Exploring the Value Chain of BC Lamb

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Being About Action: Exploring Food, Community, and Urban Sustainability

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Introduction

Who are we?

Three Undergraduate Semester in Dialogue students from diverse backgrounds have come together to bring you this project on the local BC lamb industry. An organization called Local Initiatives for Food Enterprises (LIFE) engaged us, through the Dialogue program, to perform research and explore issues on this topic. Our research on the BC lamb industry was focus within a larger group that also investigated similar issues regarding BC tomatoes and herbs.

What is LIFE?

LIFE "is an alliance of individuals, organizations and businesses committed to economic development opportunities which increase local food production and consumption" (Barbolet et al., undated). The goal of LIFE allies is to develop community owned food value chains through:

1. Quantifying the existing market demand for local high quality food, and organizing the selling to that market.
2. Develop the supply side capacity to meet this commercial volume market demand.
3. Develop a skilled labour pool for the field, greenhouse, co-packing and distribution value-chain partners.
4. Coordinate the sharing of market intelligence in order to create economies of scale for commercial transactions—from farm input providers, local farmers, labour, food manufacturers, and appropriate scaled transportation operators, to the consumer that pays premiums for high quality local food.
5. Provide a percentage of profits generated from the value chains to community development alternative food systems like community kitchens and Good Food Boxes etc.

(Barbolet et al., undated)

Project Goals

Our report is intended to provide guidance for BC lamb industry stakeholders, and progressive organizations like LIFE who are committed to promoting the preservation and viability of the local lamb industry. Our contribution takes the form of a list of suggestions that the industry should adopt, and deliverables that may be useful in facilitating our suggestions.

Research Process and Methodologies

Our research approach to exploring the BC lamb industry was integrated. Primary research sources were drawn from survey participation, person to person, and phone interviews. In addition we used various websites, online databases, articles, and journals to familiarize ourselves with the topic. The following sections detail different components of our research process methodology.

The Importance of Meetings

Throughout our project we have had a very concise schedule of meetings. Lamb is one of three product focuses of LIFE, the other two being herbs and tomatoes. Therefore, we used two different types of meetings: LIFE meetings with the larger group, and lamb meetings. The meeting agendas kept us on track and informed and gave us the chance to collaborate and integrate our projects.

Clarifying the Stakeholders

The first step in conducting our research was sketching out a comprehensive map of stakeholders involved in the lamb industry. We identified groups and individuals that have roles in each step of the product value chain. For a general picture of these stakeholders, see Appendix 1.

Unpacking the Value Chain

A value chain follows a product from its starting point (with the producer) to its end point (with the consumer), emphasizing the fact that products undergo a series of value-adding processes before reaching the consumer, making the end product more valuable (Georgy et al., 2007). Our stakeholder map led us to a general depiction of the lamb value chain. After researching the history and background of the British Columbian lamb industry, we had a more detailed and substantial idea of this value chain and how it works. Thinking of the lamb industry in terms of its value chain helps give an idea of stakeholders and what roles they play in the overall chain. Please see Appendix 2 for a visual depiction of the lamb value chain.

Documentation

For organizational purposes we compiled records of everyone we contacted. A universal record template was drawn up and used to keep track of our interactions with stakeholders. The Lamb Records Binder kept all of our interviews and contacts throughout our research. However, this is a hard copy and therefore static. For a dynamic database of contacts, which would be able to be updated as needed, we transferred our contact list to electronic spreadsheets. (A print-out version of this is available in Appendix 3.)

Surveys

When interviewing people for research purposes, consistency matters. It is important to ask the same questions, portray them the same way, and to have them properly documented. Two surveys were prepared for our research: Local Food Purchasing Survey and Local Lamb Producer Survey (See Appendix 4). These were distributed to relevant stakeholders and the results were used as background information on consumer demand and on producers and supply, respectively.

