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# **POULTRY FOCUS GROUP: CHALLENGES FACING THE SECTOR**

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# POULTRY FOCUS GROUP: CHALLENGES FACING THE SECTOR

Shawn Wiskar and Guillaume Lhermie

## EXECUTIVE SUMMARY

The Canadian poultry industry is small but significant; chicken is the most consumed animal meat protein in the country, the consumption of which has increased with population growth and immigration from cultures that favour the meat over beef and pork. Meanwhile, the industry is under pressure to align with sustainability goals, specifically to reduce its greenhouse gas emissions. In 2021, to better understand the industry's challenges and possible policy solutions to those challenges, the Simpson Centre assembled a focus group of industry stakeholders to discuss their opinions regarding the challenges facing Canadian poultry sector, along with how the sector interacts with policy, and their short-term and long-term priorities.

The focus group was composed of six agricultural industry stakeholders in the Canadian poultry sector. Researchers asked questions focused on the industry's challenges, the supply chain's resilience, and poultry production's longevity. They then aggregated and analyzed the responses along four dimensions, each containing subcategories. The four dimensions were identified as policy, sector challenges, future generations and supply chains.

Policy was the most discussed dimension, and a majority of the whole conversation could be tied back to the subcategory of supply management system. Participants viewed Canada's supply chain as posing the industry's greatest challenges but also as providing its greatest support. They lamented barriers to entry and tight profit margins, but also acknowledged that the system protects them from price fluctuation. The participants also highlighted red-tape issues as a significant challenge, due to inefficient federal processes. They described public misconceptions about the industry and stressed that individual farmers are burdened with expectations that impede growth.

Based on the focus group's discussion, the Simpson Centre recommends increasing funding for agricultural research based on scientific data and input from poultry producers; streamlining the approval process of vaccines already approved in comparative markets; reducing red tape with a new strategy based on analysis of supply chains in other countries; and collaboration between the federal and provincial governments to consult with poultry producers and farmers and thereby, also collaboratively, to develop evidence-based policy.

## **ABSTRACT**

The Simpson Centre initiated a focus group for agricultural industry stakeholders in the Canadian poultry sector to gauge their opinions on the current interaction of this sector with policy, the challenges that are specific to this sector, and their short-term and long-term priorities. Most concerns and frustrations voiced by participants involved the restrictions of the supply management system; however, the focus group felt the system provided protections that made poultry farming economically feasible. Participants felt there was a lack of meaningful consultation between different levels of government and the poultry sector, resulting in rigid regulatory requirements, and furthermore that the tension between consumers' demands for low-cost food and producers' challenges supplying the industry at a low cost has resulted in the need for investment and prioritizations of innovative practices.

## **KEY FINDINGS**

- Participants were concerned largely with challenges surrounding the restrictions of the supply management system. Many participants highlighted the barriers to entry and the tight profit margins associated with participating in the poultry sector. However, participants also credit the system with providing protection from price fluctuation and market demand. The supply management system is seen as a positive element of Canada's poultry sector but in need of improvement.
- There was large consensus on the need for "red tape reduction," specifically for creating easier and more accessible ways to access financial supports and programs in place for poultry farmers and for streamlining regulatory requirements.
- Many participants expressed that the poultry industry is misrepresented both in the public eye and in policy decisions, as industry stakeholders are often treated as one uniform industry and not always provided with an opportunity to voice their concerns/suggestions or to present policymakers and the public with accurate data.
- The Canadian poultry sector comprises several small farms, while the American market has several large farms that dwarf Canadian capacity. The small capacity was seen as a public perception advantage for Canadian farmers but as a source of significant challenges to bringing investment to Canada.
- Communication and data sharing throughout supply chain sectors was often mentioned as a key to success that needs to be addressed through policy in order to ensure the longevity of the poultry sector in Canada.

