



**VALUE CHAIN
INNOVATION
FORUM 2012**

**Creating a More
Profitable and
Competitive Canadian
Agri-Food Sector**

**April 3-4, 2012
Mississauga Ontario**



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Agri-Food Sector



Dear Agriculture and Agri-Food Stakeholder:

On behalf of the Value Chain Management Centre and Vineland Research and Innovation Centre, thank you for your participation in the Value Chain Innovation Forum, April 3 and 4, 2012.

The Value Chain Innovation Forum was the design of industry. It was industry stakeholders from across the agriculture and agri-food sector that called for a better understanding on how to become more competitive and more global. And it was the Value Chain Innovation Forum Advisory Committee that met that request with a focused agenda, and a program of inspiring international and domestic speakers.

We hope you will agree, the Forum offered practical information and guidance on how to shift industry practices to one of greater collaboration and strategic partnership. There is little debate, value chain management has become an essential tool for businesses to adapt to market demands, reduce costs, improve productivity, and increase revenues.

The following pages provide a concise summary report of the Forum, and the future direction for industry, academia, and government.

In closing, we thank Agriculture and Agri-Food Canada and the Ontario Ministry of Agriculture, Food and Rural Affairs for lending support to the Value Chain Innovation Forum, catalyzing robust discourse on value chain management and innovation, and contributing to positive change in the Canadian agriculture and agri-food industry.



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*Value Chain Management
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The Value Chain Management Centre and Vineland Research and Innovation Centre collaborated on the delivery of the Forum; however, it was the expertise of the Forum Advisory Committee that ensured its success. We thank the following Value Chain Innovation Forum Advisory Committee members for their time and dedication to this initiative.

Eric Biddiscombe, Loblaw Companies Limited	Michael Longo, Longo Brothers Fruit Markets Inc.
Stuart Budd, Ontario Ministry of Agriculture, Food and Rural Affairs	Professor Ralph Martin, Loblaw Chair in Sustainable Food Production, University of Guelph
John Cowan, Grain Farmers of Ontario	Dr. Gary Nelson, Agriculture and Agri-Food Canada
Ezio Di Emanuele, Agri-Food Business Development, MNP LLP; Ezio Di Emanuele and Associates, Inc.	Bob Ross, Canadian Farm Business Management Council
Isabel Dopta, Vineland Research and Innovation Centre	Colin Siren, Agri-Food/Ipsos Forward Research
Gary Fread, Fread & Associates Ltd.	Professor David Sparling, Richard Ivey School of Business, University of Western Ontario
Dr. Martin Gooch, Value Chain Management Centre	Brian Sterling, OnTrace Agri-Food Traceability
Anna Ilnyckyj, Ontario Ministry of Agriculture, Food and Rural Affairs	Gary Turner, Pride Pak Canada Ltd.
Dr. Isabelle Lesschaeve, Vineland Research and Innovation Centre	Jamie Warner, Warner Orchards
	Dr. Oswald Zachariah, Ontario Ministry of Agriculture, Food and Rural Affairs

Forum coordinators also graciously thank the following Forum sponsors and Farm Credit Canada for their generous support of the evening reception.

Canadian Agri-Food Policy Institute	Farm and Food Care Ontario
Canadian Federation of Agriculture	Ontario Agri-Food Technologies
Canadian Sheep Federation	Ontario Culinary Tourism Alliance
Christian Farmers of Ontario	Ontario Produce Marketing Association
Excellence in Manufacturing Consortium	

Finally, on behalf of the Forum coordinators and Advisory Committee, we express sincere appreciation to the speakers, panelists, and the Hon. Ted McMeekin, Ontario Minister of Agriculture, Food and Rural Affairs, for generously sharing their insights, experiences, and enthusiasm for positive change in our sector.

Executive Summary



The purpose of the VCIF was to foster changes in the mindset and skills of business leaders, government, academia, and the wider industry through presenting indisputable evidence about the need for and the benefits of collaborative innovation.

These benefits include the ability to adapt to market demands, reduce costs, increase productivity, and increase revenues in ways that would not otherwise be possible.

Value chain management (VCM), where businesses situated along the value chain purposely work together, is proving a valid way of attaining sustainable competitive advantage. In developing closer strategic relationships with customers and suppliers, businesses acquire the ability to learn and innovate directly in line with consumer demands. This provides the opportunity to continually improve the efficiency and effectiveness of operations performed within and between the businesses that together comprise the value chain through accelerating the pace of innovation. This results in them attaining a level of competitiveness that it is extremely difficult for competitors to replicate.

The purpose of the Value Chain Innovation Forum (VCIF) was to foster changes in the mindset and skills of business leaders, government, academia, and the wider industry through presenting indisputable evidence about the need for and the benefits of collaborative innovation. Practitioners from retail, processing, farming, and research presented a practical view on the benefits of VCM and innovation from the viewpoint of people involved in value chain initiatives occurring around the world. To increase participants' motivation and ability to adopt VCM approaches, the first day presented the "what" and "why" of value chain innovation; the second day presented the "how" of implementation through an interactive workshop.

This post-Forum report describes the material presented and the discussions that occurred among participants, along with proposed next steps. The materials emphasize why VCM is an incremental ongoing journey. They also present evidence for why terms such as "supply chain" versus "value chain" are not an effective means for describing an organization's business model. A more accurate definition is determining whether a business belongs to a fragmented, cooperative, coordinated or collaborative value chain. Evidence was also presented on why, due to the strong relationships and learning that occurs between the involved businesses, the most effective and difficult to replicate innovation is likely to occur in coordinated and collaborative value chains.

In communicating these perspectives, presenters described that it is how the chain is managed which determines its success. How the value chain is managed also determines the benefits that its members derive from their participation. These benefits include the ability to adapt to market demands, reduce costs, increase productivity, and increase revenues in ways that would not otherwise be possible.

The report ends with six recommendations, based on the input from the Forum participants, which are intended to enable and motivate the development of innovative value chain initiatives. They are:

1. Devise Methods for Increasing Managers' Awareness and Understanding of VCM: a repository of easily accessible information resources in a variety of formats that would be available for educators, industry, media, and government.
2. Develop and Deliver Strategically Targeted Training Initiatives: to maximize the effectiveness and value of training and education for academic students and graduates, business executives, and other industry and government stakeholders.
3. Invest in the Development of Resources: that meet the needs of a range of stakeholders at varying stages of value chain development and which reflect the Canadian situation.
4. Research the Influence of Policies on the Adoption of Value Chain Management Practices: to provide insights for the future development of policy, legislation, and regulations.
5. Invest in Value Chain Demonstration Initiatives: to provide businesses with funding that reduces the risk of experimenting with new business approaches in exchange for sharing their learnings with the wider industry.
6. Market-led Industry, Government, and Academic Research Partnerships: to ensure that research and innovation are linked to industry needs and lead toward commercial outcomes.

Footage from the Forum can be viewed via the links below:

- Day One: <http://www.youtube.com/watch?v=96vplZP9Yaw>
- Day Two: <http://www.youtube.com/watch?v=yXIOEH3uAA>



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1. Introduction



A purposefully managed value chain can deliver value to consumers and enable businesses to innovate.

There is a growing understanding by agriculture and agri-food stakeholders that greater business success can be achieved through participation in a strategically aligned value chain. A purposefully managed value chain can deliver value to consumers and enable businesses to innovate. It was within this context that Forum coordinators designed and hosted the Value Chain Innovation Forum (VCIF).