Presentation

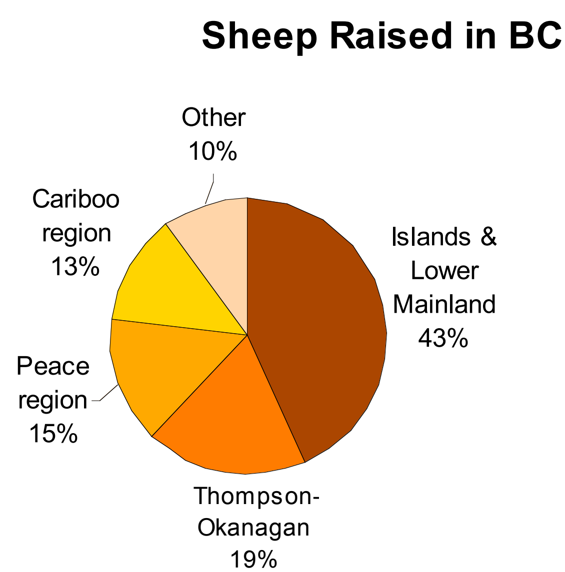
Finally, we created and performed a presentation to LIFE and our instructors. This play was intended to raise awareness on the issues concerning the local lamb industry. The presentation was structured around the value chain, portraying perspectives of each stakeholder.

The Story of BC Lamb

The BC lamb industry has a complex story behind it. From sheep farmers spread across the province to slaughterhouses and distributors to restaurants and retailers, the lamb industry is full of opportunities and challenges.

Sheep Facts

The 2001 census reported approximately 1,865 sheep farms in BC with 83, 300 sheep and lamb (Province of BC, 2001c). This number is the result of a steady rise since 1981 (which is as far back as the study goes). The Ministry of Agriculture and Lands states that 43% of the sheep in BC are raised on Vancouver Island and in the Lower Mainland, 19% in the Thompson-Okanagan region, 13% in the Cariboo region, 15% in the Peace region and the remainder throughout the province (Province of BC, 2001b) (See Appendix 5 for a map of sheep regions).



Most sheep production in BC is small scale, with the average size of a sheep farm being around 45 sheep and lamb (Province of BC, 2001c). The Ministry reasons that this is because sheep can be raised on a small piece of land and one-half hectare of pasture can support 6 to 8 ewes. A report on the Canadian sheep industry states that small-scale, dispersed production leads to problems with product collection and transportation distances (Standford et al., 1999). This means that many producers have to sell their lamb at the farm gate, direct to consumers, to avoid these problems. During the 1990s, "up to 70% of the lambs produced on Vancouver Island and near Vancouver were marketed at the farm gate," (Standford et al., 1999, p.2). A small amount is processed further and sold through farmer's markets or through distributors to restaurants and retailers.

There is no sheep supply management board in BC like there is for dairy – sheep prices are governed by supply and demand. Recently, demand for lamb in BC has exceeded supply as a growing ethnic population consumes more lamb (Province of BC, 2001a and Standford et al., 1999). BC produces about 15-20% of its lamb requirements and imports about 375,000 kg of sheep and lamb's meat each year (Province of BC, 2001a,b). This means there is great opportunity for BC's lamb industry to grow and replace imports with domestic products - if they can overcome the challenges outlined below.

Challenges

Organizational

Poor organization between people and groups in the value chain is a major challenge. "It has been observed that an efficiently organized supply chain can result in low transaction costs and a highly competitive industry…these features are absent from the Canadian lamb supply chain," (Standford et al., 1999, p.3). The report on the Canadian sheep industry recommends better co-operation and co-ordination between producers and producer marketing groups (which do not even exist in BC) and warns that:

> unless sheep producers, sheep industry groups and lamb abattoirs work together to improve the efficiency of information and product flows along the lamb supply chain, thereby reducing transaction costs, the Canadian sheep industry in the future may be epitomized by isolated, hobby flocks marketed direct to consumers at the farm gate and other supply channels which characterize a local cottage industry.
> (Standford et al., 1999, p.6)

