

Chicken Farmers of Ontario

Summary of Six Farmer-Member Risk Workshops and One Industry Stakeholder Risk Workshop

July, 2019



BRYAN BOYLE & ASSOCIATES
FACILITATING YOUR FUTURE

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Executive Summary

During July 2019, interested Chicken Farmers of Ontario farmer-members, Ontario chicken industry stakeholders, and Chicken Farmers of Ontario (CFO) staff met at seven locations across Ontario for highly interactive workshops facilitated by Bryan Boyle. These sessions was part of regional CFO farmer-members' meetings.

Dates and locations included:

- July 9 in London – Four Points Sheraton
- July 12 in Grimsby – Casablanca Inn
- July 15 in Cobourg – Best Western Plus
- July 16 in Guelph (Industry Stakeholders) – Delta Conference Centre
- July 23 in Guelph – Delta Conference Centre
- July 24 in Walkerton – Best Western Plus
- July 25 in Fournier – Fournier Community Centre

The purpose of the sessions was to solicit valuable input from farmer-members and industry stakeholders relating to risks facing supply management, the Ontario chicken industry, and local family farms as well as how these risks could be reduced or eliminated by actions of CFO, industry stakeholders or individual farmer-members. The input generated will help to create a practical and realistic Strategic Plan for Chicken Farmers of Ontario.

Risk has been defined as “An uncertain event or condition leading to an unfavourable outcome. It may result in loss, injury or other adverse circumstance”.

At the workshops participants addressed three critical questions relating to risk in supply management, the Ontario chicken industry, and their local family farms. The three questions were What? So What? and Now What?

- What? – Observations, Perspectives
- So What? – Consequences of Inaction
- Now What? – Suggested Actions

Participants identified risks that face supply management, the Ontario chicken industry, and local family farms. These specific risks were grouped under various themes and then prioritized with the following results.

- 1st: Financial
- 2nd: Political/Trade
- 3rd: Operational
- 4th: Strategic
- 5th: Reputational
- 6th: Competition
- 7th: Compliance
- 8th: Other

Participants were asked, “What are the consequences of inaction relating to addressing the risks that face supply management, the Ontario chicken industry, and local family farms?” Examples of their responses included loss of supply management, loss of market share, loss of public confidence and trust, lower profitability and decreased margins, as well as general decline in the Ontario chicken industry. By the number and variety of the responses it became evident that the participants felt that immediate actions addressing risk are critical.

There are many actions that could help to effectively mitigate the risks facing supply management, the Ontario chicken industry, and local family farms. Participants identified a number of potential actions to address each of the specific areas of risk.

The workshops were productive events, where the participants were very engaged. Through their valued input, the participants present took an important step in identifying risks and their potential mitigation. This could help ensure a strong and vibrant future for supply management, the Ontario chicken industry, as well as local family farms.

Chicken Farmers of Ontario
 Regional Risk Workshops at Locations Across Ontario
 July, 2019 Facilitated by Bryan Boyle

Purpose of the Sessions

To solicit valuable input from farmer-members and industry stakeholders relating to risks facing supply management, the Ontario chicken industry, and local family farms as well as how these risks could be reduced or eliminated by actions of Chicken Farmers of Ontario, industry stakeholders or individual farmer-members

The input generated will help to create a practical and realistic Strategic Plan for Chicken Farmers of Ontario.

Throughout this report whenever two or more of the discussion groups at the various meetings offered the same or very similar comments they are noted with an "x" and the number, i.e. (x3).

Defining Risk

Risk has been defined as:

An uncertain event or condition leading to an unfavourable outcome. It may result in loss, injury or other adverse circumstance.

Our Approach

At the workshops we addressed three critical questions relating to risk in supply management, the Ontario chicken industry, and local family farms.

The 3 Questions: What? So What? and Now What?

What? – Observations, Perspectives
 So What? – Consequences of Inaction
 Now What? – Suggested Actions

What?

Identifying Specific Risks

There are many risks that face supply management, the Ontario chicken industry, and local family farms.

Key areas of risk may include:

- S - Strategic
- O - Operational
- C - Compliance
- F - Financial
- P - Political/Trade
- CO - Competition
- R - Reputational
- OT - Other

Participants identified risks that face supply management, the Ontario chicken industry, and local family farms.

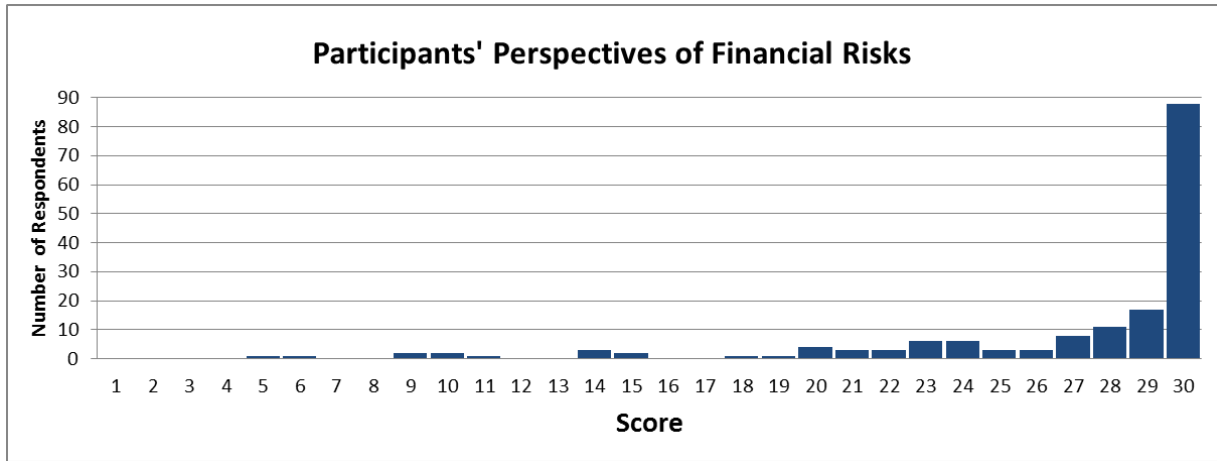
These specific risks were grouped under the various themes and then prioritized. For prioritizing, participants used the following approach and the results are shown in the table below.