The VCIF was a two-day event held on April 3 and April 4, 2012, in Mississauga, Ontario. The first day featured industry leaders presenting the “what” and “why” of value chain innovation, in addition to researchers presenting on the determinants of effective value chain management (VCM). Day One ended with an interactive session facilitated by Wayne Stark of Pursuit Inc., where delegates discussed how the development of innovative and robust value chains can be fostered in Ontario and Canada.

On Day Two, the Forum presented tools that commercial businesses and industry stakeholders can use to develop successful VCM initiatives. To accomplish this, the second day featured industry leaders and practitioners discussing the “how” of VCM implementation.

This report outlines the organization, delivery and evaluation of that Forum. It then proceeds to provide recommendations to industry, academia and government on developing a more innovative and competitive agri-food industry through value chain innovation.

2. The Value Chain Innovation Forum

The objective of the Value Chain Innovation Forum (VCIF) was to engage influential leaders from private industry, industry organizations, academia, and government in the process of identifying and understanding the role that they can play in motivating and enabling reconnection through the value chain. The outcome from this process will be a more robust, competitive and sustainable agri-food industry.

Day One of the Forum focused on the “what” and “why” of value chain innovation. Day Two was focused on the “how” of implementation. Presentations addressed the following questions:

- What are the hurdles that are holding back the development of closely aligned and effective value chains in Ontario and Canada?
- Which of these hurdles relate to industry culture and attitude, visionary leadership (or lack of), policy or legislation/regulations?
- Why is enabling and motivating the development of a closely aligned value chain important to creating a more innovative and competitive agri-food industry?
- How can stakeholders from private businesses and wider industry be motivated to invest greater efforts into establishing strategically aligned value chains?

The VCIF aimed to effect measurable change by providing Canadian and international examples of success from a commercial and policy perspective. These perspectives, presented by senior managers from business and industry experts, included:

- A practical view on VCM from the standpoint of people who have benefited from adopting such strategies in their approach to business;
- Challenging historical assumptions related to the management and operation of agri-food and agri-product businesses, and the development and implementation of government policies;
- Communicating the importance of leadership in commercial industry, organizations, and government for enabling and facilitating the development of closely connected value chains;
- Demonstrating the link that VCM has with the ability of commercial businesses and industry to innovate effectively and efficiently; and
- Presenting tools and approaches that commercial businesses and industry stakeholders can apply to developing successful VCM strategies (i.e., Six Sigma).

The majority of the presenters and panelists have made their presentations available for public release. They are posted on the [Value Chain Innovation Forum](#) website as well as the [Value Chain Management Centre's](#) website.

The objective of the VCIF was to engage influential leaders in the process of identifying and understanding the role that they can play in motivating and enabling reconnection through the value chain.

3. Why Did We Need the Value Chain Innovation Forum?



Closely aligned value chains have become an important management strategy, because they enable businesses to compete more effectively.

The leading business innovators of the future will go beyond simply borrowing and adapting others' best practices, or doing things better. They will create altogether new ideas and practices. They will defy conventional wisdom, in turn rewriting the rules and increasing the gap between themselves and the competition. Evidence indicates that appreciable and continual improvements in business performance can only occur when businesses more closely align their strategies and operations with customers and suppliers than traditional business approaches allow.

Innovating as a chain not only results in market-oriented improvements in products and services, but also enables businesses to streamline operations within and between themselves – resulting in higher levels of efficiency than would otherwise be possible.ⁱ It also enables businesses to create competitive advantages that are very difficult for competitors to copy.

Closely aligned value chains have become an important management strategy, because they enable businesses to compete more effectively in “an environment characterized by scarce resources, increased competition, higher customer expectations and faster rates of change.”ⁱⁱ Participating in a closely aligned value chain helps to ensure that other members of the chain are meeting critical specifications, such as those associated with traceability or food safety, resulting in the fact that they are less vulnerable to another business’s performance proving to be inadequate. The ability to deliver products that can only be produced through the coordination of efforts and resources along the value chain, coupled with the need to continually reduce production costs, is increasing the pressure that businesses feel to move to higher levels of cooperation to remain competitive.ⁱⁱⁱ

Operating in a closely aligned value chain also offers the opportunity for businesses to differentiate their products based on specific attributes, through having the ability to more effectively design and monitor all of the processes used to produce an end product.

For all of the above reasons, the old business model of independent companies competing against other companies is slowly being challenged by distinct value chains competing against other value chains for market dominance.^{iv}

Innovating as a chain not only results in market-oriented improvements in products and services, but also enables businesses to streamline operations within and between themselves – resulting in higher levels of efficiency than would otherwise be possible.^v Because the value chain approach to management and innovation is founded upon using the relationships between customers and suppliers to develop strategic advantages, it creates competitive advantages that are very difficult for competitors to copy. Businesses are able to learn to act on new knowledge in unique ways, leading to them having the ability to adapt more effectively to change than if operating as independent organizations.^{vi}

As has already occurred to businesses operating in the IT, aeronautical, and automotive industries, businesses in the agri-food industry will increasingly need to learn how to apply VCM approaches to their business. Otherwise, they will be extremely hard-pressed to successfully compete in the increasingly challenging global environment.^{vii}

Because the value chain approach to management and innovation is founded upon using the relationships between customers and suppliers to develop strategic advantages, it creates competitive advantages that are very difficult for competitors to copy.

4. Speakers and Presentations Summary



Linking Research into the Value Chain

Dr. Michael Brownbridge, Vineland Research and Innovation Centre



Dr. Michael Brownbridge earned his Honours B.Sc. in Agricultural Zoology and his PhD from the University of Newcastle Upon Tyne in the UK. He has worked at the Ben Gurion University in Be'er Sheva, Israel, as well as The International Centre of Insect Physiology & Ecology in Nairobi, Kenya. Following these posts, he worked for 15 years at the University of Vermont, receiving a notable promotion to the position of Research Associate Professor in 1997.

In 2005, Michael joined Ag Research in New Zealand where his work was primarily focused on pastoral and plantation forest pest management, with a strong emphasis on the transition of research products and knowledge aimed towards leading industry partners.

Michael's extensive research background in greenhouse technologies and pest management makes him an invaluable asset to the Horticulture Production Systems at Vineland. Through the development of his own lab, Michael currently leads a research team in the field of biocontrol.

Michael spoke about traditional versus engaged research activities and the opportunities that arise when collaborative value chains actively engage in research. Challenges and opportunities related to "World Crops" were provided for clarification.

Value Chain Management: What It Is and Why You Should Care

Dr. Martin Gooch, Director, Value Chain Management Centre



Dr. Martin Gooch is the Director of the Value Chain Management Centre, Canada's only organization dedicated to researching and assisting businesses in the formation of closely aligned agri-food value chains. The VCMC works with individual businesses, industry organizations, and governments to develop the capabilities and opportunities required to improve the competitiveness and profitability of commercial businesses and the sectors in which they operate.

Martin has worked in the UK, New Zealand, Australia, and Canada, and has considerable experience developing commercially successful value chain alliances, a number of which have won domestic and international awards of excellence.

Martin holds qualifications in farm management, crop and animal production, a Bachelor's Degree in International Business, along with Master's and Doctoral Degrees in Value Chain Management. His Master's thesis analyzed critical success factors for forming and managing perishable food value chains. Martin's PhD identified how managers of farms and agri-food businesses can be motivated to look at their businesses as part of a value chain, leading to more innovative management decisions and processes.

Martin described how four factors impact every business involved in the agri-food / agri-product industry: consumers, technology, globalization, and environmental influences.

The principles and characteristics of VCM were shared. Businesses that together form a chain make a deliberate decision to create more value by reducing costs and/or increasing revenue from a targeted market segment.