## **POLICY RECOMMENDATIONS**

Research staff have aggregated recommendations that focus group participants made explicitly, along with implicit suggestions to address the issues identified by the focus group, as follows:

1. It is recommended that the provincial government increase funding towards agricultural research based on scientific data and suggestions from poultry producers. This includes funding for poultry diagnostics, veterinary medicine, and agriculture technology and innovation. This should include affordability measures that support sustainability and infrastructure upgrades on poultry farms.
2. It is recommended that the federal government work with the Canadian Food Inspection Agency and national and provincial poultry bodies to streamline the approval process of vaccines previously approved in comparative markets such as the European Union and the United States.
3. It is recommended that a comprehensive analysis of the poultry supply chains in other countries is conducted to identify efficiencies and cost-saving measures. Once identified, a red-tape reduction strategy should be implemented by federal and provincial governments in collaboration with poultry organizations.
4. It is recommended that the federal and provincial governments work together to increase consultation with and information/data from producers and farmers within the poultry sector within corporations of all sizes to better inform evidence-based policies for the sector. The focus group mentioned increased collaboration on policy development as an essential part of ensuring that farms can be sustainable in the long run.

## INTRODUCTION & BACKGROUND

In Canada, agriculture accounts for 1.7 percent of the GDP, with limited variation over the last few years. Poultry and egg production is a significant but small agricultural industry. For Canada as a whole, in 2021 the poultry sector contributed \$5.5 billion to the Canadian GDP from over 4,700 farms (Agriculture Canada, “Canada’s Poultry,” 2022). Canada’s total annual production of chicken and turkey was 1.45 billion kilograms (eviscerated weight), with 60.4 percent of all chicken being produced in Ontario and Quebec (Agriculture Canada, “Canada’s Poultry,” 2022). Canada’s poultry export market is fairly limited in scope. In 2021, Canada exported 138 million kilograms of poultry and egg resources, representing 9.5 percent of total poultry production (Agriculture Canada, “Canada’s Poultry,” 2022); Agriculture Canada, “Canada’s Chicken,” 2022).

Canada’s poultry is a staple food, chicken being the most consumed animal meat protein in Canada at an average annual consumption of 34.4 kilograms per person (Agriculture Canada, “Canada’s Chicken,” 2022). A study of the Canadian poultry market found that chicken consumption in Canada has increased threefold since 1980, due to a variety of factors including population growth and changing consumer preferences (United States Department of Agriculture 2020). Consumer preferences may have also changed with the Canada’s ethnic makeup. One in five Canadians were born in another country, with a significant percentage of those hailing from a country with a preference for chicken over beef and pork (United States Department of Agriculture 2020). The study also linked an increase in consumption to the increase in chicken sold in fast-food restaurants which comprises 24 percent of all chicken sales.

As any other economic sector producing outputs, agriculture uses natural resources. Production processes generate externalities, such as greenhouse gases (GHG) and other contributors to environmental damage. The pressure to reduce GHG emissions and align with sustainability goals has put agriculture under scrutiny. In Canada, agriculture accounts for approximately 10 percent of GHG emissions, and global food systems contribute an estimated 21 to 37 percent of annual global GHG emissions (Lynch et al., 2021). A 2021 briefing paper released by the Simpson Centre states that the estimated GHG emissions from poultry represents 2.62 percent of total agriculture (Fouli et al 2021).

To gain a better understanding of how Canadian agriculture industry stakeholders integrate and address these challenges, and also to find opportunities for economic growth, a focus group was organized with actors representing several stages of the poultry supply chain. We opted to run a focus group to foster an opportunity to openly exchange viewpoints and connect participants with each other. This deliberative process has been shown to be suitable for formulating policy recommendations because it allows participants to discuss concerns in a dynamic conversation whereby viewpoints aggregate naturally as the discussion flows. The participants were asked a set of questions about the challenges and perspectives for the poultry sector, the resilience of the supply chain, and the longevity of poultry production. Responses provided by the participants were aggregated and analysed under four dimensions, namely policy, sector challenges, future generations and supply chain.

# RESULTS AND DISCUSSION

Table 1 is a summary of the four dimensions discussed within the focus groups, and their respective sub-nodes. Each colour represents a specific dimension, with the lighter colours representing the subcategories. The size of the square/rectangle correlates with the frequency that the dimension or subcategory was discussed as per the number of statements that were coded into each dimension/subcategory through Nvivo software. For example, “policy,” represented by the orange boxes, was the most discussed dimension, and covered 48.30 percent of the total contents of the discussion (based on word count), with “Canada’s supply management system” being the most frequently discussed sub-node, with a coverage rate of 22.15 percent.

