



Strategic Plan

for the Canadian Chicken Industry

2019 – 2023

Canadian chicken:
Consumers' preferred and trusted protein





Vision

Canadian chicken:

Consumers' preferred and trusted protein.

Mission

To lead and grow a sustainable Canadian chicken industry, while strengthening trust and enhancing value for Canadians.

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About Us

Chicken Farmers of Canada represents the 2,800 chicken farmers from coast to coast, and ensures that the Canadian chicken that consumers want is safe, delicious, and raised to the highest standards.



Strategic Ambitions

There have been many great successes in the chicken industry and with Chicken Farmers of Canada (CFC) over the past five years. The past growth in consumption, the new allocation system, the work to reduce fraudulent imports, the development of the brand and quality food safety and animal care programs, are some examples of the great work accomplished.

Even with the great amount of success in the past, there are still challenges within the industry, and there remains a need to continue to set CFC and the industry's direction.

The Strategic Ambitions set the tone for the five-year plan, and put optimal goals within reach for the industry. They provide the energy and direction for the Key Result Areas.

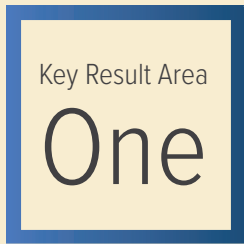


External

- » Belief among Canadians that chicken is a safe and healthy source of protein, raised by farmers they can trust
- » Broad consumer, retail, and food service support and recognition for the brand *Raised by a Canadian Farmer*
- » Standardized, science-based, on-farm food safety and animal care programs throughout the chicken industry value chain, which are recognized by government, are transparent and supported by consumers, farmers, and the chicken industry value chain
- » Demonstrated support from the government for supply management and its three pillars (import control, production discipline, and producer pricing)
- » Sustainable and profitable growth – increase consumption
- » Promotion of the truth about our industry, neutralizing the impact of vegan activist tactics

Internal

- » A deep understanding, throughout the chicken industry value chain, of consumer wants/expectations
- » A fact-based allocation process resulting in greater industry alignment
- » Advocating and lobbying efforts for shared values by CFC, with the support of an engaged and collaborative chicken industry value chain
- » Elimination of the preventative use of antibiotics important to human medicine
- » Collaboration throughout the chicken industry value chain
- » Environmentally responsible, sustainable farming, and value chain practices
- » An industry commitment to innovation through continuous improvement, and research and development
- » Recognition of CFC as a leader in governance and organizational effectiveness



Consumer Trust

Objective:

Be the most trusted Canadian protein provider

Context:

Consumers will believe and know that farmers and CFC are reliable sources of information and that the Canadian chicken and industry value chain practices are sound. Consumers will believe that CFC and the industry value chain have best-in-class animal care/welfare, food safety, and sustainability practices.

Draft Strategies:

- » Recognized Animal Care Program
- » Safety program – managing pathogens – Antimicrobial Use
- » Consumers trust farmers – build further trust
- » Address myths
- » Audit/standards



Goals:

- 1. Consumers love and trust Canadian chicken farmers**
- 2. Expose and eliminate myths**

Goal 1: Consumers love Canadian chicken farmers

Initiatives – CFC will:

- » Conduct research to understand consumer values
- » Promote and demonstrate that chicken farmers align with Canadian consumer values
 - Initiatives will have messaging based on shared values – e.g. care for animals, environment, etc.
- » Encourage transparency of chicken production
- » Wherever possible, align branding so that consumers associate the brand with the farmer
 - Also align the brand with food safety, animal welfare, and sustainability
- » Where appropriate, ensure the industry value chain advocates for chicken and chicken farmers
- » Increase transparency of chicken production through third party audits, track record, practices, and policies
- » Continue to explore complementary associations e.g. Swimming Canada, food banks

Goal 2: Expose and eliminate the myths

Initiatives – CFC will:

- » Identify common myths about chicken
- » Communicate the real message, busting myths about chicken
- » Take action to ban mention of hormones and steroids in chicken labelling

Key Result Area

TWO

Collaboration

Objective:

Meaningful collaboration with stakeholders to gain alignment on matters of mutual interest

Context:

1. Build trust with the chicken industry value chain
2. Recognize the need to align the chicken industry value chain around opportunities, innovation, and challenges from a value chain perspective
3. Communicate and deliver unified, coordinated industry strategies

Draft Strategies:

- » Determine and solve common challenges together
- » Ensure meaningful collaboration at
 - CFC Committee level
 - Provincial Boards/CFC level
 - Government/CFC level
 - Chicken industry value chain/CFC level
 - Canadian Hatching Egg Producers/CFC

Goals:

- 1. Increased Collaboration – Provincial Boards**
- 2. Increased Collaboration – Government/Supervisory Body**
- 3. Increased Collaboration – Chicken Industry Value Chain**

Goal 1: Increased Collaboration – Provincial Boards

Initiatives – CFC will:

- » Consult with Provincial Boards in addressing all relevant issues
- » Meet annually with every Provincial Board
- » Communicate its strategic plan with each province annually so that provincial plans can complement CFC initiatives
- » Ensure that there is an ongoing dialogue with Provincial Board staff
- » Attempt to complement and support Provincial Board strategic directions
- » Align and coordinate communication strategies with the Provincial Boards
- » Collaborate with Provincial Boards on all Federal/Territorial/ Provincial initiatives
- » Provide support to Provincial Boards in their Government Relations strategies and initiatives



Goal 2: Increased Collaboration – Government/Supervisory Body

Initiatives – CFC will:

- » In addressing all issues, consult with the Farm Products Council of Canada, Agriculture and Agri-Food Canada, the Canadian Food Inspection Agency, Global Affairs Canada, Health Canada, the Canadian Border Services Agency, and Finance Canada
- » Communicate its strategic plan to the Farm Products Council of Canada, and where appropriate, with other government agencies or department so that the agency plans complement CFC initiatives
- » Ensure that there is an ongoing dialogue with representatives from the agencies or department

Goal 3: Increased Collaboration – Chicken Industry Value Chain

Initiatives – CFC will:

- » In addressing all issues, consult with the members of the chicken industry value chain (primary processors, further processors, retail, food service, Canadian Hatching Egg Producers, other agricultural agencies, Canadian Federation of Agriculture, SM4, SM5, Canadian Hatchery Federation, Canadian Veterinary Medical Association, feed companies, consumer groups, animal welfare groups, etc.)
- » Where appropriate, communicate its strategic plan with the chicken industry value chain associations annually, so that the chicken industry value chain's plans may complement CFC initiatives and vice versa, to achieve maximum impact
- » Ensure that there is an ongoing dialogue with staff from the chicken industry value chain
- » Where appropriate, align and coordinate communication strategies with the chicken industry value chain



Key Result Area

Three

Supply Management System

Objective:

Enhance the flexibility and effectiveness of the supply management system while maintaining its integrity

Context:

1. Effectiveness of the national allocation system to meet market needs
2. Strong public and political trust
3. Maintenance of the integrity of the three pillars of supply management recognizing that CFC operates in a Federal-Provincial sharing of regulatory authority
4. Flexibility and transparency

Draft Strategies:

- » Maintain import controls
- » Maintain effective allocation system
- » Continuous improvement of the allocation system to meet consumer demand
- » Communicate and influence government on policy
- » Public relations

Goals:

- 1. Continue to ensure the integrity of the import control pillar of supply management for chicken**
- 2. Improve the effectiveness of the allocation system**
- 3. Build strong political trust and public support for Canada's chicken farmers and for the benefits of supply management**
- 4. Effectively respond to changing consumer markets**
- 5. Trade negotiations do not result in increased import market access**

Goal 1: Continue to ensure the integrity of the import control pillar of supply management for chicken

Initiatives – CFC will:

- » Aggressively pursue government and the chicken industry value chain action to stop and prevent the disruption to the Canadian chicken industry value chain caused by spent fowl imports, the Duties Relief Program, and Specially Defined Mixtures (13% rule)
- » Maintain continuous engagement with government and officials on import control issues, including:
 - Global Affairs Canada – Tariff Rate Quota administration
 - Agriculture and Agri-Food Canada – Policy leadership and market information
 - Finance – Definitions and tariff treatment
 - Canada Border Services Agency – Classification determinations and enforcement
 - Canadian Food Inspection Agency – Inspection and enforcement
- » Advocate government for changes/modifications for an effective Supplemental Import for Market Shortage program



