where appropriate the infrastructure to establish certification processes to differentiate livestock products in Alberta, including definition, standards, protocols and audit capacity.
  - Obtain trademark rights for Alberta branded livestock products and make them available to industry through a certification program.
  - Develop standards for "Animal Care", environmental management and other certifiable programs to differentiate livestock products as required (within one year) and have them approved by CFIA.
  - Improve access to national certification programs such as hormone-free.
  - Where national programs do not exist establish provincial standards and protocols for naturally raised, range fed, grass fed and / or others as suggested by industry and markets.
  - Examine and make recommendations with respect to establishing a provincial grading system for products.
  - Work with CFIA to establish required agreement and protocols in order to deliver the above programs in Alberta.
  - Enhance the capacity to provide advice and assistance to industry in support of verification and certification initiatives.
- 4.3: **Animal Care Practices** - Introduce voluntary certification programs that allow the industry to verify humane animal care practices. See Priority Plans 3.1, 3.2, 4.2 and 4.4.
- 4.4: **Environmental Management** - Introduce voluntary certification processes that allow the industry to verify mitigation of environmental risks. See Priority Plans 3.1, 3.2, 3.3 and 6.
- 4.5 **Country-of-Origin Labelling (COOL)** - Work with the Federal Government to consider mandatory country-of-origin labelling in Canada for livestock products. Failing this, Alberta will consider adopting its own labelling programs. See Priority Plans 2.1, 2.3, 3.1, 3.2 and 5.1.
- 4.6 **Organic Grains Pilot** - Evaluate the costs and benefits of implementing a pilot program that will provide an incentive to encourage the production of organic grains for the organic meat market. See Priority Plan 4.2.

## 5. MARKETING AND DIVERSIFICATION INITIATIVES

Redirect and refocus government funds to improve product development and commercialization, promote supply chain partnerships, enhance export marketing effectiveness and lower export market risk.

- 5.1 **Government Trade, Business and Product Development Programs** - Strengthen Alberta's trade strategy to help exporters capture new opportunities in export markets, encourage market diversification and attract new customers for Alberta livestock products. Ensure government business and product development programs and supports are aligned with the strategy and that government officials work closely with industry on the development of such programs.

- 5.2 **Export Financing & Insurance** - International and Intergovernmental Relations (IIR) should undertake a study that would focus on how best to assist the agriculture and food industry (including livestock) minimize and manage export risk (e.g. export insurance, export financing mechanisms) in order to help expand exports, especially in offshore markets.
- 5.3 **International Investment and Partnership Attraction** - Government should develop an investment/strategic partnership attraction strategy with adequate resources to help attract international participation in the livestock industry and in the Alberta agriculture and food industry in general, so as to secure the long-term commitments of international customers.
- 5.4 **Refocus and Realign Marketing Funds** - Redirect government-provided grants and funds toward strategic priorities and with clear objectives and accountabilities. Focus funds on supporting differentiation of products and diversification of markets. Consult directly with exporters to develop market development initiatives designed to achieve long-term export sales.
- 5.5 **Technology Commercialization** - Support the recommendations of the Alberta Advanced Education and Technology Task Force on Value-Added Technology Commercialization by following through on the tasks outlined to ensure that the agriculture industry will have opportunity to access this suite of initiatives and programs.
- 5.6 **Align Government Research and Development Funding** - Align all Alberta government funded livestock research and development programs with the industry strategy and policy framework focusing more resources on commercialization opportunities. See Priority Plans 5.1 and 5.5.
- 5.7 **Enhancing Market Access** - Advocate to the Federal Government for the following:
  - a. Timeliness and effectiveness of Canada's international livestock market access negotiations;
  - b. Gain partial access in foreign markets as an interim measure to re-establish trade in livestock products;
  - c. Allocate resources to negotiate market access with all remaining key livestock importing countries.