**Table 1:**

<b>Policy</b>				<b>SUPPLY CHAIN CHALLENGES</b>			
Sector Consultation		Communication		Internal policy		Canada's Supply Manag...	
Federal		Provincial		Regional		Tight Margins	
		Environmental and Sustainability		Misrepresen...			
Performance Measures		Processing Ca...		<b>Future Generations</b>			
Collaboration		Competition		Size of Operation		Incentives	
Public Image		Geography		Avian Flu		Education	
				International		Longevity	
				Pr...			
				Inc...		Env...	
				Data and...			
				Covid-19			

## **FUTURE GENERATIONS DIMENSION**

Future generation points of discussion covered approximately 14 percent of all points of discussion within the focus group, as calculated by NVivo. Many participants spoke to the incentives for future generations to join the Canadian poultry sector, including the audited animal welfare programs and smaller operations. Many participants also felt that while there are several programs designed to incentivize joining the poultry sector, the barriers to entry for future generations are significant.

### **Barriers to Entry**

This sub-node spoke primarily to the issues facing future generations in entering the poultry sector. The focus group noted that without entering from a family farm, becoming a poultry producer is reasonably difficult. The new entrant programs were specifically highlighted as a positive element but imperfect. The view of the participants was that the system is not balanced fairly to allow for new entrants.

### **Education**

Education was spoken of in the context that many focus group participants were concerned with the ways producers and consumers are educated on the poultry sector. There were significant discussions on the misconceptions and need for better education about supply management and how it benefits both consumers and farmers. Discussions also revolved around the use of mentoring programs and a need for more encouragement for future generations to get involved in policy development.

### **Incentives**

This sub-node spoke to the perceived incentives for future generations to join and participate in the poultry sector. This section largely comprised positive comments regarding a feeling that the Canadian sector holds several advantages, including smaller operations, income guarantees due to supply management, sustainable operations and strong policy for issues such as avian influenza. This conversation was posed through a “what Canada can offer future generations” lens.

### **Longevity**

The longevity of the poultry industry was a significant concern raised by the focus group due to the challenges facing the industry. The group spoke of the need to build trust in consumers through messaging about the work being done in sustainability, animal welfare and industry efficiency to ensure longevity. Specific challenges noted by the group were the cost of innovating and developing new technological practices to be more environmentally friendly, the lack of support and consultation from government for new regulations, the lack of clarity about whether current agriculture practices will be acceptable in the future and the application of US expectations to Canadian poultry farms.



## **POLICY DIMENSION**

Policy-specific points of discussion covered approximately 48 percent of all points of discussion. There was significant discussion around interaction with and the roles of different levels of governments and regulatory bodies. Specific policy types such as internal policy and environmental policy were also highlighted as specific policies that are contentious. Overall themes that emerged in this node were the need for strong consultation and a recognition of each poultry sector as a unique commodity.

### **Communication**

The participants discussed communication as an important tool in the context of both government and the supply chain. The overall sentiment was that communication was strong within the industry itself, but that communication between industry and the government ranged between strong to weak depending on the issue and the government's level of prioritization for the issue.

### **Environmental and Sustainability**

This sub-node spoke largely to how poultry policies can promote sustainability as well as profitability. The concept of sustainability is top of mind for poultry farmers, as it is seen an expectation in the industry. Some participants highlighted the Canadian advantages such as supply management and animal welfare programs, which make sustainability initiatives affordable due to guaranteed profit margins. There was also an acknowledgement that sustainability needs to be a major focus moving forward. Participants raised concerns that as sustainability practices change, the farms of today won't meet the standards without significant renovation. The focus group mentioned increased collaboration on policy development as an essential part of ensuring that farms can be sustainable in the long run.

### **Federal**

Overall, the attitudes of participants towards the federal government and their efforts were positive. Participants noted that federal government policy work has positive impacts on the poultry sector when it comes to addressing issues such as avian influenza and supply management. The pan-Canadian frameworks were highlighted as positive step to addressing anti-microbial resistance and the effects of climate change on the sector. There were also several criticisms levied against the federal government including research priorities not aligning with industry needs and priorities, the lack of understanding of supply management as a system, and the slow bureaucratic processes. Specific weaknesses highlighted were focused on vaccine development and product approval taking significantly longer due to inefficiencies within the Canadian Food inspection Agency (CFIA) and Department of Agriculture Federal Government.