On the ballots that were numbered from 1 to 30, participants placed each of the 8 letter codes from the areas or themes of risks somewhere on the 1 to 30 grid at the point that they feel best describes the need for action in that area of risk.

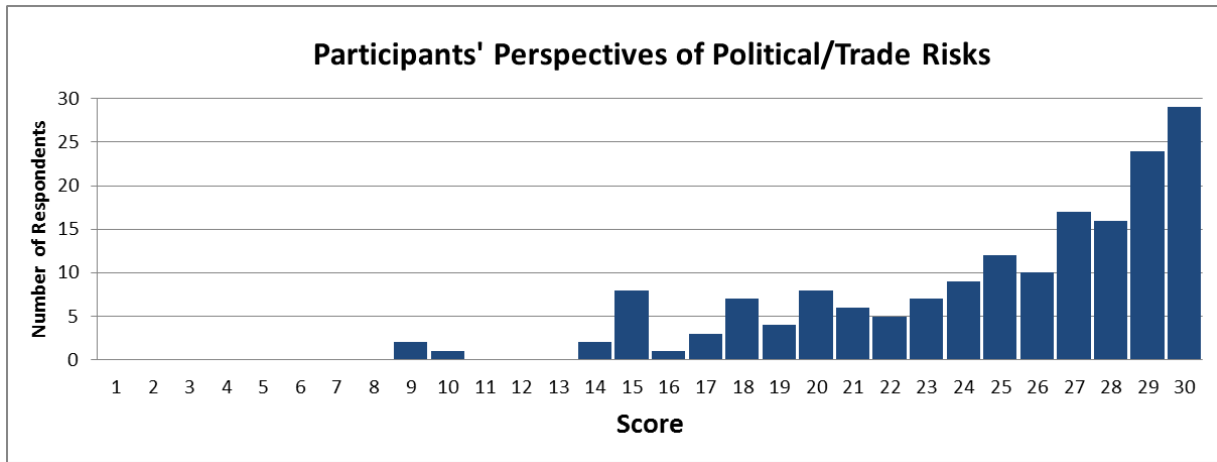
#30 = “Highest Priority for Action”: It is critically important that we move quickly and decisively to address this area of risk to ensure a strong and viable future for supply management, the Ontario chicken industry, and local family farms.

#1 = “Lowest Priority for Action”: Addressing this risk is a much lower priority either because it is currently being effectively addressed or is not that significant compared to some other risks in supply management, the Ontario chicken industry, or local family farms.

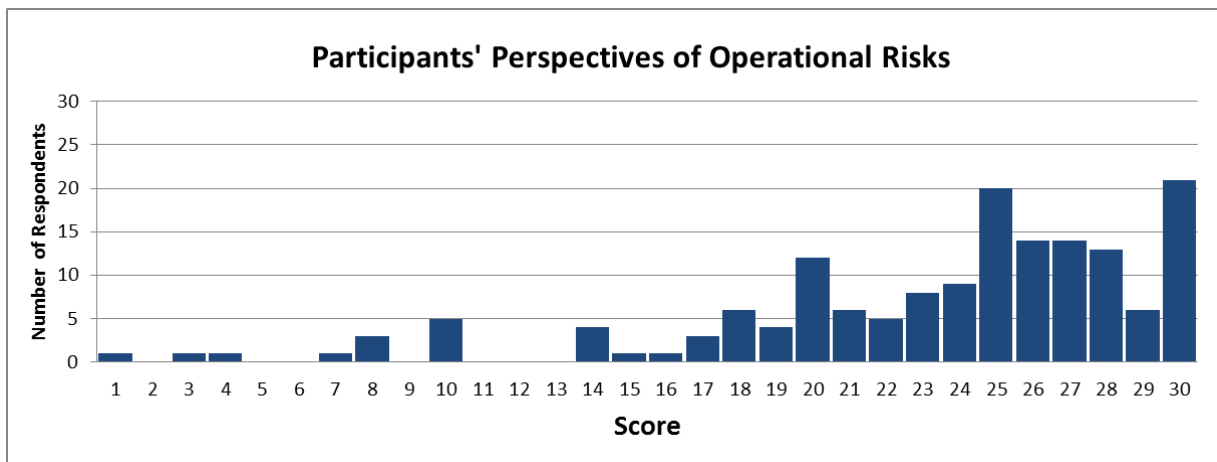
Priority Rank	Areas or Themes of Risk	Average Significance Score (Maximum = 30)
1 st	Financial	26.93
2 nd	Political/Trade	24.86
3 rd	Operational	23.25
4 th	Strategic	20.32
5 th	Reputational	20.12
6 th	Competition	19.99
7 th	Compliance	18.92
8 th	Other	11.94