This is achieved by:

- Focusing on what consumers and customers value,
- Getting the product right every time,
- Ensuring effective logistics and distribution,
- Having effective information and communication, and
- Building and sustaining effective relationships.

Essentially, being a part of a value chain creates a distinct competitive advantage because innovation through collaboration is very difficult to copy.

Research has found that common traits found in sustainable, innovative chains include:

- Strong recognized leader and lieutenants. These individuals are primarily respected for their capabilities and ethics rather than for their rank in the organization(s).
- Focus on managing determinants of quality.
- View trust as outcome of connecting the chain.
- View premiums as a bonus that must be earned. Primary efforts should be focused on reducing costs, accessing markets and creating ability to learn, and then adapt.
- Technology is viewed as a tool/resource and its primary value relies on how it is applied.

Consumers - What's Changing?

Colin Siren, Associate Vice President, Ipsos Forward Research



Ipsos Forward is a global independent market research company, ranking third worldwide among research firms. Colin joined Ipsos in January 2004, after spending two years focusing on new media and online research.

Since that time, Colin has managed many market research studies in the Canadian, U.S., and global agribusiness sectors – everything from producer satisfaction and loyalty, through to new product development and pricing strategy consulting to consumer attitudes and behavior, as they relate to practices throughout the food value chain. Colin sits on the advisory board for the Value Chain Management Centre.

Colin provided the audience with the latest consumer research. His presentation focused on three key questions:

1. **What is on the minds of Canadian and global consumers?** The constant themes on the minds of Canadians are jobs, healthcare, and the economy.
2. **To where do consumers turn for information on food?** The mainstream media continues to be the main source of food information for Canadian consumers, with social media being the most dynamic channel.
3. **What are some consumer trends in food purchasing?** Trends include: Low Carb, High Fibre, Whole Grain, Low Sugar, Low Fat, Low Calorie, Organic, Vegetarian, Omega-3, Probiotic, Artificial Sweetener, Low Salt/Low Sodium, Locally Grown, Individual Portion Size, Natural, Soy, Fortified/functional food (e.g., with added calcium, vitamin A, etc.). Many of these trends relate to an aging demographic and one that is concerned with health and weight management. Furthermore, maintaining high standards for food safety was described as “the table stakes requirement of the food industry.”

The 3 C's of Wm Morrison Supermarkets PLC: Customer, Cost, Collaboration



MORRISONS

Martyn Jones, Group Corporate Services Director, Wm Morrison Supermarkets PLC



Wm Morrison Supermarkets PLC is the UK's fourth largest grocery chain and second largest fresh food processor. Martyn Jones joined Morrisons in 1990, after gaining wide buying, marketing, and product development experience in fresh and frozen foods. After eight years with J Sainsbury, he moved into manufacturing with RHM and Campbells before joining Morrisons.

Starting as Trading Manager for frozen foods, he was promoted to Trading Operations Director in 1993. He was appointed Grocery Director in 1997 and then Senior Trading Director in 2002. He was appointed to the Board as Group Trading Director in March 2007. He is also a member of the Corporate Compliance and Responsibility Committee.

Martyn's presentation began with information related to the importance of customers: "Value chains start and end with the consumer." In the UK market, the consumer has become increasingly interested in good value for money, but no less demanding about quality expectations. There is also an increasing demand for locally grown/produced food. As he succinctly stated, his company must focus on responding to these requirements because, "If we don't listen, they don't shop. They go elsewhere."

The second part of his keynote presentation described how Morrisons was meeting consumer expectations relating to cost, quality, and place of origin, by efficiently controlling what is possible through the chain (versus what they cannot control, such as climate, demographics, and commodity prices). In times of turbulence, predictability has been worked into Morrisons vertically integrated system. Their business model appreciates others in the chain as partners rather than just suppliers.

This led to his final point about collaboration and coordination. Chain partners are expected to work with Morrisons to develop and meet high standards in order to best serve customers. Martyn closed his presentation with the idea that, "Value chain management will become common, due to necessity. Technology is the driver to enable it."

Martyn gave a second presentation on Day Two that described a specific example of how Morrisons worked closely with supply chain groups to come up with a solution to the question, "How do we keep our customers buying British chicken?" To counter cheap imports and too many premium standards that were confusing to the consumer, they agreed on a common high standard of animal welfare and researched the benefits. These positive results were communicated to growers, processors, and consumers, and the retail price was left unchanged. As a result, sales increased.

Managing the Value Chain to Deliver on Consumer Perceptions of Value

Dr. David Tanner, General Manager Psa Innovation, ZESPRI® International Limited



ZESPRI® International Limited is the world's largest marketer of kiwifruit, selling kiwifruit into more than 60 countries and managing 30% of the global volume. Dr. David Tanner joined ZESPRI in February 2007 as Technical Manager — Global Supply Chain. He progressed in the company to hold the position of General Manager — Quality & Innovation and was responsible for the management and development of all Quality/Technical functions including compliance programs, quality systems, product management into market, packaging, and the Innovation function, covering strategic oversight of R&D portfolios. With the onset of Psa, a decision was made in July 2011 to create a focused role of General Manager — Psa Innovation, and David accepted the challenge to lead this activity.

Prior to joining ZESPRI, David spent 13 years managing and conducting commercially focused research and development, in both New Zealand and Australia, with specialist experience in refrigeration and packaging. David has a Bachelor's degree in Horticultural Technology and a PhD in Food Engineering from Massey University. He has also been active in the International Institute of Refrigeration (IIR), and is immediate Past President of the Science and Technology Council of this global, intergovernmental organization.

David explained how ZESPRI® has driven growth through value chain efficiencies. He discussed how sustainability supports his organization's core brand values relating to brand equity, future customer requirements, efficiency gains, and risk management. His company's achievements have been based on successfully fulfilling consumer needs for taste, convenience, and novelty, rather than competing on price.

More specifically, success has come from innovations relating to new product developments and the marketing of these new products to key consumer markets. These innovations have been made possible through integrated relationships between the growers, ZESPRI®, and customers. This unity and focus on the consumer has enabled ZESPRI® to become a global leader in kiwi fruit "by growing the pie, not cutting a piece from the existing market."

Adapting to Market Demands by Partnering with Producers

Jack Barclay, Managing Director, CRF Group Ltd



Jack Barclay is the Managing Director of CRF Group Limited, located in Colac, Western Victoria, Australia. Jack was a founding investor in the company, which commenced operations in 2000 and now processes up to 1.7 million lambs each year for the Australian, Asian, European, Middle Eastern, and North American markets.

The company is on a lean journey to explore what is possible in global supply chain management, delivering the highest quality and lowest cost product to its customers through the application of lean thinking and process improvement models.

Jack graduated in Agricultural Economics from the University of New England (Australia) and also completed an MBA at the Australian Graduate School of Management. Jack has worked for many years in regional economic development and maintains a strong commitment to improve the performance of regional economies. He also sits on one of the boards of the Australian Meat Industry Council.



Jack described that the term “lean” means the engaging of all of the organization’s people in a proven path to profitable growth, through providing exceptional customer value at the best possible cost. This is enabled by the ruthless and relentless elimination of waste, and demonstrating respect for people. He also described how lean can be applied along a value chain, not just within an individual business; the alignment of value chain participants enabling better performance and increasing stability, ultimately resulting in an even greater increase in profits. His company has achieved growth and success by applying a lean production system to business. This system supports the company’s core values of looking after the customer (relating to value and service), as well as “treating people the way we want to be treated.”