### **Internal Policy**

Several participants noted the importance of the industry-driven internal policies that are self-imposed in the poultry sector. These policies, while producer driven and approved, are subject to ministerial approval, so they can present challenges. However, participants viewed internal policymaking as a positive. They felt it guides collaboration between producers and suppliers and provides guidance for the sector when dealing with government regulation.

## **Misrepresentation in Policy**

Conversations surrounding this sub-node spoke to producer confusions in the policy sphere. Confusions were identified around what is national, provincial or board policy. Focus group members highlighted that different poultry sectors are commonly grouped together, leading to policy development that is too broad and doesn't fit industry priorities.

## **Provincial**

Provincial collaboration on agriculture issues drew a mix of responses from the focus group. Some members felt that the strength of their advocacy depended on the priorities of the government and the political party in charge. Funded research opportunities were largely disconnected from asks made by farmer groups and instead aligned with political priorities. Criticisms were also raised about the pulling back of funding by provincial governments, which has put costs of addressing issues such as salmonella and avian influenza costs on the producers. Several comments regarding the differing provincial government approaches were raised as a significant challenge for the implementation of national programs. Programs such as the National Food Safety Program have different chemical applications due to the programs being administered by each province. Overall, the focus group still put heavy emphasis on the provincial governments' roles as strong partners in the innovation of new policy and research.

## **Regional**

Within this sub-node, some participants spoke of the vast differences found across Canada. Feed systems and ingredients vary depending on what region of Canada poultry is produced in. Specific regions such as Eastern and Central Canada produce significantly more poultry products than others. Focus group members highlighted that smaller producing regions face unique challenges such as struggling to get prescriptions due to a lack of veterinarians.

## **Sector Consultation**

Sector consultation was a major point of discussion amongst the focus group, with a variety of perspectives offered. Participants saw consultations as a positive; they felt that the poultry industry was regularly taken into consideration during development of policy. Examples of positive consultation offered include the transition of regulations into bylaws, avian influenza and maintaining general communication. However, while consultations were positive, the focus group had several concerns with consultation approaches. The group felt that existing consultations were flawed due to the lack of continuity between consultations in addressing specific issues like avian influenza and during the transition from one government to another. Participants described feeling that consultations are "a box to be checked" by the government, and that the questions asked are targeted, with expected answers. Priorities for consultation were described as handed down to farmers rather than being driven by farmers to government. The focus group voiced a general sentiment that consultation is not being driven by data. Overall, all focus group members highlighted that consultation is one area in which they would like to see improvement.

## **SECTOR CHALLENGES DIMENSION**

Points of discussion specifically related to challenges within the poultry sector covered approximately 41 percent of all points of discussion. There was significant discussion about how producers and suppliers can collaborate, how producers are viewed by the public, and how to better manage the competitive elements of the sector.

### **Avian Influenza**

Avian influenza was cited as a major challenge for the poultry sector. There seems to be a mix of positive and negative policy responses to avian influenza from government and industry. Some members of the focus group felt that lessons learned in 2014 and 2015 did not stick and remain unaddressed. The group discussed the positive role of the CFIA and how it was able to quickly make policy changes to assist farmers. The group also discussed the positive insurance system and its ability to strengthen agro-recovery.

### **Collaboration**

Conversations coded to this sub-node alluded to an increased need for collaboration in the poultry sector and the agriculture industry. While it was noted by many participants that there was an overall working level of collaboration, there could be more surrounding identifying efficiencies in the supply chain and developing environmental sustainability processes. Due to the variety of different commodities in the poultry sector, collaboration is sometimes hindered by conflicting priorities. Focus group members acknowledged that they felt collaboration along the supply chain was more effective and efficient than with government bodies.

### **Competition**

This sub-node spoke to the need for increasing competition within the international market. Focus group members felt that Canada was put at several competitive disadvantages when compared to other poultry producing nations. Canadian rules around feed requirements, veterinary prescriptions and medications, and vaccine developments and integration were also discussed as being onerous and slow to change, leading to Canada lagging behind other competitors. Canada's small and highly regulated market also attracts less innovation; some focus groups discussed how pharmaceutical companies and even other types of industries aren't necessarily interested in Canada.