Numerous sheep associations exist in BC, with the BC Sheep Federation (BCSF) as an overarching body. This federation is the perfect body to be carrying out these organizational roles. The BCSF's website has a few resources for farmers and mentions a producer database but does little to market BC sheep or raise awareness about the industry. The provincial government expresses the view that "the BC Sheep Federation has been working to improve the marketing of BC lamb through education and promotions" (Province of BC, 2001b). However, responses from varying producers, involved with the BC Sheep Federation, depict a different story. Producers indicated that the federation does not have enough funding to carry out such tasks as marketing and does not have enough farmers signed up as members to increase their funding or provide input. The feeling of frustration from these individuals offers a very different viewpoint from the statements by the governments and indicates an overall lack of organizational strength.

Regulatory

New regulations concerning licenses of abattoirs, or slaughterhouses, in BC, pose immediate concern to the local lamb industry. This Meat Inspection Regulation falls under the Food Safety Act and was enacted by the province in 2004 to ensure that all requirements for the slaughter and sale of meat in BC are standardized across the province (Castro, undated). It states that all BC abattoirs must be provincially or federally licensed by September 30, 2007 and all animals must be inspected pre and post slaughter. (Before this regulation, abattoirs could be licensed or simply approved by the regional health authorities depending on to whom/where they were selling their meat.)

A news release from the Ministry of Agriculture and Lands and Ministry of Health announced in April, 2006 that the BC government would provide $5 million of funding to help the industry meet these requirements and "help ensure livestock producers across the province will have access to small slaughter facilities, which is so important to small farms with an existing base of loyal customers" (Ministry, 2006). However, critics, including producers with whom we spoke, say the new regulations are capital intensive and many small processors will not be able to meet the requirements to get licensed, even with the funding. These regulatory pressures may force small farmers to send their lamb to large abattoirs in Alberta. One farmer we spoke to also voiced the concern that large abattoirs would start getting all their lamb from Alberta feedlots instead of BC producers, as it would be cheaper.

Competition

Present figures state that British Columbia meets 15-20% of its lamb consumption through provincial production (Standford et al., 1999). The remaining 80-85% is coming from other provinces and nations. Our primary Canadian competition is Alberta simply due to their proximity. The Alberta sheep industry has more capital intensive processing infrastructure and as such draws value-added production from BC cottage industry lamb farmers. The scale of infrastructure in Alberta allows for lower pricing on processing services and minimizes the risks posed by standardized regulation. Internationally, the single greatest threat to BC lamb comes from New Zealand. Similar to Alberta's 'economies of scale' advantage, the sheer number of sheep in New Zealand (exceeding the number of people) provides the industry with an enormous comparative advantage. BC lamb relies heavily on product differentiation through the connotation of quality as a means to preserve their share of the market.

Lack of Product Awareness

Research indicates that lamb consumption has been in steady decline for years (Standford et al., 1999). Standford et al. (1999) stated that lamb meat was considered the least favorable commercial meat in North

America. While the reasons for diminished demand are complex, the lamb industry has made little branding impact on consumer consciousness. Despite repeated and clear recommendations, the BC lamb industry has no marketing strategy in place. While small-scale production has been able to sell some product to boutique retailers and restaurants the largest, and fastest growing sector is the ethnic market (Standford et al., 1999 and Downe, 1990). Failing to market lamb and address shifting demand demographics, the BC lamb industry is faced with further market marginalization.

Contribution to Sustainability

The British Columbia lamb industry consists mostly of small scale, multi-use farms. While this may not allow individual farmers to make a living solely from their sheep, it is much better for the animals and the environment. Instead of being confined to feedlots like in large scale farms, the sheep are generally allowed to graze in the fields. In some cases, the grazing sheep may even be helping the farmer by controlling weeds around crops. For instance, sheep are used in vineyards to effectively mow the grass between the rows of grapes (Thetis Island Vineyards, 2006). In addition, sheep can be used in tree farming, as they will eat the grass and weeds around small trees which helps the trees grow. An example of this is the Loxton Sheep Company which rents out their lambs to tree farms and, at the end of the season, sells the lambs for meat (Loxton, pers. comm., 2007).   In other cases, sheep and lambs may simply be grazing on fallow land on the farm.