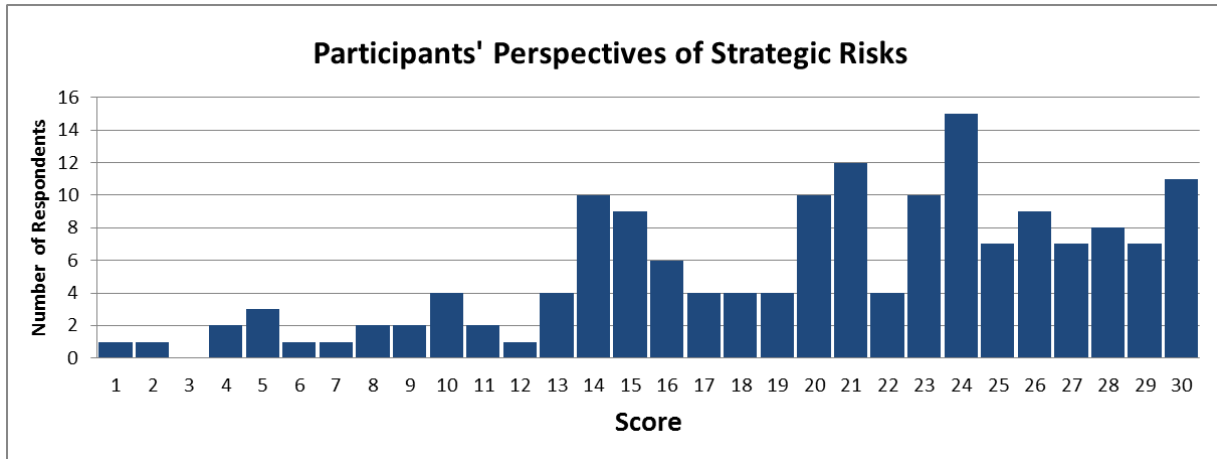
Average = 26.93



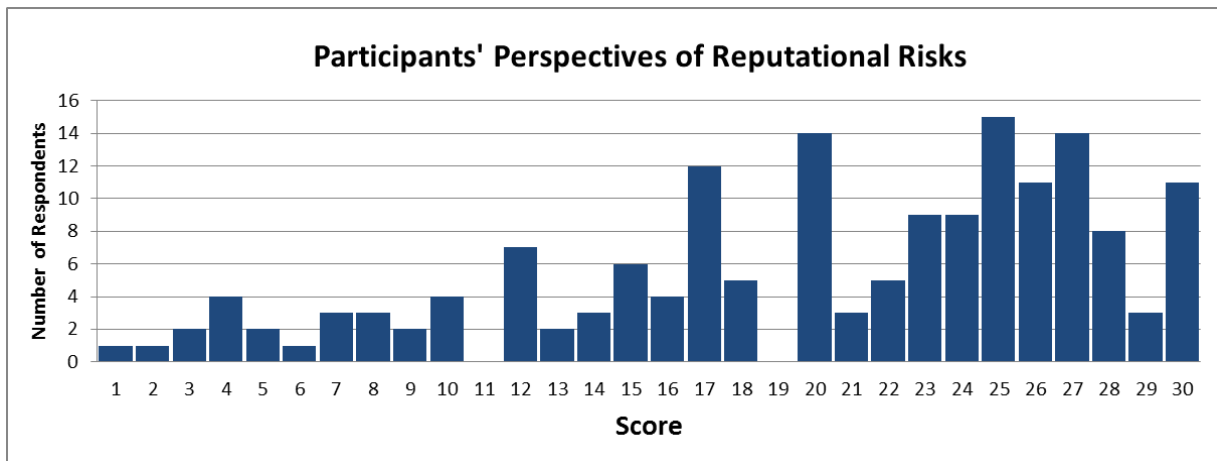
Average = 24.86



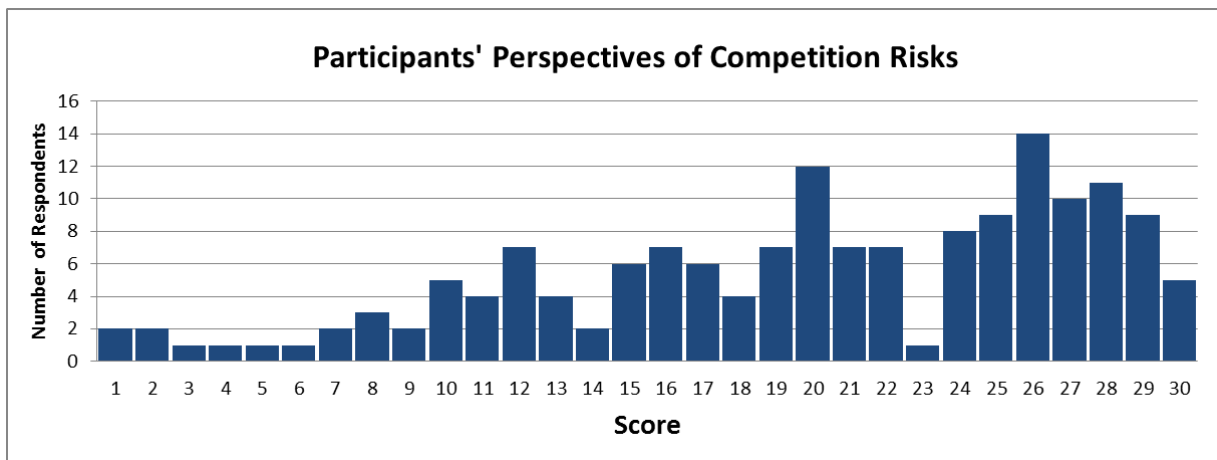
Average = 23.25



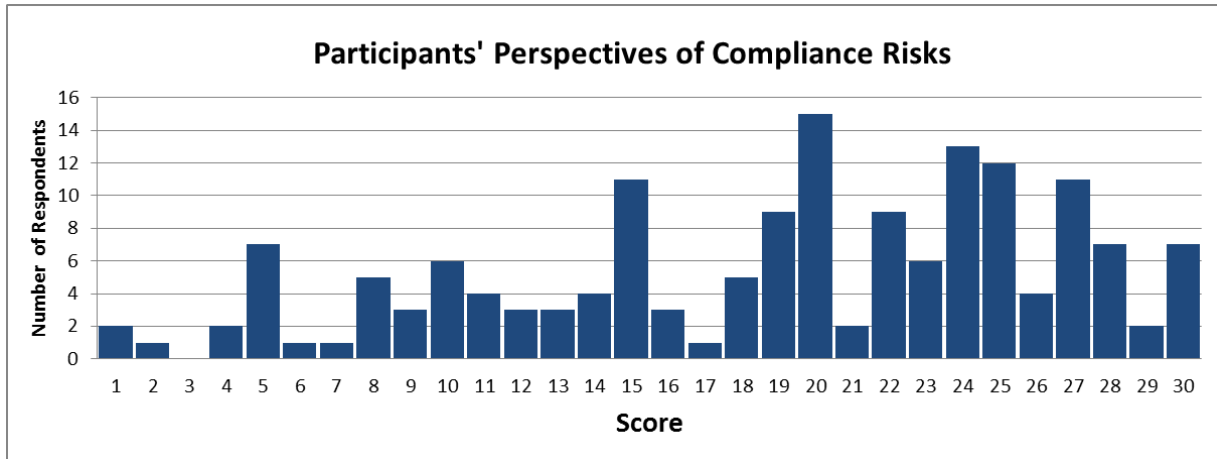
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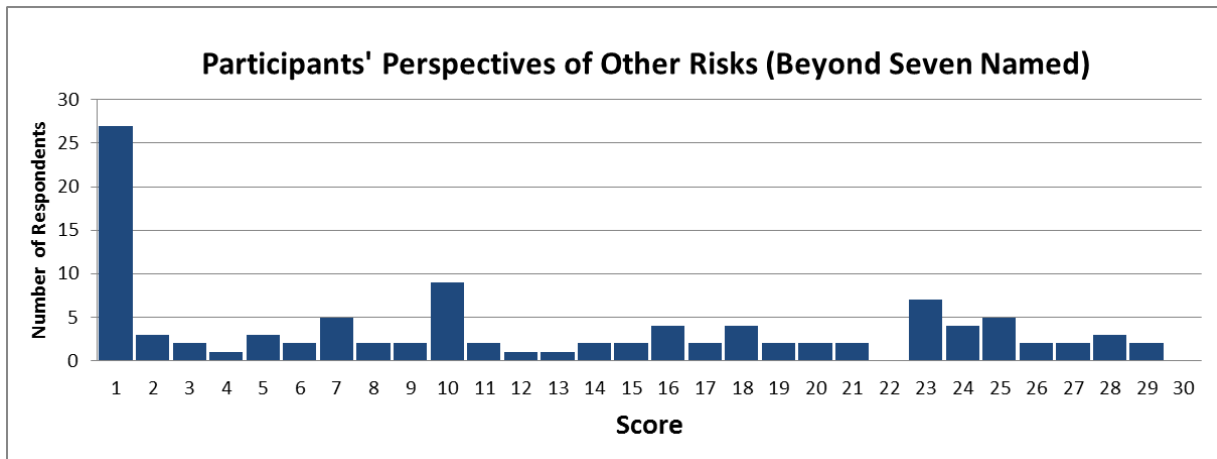
Average = 20.12



Average = 19.99



Average = 18.92



Average = 11.94

Location and frequency of all comments have been noted in this report. The meeting locations are identified by the following code:

- LO – London
- GR – Grimsby
- CO – Cobourg
- IS - Industry Stakeholders (Guelph)
- GU – Guelph
- WA – Walkerton
- FO – Fournier

The frequency that specific comments were made by discussion groups at each meeting is noted in the table in each section of this report.