Goal 2: Improve the effectiveness of the allocation system

Initiatives – CFC will:

- » Develop an agreed set of fact-based factors to determine short-term allocations
- » Work with Provincial Boards and chicken industry value chain staff to identify key data for allocation determination

Goal 3: Build strong political trust and public support for Canada's chicken farmers and for the benefits of supply management

Initiatives – CFC will:

- » Coordinate public and government relations strategies to promote the relevance and benefits of a Canadian chicken industry
- » In collaboration with the chicken industry value chain, build awareness and understanding among politicians and government officials on the realities and benefits to Canada of a uniquely Canadian system for chicken production
- » Lobby government so that all imported chicken is raised and produced to meet our standards
- » Work with Provincial Boards and the chicken industry value chain to lobby government to support supply management
- » Build relationships with other key national agriculture commodity groups



Goal 4: Effectively respond to changing consumer markets

Initiative – CFC will:

- » With its industry value chain partners, determine if allocation system changes are required to promote/facilitate growth, including innovative, emerging or specialty markets
- » Implement allocation system changes as required to promote/facilitate growth

Goal 5: Trade negotiations do not result in increased import market access

Initiative – CFC will:

- » Pursue an integrated government approach to effective import controls
- » Continue to lobby with other stakeholders on trade negotiations
- » Engage federal and provincial governments on multilateral, regional and bilateral trade negotiations to ensure that supply management is preserved, and that there is no increase in import market access

Key Result Area

Four

Sustainability

Objective:

To advance a sustainable chicken industry value chain in Canada

Context:

1. Social: On-Farm Food Safety Program, Animal Care Program, and Antimicrobial Use/Antimicrobial Resistance
2. Environmental
3. Economic
4. Innovation
5. Effective governance

Draft Strategies:

- » Environmentally responsible, sustainable farming, and chicken industry value chain practices
- » Economic – Healthy and growing farmer group
- » Implementation of risk management practices

Goals:

- 1. Social – Maintain leadership in the development and implementation of science-based management practices that reflect and address shared Canadian values and perceptions for public health and animal care**
- 2. Environmental – Improve the overall environmental performance of the chicken industry value chain**
- 3. Economic – Continue to look for ways to create value for producers, processors, further processors, retailers and food service**
- 4. Continuous improvement**
- 5. Enhanced governance within CFC**

Goal 1: Social – Maintain leadership in the development and implementation of science-based management practices that reflect and address shared Canadian values and perceptions for public health and animal care

Initiatives – CFC will:

- » Maintain its position as a recognized leader in on-farm food safety:
 - Undertake proactive communications to ensure that consumers and government are aware of the steps taken in food safety and biosecurity





- Maintain consistency of 100% mandatory On-Farm Food Safety Program implementation and compliance across all provinces
- Work with Government and other sectors to promote the On-Farm Food Safety Program model nationally
- Digitize the On-Farm Food Safety Program, to facilitate use among farmers
- » Maintain third-party recognition of the On-Farm Food Safety Program
- » Review and update the On-Farm Food Safety Program as required
- » Coordinate with Government and the chicken industry value chain to understand and reduce pathogens
- » Investigate and develop a pathogen reduction strategy with the industry value chain
- » Educate consumers on proper chicken handling and cooking techniques
- » Within the framework of a antibiotic use and resistance:
 - Pursue the implementation of an antibiotic reduction strategy for the use of antibiotics within overall responsible animal husbandry practices
 - Eliminate the chicken industry's preventative use of antibiotics of human importance
 - ~ The preventative use of Category II antibiotics by the end of 2018
 - ~ Work towards the elimination of preventative use of Category III antibiotics by the end of 2020
 - Increase producer knowledge of, understanding of, and involvement in antibiotic use
 - Collaborate with the chicken industry value chain to modify management practices from the breeders, hatcheries, and chicken farms to help improve quality and reduce the use of antibiotics
 - Increase the use of, acceptability of, and confidence in antibiotic alternatives: feed, vaccines, in-ovo
 - Advocate for change to the Canadian regulatory system to allow for the more rapid registration of antibiotic alternative products