## 6. ENVIRONMENTAL STEWARDSHIP

Attitudes and expectations of Albertans and the international community are changing. The livestock industry must adapt appropriately. Opportunities exist for the industry to generate revenue through environmental enhancement. Recognition from the market for the provision of Ecological Goods and Services (EGS) from the agricultural landscape, including the carbon market, may generate additional revenue. Environmental stewardship can also enhance productivity, lower input costs through conservation and improved efficiencies and improve economics. The use of alternative energy technologies offers potential for producers and communities to realize new sources of income and lower costs and achieve environmental benefits.

- 6.1 **Ecological Goods and Services** – Working through the Institute for Agriculture, Forestry and the Environment, develop a set of principles and a policy framework that supports

environmental stewardship in the livestock industry to recognize the production of Ecological Goods and Services (EGS). See Priority Plan 4.4.

- 6.2: **Bio-Energy** - Support biogas adoption and adaptation and enhance the bio-energy program through consultation and collaboration with stakeholders.
- 6.3: **Carbon Credits** - Introduce additional carbon offsets that support environmental stewardship in the livestock sector for revenue generation.

### 7. COST REDUCTION AND REGULATORY BARRIERS INITIATIVES

To achieve competitiveness in the livestock sector there must be a focus on reducing costs and barriers as well as adding value. Cost reduction and the removal of unnecessary regulatory barriers are vitally important in improving the overall competitiveness of the livestock industry.

- 7.1 **Lean Manufacturing / Cost Reduction** - Establish an automation program for livestock producers and meat processing companies to help reduce costs and increase efficiencies, and adopt technology to encourage environmental management and best practices.
- 7.2 **Temporary Foreign Worker Program** - Extend the term of the Temporary Foreign Worker Program to three years and expand the Provincial Nominee Program (PNP) as required.
- 7.3 **Kernal Visual Distinguishability (KVD) Phase Out** - Phase out KVD as rapidly as possible in order to stimulate the use of high-yielding feed grain varieties.
- 7.4 **Plant Novel Trait** - Conduct a review of the regulations governing "Plant Novel Trait" to achieve flexibility to meet market needs. Plant novel traits refers to specific attributes of the grain that are targeted at market needs (for example, health, drought resistance, feed characteristics).
- 7.5 **Alberta Feed Grains Centre of Excellence** - Establish an Alberta Feed Grain Centre of Excellence to focus on the development and adoption of higher yielding varieties.
- 7.6 **Marketing Choice** - Pursue the removal of Canadian Wheat Board monopoly control over wheat and barley.
- 7.7 **Cattle Price Insurance Program** - Reduce costs and risks to producers by introducing a cattle price insurance program that incorporates price and / or 'basis' risk options. This is a unique program that does not currently exist in Canada.
- 7.8 **Regulatory Liaison Unit** - Create a regulatory liaison unit to improve and elevate ARD's ability and capacity to collaborate with industry, other provinces and the Federal Government to improve and streamline regulatory regimes and reduce unnecessary regulatory obstacles impacting the agriculture industry in Alberta.
- 7.9 **Regulatory Review** - Complete a review of regulations administered by ARD to identify those that add unnecessary costs and those that may be required to enable strategic investment in the competitive transformation of the Alberta livestock industry.
- 7.10 **Federal and Provincial Advocacy** - Work with the Federal Government and other provinces to gain their support and alignment with current initiatives, and work with all outside jurisdictions to pursue priorities over the longer term. See Priority Plan 5.

### 8. INDUSTRY GOVERNANCE AND TRANSITION

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Alberta livestock industry organizations must also evolve to adequately support the changes required to return to competitiveness. Alberta will engage with key industry organizations to address issues of accountability, representation and effectiveness and will create opportunities for industry and government to work together in a more effective partnership.

- 8.1 **Evolving Industry Governance.** Facilitate the transition of livestock organizations to be more effective in providing value to the livestock industry. A renewed Alberta livestock industry designed for the 21st century requires updated industry governance and approaches. See Priority Plans 2.1 and 3.1.