The specific risks that face supply management, the Ontario chicken industry, and local family farms that were identified by participants included:

1. Financial

	#	LO	GR	CO	IS	GU	WA	FO
Cost of Production Formula (COPF)	11	1	1	1	1	2	4	1
Increasing quota values	5		2		1		2	
Animosity and lack of success of COPF	4		2			1		1
Potential increase in interest rates	3	2						1
Succession planning and financing of farms	2					1		1
True cost of production or expansion	2	2						
Need to increase input for COPF formula	1					1		
Farmers are powerless in COPF negotiations	1					1		
COPF retroactivity	1						1	
No deadline for COPF	1						1	
Loss of potential profit during COPF negotiations	1							1
Profitability declining under current COPF	1							1
Profitability measured by earnings before interest, tax, depreciation, and amortization (EBITDA)	1						1	
Live price	1			1				
Financial sustainability	1				1			
Fair compensation	1	1						
Increased input costs	1			1				
Requirement to build new barns	1		1					
Need to replace equipment	1		1					
Increasing control of the industry by the Association of Ontario Chicken Processors (AOCP)	1			1				
State of the Canadian economy	1		1					
Allocation of growth per capita	1						1	

2. Political/Trade

	#	LO	GR	CO	IS	GU	WA	FO
Compromising supply management through current and future trade agreements	9	2			1	2	4	
Loss of political support for supply management	7		2	1	1	1		2
Increase of imports impacting market access	4		2		1	1		
North America Free Trade Agreement/United States-Canada-Mexico Agreement	3		1	1		1		
Need for informed and understanding politicians in next election	3				1	2		
Trade negotiations where the government will give us away	2		2					
People's Party of Canada (Maxime Bernier)	2	1			1			
Trade agreements with uncertain starting dates	1				1			
Government relations	1	1						
Change in the government	1					1		
Farmers' lack of influence on political decision-makers	1							1
Re-election of Donald Trump	1				1			
Potential impact of BREXIT	1					1		
External political impact on our family farms	1							1
If USA chicken price plus tariff is less than the Canadian price	1			1				
Quality of products imported through trade	1					1		
Border staff not well trained to identify spent fowl	1				1			
Illegal imports	1						1	
Quota security	1	1						
Misinformation	1	1						
Rules around foreign labour attraction	1				1			
Climate change	1		1					
Although we share all our cost of production numbers, we never see the cost of production information from the Association of Ontario Chicken Processors' members	1							1

3. Operational

	#	LO	GR	CO	IS	GU	WA	FO
Chick quality	12	1	2	2		3	4	
Labour availability and quality for primary and further chicken production	8	1			3		2	2
Removal of vaccines and antibiotics that are critical to our production system	7		1			4	1	1
Severe animal disease outbreaks	7		3	1	1	1	1	
Animal activists, including vegans and anti-livestock groups	4	1			1	1	1	
Extreme weather's impact on production	3	1		1				1
Transportation	3	1					2	
Animal welfare	2				1	1		
African Swine Fever	2				2			
High CFO staff turnover	2	2						
Slow research into products to replace current antimicrobials	1					1		
Biosecurity and new diseases	1				1			
Damage to barns by untrained catchers	1		1					
Health and safety of on-farm labour	1			1				
Processing capacity	1				1			
Inability for farmers to utilize available growth	1				1			
Loss of barn and the resulting relocation	1			1				
Food safety	1				1			
Welfare = CFO Cares	1				1			
Poultry health insurance issues	1					1		
Feed costs	1					1		
Greenhouse gas and environmental impacts	1				1			
Enriched housing to be imposed	1						1	
Meeting high standards of production	1					1		
Quota transfer policy fees	1					1		
Transition planning	1					1		
Impact of weather extremes are not covered by insurance companies as a business loss	1					1		
Loading protocol for Québec processors is different than that in Ontario	1							1
Strained relationships and the need to mend fences	1				1			
Attending regional meetings	1	1						
Communication within the industry	1		1				1	

	#	LO	GR	CO	IS	GU	WA	FO
CFO staff not understanding our industry, yet making decisions	1	1						
Chicken Farmers of Ontario needs to be more farmer friendly	1		1					
Chicken Farmers of Ontario may not be sensitive enough to our needs for communication in French language in this area								1
Reliance on computer technology			1					

4. Strategic

	#	LO	GR	CO	IS	GU	WA	FO
Consumer perception, attitudes and education	9		2		3	4		
Industry cohesion and collaboration	2	1			1			
Market identification and development	2					1	1	
Activist groups	1		1					
Lack of promotion on quality	1		1					
Sustainability of supply management	1		1					
Processor power	1		1					
Integration, including chicks and processing	1		1					
Extremes in innovation, either lack of or too much	1		1					
Chickens fed non-GMO feed	1			1				
Aging producers	1			1				
Researchers not on the same page as industry	1				1			
Lack of research investment	1				1			
Ineffective extension of applied research	1				1			
Data versus information	1				1			
Sustaining annual strategic plans	1				1			
Full scope of sustainability - air, soil, water, etc.	1				1			
Flawed quota transfer system	1						1	
Allocation of growth in quota increases	1						1	
Loss of supply management	1							1
Need for strong leadership	1							1
Low farmer engagement in CFO Board elections	1	1						
Districts are not proportionally aligned	1	1						
Better balance and representation	1	1						
District Committee Representatives are underutilized	1	1						
Chicken Farmers of Ontario staff interactions with farmer-members are being handled poorly	1	1						