Jack explained that process improvement is a long and continuous journey. Senior management must be actively involved and supportive in order for changes to be made and sustained. He also explained how companies should get their own house in order before trying to establish change through the value chain. Through daily (rather than weekly or monthly) management reporting, his organization has improved staff retention, reduced absenteeism and accidents, and has cut 11% of its costs over three years. Furthermore, senior staff is now able to add value rather than use their time “firefighting.” Lean business management has engaged people and they want to help and improve. “We have seen an incredible change in people, and in our bottom line.”

Jack challenged the audience to make business decisions based on accurate forecasting, to reduce waste through the chain, and to take advantage of opportunities. “Make decisions when you have real information,” he commented. He suggested that using real information will enable you to move from your current state to an (ideal) future state where you will find “more flexibility, more change and more freedom.” Ultimately, his presentation spurred on the audience to “Start thinking. Start challenging. Start experiencing. Start changing.”

Improving the Competitiveness of Agri-food Value Chains in the Americas and the Caribbean

Danilo Herrera, Value Chain Specialist, Inter-American Institute for Cooperation on Agriculture (IICA)



Danilo Herrera is an agribusiness, value chain specialist for the Agribusiness and Commercialization Program (PAC) of the IICA. The IICA is the specialized agency of the Inter-American System for the promotion of agriculture and rural well-being. PAC assists the countries in the development of policies, institutional frameworks and capabilities required to create enabling environments for agribusinesses. PAC also promotes the strengthening of individual and collective capacities of producers and agribusiness to promote successful market access.

Danilo graduated in economics from the University of Costa Rica. He was General Director of Foreign Trade of the Economy, Trade and Industry Ministry of Costa Rica. In the private sector, he was the Executive Director of the National Chamber of Industries of Rice. In 2003, he was the recognition award winner of the “Director General for Professional Excellence of IICA”, as author of conceptual and operational developments and publications for improving the competitiveness of agri-food chains.

Danilo described how the IICA is working with South and Central American governments to encourage industry to form closely aligned value chains. He discussed some of the challenges working with organizations of varying sizes, capabilities, and motivations, and how his organization is assisting managers to work together despite their differences.

Panama is an example of a country that is committed to motivating the development of innovative value chains across its agri-food industry. An Executive Decree was signed in 2011 that provides a legal framework for nine agri-food chains (rice, milk, bean, corn, plantain, beef, potato-onion, cassava-yam, and vegetables). These sectors were featured because of the numbers of small to medium sized producers involved and because they are considered vital to the national economy and employment. Details of each plan are jointly negotiated and agreed upon by producers, businesses, and associations. The goals of the plan are to reduce competition within each chain, to ensure greater equity in the distribution of income among producers, reduce the cost of food, and ensure access to food for the entire population.

A Guide to Success: How to Apply Lean Techniques to Your Business

Professor Peter Hines, Co-Founder of the Lean Enterprise Research Centre



Professor Peter Hines is the Co-Founder of the Lean Enterprise Research Centre at Cardiff Business School and is the current Chairman of S A Partners, a specialist consultancy organization that assists companies to apply lean thinking to their own value streams. He is an active LinkedIn member and also continues his academic links as an Adjunct Professor at the University of South Australia and associate role at LERC.

Peter holds a BA (MA) in geography from Cambridge University and an MBA and PhD from the University of Cardiff. He followed a successful career in the distribution and manufacturing industry before joining Cardiff Business School in 1992. He has undertaken extensive research into Lean Thinking and Supply Chain Management and has pioneered a number of key concepts, methods, and applications in Europe and Australia, including: Supplier Associations (now involving over 800 European firms), Value Stream Mapping, Network Sourcing, the Three Tier System of Management, and the Value Stream Analysis Tool. He has written or co-written several books, and was the winner of the Shingo Research and Professional Publication Prize for “Staying Lean” (first published in 2008).

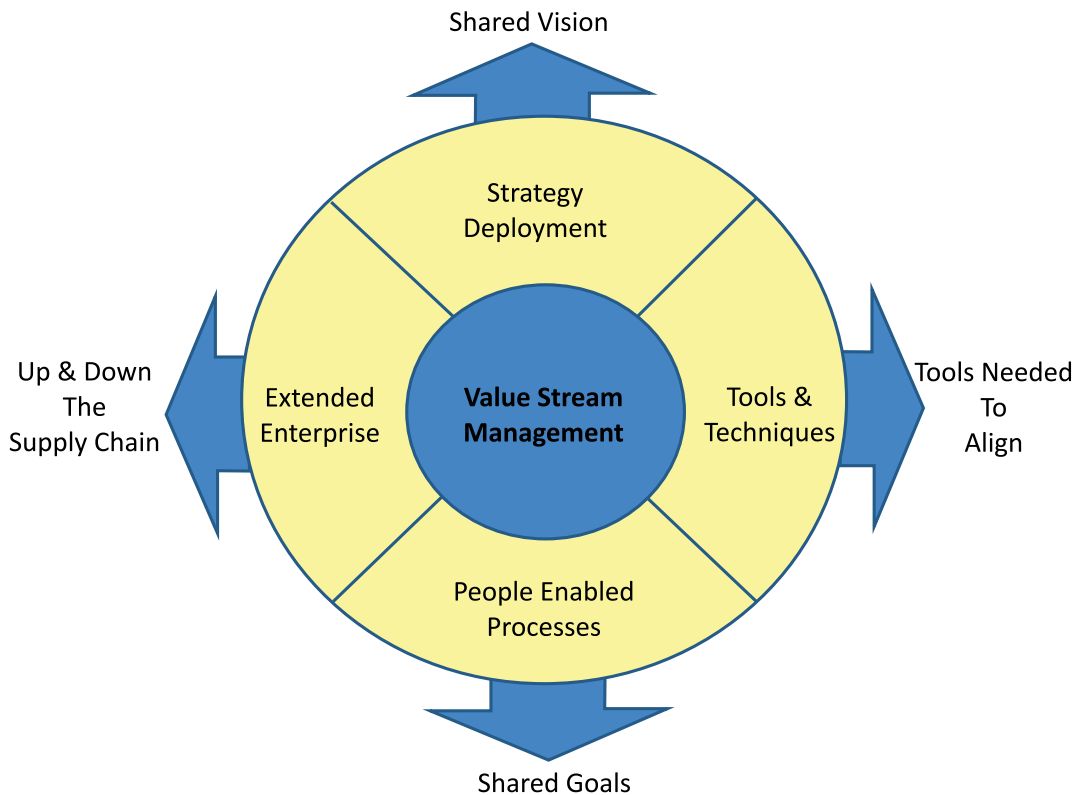
Peter presented a thorough guide to lean principles and applying lean, including change management, creating a lean roadmap and people enabled processes. He explained how “fake lean” is solely focused on continuous improvement, whereas “real lean” is continuous improvement anchored by a respect for people.

Following his Lean Business Model[®], he described how a company’s activities need to be vertically integrated to make change effective. The management team must enable deployment by sharing the company’s vision and goals, strategy, and direction, so that every employee, at every level, is able to answer the following questions:

- What are we trying to achieve over the next five years?
- What are you and your team doing to contribute to this plan?
- What projects are you working on in the next six months?

This enables people throughout the organization to share the company's goals and work with a common purpose.

Figure 4-1: Lean Business Model®



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Implementing lean is only possible when the correct tools and techniques are aligned to the company's objectives and goals. The five key elements of success relating to Lean Implementation include:

1. A focus on customer value through policy deployment,
2. Deployment through cross-functional processes,
3. Value stream management aligned to business goals,
4. Lean tools and techniques aligned to need, and
5. Application in the extended enterprise.