"The raising of livestock (cattle and sheep) in a way that complements the growing of trees is a form of agroforestry called silvopasture" (Opio et al., 2001). By grazing sheep and raising crops or trees together, these different systems work in collaboration and yield multiple benefits and products that you would not receive from performing them separately. As well, it is beneficial for soil quality and the environment as it requires less herbicide. One BC producer interviewee told us their ranch has a land management focus that includes silvopasture, and she enthused about the benefits of this system, both for the environment, and for lamb health.

Capital intensive, large-scale lamb production, as conducted in New Zealand, Ontario, Quebec, and Alberta, does not allow for the multi-use, environmental benefits of small-scale lamb industry in BC. It is important to keep this process of small scale, multi-use sheep farming alive because of its contribution to sustainability. In order to do this, it must be economically viable for the farmers.

In addition, the local lamb industry should be supported simply because it is more sustainable to eat local products than imported products. Local food does not have to travel as far to get to your plate. Therefore, the transportation of local lamb uses less fossil fuel than the importation of lamb from New Zealand and other regions. According to some reports, "there is an enormous fear in New Zealand about how awareness of food miles could impact on their huge export trade" (Dube, 2007). With peak oil looming, transportation costs and impact are increasingly relevant considerations.

Suggestions

Leadership and Organization

None of the barriers facing BC lamb farmers can be effectively addressed until a more cohesive, empowered, and well-funded organization emerges. While BC contains a league of sheep associations (See Appendix 6), lacking a strong unitary body they cannot bargain for better conditions, nor can they offer the consolidated supply that the demand side desires. Furthermore, the absence of a unified voice leaves the industry more vulnerable to regulatory barriers. As discussed, the British Columbia Sheep Federation lacks members and funding. While a chicken and egg debate could follow, an improvement in service and representation by the BCSF would no doubt stimulate participation and raise capital through new membership. Of course, improvements cost something; however, certain critical improvements could be made at a relatively low cost. The following suggestions are potential initiatives that organizations such as LIFE could promote in cooperation with an invigorated federation.

Interactive Website

The BCSF should look at the website hosted by the Ontario Sheep Marketing Agency (OSMA). As indicated by their title, marketing is an essential function of their existence. The OSMA, through their website, offers users a comprehensive listing of sheep farms and contact info, as well as information on other stakeholders such as abattoirs and distributors. While this might seem obvious, the BCSF does not provide this basic info and as such, prohibits retailers, restauranteurs, the entire demand sector, from easily accessing information on local lamb supply. We urge BCSF to upgrade their website's capacity to connect different players across the value chain, the first step would be the inclusion of their present membership list. We further encourage the BCSF to out do the efforts of the OSMA by creating an interactive web platform that would allow all value chain members to easily locate and contact one another. Our vision of this is simple. The BCSF homepage should embrace the disperse nature of our local industry by presenting a map of the province with a visual and interactive display of all the active lamb farms.

Promotions/Events

As was mentioned in the context section, a crucial factor in the BC lamb market is the rising demand amongst ethnic communities. While this project did not thoroughly investigate the ethnic demand equation we did imagine ways in which the market could be better engaged. According to our research, the ethnic market presently relies on cheap imported lamb. As is common with other ethnic communities a trust for, if not a reliance upon, imported goods is common. Our suggestion for the industry is to sponsor neighbourhood community events. Presently, there is a dirth of community events in some of Vancouver's most ethnically vibrant communities. Specifically, the growing South Asian neighbourhoods. While the prospects of organizing a celebration around lamb alone is tenuous, its role as the central food theme could be capitalized upon. Existing festivals should also be engaged. After conducting interviews with Souvlaki sellers at Vancouver's famous 'Greek Days' we were encouraged that the opportunity to promote local lamb would be a welcome asset to their sales. (See Appendix 7 lamb fest ideas.)