5. Reputational

	#	LO	GR	CO	IS	GU	WA	FO
Animal activists	6			1	1	1	2	1
Erosion of customer confidence due to salmonella	3				2		1	
Social media	2				1	1		
Our story is not being told properly	2	2						
Consumer demand for transparency and traceability	2	1			1			
Consumer confidence or public trust	2				1	1		
Consumer misinformation and biases	2				2			
Small flocks	1	1						
Factory farm image	1	1						
Incentives for improving bird welfare	1		1					
Animal welfare due to reduced antimicrobial use	1						1	
Marketing reputational perspective of Antibiotic and Animal By-Product Free (AABF) vs Raised Without Antibiotics (RWA)	1				1			
Greed	1		1					
Representation	1	1						
Cyber security	1				1			
Lack of research investment	1				1			
Category III antibiotic elimination	1				1			

6. Competition

	#	LO	GR	CO	IS	GU	WA	FO
Rising popularity of plant-based protein, e.g. "Beyond Meat"	15	3	4	1	3	2	1	1
Imports from USA impacting our market share, especially if the border gets more porous	2						1	1
Vegan activism	2				1			1
Canada's Food Guide	1		1					
Antimicrobial use (AMU) reduction related to animal welfare	1					1		
Changing consumer preference	1		1					
Consolidation of processing	1							1
Ontario retailers selling chicken produced outside of Ontario	1							1

7. Compliance

	#	LO	GR	CO	IS	GU	WA	FO
Overregulation, excessive documentation required	2			2				
Over and under annual production targets	2		1				1	
The 104% allowable production target may not be sufficient	1							1
Fluctuations in production within a single quota period are hard to control and can be stressful	1							1
Regulatory impacts	1				1			
Responsible regulations comparing cost versus benefit	1			1				
Speed of regulatory response to consumer trends	1				1			
Reduced market access	1			1				
Uninformed public	1			1				
Responsive to new research on farm safety	1				1			
Impact of antimicrobial use (AMU) on bird health and flock management	1				1			
Biosecurity	1			1				
Litigation on-farm and across the industry	1					1		
On-farm testing for various purposes	1					1		
Uncertainty and time frame relating to COPF	1					1		
Values established for compliance	1					1		
Frequency of audits	1				1			
Same auditing standards for all farmers with no double standards	1	1						
Understanding the reality versus theory of third-party audits	1						1	
Challenges for new families to get into the chicken business	1						1	
Food origin	1	1						

So What?

Identifying Consequences of Inaction

Participants were asked, “What are the consequences of inaction relating to addressing the risks that face supply management, the Ontario chicken industry, and local family farms?”

By the number and variety of the responses it became evident that the participants felt that immediate actions addressing risk are critical.

	#	LO	GR	CO	IS	GU	WA	FO
Loss of supply management system	19	2	2	2	5	1	6	1
Loss of market share	19	1	1	2	7	6	2	
Loss of public confidence and trust	14	1	3		6	1	3	
Lower profitability and decreased margins	14		3	2	2	2	5	
General decline in the Ontario chicken industry	14	3	3	2	3	1	2	
Production implications with loss of antibiotic use	8	2				4	2	
Very little, no growth or negative growth	7	1	1		3	1	1	
Fewer family farms, more larger farms	7	1	4		1		1	
Influence with government will diminish	7	2			5			
Financial instability, reduced sustainability	6			1	4		1	
Trade agreements take away our production potential	4				1	3		
Compromising quality of our chicken product	3	1		1			1	
Risk losing our ability to self-regulate	3	1			2			
Negative impact on food safety	2				2			
Foreign countries have to feed us	2				1	1		
Lost opportunities and innovation	2				2			
Loss of future opportunities for next generation	2				1	1		
Poor relationships between CFO and farmers	2	1				1		
Lack of CFO Board support	1					1		
Frustration could build with farmer-members if positive changes are not taken	1							1
No food security	1	1						
Vegans gaining more influence	1		1					
More processor control	1		1					
No family succession	1	1						
Inability to operate due to the labour shortage	1				1			
Higher costs	1				1			
Destruction of farm values	1				1			
Others will decide our future	1				1			
Severe barriers to entry into the industry	1				1			

	#	LO	GR	CO	IS	GU	WA	FO
Threats of consolidation, e.g. mega-farms, mega processors	1				1			
Foreign animal disease devastation	1				1			
Loss of social programs, e.g. CFO Cares	1				1			
Food preparation challenges	1				1			
Inaccurate opinions	1				1			
Inability to meet markets	1				1			
Loss of jobs and economic impact	1				1			
Loss of quota	1					1		
Cost of Production Formula unresolved	1					1		
Litigation and restrictive regulations may result	1					1		
Negative impacts due to lack of research	1					1		
Consumer misconceptions	1					1		
Lack of planning	1						1	

Now What?

Specific Actions Identified Within Risk Areas

There are many actions that could help to effectively mitigate the risks facing supply management, the Ontario chicken industry, and local family farms. To mitigate is defined as to soften, moderate or to make less severe or harsh.

Participants identified potential actions to address each of the various specific areas of risk.