### TIMELINE

#### GANTT CHART: FIRST THREE YEARS (QUARTERLY)

Priority Plan	Target completion Date	3 / 3 / 08	6 / 30 / 08	9 / 30 / 08	12 / 31 / 08	3 / 3 / 09	6 / 30 / 09	9 / 30 / 09	12 / 31 / 09	3 / 3 / 10	6 / 30 / 10	9 / 30 / 10	12 / 31 / 10
Shared Vision	Dec 31, 08												
Animal Health and Food Safety	Dec 31, 13												
Food Safety System	Jul 31, 13												
TSE Mitigation	Dec 31, 10												
Animal Health	Dec 31, 13												
Alberta Livestock Information System	Jun 1, 10												
ALIS Development	Apr 30, 10												
Traceability	Jun 1, 10												
Differentiation Initiatives	Dec 31, 13												
Livestock Genomics	Sep 30, 11												
Alberta Branded Livestock Products	Dec 31, 13												
Animal Care Practices	Nov 30, 09												
Environmental Sustainable Practices	Mar 31, 11												
Country of Origin Labelling	Jul 31, 10												
Organic Grains Pilot Project	Dec 31, 12												
Marketing and Diversification Initiatives	Apr 1, 09												
Government Trade Development and Investment Programs	Apr 1, 09												
Export Financing and Insurance	Apr 1, 09												
Investment Attraction	Oct 31, 08												
Refocus and Realign Marketing Funds	Sep 30, 08												
Technology Commercialization	Dec 31, 08												
Evolving Industry Governance	Dec 31, 08												
Enhancing Market Access	Jan 1, 09												
Environmental Sustainability	Jun 30, 10												
Ecological Goods and Services	Nov 30, 09												
Bio-Energy	Jun 30, 10												
Carbon Credits	Jun 5, 10												
Cost Reduction & Regulatory Barriers Initiatives	Jul 1, 10												
Lean Manufacturing / Cost Reduction	Nov 30, 08												
Temporary Foreign Worker Program	TBD												
KVD Phase Out	Dec 31, 08												
Plant Novel Trait	Mar 31, 09												
Alberta Feed Grains Centre of Excellence	Jul 1, 10												
Marketing Choice	Dec 31, 08												
Cattle Price Risk Insurance Program	Dec 31, 09												
Regulatory Liaison Unit	Dec 31, 08												
Regulatory Review	Mar 31, 09												
Federal and Provincial Advocacy	Jun 30, 08												
Industry Governance & Transition	Jun 30, 09												
Align Government Funding	Jun 30, 09												

### ENGAGEMENT PLAN

#### Key Engagement Meetings & Events (First Six Months)

Announcement	June 2008	July – August 2008	September 2008	October 2008	November 2008	December 2008
<p><b><u>Engagement Workshop #1</u></b></p> <p>Focused on clarifying announcement and next steps</p>	<p><b><u>Engagement Workshop #2</u></b></p> <p>Focused on introducing ALIS</p> <p><b><u>Engagement meetings</u></b> with individual industry associations</p>	<p>Review schedule, outcomes, clarify details</p>	<p><b><u>Engagement Workshop #3</u></b></p> <p>Focused on the shared vision and industry governance; Minister reception following workshop</p>	<p><b><u>Engagement Workshop #4</u></b></p> <p>Focused on certification (environment, health, food safety, animal welfare/health)</p> <p><b><u>International Livestock Symposium</u></b></p>	<p><b><u>Engagement Workshop #5</u></b></p> <p>Focused on consolidation; Minister reception following workshop</p>	<p><b><u>Industry AGMs</u></b></p> <p>Minister attends</p>
<p>Deputy Minister to host engagement meetings with small groups of individual producers</p>						
	<p>Producer Meetings with AFSC</p>			<p>Producer Meetings with AFSC/ARD</p>		
<p>Industry technical meetings, as required, to advance priority initiatives</p>						