Full-time Marketing Staff

While outside parties such as LIFE can offer crucial steering for the lamb industry, as highlighted before, a strengthened federation is essential to preserving a role for BC producers in our provincial lamb economy. The aforementioned website and event promotions are both suggestions that would fall under a broader marketing strategy that the BCSF requires. These initiatives would benefit from at least one full-time position committed to marketing and branding BC lamb. As previously discussed, budgets are tight. As such, we suggest LIFE and the BCSF investigate opportunities to engage university co-op programs as an inexpensive source of innovative and specialized labour.

Deliverables

In addition to our implementation suggestions, we have some raw deliverables to be used by the LIFE organization in their efforts to localize the lamb value chain.

Living Database

In collaboration with the larger LIFE group, we have assembled an online database that we will hand over to the LIFE group. The directory contains detailed listings of varied contacts throughout the value-chain with details regarding our interaction with them, it is an ideal contribution to an existing directory, or starting point for a new one.

Producer and Consumer Surveys

Upon our second consultation with the LIFE organization we were given a survey designed to gauge variables affecting the demand side of local lamb from the restaurant perspective. Working with the other LIFE group, we reformulated the survey to better address our questions while reducing the burden upon the survey participant. In addition to the updated LIFE survey for restaurants, we also constructed a survey for producers that followed the same principles and aimed to uncover knowledge gaps on the supply end of the value chain. Both surveys are assets to any agency seeking to uncover more information on value chain strengths and weaknesses, they are also included in Appendix 4. In addition, the completed surveys we have collected will be included with the contributions of the larger LIFE group.

Presentation Tool Kit/Value Chain Play

As a larger group, focusing on value chain issues for herbs and tomatoes as well as lamb, nine Undergraduate Semester in Dialogue students performed a live performance with multi-media components. The response was very positive and audience reactions confirmed that the medium chosen was an engaging and informative approach to exploring the complexity of localized food economy issues. We have included our master script for the performance to be used as fit for the LIFE organization. As Al Gore's documentary served as the basis for a traveling informative tool kit, we hope our play could be used in a similar fashion, as a learning tool or a template for mobile education.

'Exploring the Value Chain of Local Lamb' Report

This report will be available online with its findings and useful appendices for the LIFE networks, lamb value chain players, or any interested parties. The full report may be accessed at: www.sfu.ca/dialogue

Conclusion: A Critical Time

The forecast for the small to medium scale lamb industry in BC is ominous; in fact, it's been cloudy for awhile. In 1999, *Supply Chain Management: An International Journal*, predicted that declining lamb consumption paired with the impacts of NAFTA would render the Canadian lamb industry extinct by the year 2000 (Standford et al., 1999). The industry proved more resilient then expected, yet things may be about to get worse. British Columbia represents the smallest portion of national lamb output, trailing Alberta, Ontario, and Quebec (ibid.). Unlike the larger scale, and more intensive practices of the aforementioned provinces, BC lamb production is more diverse, dispersed and small scale (ibid.). Comprising of far-flung cottage industries, BC lamb producers face inherent disadvantages in regards to cost of transport, weak communication, and inconsistent supply. Added to this host of barriers, recent federal Meat Inspection Regulation under the Food Safety Act has placed unrealistic financial burdens on a flailing sector. Interviewees have stated the cost of retrofitting an abattoir to be in the range of a million dollars. Lacking strong organization in the face of so many pressures, internal and external, changes are needed to support the continued production of lamb in British Columbia.