1. Financial

	#	LO	GR	CO	IS	GU	WA	FO
Negotiate a fair Cost of Production Formula (COPF)	6		2		2	1	1	
Secure an improved COPF	2		2					
Encourage Board to persist as farmers' proponent in COPF negotiations	2					1	1	
Ensure COPF is retroactive	2						1	1
Encourage and allow open sign-up	2		2					
Exercise fact-based decision making to come to mutual agreement on COPF	1				1			
Solve the COPF impasse, now	1		1					
Develop a real COPF that is not negotiated but implemented	1	1						

	#	LO	GR	CO	IS	GU	WA	FO
Do not take concessions on COPF	1			1				
Be patient with COPF negotiations	1			1				
Support the Board in continued work on COPF	1					1		
Implement COPF effectively	1					1		
COPF: Get it done with new updated formula	1					1		
Include definition of “bird” and specialization in COPF	1					1		
Implement a deadline for COPF	1						1	
Simplify Cost of Production Formula surveys for willing and quicker response	1	1						
Hire a professional negotiator	1	1						
Analyze financial statements line by line in detail at the farm level	1			1				
Allow more control for farmers	1		1					
Remember no financial incentive equals no succession plan	1		1					
Encourage every part of the industry to avoid greed	1				1			
Develop relationships with financial institutions	1				1			
Allocate quota to cover growth on a per capita basis	1						1	
Ensure all quota purchases utilize online quota transfer system	1						1	
Cap the quota price	1						1	
Regulate quota price	1	1						
Ensure quota has more than paper value since it is only good if you sell it	1						1	
Provide fair compensation for farmer-members to encourage investment	1							1

2. Political/Trade

	#	LO	GR	CO	IS	GU	WA	FO
Lobby all politicians and government officials	7	1			2	3	1	
Lobby government to regulate activist activity	4		2		1		1	
Be proactive in trade negotiations	2			1		1		
Vote in upcoming election	2				2			
Change our government	2		2					
Continue the visual government pressure directed towards all parties	1	1						

	#	LO	GR	CO	IS	GU	WA	FO
Capitalize on fair government oversight (Ontario Farm Products Marketing Commission)	1		1					
Collaborate with local, provincial and federal politicians	1					1		
Advocate for stronger farmer/politician communication	1						1	
Stay positive and informed when dealing with government	1						1	
Be proactive not reactive	1					1		
Keep our MPs and MPPs aware of our interests	1			1				
Actively support the political process	1			1				
Encourage active involvement in politics	1				1			
Research political policies	1			1				
Lobby government on foreign worker policies to address labour shortages	1				1			
Encourage government support to reduce barriers to entry into export market	1				1			
Lobby our politicians about importance of quota	1						1	
Enhance government regulations	1				1			
Solicit government support for SMART regulation	1				1			
Change trespassing regulations	1				1			
Do not accept trade-off of supply management for other industries or sectors	1					1		
Work hard to insulate us from trade impact	1					1		
Balance the trade impact of more imports	1		1					
Establish the right to refuse the importation of products that do not meet Canadian standards	1					1		
Limit imports and mislabeled products	1		1					
Ensure we supply maximum domestic availability of chicken products	1					1		
Encourage Canadian branding	1			1				
Don't vote for Maxime Bernier	1				1			
Maintain a strong relationship with other USA politicians but keep a low profile with Donald Trump	1			1				
Encourage and demonstrate openness, transparency, and two-way communication between Chicken Farmers of Ontario and Association of Ontario Chicken Processors	1							1
Chicken Farmers of Ontario should conduct polls to assess processor and consumer needs	1							1

3. Operational

	#	LO	GR	CO	IS	GU	WA	FO
Ensure that chick quality improves	4		2			1	1	
Speed up approval process for products to replace antimicrobials	3					3		
Expand poultry health insurance for more diseases	2				1	1		
Encourage more effective transition planning, especially because of increasing age of farmers	2				1	1		
Utilize new chick production facilities	1	1						
Utilize infrastructure more effectively	1			1				
Make energy investments	1			1				
Implement production practices to improve bird health, e.g. vaccines	1				1			
Develop approaches to deal with inclement weather	1				1			
Collaborate with insurance companies to reduce the impact of weather extremes	1					1		
Develop a better relationship between farmer-members and the Chicken Farmers of Ontario	1		1					
Ensure adequate staffing at CFO	1			1				
Create two Chicken Farmers of Ontario Board positions for women	1				1			
Create a platform for farmers to provide more input to CFO	1				1			
Assist with solutions to corrective action on audits	1						1	
Improve the “Big Picture” education for farmers and industry	1				1			
Share the results of these consultations with all participants	1				1			
Innovate all along the value chain	1				1			
Implement research responsiveness	1				1			
Implement new ways to train and recruit staff for agricultural jobs	1				1			
Develop University of Guelph Ridgetown co-op programs to reduce labour shortage	1						1	
Address the labour shortage through training and mechanization, e.g. robots	1				1			
Allow offshore workers to stay longer and provide easier access	1				1			

	#	LO	GR	CO	IS	GU	WA	FO
Encourage the Ontario Broiler Hatching Egg and Chick Commission (OBHECC) to increase production and improve quality	1					1		
Integrate strong and effective salmonella policies throughout the sector	1					1		
Create big data network	1						1	
Provide handout sheets based on website information relating to protocol for dealing with animal activists that can be posted for farmer-member use	1							1
Allow special consideration for Ontario producers shipping to Québec processors under Chicken Farmers of Ontario's modular loading requirements	1							1
Provide more specific information on the areas of disease outbreak that are publicized by Chicken Farmers of Ontario to influence farmer-member movement and awareness	1							1