**Key Outcomes (Dec 31, 2008)**

1. Agree, in principle, to shared vision
2. Agree, in principle, to buy-in to the Agency

### APPENDICES

#### APPENDIX A: ALBERTA LIVESTOCK INFORMATION SYSTEM – IMPLEMENTATION DATES

	Information Required	Beef Producers	Feedlots (Beef)	Pork Producers	Other Species	Packers	Stakeholders
<b>Mandatory Requirements</b> <i>(explore implementation options with industry)</i>	Premise ID	Jan 2009	Jan 2009	Jan 2009	Jan 2009	Jan 2009	Animals are grown, kept, assembled, or disposed Jan 2009
	Age verification (beef)	Jan 2009	Jan 2009	NA	NA	Jan 2009	NA
	Movement	Jun 2010	Jun 2010	Jun 2010	TBD	Jun 2010	Jun 2010
	Source verification	Jun 2010	Jun 2010	Jun 2010	TBD	Jun 2010	All by Jun 2010
	Yield and grade	Sep 2010	NA	NA	TBD	Pork Apr Beef Sep 2010	NA
	On-Farm Food Safety verified	Jul 2013	Jul 2010	Jul 2010	Sheep 2011 Deer/Elk 2012 Bison 2013	NA	NA
	Weaning date	TBD	TBD	NA	TBD	NA	NA
	Medication / vaccination	Sep 2010	Jan 2010	TBD	TBD	NA	NA
<b>Voluntary Programs</b> <i>(explore incentives with industry)</i>	Bio-security verified	Jan 2010	Jan 2010	Jan 2010	Jan 2010	Jan 2010	Jan 2010
	Animal care verified	Jan 2010	Jan 2010	Jan 2010	Jan 2010	Jan 2010	Jan 2010
	Environmental stewardship verified	Jan 2010	Jan 2010	Jan 2010	Jan 2010	Jan 2010	Jan 2010
	Brand and attribute certification	Oct 2010	Oct 2010	Oct 2010	Oct 2010	Oct 2010	Oct 2010

TBD - To Be Determined

NA - Not Applicable

### ALIS: SECTORAL OVERVIEWS

#### **Beef:**

The Alberta program will:

- Identify Alberta sourced cattle, share information as to its traits and markers, breeding, vaccination and other treatment, feeding, whether under On-Farm Food Safety Program, animal welfare, yield and grade and other information. See Priority Plan 4.2.
- Link databases (some already in existence) to share valid and useful information to owners of cattle throughout the supply chain so producers and processors can make better decisions on production practices, providing the customer with the products in highest demand, branding based on attributes throughout the life of the animal and improving efficiencies.
- Enable the adoption of the technology at each point in the information chain. See Priority Plan 3.2.

Producer personal digital assistance (for example, Blackberry or cellphone), Radio Frequency Identification (RFID) readers in auction marts and feed-yards, and appropriate speed-of-commerce technology adoption in processing plants will be essential for any program success. The Alberta beef industry will lead the national effort in information flow along the supply chain.

Data captured through the Traceability Initiative will form the basis of ALIS. ALIS is fully dependent on having full traceability for livestock, including premises ID. During Phase I of implementation, and following the same timelines, an inclusive industry-government group will be struck to define the scope of the data requirements. Producers would be required to have premises ID, age verify their calves, and provide such information as vaccination, pre-conditioning and treatments. Feeders would use this information to appropriately treat incoming animals and provide processors with production information. In exchange, processors would be required to provide carcass grade and yield information back to previous owners along the supply chain.

As with traceability, information requirements will be developed and phased in over a three year period, working with the Agency. Information sharing agreements need to be in place to move this initiative forward.

Alberta should also build upon national initiatives already underway. The Canadian Beef Advantage Pilot Project managed by the Canadian Cattlemen Association (CCA) is focused on implementing significant and demonstrable animal production, health and beef safety changes throughout the supply chain, with source and age verification and including quality assurance and Hazard Analysis Critical Control Point (HACCP)-based programs.

#### **Pork:**

As indicated in the Alberta pork industry's 'The Way Forward', the industry will work towards building a long-term industry strategy by requiring full traceability and process verification through to the processor. The plan is to include enhanced transparency in the entire system including movement, production attributes, inputs such as PayLean, carcass information and pricing. Implementation of food safety and Quality Assurance processes must be easily verifiable and demonstrable to customers. This

will require accreditation to ensure standards are met. Alberta's pork industry will be participating in Phase 1 of the Traceability Implementation Plan.