The last element of the Lean Business Model relates to the application of the extended enterprise.

Professor Hines explained that this is where the organization develops integrated strategies and trusting relationships with the best external partners, to deliver customer value and eliminate waste across the boundaries, between organizations.

Horticulture Panel – Succeeding with Premium Quality Ontario Fruit

- Dr Michael Brownbridge, Vineland Research and Innovation Centre
- Mike Ecker, President, Vineland Growers Cooperative Limited
- George Lepp, Shoreline Packer; Lepp Farms
- Frank Pagliaro, Vice President Produce Procurement, Loblaw Companies Limited

Facilitated by Dr. Martin Gooch, Value Chain Management Centre

The panel comprised individuals who played a key role in a project that has gained international recognition for proving the outcomes that can be achieved through the application of VCM practices.

The project had the following five key outcomes:

1. It increased the management capabilities of key stakeholders operating in Ontario's tender fruit industry, particularly for peaches and nectarines.
2. It developed the processes required to deliver the right quality of fruit in the right way to target consumers.
3. By so doing, the project:
 - a) increased the value of Ontario-grown tender fruit from the perspectives of target consumers,
 - b) proved that a means existed to increase the value of Ontario tender fruit in target markets,
 - c) created opportunities to strengthen the wider industry's long-term competitiveness and profitability, and
 - d) showed how Ontario's tender fruit industry could develop new markets, both in Canada and internationally.
4. It also tested the willingness of target segments of the consumer population to pay for Ontario-grown peaches and nectarines that possess distinct high-quality attributes.
5. It increased the volume of Ontario tender fruit purchased by Canadian consumers.

The panelists each described their motivation for being involved in the project and what the project had enabled them to achieve.

Frank Pagliaro described how the project had enabled Loblaw Companies Limited to include Ontario grown peaches as a "Platinum" item, meaning that it could be marketed to consumers on its superior appearance and taste. This lessened the attention that consumers paid to price when purchasing fruit.

George Lepp stated that not every grower has the same vision or determination and that the project had enabled him and like-minded growers to secure new markets. It also proved that innovative orchard, grading, and cooling practices could enable producers to capture added value, leading to an increase in profitability.

Mike Ecker described how the project had enabled Vineland Growers to develop a stronger relationship with the rest of the chain, through better understanding consumer expectations. Vineland Growers also gained the ability to act upon the knowledge that they had acquired, and begin translating lessons learned into other parts of their business.

There was strong agreement among the panelists that this project proved the importance of businesses along the value chain working together, to capture value through learning and adapting in ways that would otherwise not be possible; and that the project had led to them identifying even greater opportunities for the future.

Livestock Panel – Opportunities and Challenges Facing the Sector

- Mike Buis, Beef Producer/Retailer
- Arnold Drung, President, Conestoga Meat Packers Ltd.
- Andrew Gordanier, Lamb Producer; Chair, Canadian Sheep Federation
- John Groenewegen, Canadian Agri-Food Policy Institute (CAPI)

Facilitated by Virginia Zimm, President, Faye Clack Communications

Panelists discussed the various challenges and opportunities facing their sector and different options to address them.

John Groenewegen presented information on CAPI's project, developing a strategic framework to support the Canadian beef industry. Supported by information on the current market, production and consumption levels, and import/export data, his presentation concluded:

- The overall domestic beef sector is under performing,
- Canada is losing its share of global beef export markets,
- Canada is becoming a net importer of beef,
- There exists a declining per capita domestic consumption,
- Canada is not a low cost beef producer, and
- There is a need to boost competitiveness of the overall beef supply chain.

He suggested that a change in approach is required for the industry to become more relevant. A few of his suggestions for improvement included understanding what the market wants (demand pull), providing differentiation, and improved branding.

Some conditions for successfully advancing the industry through improved strategic alignment are recognizing a need for change, increased industry alignment, leadership, and collaboration. For operational alignment, it was suggested that the industry work towards establishing a competitive operating environment through information sharing, an innovation culture, and supporting regulations.

Another panelist, Andrew Gordanier, represented the Canadian Sheep Federation. He too discussed challenges facing the Canadian sector and ways to best address them. Issues discussed included lack of Canadian supply, lack of consistency, and many producers not possessing business acumen.

There was a general consensus among panelists that the livestock industry needs to be more customer focused and work more collaboratively through the chain to stimulate innovation to capture value and drive out unnecessary costs.

Field Crops Panel – Taking a Value Chain Approach to Business

- James dePater, CEO, SeVita International
- Darcy Oliphant, Merchandising Manager, Thompsons Limited
- Archie Wilson, General Manager, C&M Seeds; Palmerston Grain

Facilitated by Ezio Di Emanuele, Senior Advisor, Agri-Food Business Development at MNP LLP; and President, Ezio Di Emanuele and Associates, Inc.

Canadian soybean companies are relatively small players in a large global market, which often survives on high volumes and low margins. Several Canadian firms, including those represented by our panelists, have established themselves as global leaders offering differentiated, premium products that provide added value for growers and consumers. Despite being recognized as among the best in the world at producing high quality soybeans, the industry's lack of economies of scale challenges its long-term sustainability and must therefore be addressed.

James dePater described how the success of SeVita was borne of value chain integration. Over a period of time and through a series of mergers, amalgamations, and acquisitions, they have developed a closed loop food grade soybean business model. Having a fully integrated system—including research, growers, processors, food manufacturers, and sales and distribution—enables value chain participants to control genetics and to commercialize innovations. This allows them to develop proprietary offerings and produce certified seed. Being fully integrated has reduced costs and allowed them to remain globally competitive in both mature and emerging markets.

Darcy Oliphant described how Thompsons also works in a closed loop system, which enables them to plan for the future rather than just react to immediate challenges and opportunities. Working closely with their chain partners also allows them to achieve higher environmental and food quality standards.

Panelists also discussed how being focused on the end user is key to the commercialization of genetic innovations. New product examples included a variety of specialty pastas that provide growers with maximized returns and end users with higher margins. Additional examples of how genetics and research must be developed to support end-use requirements were highlighted, for example, differences between traditional soybean products and next generation products.

Ultimately, it was agreed that concentrating on the end user, and working more collaboratively through their respective supply chains, has enabled each company to have greater control and focus, which ultimately results in improved competitiveness.

Audience discussions focused on how the industry as a whole must work more collaboratively to maintain a strong Canadian brand presence for premium soybean products in the competitive global environment.



5. Driving Industry Change with Value Chain Innovation

This section of the report describes the facilitated session that occurred during the VCIF. The purpose of this session was to draw people into the conversation on value chain innovation, and to gauge the value of the Forum.