4. Strategic

	#	LO	GR	CO	IS	GU	WA	FO
Improve mutually beneficial industry relations, collaboration and alignment	4	1			3			
Educate society by telling our story	4		2			2		
Actively promote quality chicken	3				1	1	1	
Encourage communication within the industry, education facilities, stakeholders and consumers	2				2			
Create better branding and marketing	1	1						
Sell supply management to the public	1		1					
Influence and educate consumers to meet their needs					1			
Develop and maintain a larger social media presence	1		1					
Make the public more aware of our challenges	1		1					
Listen to input from consumers, processors, banks	1				1			
Share market development with all quota holders	1					1		
Show us the opportunities	1		1					
Sustain annual strategic plans	1				1			

	#	LO	GR	CO	IS	GU	WA	FO
Redraw the CFO district map	1	1						
Bring CFO staff to see our farms and the details of chicken production	1	1						
Develop a succession planning committee to make recommendations relating to CFO Board and District Committee Representative governance	1					1		
Provide better extension and applied research	1				1			
Increase research funding	1				1			
Implement new research initiatives	1				1			
Support existing research initiatives	1				1			
Be careful what you ask for, as you may receive it	1				1			
Increase CFO support for smaller processors	1				1			
Align priorities	1				1			
Demonstrate transparency to help avoid greed	1				1			
Remember that diversity of supply is more important than overall efficiency, so family farms remain critically important	1				1			
Value power and respect of all stakeholders in the industry	1					1		
Restrict size of quota holding and cap quota cost	1					1		
Encourage grants to support transition planning on farms	1					1		
Encourage farmers to protest against Regulation 402	1						1	
We need to demonstrate “leadership” and not “followership”!	1							1
In all our actions we need to think of the collective good of our industry, which may not be the same as maximum benefit for any individual farmer-member	1							1

5. Reputational

	#	LO	GR	CO	IS	GU	WA	FO
Engage in proactive consumer education	7	1			4	1		1
Communicate the attributes of supply management	3		2		1			
Utilize social media effectively	2					2		
Educate the public about the excellent care we provide in animal welfare	2					2		
Initiate action to reduce antimicrobial use (AMU)	2				1		1	
Promote the benefits of chicken	1				1			
Make sure that our voices are heard	1		1					
Increase awareness and social importance of employment opportunities	1				1			
Effectively communicate consequences	1				1			
Promote all the good things that the chicken industry does, e.g. animal welfare, jobs, etc.	1				1			
Increase Chicken Farmers of Canada consumer education	1				1			
Educate consumers to offset activists' impact	1			1				
Develop a more comprehensive chicken education program by working with other Boards, Farm and Food Care Ontario, Ministry of Education, and local Boards	1					1		
Engage our youth	1	1						
Share chicken information with the local schools and local fairs	1	1						
Encourage honesty and transparency among all participants in the business	1		1					
Demonstrate responsible stewardship	1				1			
Know our rights and respond legally to animal activism	1					1		
Actively promote and support the CFO Cares campaign	1					1		

6. Competition

	#	LO	GR	CO	IS	GU	WA	FO
Provide promotion and education regarding the value of our product	2			2				
Promote chicken products and our industry extensively through advertising	2	1		1				
Emphasize chicken as unprocessed and natural protein	1	1						
Listen to consumers' wants	1						1	
Develop new marketing strategies to compete with Beyond Meat	1						1	
Monitor but do not get obsessed with Beyond Meet as it may be just a fad	1							1
Promote positive chicken farming practices	1					1		
Implement more marketing from farmers	1					1		
Encourage Ontario retailers to purchase Ontario chicken from Ontario consumers	1							1
Assess the competition's marketing effort	1		1					
Remain competitive to ensure viability	1				1			
Encourage innovation and research to stay ahead of competitors	1				1			
Create innovative chicken products	1				1			
Ensure that our product is competitively defensible	1				1			
Promote family chicken farms in a similar method to the commercials from Dairy Farmers of Ontario	1						1	
Support Hazard Analysis and Critical Control Points (HACCP)	1					1		

7. Compliance

	#	LO	GR	CO	IS	GU	WA	FO
Always remain in compliance with regulations	1				1			
Improve government relations and education to help ensure compliance	1				1			
Control over/under production	1		1					
Review and create an allowable 105% production target for farmer-members	1							1
Over/under production should be evaluated over more than one flock, e.g. over 1 year on each farm	1							1
Soften penalties on over/under production targets	1			1				
Streamline CFO interactions valuing real people not just website	1	1						
Ensure less paperwork	1		1					
Develop an integrated solution to salmonella issues	1					1		
Address litigation issues for farmer-members	1					1		
Since antibiotic use (AMU) restriction has put us at a competitive disadvantage, lobby for quicker approvals for replacement products that are being used in other countries	1					1		
Enforce standardization of chick quality	1					1		
Enhance chick mortality reporting	1						1	
Allow Eastern Ontario farmer-members to sell to processor in New Brunswick as well as Québec	1							1

8. Other Risks (Beyond Seven Named Above)

	#	LO	GR	CO	IS	GU	WA	FO
Coordinate an opportunity for politicians to work on our farms for one month	1	1						
Try to maintain some independence and diversity to offset the tight linkages between selling feed, chicks, and processing	1						1	

Summary of the Workshop

The workshops were productive events, where the participants were very engaged. Through their valued input, the participants present took an important step in identifying risks and their potential mitigation. This could help ensure a strong and vibrant future for supply management, the Ontario chicken industry, as well as local family farms.