### **Bison:**

Bison are required to be identified through Canadian Cattle Identification Agency (CCIA) animal ID tags. The development of any bison traceability and information sharing system should mirror Alberta cattle and beef efforts. Additional database requirements will be determined during Phase I implementation.

### **Elk and Deer:**

Full traceability has already been established. Additional database requirements would be during Phase I implementation. Carcass information is already delivered back to individual producers. A way of automating this information system will be reviewed.

### **Sheep and Lamb:**

ARD is in the second year of the Lamb Traceability Pilot project (10 farm / feedlot co-operators, plus Sunterra Meats). The transfer of carcass information is part of this initiative and currently a software developer is designing the carcass reports and the remote data storage/exchange repository. This pilot interfaces with CCIA's database. It will be easy to fold this initiative into the Traceability Implementation Plan and have the information available throughout the supply chain.

### **Horse:**

There is currently an ongoing traceability pilot program. Although full traceability is necessary for food safety requirements, horsemeat is a by-product of the horse industry and animals are not specifically raised for quality attributes. The Agency will need to review whether there is any value in an information system.

### **Camelids and Goats:**

The individual identification of llamas, alpacas and goats will be necessary for food safety and emergency response. The Agency will need to review whether there is any value in an information system.

### APPENDIX B: DEFINITIONS

Word or expression	Definition
<i>Advocacy</i>	Active support; especially the act of pleading or arguing for something.
<i>Animal Identification</i>	A form of identification that will allow an animal to be identified and tracked.
<i>Attribute Verification (AV)</i>	A quality managed system that can identify a specific attribute of a product.
<i>Benchmarks</i>	A standard by which something can be measured or evaluated.
<i>Communications</i>	A two-way interaction between audiences. The words we say, the way we act and how we reinforce these through policies, infrastructure, and support systems.
<i>Competency-based Board</i>	A board whose board members are selected based on their ability to create a balance of business management, production and processing knowledge, marketing, economics, finance, accounting and legal knowledge. Other important skills include collaboration, visioning, ability to analyze and take risks, relationship-building, problem solving and negotiations.
<i>Desirable Changes</i>	Changes that the industry has identified as ones that should be considered as they would be beneficial to the industry or segments of the industry.
<i>Engagement</i>	Meaningful, two-way involvement in the process.
<i>Governance</i>	The use of institutions, structures of authority and even collaboration to allocate resources and coordinate or control activity in society or the economy.
<i>Government Certification(GC)</i>	A standard set for a quality managed system to meet. Government certification can be for an attribute or a process. It can be applied for branded products or best practices. Two levels of review and approval are required for full certification. One is a technical review which ensures that the proposed system is valid on paper. The second is an ongoing audit review to ensure that the system is maintained in a quality controlled system.
<i>Implementation</i>	The realization of an application, or execution of a plan, idea, model, or public policy.
<i>Industry</i>	The entire livestock supply chain.
<i>Leadership Support</i>	A willingness to champion and secure resources (both financial and human) necessary for implementation.
<i>Next Generation Producer</i>	Producers or future producers ages 18 to 35.
<i>Premise Identification</i>	A premise is a parcel of land defined by a legal land description or, in its absence, by geo-referenced coordinates, on which or any part of which, animals or food are grown, kept assembled or disposed of.
<i>Principles</i>	Statements about one's fundamental beliefs and/or mode of operation/behaviour. They are relatively static. They are often used as a benchmark – do our actions support our principles?
<i>Process Verification (PV)</i>	A quality managed system that can trace how the food was handled from farm to retail. A company, industry or government can "own" a process.