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Appendix 1: Stakeholder Map

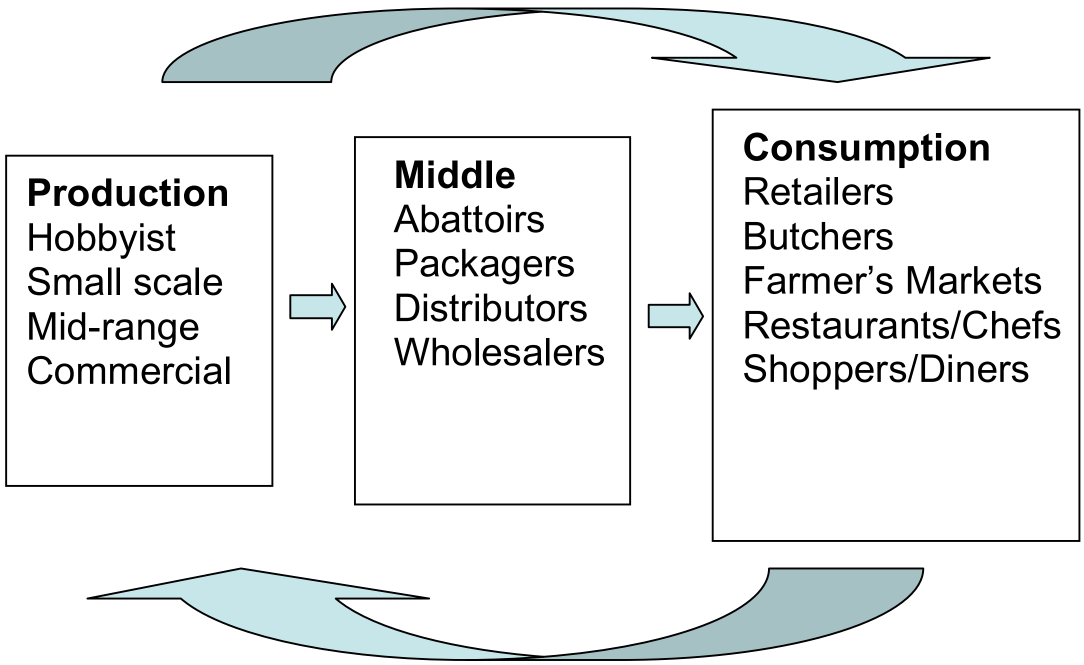

Figure 1: Stakeholders involved in the lamb value chain.

