



The Pork Value Chain Roundtable

Pramod Mathur
Canadian Centre for Swine Improvement



Pork Value Chain Roundtable

Main objectives

- Increasing competitiveness on domestic and international markets
- Bringing together all segments of the production chain
- Integrated efforts and efficient use of resources



A unique model of development

- Original method of work based on dialog and confidence
- Co-ordination and planning at national and provincial levels
 - Acknowledge the importance of working together
 - Consultation with industry stakeholders
- Working together for the Canadian swine industry



Participants

- Producers
 - CPC, provincial councils
- Processors
 - Olymel, Brochu, Maple Leaf Pork, Michel's Gourmet Food
- Retailers and Traders
 - Maple Leaf International, Canworld, Sunterra Farms



Participants

- Genetics
 - CCSI, CSBA
- Federal Government
 - AAFC, CFIA
- Provincial Government
 - Manitoba, Quebec, Saskatchewan
- Resource Persons
 - CPC, FPPQ, AAFC
 - Groupe AGÉCO



Founding of the PVCR

- March 2003
- Focus on two main objectives:
 - Cooperation and joint action
 - Maintaining Canada's position as the world's number one pork exporter

Initial Initiatives of the PVCR

1. Export Strategy (June 2003)
2. Benchmarking Study (Autumn 2003)
3. Pork Story (Winter 2004)
4. Action Plan (On-going process)

1. Export Strategy

- Objectives
 - Identify highest potential markets for Canadian product
 - Utilize the whole hog and capture the highest possible value from every cut
 - Increase market share in these priority markets
- Some results
 - Prioritizing key import markets (gold, silver and bronze)
 - Assessment of Canada's Ability to Compete on key import markets

1. Export Strategy – Key Markets

GOLD

- High Current Potential Returns
- Or vulnerable to share losses
- Or high potential growth of high value add product

Countries

- Canada
- USA
- Japan
- EU

SILVER

- High potential growth if Canada can gain access

Countries

- Korea
- Mexico
- China

BRONZE

- Maintenance of existing volumes
- Low potential growth

Countries

- Australia
- Russia

2. Benchmarking Study

- Objective
 - Defining the situation of Canadian pork industry vs. US and Denmark
- Comparison/ranking of ~ 30 elements
- Four main sections
 - Animal Health
 - Food Safety
 - Meat Quality
 - Responsive to consumer and citizen needs

2. Benchmarking Study

- Animal Health
 - Prevalence of disease ranking

Canada	US	Denmark
1	3	1

 - Better situation than US for prevalence of B diseases
 - Comparable to Denmark situation

2. Benchmarking Study

- Food Safety

	Canada	US	Denmark
Biological Hazards			
Feed Mills	2	3	1
On-Farm	2	2	1
Transport	3	2	1
Slaughter House	3	2	1
Chemical Hazards	?	?	?
Physical Hazards	2	2	2
Traceability			
Live Hogs	3	2	1
Meat	2	2	1

2. Benchmarking Study

- o Meat Quality

	Canada	US	Denmark
Carcass grading – Payment to Producer	2	2	1
Carcass grading – carcass utilization	3	2	1
Genetic Factors	1	3	1
Feed	2	2	1

3. Pork Story

- o To define a Canadian platform: a minimum quality standard
- o To develop a “Canadian brand” based on industry strengths
- o To develop a particular « version » of the story to suit specific buyers (emphasis on certain strengths)

3. Pork Story

- o Industry strengths proposed, following the Benchmarking study:
 - Long history (commitment, reliability)
 - o Meat Export history
 - o Genetic history
 - CQA/HACCP
 - Animal health
 - Traceability
 - Environment

4. Action Plan

- o Sets goals
- o Define objectives, issues and actions
- o Consultation across provinces
- o To be implemented by the end of 2004

4. Action Plan

Consultation process

- o Objectives
 - Inform stake holder about the PVCRT goals and initiatives
 - Share information about the strategic plan
 - Get their opinion

4. Action Plan

Consultation process

- o Groups that could meet
 - Producers
 - Processors
 - Retailers and Trading houses
 - CFIA
 - Veterinarians
 - Breeders and Research groups



4. Action Plan

Consultation process

Objectives	Comments
Improve on an ongoing health of the Canadian swine herd	
Priorities for Action: a) Promote the detection and elimination of genetic traits identified with diseases b) Support the research on genetic traits related to health factors c) Improve and promote a national slaughterhouse-producer feedback program to communicate to all producers information regarding herd health	



4. Action Plan

Consultation process

British Columbia	Calgary	May 4 - 5
Saskatchewan	Saskatoon	May 11 - 12
Manitoba	Winnipeg	May 18 - 19
Quebec	Drummondville	May 25 - 26
Ontario	Toronto	June 1 - 2
Atlantic	Fredericton	June 8 - 9
World Meat Congress	Winnipeg	June 14 - 17



Acknowledgement

Isabelle Charron
Groupe AGÉCO



Thank You



www.ccsi.ca