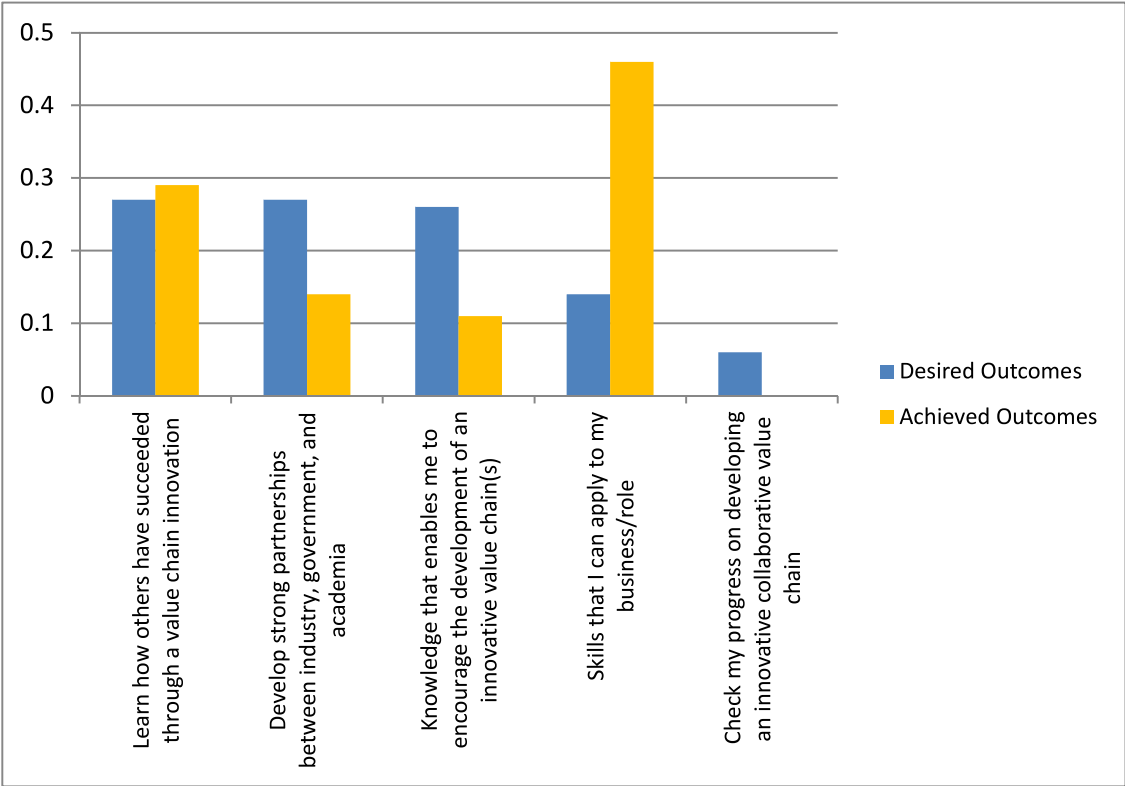
5.1 Facilitated Session - Desired Outcomes from Attending the VCIF

Many delegates gained a considerable amount more out of having attended the Forum than they expected to achieve going in.

At the beginning of the VCIF, and following a brief presentation on the concept of value chains and value chain innovation, delegates were asked to state their primary reason for attending the Forum. At the end of Day One, delegates were asked whether their expectations had been met, and whether they had benefited from attending the VCIF.

The two sets of responses are presented below in Figure 5-1. An interesting and valuable finding is that many delegates gained a considerable amount more out of having attended the Forum than they expected to achieve going in. The most valuable benefit from having attended the VCIF was having acquired skills that they could apply to their business or role.

Figure 5-1: Desired vs. achieved outcomes



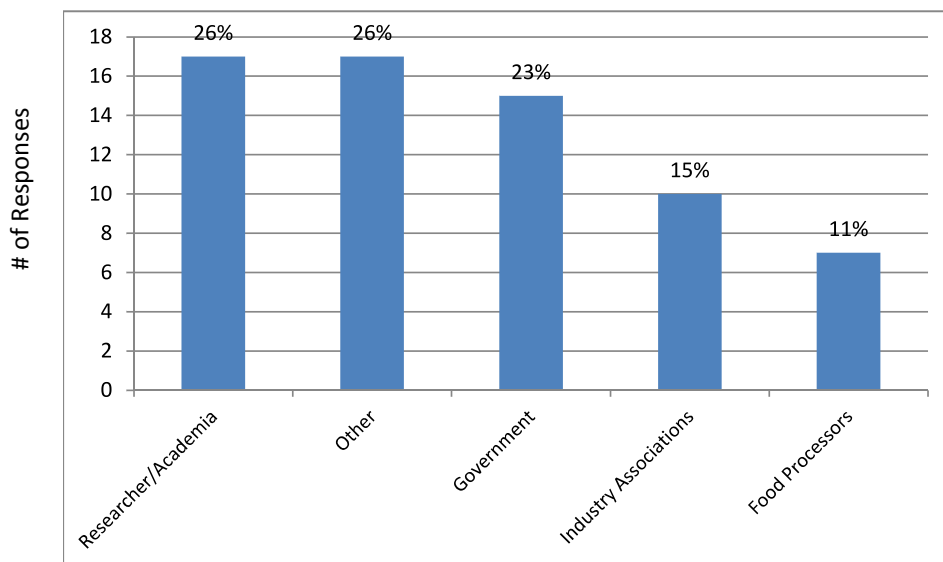
5.2 Facilitated Session - Developing a More Competitive Agri-Food Industry

The following questions were answered during the facilitated session at the end of Day One, following presentations by international and Canadian industry leaders on how they are succeeding through innovating with other members of the value chain and the challenges that they have faced. Each chart represents a specific stage of the dialogue. Guided by a facilitator, each stage began by determining the choices or categories that delegates believed important to the question posed by the facilitator. Delegates then voted on the relative importance or influence of each factor to the topic being discussed. In each case, delegates had a maximum of five choices on which to vote.

Each stage began by determining the choices or categories that delegates believed important to the question posed by the facilitator.

The first question posed to delegates was how they categorized themselves. As can be seen below, 52% of participants came from commercial industry or were directly associated with commercial industry (“Other”, Industry Associations, and Food Processors). Businesses represented at the VCIF came from along the entire value chain: producers, processors, marketers, retailers, and foodservice operators. Additionally, 26% of the delegates were from research, academia or consulting, and 23% were from government.

Figure 5-2: Which group best describes you?



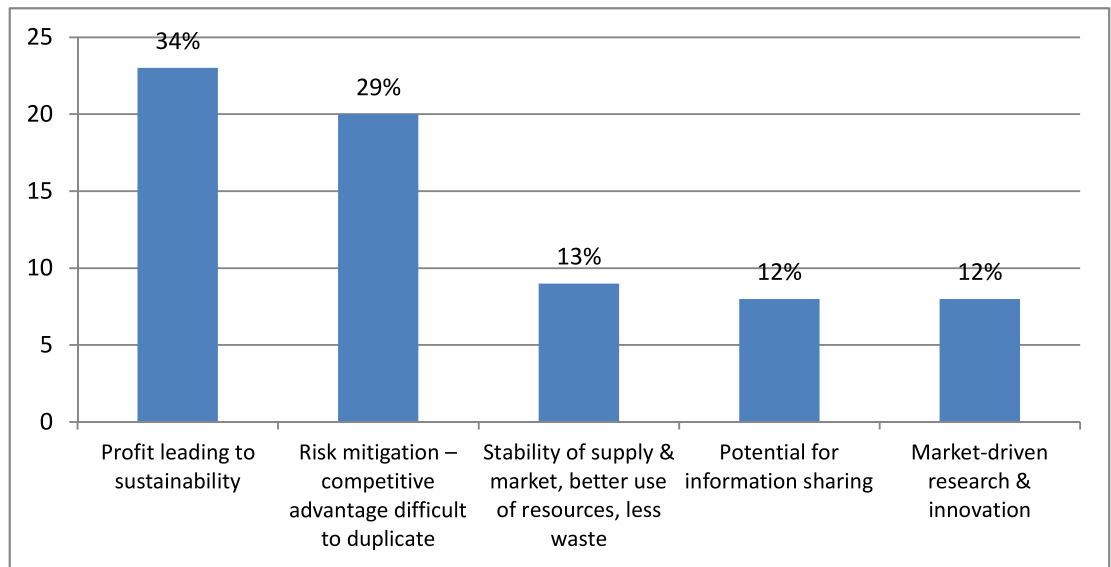
The information from Figure 5-2 was used to evaluate the popularity of different responses described below. The tables shown throughout this section present the existence of each response within the value chain group mentioned above. It would be misleading to show the percentage of each group’s answer as a total of each response, because the size of the groups is inconsistent and would therefore produce skewed data.