Appendix 2: Lamb Value Chain

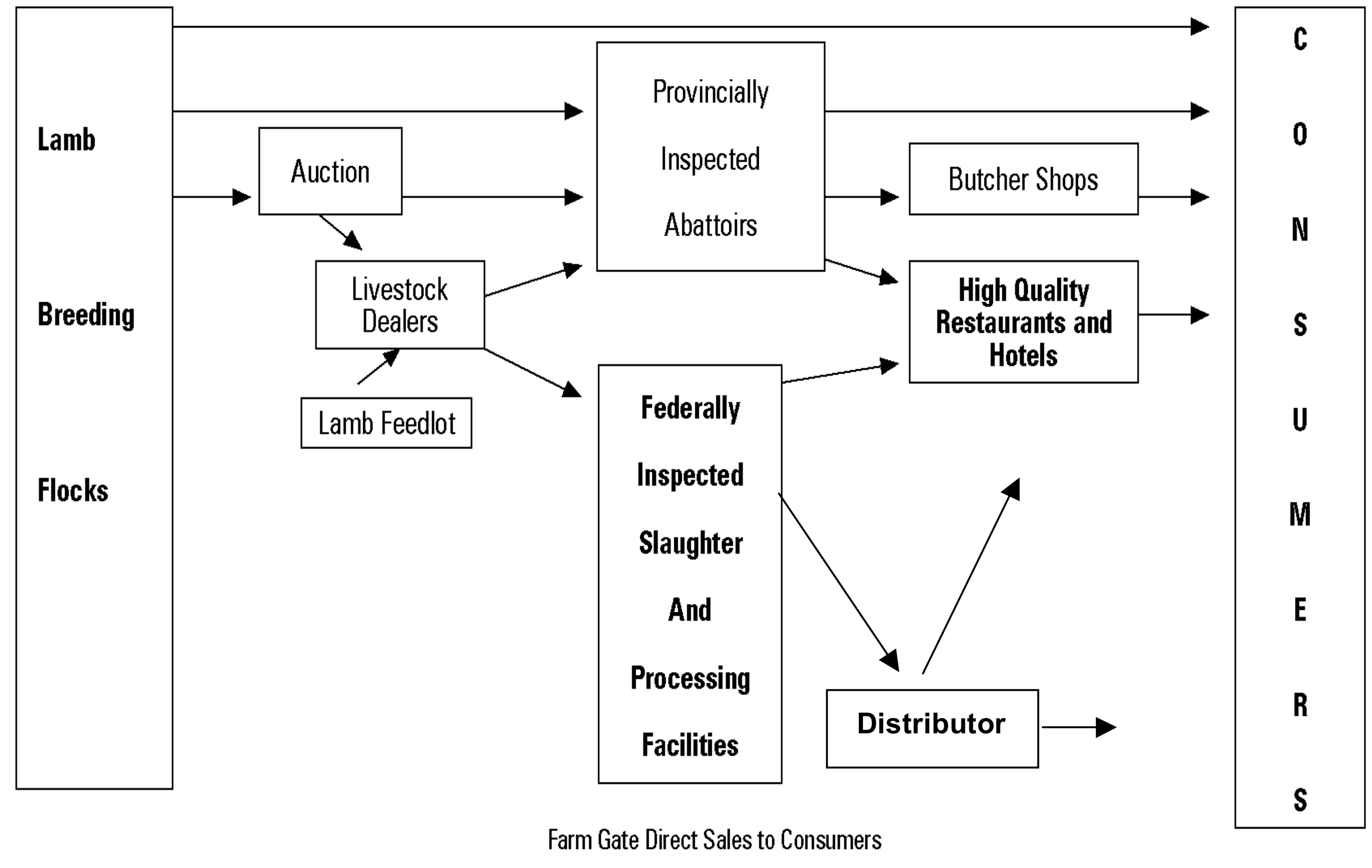

Figure 2: Lamb Value Chain (Adapted from Standford et al, 1999).

Appendix 3: Contact Database

Appendix 4: Surveys

Local Lamb Producer Survey

The Local Initiative for Food Enterprises (LIFE) is a collaboration of key stakeholders in our food system, including farmers, retailers, foodservice operators, health care providers, and many others. Its primary goal is to identify and consolidate demand for BC agricultural products and develop new initiatives in processing, packaging and distribution to meet that demand.

One current project examines the local food system through a focus on lamb. It would be much appreciated if you could provide insight on these issues, from your perspective as a lamb producer. Your participation in this survey will help to build bridges between farmers, business owners, and consumers across the Lower Mainland and BC. Thanks.

Name of farm/company:

Contact details (email/phone):

Location of lamb farm:

Size of lamb farm (acreage and capacity):

1. How much lamb do you produce and sell each year?

   Would you classify your farm as small-scale, mid-scale, or large-scale production?

2. Would you be interested in/able to increase your production, or expand your farm, if there was reliable local demand for it?

   Comments:

3. How do you sell your lamb? (For instance: direct to individual customers, farmer's markets, restaurants, retailers, distributors, etc.)

4. What companies do you sell your lamb to?

Name of company	**Type of company (restaurant, distributor, etc)**	**Location (city or region)**

(I only sell direct to individual customers _____)

5. What concerns (if any) do you have with selling commercially (ie. not directly to individual customers)?

   What would make this easier?

6. Do you sell direct to restaurants?

   Would you be interested in selling to (more) restaurants? Why or why not?

7. Do you process your own lamb?

   If not, who/where do you send it to for processing? Please list company name and city/region.