Word or expression	Definition
<i>Source Verification (SV)</i>	A quality managed system that can trace a food to its farm of origin (for example, a roast can be tracked to the farm the steer was born on). Movement tracking is required within SV. Source verification is a requirement for processes or attributes that require more than visual identification (like grade).
<i>Supply Chain</i>	The system of organizations, people, technology, activities, information and resources involved in moving a product or service from supplier to customer.
<i>Traceability</i>	The ability to follow the movement of food through specified stages of production, processing and distribution.
<i>Value Chain</i>	<p>A strategic collaboration of organizations for the purpose of meeting specific market objectives over the long term and for the mutual benefit of all 'links' of the chain.</p> <p>Beef value chains allow the participants to be 'customer driven' and change the product offered when customers change what they want, and are willing to pay for it.</p> <p>Toma and Bouma (1998) indicate that value chain formation within the agri-food systems is developing in response to several key drivers. These include:</p> <ul style="list-style-type: none"> <li>- Food safety issues, product quality, new product innovation and differentiation and lowering 'system' costs; and</li> <li>- The most common chain drivers include market differentiation, quality assurance, and chain optimization.</li> </ul>
<i>Value Proposition</i>	The sum total of benefits which a vendor promises a customer will receive in return for the customer's associated payment (or other value-transfer). In simple words: value proposition = what the customer gets for what the customer is willing to pay.
<i>Values</i>	Fundamental principles and beliefs that serve as implicit criteria guiding all actions and decision-making.
<i>Vision</i>	A picture of the future the industry seeks to create, typically described in the present tense as if it were happening today.

### APPENDIX C: ACRONYMS

Acronym	Formal Name
AAF	Alberta Agriculture and Food
AAFRD	Alberta Agriculture, Food and Rural Development
AAPMC	Alberta Agriculture Products Marketing Council
AARI	Alberta Agricultural Research Institute
ABIC	Alberta Beef Industry Council
ABP	Alberta Beef Producers
ACAAF	Advancing Canadian Agriculture and Agri-Food
ACIDF	Alberta Crop Industry Development Fund
ACFA	Alberta Cattle Feeders' Association
AFRP	Alberta Farm Recovery Plan
AFSC	Agriculture Financial Services Corporation
AGC	Alberta Grain Commission
AIBMDF	Alberta International Beef Market Development Fund
ALIDF	Alberta Livestock Industry Development Fund
AMPC	Australia Meat Processor Corporation
APRI	Alberta Prion Research Institute
ARD	Alberta Agriculture and Rural Development
ATQ	Agri-Traçabilité Québec
AVAC	Alberta Value-Added Corporation
BIC	Beef Information Centre
BIG	Beef Initiative Group
BSE	Bovine Spogiform Encephalopathy
CAHC	Canadian Animal Health Coalition
CAISP	Canadian Agricultural Income Stabilization Program
CBA	Canadian Beef Advantage (coined by CCA)
CBEF	Canada Beef Export Federation
CBBC	Canadian Beef Breeders' Council
CCA	Canadian Cattlemen Association
CCIA	Canadian Cattle Identification Agency
CCMDC	Canadian Cattlemen Market Development Council
CFIA	Canadian Food Inspection Agency
CI	Competitiveness Initiative
EGS	Ecological Goods and Services
EII	Employment, Immigration and Industry
FAA	Feeder Associations of Alberta
FDA	(US) Federal Department of Agriculture
GMAC	Global Marketing Advisory Committee
HACCP	Hazard Analysis Critical Control Point
IAFG	Institute for Agriculture, Forestry and the Environment
IFASA	Institute for Food and Agricultural Sciences
KVD	Kernel Visual Distinguishability
LICA	Livestock Identification and Commerce Act
LIS	Livestock Identification Services
MBM	Meat and Bone Meal
NCFA	National Cattle Feeders' Association
OFFS	On-Farm Food Safety

Acronym	Formal Name
OIE	World Organization for Animal Health
OMB	Office of Management and Budget
OTM	Over-30-Months
PNP	Provincial Nominee Program
SRM	Specified Risk Materials
TCI	Technology Commercialization Fund
USMEF	United States Meat Export Federation
UTM	Under-30-Months
VBP	Verified Beef Production (coined by CCA)
WSGA	Western Stock Growers Association
WTO	World Trade Organization

### APPENDIX D: SUPPORTING DOCUMENTS

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