The next two questions posed to delegates directly related to the presentations and discussions that preceded the interactive session. The first was whether they associated specific benefits with the formation of value chains. As can be seen below in Figure 5-3, all of the responses relate to factors that determine businesses’ ability to retain or attain competitive advantages. Many of these are difficult for competitors to replicate, unless they also adopt VCM approaches to how they manage their business.

The majority of respondents identified the primary benefits of VCM as profit leading to sustainability.

The majority of respondents identified the primary benefits of VCM as sustainability, through having the ability to maintain profitability (by simultaneously reducing costs and maintaining or enhancing revenue) and mitigate risks. Other identified benefits included those which determine businesses' ability to be profitable and mitigate risks through learning as a strategic partnership: the ability to share information and engage in market driven research and innovation.

Figure 5-3: What are the most significant potential benefits of value chains?



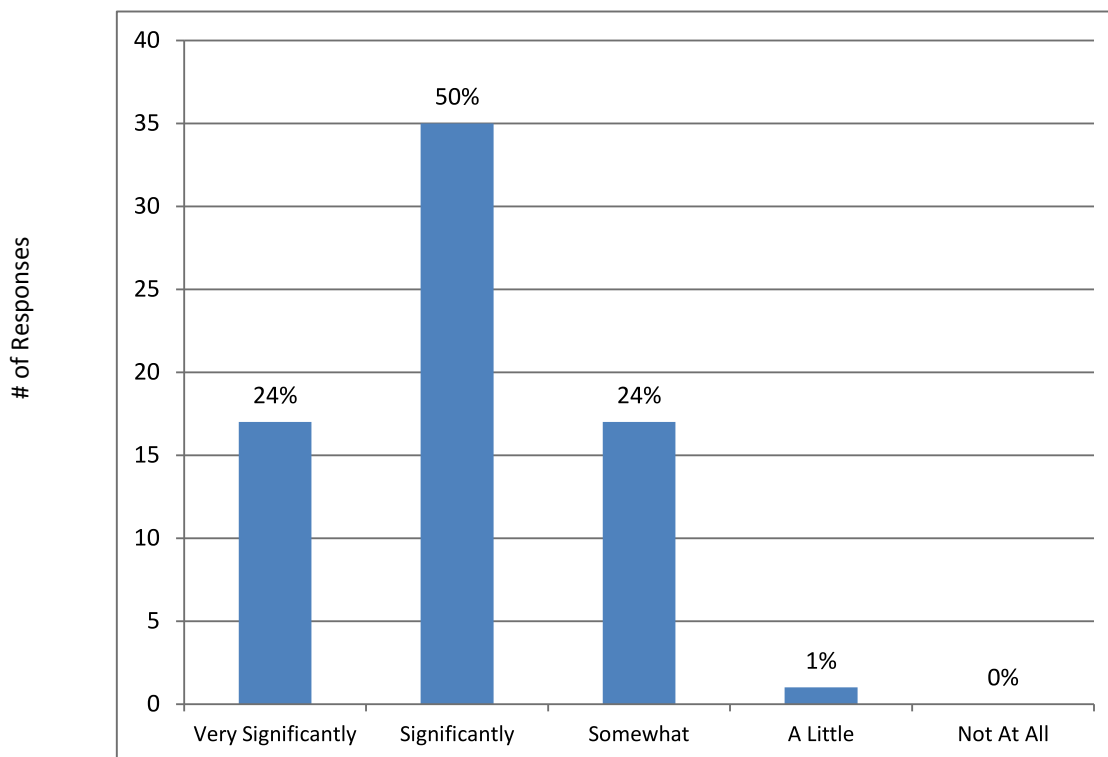
As shown in Table 5-1 below, the majority of individuals from Industry Associations supported the answer, “Profit leading to sustainability” (70%). This was also a popular answer among Government respondents (33%). It is interesting to note that no one from the Food Processors group selected this answer as the most significant benefit of value chains. The Food Processor delegates were more likely to choose “Risk mitigation” (29%) or “Stability of supply and market, better use of resources, less waste” (29%) as the greatest benefits of value chains.

**Table 5-1: What are the most significant potential benefits of value chains?
Percentage breakdown within respondent group**

	Food Proc.	Ind. Ass.	Research	Gov't	Other
Profit leading to sustainability	0%	70%	18%	33%	18%
Risk mitigation. Competitive advantage difficult to duplicate	29%	20%	29%	33%	24%
Stability of supply and market. Better use of resources, less waste	29%	10%	0%	20%	12%
Potential for information sharing	14%	0%	18%	7%	12%
Market driven research and innovation	14%	0%	18%	7%	18%
N/A	14%	0%	18%	0%	18%

As can be seen below, every delegate believed that Canada’s agri-food industry can benefit from acting on the information presented at the VCIF. Not one delegate stated that Canada’s agri-food industry could not benefit from acting on the information presented. The extent to which the adoption of VCM practices is important to the future of Ontario and Canada’s agri-food industry is underlined by 74% of delegates believing that VCM approaches offer significant or very significant benefits to industry.

Figure 5-4: To what degree can our agri-food industry benefit from the information presented?



As illustrated in Table 5-2, the majority of every group believes that there are “very significant” or “significant” benefits from the information presented for the agri-food industry, ranging from 58-71%. Food Processors were perhaps the most tentative, with 43% stating that they “somewhat” believe the information will benefit the industry.

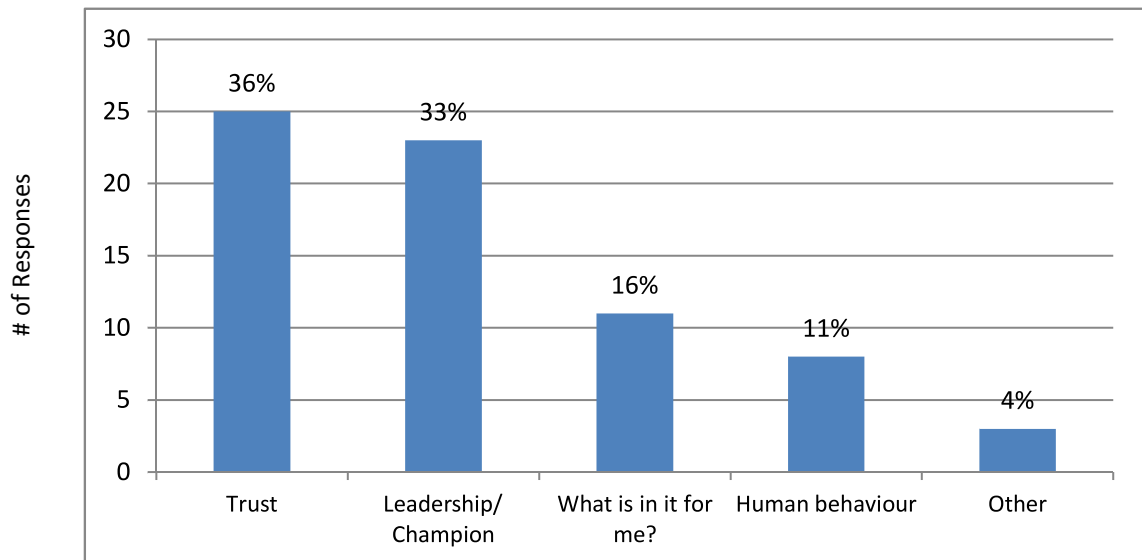
Table 5-2: To what degree can our agri-food industry benefit from the information presented? Percentage breakdown within respondent group

	Food Proc.	Ind. Ass.	Research	Government	Other
Very Significantly	29%	0%	18%	40%	24%
Significantly	29%	60%	53%	27%	47%
Somewhat	43%	40%	18%	33%	12%
A Little	0%	0%	0%	0%	6%
Not At All	0%	0%	0%	0%	0%
N/A	0%	0%	12%	0%	12%

Given that all the delegates had stated that the adoption of VCM practices offer significant benefits to Canada’s agri-food industry (Figure 5-4), the facilitator asked delegates to identify what was holding industry back from taking a value chain approach to how it operated. As shown below in Figure 5-5, the primary factors hindering the development of closely aligned value chains was identified as a lack of trust that exists between businesses and industry stakeholders.