8. What products is your lamb processed into?

9. Are you certified organic?

10. Do you belong to a lamb producers association/group/co-op? Please list any.

11. Would you be interested in further participation in the LIFE project?

Any other comments:

Thank you for your input.

Local Food Purchasing Survey

LIFE is a fresh collaboration of key stakeholders in our food system, including farmers, retailers and foodservice operators, health care providers and many others. Its primary goal is to identify and consolidate the demand for BC agricultural products, and develop new initiatives in processing, packaging and distribution to meet that demand.

Your participation in the following 10-minute survey will help to build bridges between farmers, business owners, and consumers across the Lower Mainland.

General Information

Restaurant name: ……………………………………………………………………………………
Type of cuisine:
……………………………………………………………………………………
Contact name:
……………………………………………………………………………………
Address:
……………………………………………………………………………………
Phone: ……………………………………………………………………………………
Email: ……………………………………………………………………………………
Best time to contact: …………………………………………………………………………………..

Is your restaurant…
_______ Independent
_______ Franchise or multi-unit operation
_______ Contract caterer
_______ Other (please specify): ______________________________

Local food usage and interest

Do you currently purchase **local BC** agricultural products?
(e.g. produce, specialty meats, cheeses)
_______ Yes
_______ No
_______ Seasonally
_______ Don't know

If yes, which **local BC** products do you currently buy?

Are you interested in using more **local BC** foods?
_______ Yes _______ No

Where and how do you purchase the products you use?
(Check all that apply)
_______Distributor
_______Retailer
_______Farmers' market
_______Direct from the farmer
_______Co-operative
_______Other (please specify): __________________________

Please prioritize the benefit to your restaurant of using **local BC** food…
(With 1 being the highest)
_______ Quality & freshness
_______ Price
_______ Marketing/Public Relations
_______ Customer request/response
_______ Accessibility
_______ Ethics
_______ Other (please specify): __________________________

What would make using **local BC** agricultural products easier and more accessible?
(Check all that apply)
_______ Greater consistency of product (quality control)
_______ Greater consistency of supply (year-round availability)
_______ Online ordering
_______ Price point
_______ More information
_______ Other (please specify): __________________________

What products come to mind when you consider "**local BC**" food?

Consider the table below as proposed order form. Please indicate your willingness to purchase these **local BC products**.

Product	**Quantity** (monthly)	**Size of portions**	**Kind of processing** (please list all that apply e.g. fresh/freeze dried)	**Approximate monthly cost**	**Additional features**
Tomatoes					___Organic ___Local
Lamb					___Organic ___Local
Herbs (please list top 3)					___Organic ___Local

Are there other specific **local BC** products that you are interested in using?

Would you be available to provide more details on your purchasing policies in the future?
_______ Yes _______ No

Are you interested in partnering with LIFE to connect your restaurant with local suppliers?

For more details about LIFE contact:
Andre LaRiviere
Executive Director, Green Table Network
andre@greentable.net

***Please fax completed survey to 604.268.7892 Attention: UGSID LIFE ***

Appendix 5: Sheep Regions of BC

Map 1: This map displays major sheep regions in BC: the islands, the Lower Mainland, the interior, the Cariboo region, and two northern regions centered around Prince George and Dawson Creek.
(Map adapted from Ministry of Environment, 2001)

Appendix 6: BC Sheep Organizations

- BC Sheep Federation
- BC Purebred Sheep Breeders Association
- BC Sheep Breeders Association
- Okanagan Shuswap Sheep Producers Association
- Upper North Thompson Sheep Breeders Association
- Cariboo Sheep Breeders Association
- Bulkley Nechako Shepherds Association
- Lower Mainland Sheep Producers Association
- Fort George Shepherds Association
- Dawson Creek Sheep Breeders Association
- Intra Island Sheep Breeders Association
- Quesnel Sheep Association

Appendix 7: Lamb Fest Ideas