### **COVID-19**

COVID-19 was overall not a largely discussed topic, with only 0.99 percent of the overall coded commentary related to this sub-node. Those who spoke to COVID-19 noted challenges surrounding disruptions within the supply chain. Focus group members cited supply management as a barrier making the response to supply chain disruption slow.

### **Data and Information**

This sub-node spoke to the need for improved research in the poultry sector. The focus group felt that research should be industry driven and make continuous improvements in policy areas such as climate change, sustainability and anti-microbial use and resistance. Research priorities are seemingly tied to political agendas rather than industry led.

## **Environmental**

Challenges discussed within this node specifically spoke to Canada's cold climate. Cold climates contribute to the need for more substantive infrastructure on farms, such as light-type barns, which adds to the costs of production. The group mentioned other countries with warmer climates, as it is believed those countries have a competitive advantage due to the use of open-sided structures.

## **Geography**

The large geography of Canada was highlighted by the focus group as a challenge for poultry producers. Each province has a slightly different approach to the requirements of the supply management system. The provinces' lack of cohesive approaches makes studying the market on a national scale difficult. Further, the group highlighted the wide geography of Canada creating climate differences and a broad range of requirements for poultry production.

## **Incorrectly Grouped Commodities**

Several members of the focus group discussed the issues of treating the poultry as a single commodity. Significant differences exist between the various poultry commodities, and each of them has unique policy positions. The group cautioned against policy approaches that group all poultry commodities as one.

## **International**

International agreements were discussed in the context of how they impact the poultry sector. Supply management is seen as a major win for Canada due to its protection in the Canada-United States-Mexico Agreement (CUSMA) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). Supply management was framed by some focus group members as an advantage due to its allowance for smaller farms in Canada when compared to the United States. "Competition" as discussed in the node above was also cited as a disadvantage for Canada, due to the rigid structure of its approval processes.

## **Municipal Encroachment**

A focus group member discussed the policy challenges that exist with municipal encroachment into agriculture land. Rezoning and expansion of municipalities has resulted in the loss of agriculture land, potentially reducing the number of poultry producers.

## **Public Image**

The focus group expressed significant concerns regarding the perception of the poultry sector by the general public. Supply management's role in setting food prices is seen as a concern due to a lack of understanding from the general public. Producers are worried that increasing prices will be blamed on the farmers rather than the policy framework. The participants also expressed a concern that the American conception of poultry farming is applied to Canadian farms, and they emphasized the need to dispel myths on the scale and state of farms. Poultry organizations such as the Retail Council of Canada have changed their positions on issues such as cage-free by 2025 to allow for free-run options,

but producers are worried this may change again. This group felt that activism targeted at retailers may result in the demand for sudden changes in the industry that are not science based. It is perceived that too often activism is portrayed as consumer trends, resulting in inefficiency in the poultry sector.

### **Size of Operations**

The size of poultry operations in Canada was frequently discussed in both a positive and negative light. Canada's small-scale operations were discussed as being superior to single American operations that have chicken populations larger than those of most provinces. The size of operation was offered up a communication tool to promote the local production of poultry. However, small farms are also limited in scope and tend to be inefficient when compared to larger operations. The Canadian quota system also presents a barrier to entry in the poultry sector, as farmers must bid to purchase a quota of production.

### **Transport**

This was a small section of conversation for the focus group. Rising costs of gas, lack of grading stations, and the large geography of the country have created concerns for farmers around tight margins. However, the focus group credited the supply management system as something that helps distribute costs and ensure a baseline revenue.

## **SUPPLY CHAIN CHALLENGES DIMENSION**

Points of discussion specifically related to the supply chain challenges within the poultry sector covered approximately 40 percent of all points of discussion. There was significant discussion about the supply management system and challenges that fact Canada's supply chain. This node presented a unique overall perspective from the focus group, as participants placed heavy emphasis on the efficiency and strength of the Canadian poultry supply chain. However, they also put strong emphasis on how the supply chain holds the Canadian market back.

### **Canada's Supply Management System**

The majority of all conversation held in the focus group can be tied back to Canada's supply management system. The group overall expressed that they believed the supply management system was a positive element that provided significant protection to poultry producers. As mentioned above, several deficits were also highlighted, such as the lack of flexibility afforded to the program to make policy changes and a general lack of understanding of the program. Themes that emerged were the need for better communication, consultation and collaborative governance amongst the supply chain.