- » Continue to fully implement the Animal Care Program:
 - Ensure consistency and full implementation of and compliance with CFC's Animal Care Program across all provinces
 - Work to establish a Federal-Territorial-Provincial recognition protocol for the Animal Care Program
 - Continue with the chicken industry value chain to implement a national program for animal care, which is based on practical, responsible, science-based standards
 - Work with the chicken industry value chain on related issues, such as production, catching, handling, and transportation
 - Review and as required, update the Animal Care Program
 - Digitize the Animal Care Program, to facilitate use among farmers

Goal 2: Environmental – Improve the overall environmental performance of the chicken industry value chain

Initiatives – CFC will:

- » Create a benchmark of the present environmental footprint for CFC and the entire chicken industry value chain
- » Help the chicken industry value chain set environmental goals
- » Set its own environmental goals





Goal 3: Economic – Continue to look for ways to create value and mitigate risk for the whole chicken industry value chain

Initiatives – CFC will:

- » Partner with Provincial Boards on risk management
- » Have contingency management plans for all major animal disease outbreaks
- » Leverage Provincial Board flock and premise identification systems through data-sharing protocols with Government
- » Complete a National Risk Assessment for the chicken industry value chain
- » Share best practices to increase efficiency and profitability for the chicken industry value chain

Goal 4: Continuous Improvement

Initiative – CFC will:

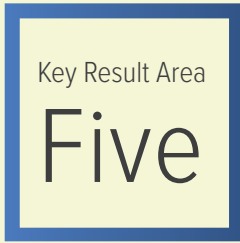
- » Continue to support research and innovation through the Canadian Poultry Research Council, to align with strategic priorities

Goal 5: Enhance governance within the CFC

Initiatives – CFC will:

- » Ensure clear understanding of its roles and responsibilities, as well those of Provincial Boards, and the chicken industry value chain
- » Assess its current governance practices and performance with the intent to enhance its governance
- » Perform a board and board member performance assessment annually
- » Complete a CFC Board skills matrix, to maximize members' skill sets
- » Continue to pursue continuous improvement opportunities in its work and administration
- » Further develop the Young Farmers Program, to promote and support young chicken farmers across Canada





Consumption

Objective:

Sustainably grow consumer demand for Canadian chicken

Context:

1. A deeper understanding of consumers and consumer values
2. Understanding shifting trends

Draft Strategies:

- » Build the Brand
- » Understanding consumers

Goals:

- 1. Build on the success of the national branding program for chicken and increase uptake at retail and food service**
- 2. Understand consumers more fully to enable the chicken industry value chain to serve them more fully and increase consumption**
- 3. Sustainably grow per capita consumption of Canadian chicken by one kilogram per year**



Goal 1: Build on the national branding program for chicken, increase uptake at retail and food service

Initiatives – CFC will:

- » Promote and increase awareness of the *Raised by a Canadian Farmer* brand to consumers
- » Promote the brand with food service, retail and stakeholders
- » Demonstrate the value of the brand to retailers and processors
- » Investigate the merit of establishing a Promotion Research Agency

Goal 2: Understand consumers more fully to enable the chicken value chain to serve them more fully and increase consumption

Initiatives – CFC will:

- » With a goal to identify opportunities, conduct research to understand consumer expectations, shifts and trends and set initiatives for issues like:
 - Raised Without Antibiotics
 - Animal Welfare
 - Sustainability
 - Chicken Usage & Attitudes



- » Work with retailers and foodservice in conjunction with processors to understand needs/strategies that influence their demand for and promotion of Canadian chicken
- » Gather data from the chicken industry value chain to develop consumer profiles

Goal 3: Sustainably grow per capita consumption of Canadian chicken by one kilogram per year

Initiatives – CFC will:

- » Explore complementary food products
- » Explore opportunities for partnership, pairing with other foods – e.g. vegetables, rice, plant-based protein – in response to the Canada Food Guide
- » Explore opportunities with partners to grow the dark meat market
- » Use its influence to ensure chicken's proper placement as a healthy protein in the Canada Food Guide
- » Promote the health benefits and versatility of chicken
- » Communicate more effectively the good news story about Canadian chicken in order to influence consumer behavior and share what we are already doing very well