### **Performance Measures**

The focus group discussed the various policies that have been put into place to assist the poultry sector and how effective each of them are. Several participants highlighted the quota system and the barrier to entry. This system has the benefit of ensuring farmers can sell their chicken at a fair price, but it restricts the number of producers in the market. Several policies put in place by the government, including veterinary and antimicrobial requirements, while positive, have slowed down suppliers' ability to build capacity and be financially sustainable.

## **Processing Capacity**

Current challenges in the sector with the processing capacity were identified in this sub-node. Supply management allows for smaller farms in Canada but reduces the market's processing capacity due to the need to work with a variety of suppliers. Efficiencies of large-scale farming are lost, but the focus group felt that the public image of eating poultry from a family farm was a positive tradeoff.

## **Red Tape Reduction**

The Canadian government was criticized several times for their slow response to sector challenges. Focus group members specifically highlighted the CFIA and the federal government for restricting the use of innovations in other countries due to slow regulatory reviews. There is a need for better communication and efficiency from the federal government in the eyes of the participants.

## **Supply Chain Management**

Several focus group members highlighted the benefits and issues that exist in the poultry supply chain. Supply management and provincial restrictions were cited as a barrier to the supply chain, creating smaller farms and restricting the size of operation possible. However, supply management and its protection in CUSMA and CPTPP were highlighted as a positive that drives innovation through the supply chain. The focus group was asked, "What are the elements of an effective supply chain?" Several members highlighted the effective communication that occurs up and down the supply chain. The focus group felt that the business community was well supported by the government and industry. Some members highlighted that they have little communication further down the supply chain with retailers, and that negative perception of retailers can have adverse impacts on the suppliers or result in a change of buying habits. Finally, a focus group member discussed how COVID-19 and avian influenza have created supply chain disruptions, and highlighted a need to learn from the slow response.

## **Tight Margins**

Within this sub-node, participants spoke to tight revenue margins as a significant challenge to the poultry industry. Participants spoke to the increase in veterinary prescription requirements on the poultry sector resulting in higher costs and tighter margins due to the supply chain balancing higher food costs with higher production costs. There was also discussion on limited resources such as locations and availability of grading stations, which result in farmers having to transport their eggs, further increasing costs. Finally, there was discussion around a reduction in funding from the government and a lack of industry investment, making production costs higher and a lack of focus on cost saving measures. This all culminates in higher production costs but a consumer demand for lower food costs resulting in tight production margins.

## **CONCLUSION**

The participants in this focus group primarily targeted the supply management system as the primary barrier but also benefit to the poultry sector. The focus group highlighted a need to protect this system to ensure that poultry farmers can maintain financial sustainability. Several ideas were raised to accomplish this goal, such as the need for improved consultation and significant new industry investment. Participants felt the current federal system suffered from abundant inefficiencies and misconceptions about how it operated. With the small size of Canadian poultry farms, expectations are placed unfairly on farmers across the country, creating regional strain and limiting the markets' ability to grow. The policy recommendations from this focus group represent a mix of short-term actionable items such as increasing funding and developing stakeholder consultations. Other recommendations will require a long-term sustained framework to accomplish such as red-tape reduction strategies and supply chain analysis.

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## APPENDIX

### FOCUS GROUP QUESTIONS

1. What are your perspectives on the Canadian poultry sector and how the various aspects of the industry interact with policy?
  - a. Follow-up: How does the provincial or the different level of jurisdictions impact in a good way or bad way the poultry sector?
2. What do you think of the policies that have been implemented affecting the industry? Do you feel policy makers take industry into consideration? Hesitations, complaints? Things you like? Effects on the supply chain?
3. What challenges do you think are unique to the Canadian poultry industry compared to other agricultural sectors and poultry industries around the world? In the poultry supply chain? Poultry sector-specific policy?
4. To ensure longevity in the poultry industry, what needs to be prioritized? By stakeholders? By government through policy? How should government be taking stakeholders into consideration and improve communication through the policy process? What kinds of ways to you envision enticing future generations of producers?
5. What are the elements of an effective supply chain to you? What is working well in the supply chain? What do you think isn't working? What would it take to improve the aspects that aren't working?

### MATERIALS AND METHODS

#### Participant Demographics

Then Simpson Centre for Food and Agricultural Policy hosted the focus group of six individuals on July 8, 2022. These individuals represented various elements of the poultry supply chain.

#### *Employment/Supply Chain Role*

Participants, while comprising a small sample size, represented a significant scope of the industry. Invitations for this focus group were sent out to the following industry categories:

- National and provincial boards for eggs, chicken, turkey and hatching egg producers
- Poultry research organizations
- Government stakeholders
- Processors
- Retailers and wholesalers
- Producers
- Input and service providers

The six members of the focus group came from the following industry categories: national and provincial egg boards, national egg hatching boards, poultry research organizations, poultry producers, and input and service providers.

### ***Gender***

The focus group was comprised of four females and two males.

### ***Geographic Location***

Half the participants were located in Ontario, and the other half in Alberta, Quebec and Saskatchewan.

### ***Size of Organization***

Participating organizations ranged from small farms to large national organizations. The smallest organization participating in the focus group comprised five employees, with the largest comprising approximately one hundred employees. The producing organizations ranged from organizations that generate less than \$5 million to approximately \$24 million. The provincial and national boards ranged between representing 170 and 1,200 producers.

### **Participant Recruitment**

Participants were recruited informally based on purposive research sampling and snowball sampling, where participants were intentionally selected for their role as it related to this research study. The research staff circulated an invitation based on existing connections and word of mouth, and the identified participants were encouraged to extend the survey and focus group invitation to colleagues and other industry stakeholders as they saw appropriate.

### ***Participant Consent***

Participant consent was gathered at multiple stages throughout the study. Initial consent to participate and share the participants' answers was gathered in a consent form that was circulated to participants prior to the focus group. Prior to beginning the focus group, the purpose of the study was explained, along with the explanation that participants can choose to withdraw from the study, choose not to answer a question, or choose not to have their answers recorded/publicly shared, at any time. It was noted that all participants' identities would remain anonymous in the report, and all personal information and other forms of identifiable demographics would remain confidential. At the beginning of the focus group, the moderator confirmed participants' consent to be recorded and transcribed to ensure data accuracy and to facilitate thorough data analysis.

### ***Focus Group Execution***

One focus group was conducted in July of 2022, online using Zoom. This meeting involved two research staff members, and six participants. The focus group began with a brief introduction to the research staff, and the explanation surrounding participant consent for participation and the recording/transcription of the focus group. Following this, a brief introduction of the goals of this project and how the focus group will run was conducted. In addition to this, one one-on-one interview was conducted as per the request of the participant. Questions for the focus group were drafted beforehand to guide the conversation but utilized semi-structured questions that allowed for open discussion (See APPENDIX A for questions).

### ***Transcription***

The transcript for both the focus group and the one-on-one interview was generated through the transcription tool on Zoom. This transcript was then read through and compared to the audio recording of the focus group/interview by research staff to ensure accuracy. The interview results were combined with focus groups results to supplement the focus group discussion. The results are summarized based on the node that they were coded into using NVivo 12.

### ***Data Analysis***

Transcripts the focus group was uploaded to NVivo 12, a qualitative data software. To ensure consistency in the classification of participants' contributions, all data was double-coded, a process where two researchers code data independently to mitigate subjective classification. The information was sorted into the following categories by research staff in NVivo 12: Future Generations; Policy; Sector Challenges; and Supply Chain Challenges. Many responses were coded under multiple nodes due to the overlapping dimensions or points of discussion. Criteria for each node are as follows:

#### **Future Generations Dimension**

Any participant responses related to the topic of future generations in the poultry sector were coded into this dimension. The subcategories for this node are: costs, education, incentives, longevity.

- **Barriers to Entry:** comments associated with the challenges of entering the poultry market.
- **Education:** comments associated with Education require to enter the sector or maintain the sector's livelihood.
- **Incentives:** comments made regarding the presence of or lack of incentives associated with the poultry sector.
- **Longevity:** comments made that speak to the longevity of the poultry sector and its ability to continue in the future.

#### **Policy Dimension**

Any participant responses that spoke to policy were coded into this dimension. The subcategories for this node are: communications, environmental and sustainability, federal, provincial, regional, misrepresentation in policy, and sector consultation.

- **Communications:** comments made in relation to how policy has been communicated and what is working or not working in this regard.
- **Environmental and Sustainability:** comments made specific to environmental and sustainability policy that has been implemented or is recommended to be implemented.
- **Internal Policy:** comments on the industry-driven commodity board policy, response, and regulation.
- **Federal:** comments on federal policy, response, and regulation.
- **Provincial:** comments on provincial policy, response, and regulation.

- Regional: comments on regional policy, response, and regulation.
- Misrepresentation in Policy: comments specific to how the poultry sector may not be accurately represented in policy from the perspective of the participants.
- Sector Consultation: comments in relation to how producers and other stakeholders have been consulted regarding policies that affect the poultry sector.

### **Sector Challenges Dimension**

Any participant responses that spoke specifically to challenges faced by the poultry sector were coded into this dimension. The subcategories for this node are: collaboration, competition, COVID-19, data and information, environmental, infrastructure, international, national, production costs, public image, size of operation, and transport.

- Avian influenza: comments specific to the challenges of AI in poultry operations.
- Collaboration: comments made as to how workers within the poultry sector are collaborating with each other, and with other sectors, and what challenges might be present.
- Competition: comments regarding challenges in the ability for the poultry sector to be competitive in a local and global market.
- COVID-19: comments that speak to any challenges that the poultry sector has faced as a direct result of COVID-19.
- Data and Information: comments in relation to challenges that the poultry sector has faced regarding the sharing or gathering of data and information.
- Environmental: comments made regarding specific environmental challenges faced by the poultry sector or other sectors that have impacted the poultry sector.
- Geography: comments relating to the challenges the poultry sector faces due to geography.
- Incorrectly grouped commodities: comments based on the challenges faced by the poultry sector in their public perception that all poultry is a single commodity.
- International: comments relating to challenges that the poultry sector faces with the international market or sector equivalent.
- Municipal Encroachment: comments about the specific challenges of urban municipalities purchasing and replacing farm-land.
- Public Image: concerns in how the poultry industry is publicly perceived. These challenges may speak to other nodes such as the environment or federal/provincial policy.
- Size of Operation: comments that speak to concerns and challenges that the poultry sector faces in regard to the size of its operation, such as funding, capacity, output, public image, etc.
- Transport: comments made specific to transportation challenges that the sector faces when transporting inputs or outputs.

## Supply Chain Challenges

- Canada's Supply Management System: comments that speak to the supply management system and its effects on the poultry sector.
- Performance Measures: suggestions made on how to monitor and or implement performance measures within the supply chain to increase efficiency.
- Processing Capacity: comments made that speak to issues that producers have faced with the processing capacity of the facilities within the poultry sector.
- Red Tape Reduction: comments and suggestions that speak to red tape reduction as a result of government policies and regulations, and how to mitigate red tape.
- Supply Chain Communication: comments made specifically that spoke to communication challenges within the supply chain between and across all levels of the supply chain.
- Tight Margins: comments made regarding the inability for diversity and expansion within the poultry sector due to tight margins in areas such as size of business, the number of cattle, and how the cattle are marketed.



## ABOUT THE AUTHORS

**Shawn Wiskar** is a 2022 Masters of Public Policy graduate studying the effects of climate change on various sectors of Canadian life. Shawn grew up in Swift Current SK and received a Bachelor of Human Justice from the University of Regina. His current work with the Simpson Centre is focused on developing potential future research projects that assist in the goal of being a leading voice in the agri-foods sector.

**Dr. Guillaume Lhermie** joined the University of Calgary from the University of Toulouse, where he was Associate Professor in Animal Health and Veterinary Public Health Economics. He also held an Adjunct Assistant Professor position at Cornell University for two years. A veterinarian by training, he also holds an MSc in Economics and a PhD in Pharmaco-epidemiology and Innovation. Dr. Lhermie's research interests include Planetary Health and Infectious Diseases challenges, the economics of antimicrobial use and resistance at the farm, supply chains, and global levels, and sustainability challenges. He serves as an expert in animal health economics for international organizations, national agencies and NGOs. Dr. Lhermie strives to inform policymakers, helping them to design sound, resilient policies.

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