The second greatest factor—lack of leadership—is particularly telling, because research consistently shows that effective leadership is the primary enabler for developing trust between businesses and individuals. Leadership is a crucial element of communicating to people and businesses “what is in it for them”, and countering human behaviours that could otherwise create a barrier to the formation of robust and innovative value chains.

Figure 5-5: What are the most significant challenges or hold backs?



The primary factors hindering the development of closely aligned value chains was identified as a lack of trust.

There were significant differences in the way that the value chain groups responded to the question, “What are the most significant challenges?” Food Processors were most likely to choose “What’s in it for me?” (29%) or “Human behaviour” (29%). Delegates from Industry Associations were most likely to select “Trust” (50%) or “Leadership/ Champion” (40%). This was similar to answers from “Other” delegates, although with slightly lower percentages (35% and 24% respectively). The majority of Government employees stated “Leadership/Champion” (53%). Researchers or those from Academia had a relatively even distribution of answers.

Table 5-3: What are the most significant challenges or hold backs? Percentage breakdown within respondent group

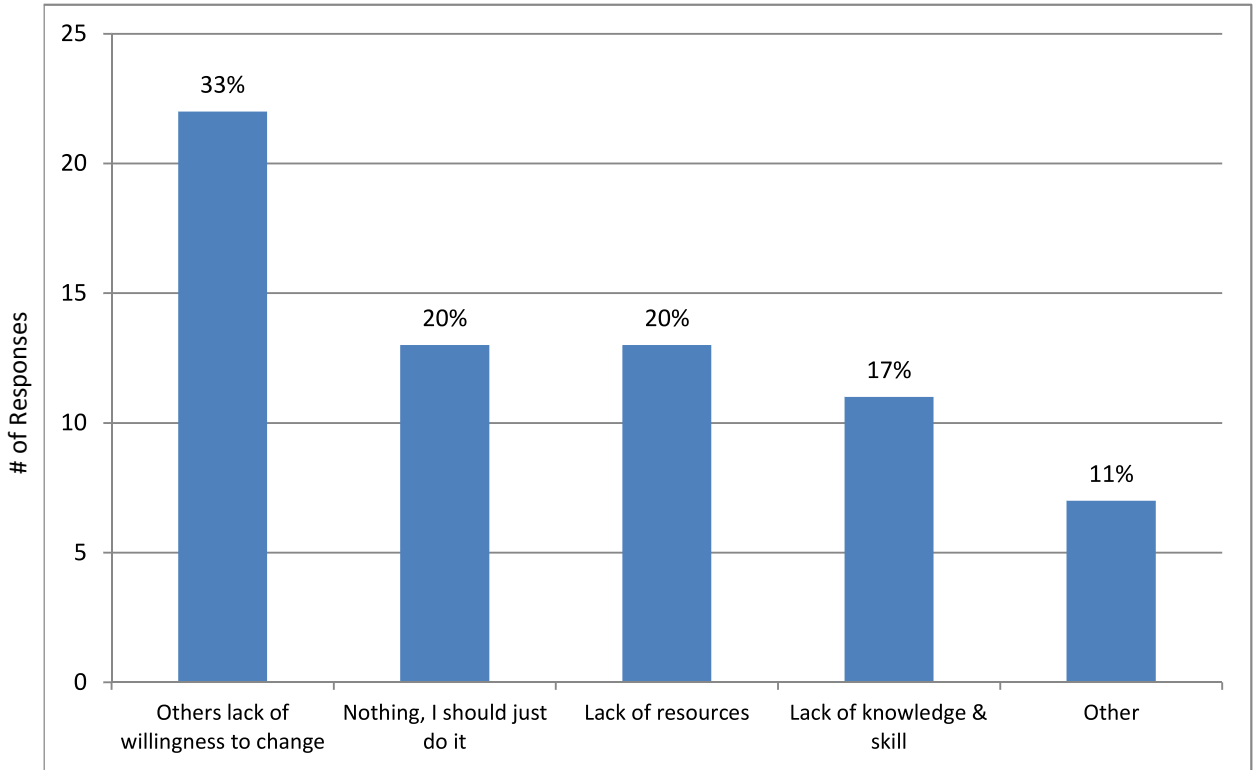
	Food Proc.	Ind. Ass.	Research	Gov’t	Other
Trust	14%	50%	29%	20%	35%
Leadership/ Champion	14%	40%	18%	53%	24%
What is in it for me/each party?	29%	10%	24%	13%	6%
Human behaviour	29%	0%	18%	7%	6%
Other	14%	0%	0%	7%	6%
N/A	0%	0%	12%	0%	24%

Delegates were then asked to identify the impact that the current lack of effective leadership has upon the motivation and ability of businesses operating within the Canadian agri-food industry to adopt VCM approaches, along with the reasons why the present situation persists. While 20% of respondents said “nothing, I should do it”, the majority of respondents stated that the greatest inhibitor to businesses’ adoption of VCM practices was a lack of willingness among others to change.

Overall, the responses presented below in Figure 5-6 reflect findings from research previously undertaken by the VCMC; that is, that a lack of willingness to change is commonly an outcome of individuals and businesses not possessing the resources required to change. Resources include possessing appropriate knowledge and skills. Not possessing the correct resources also makes it more difficult for businesses or stakeholders to overcome a potential partner’s unwillingness to change. A “lack of resources” in addition to a “lack of knowledge and skill” were the other two main reasons preventing participants from working more strategically in a chain, with 20% and 17% respectively.

The majority of respondents stated that the greatest inhibitor to businesses’ adoption of VCM practices was a lack of willingness among others to change.

Figure 5-6: What is preventing you from working more strategically with other members of a particular value chain?



Food Processors were the most likely to agree that it is “other’s lack of willingness to change” that is preventing them from working more strategically with other members of a value chain (57%). This was followed by respondents from Industry Associations (40%) and Government (33%). The most popular answer among researchers/academics was “nothing, I should just do it”, with 29% of this group choosing that response.

There were again some key differences between delegates from Food Processors and Industry Associations. Not one person among Industry Associations said, “nothing, I should do it”, suggesting a greater awareness of barriers to action including “lack of resources” (20%), “lack of knowledge and skills” (20%) and “Other” (10%). On the other hand, 15% of Food Processors said there was nothing holding them back and no one from this group indicated that a lack of resources was the key barrier to action. However, nearly a third (29%) indicated that they lacked the knowledge or skills required. Almost a third (29%) of delegates from the “Other” group chose not to reply to this question.

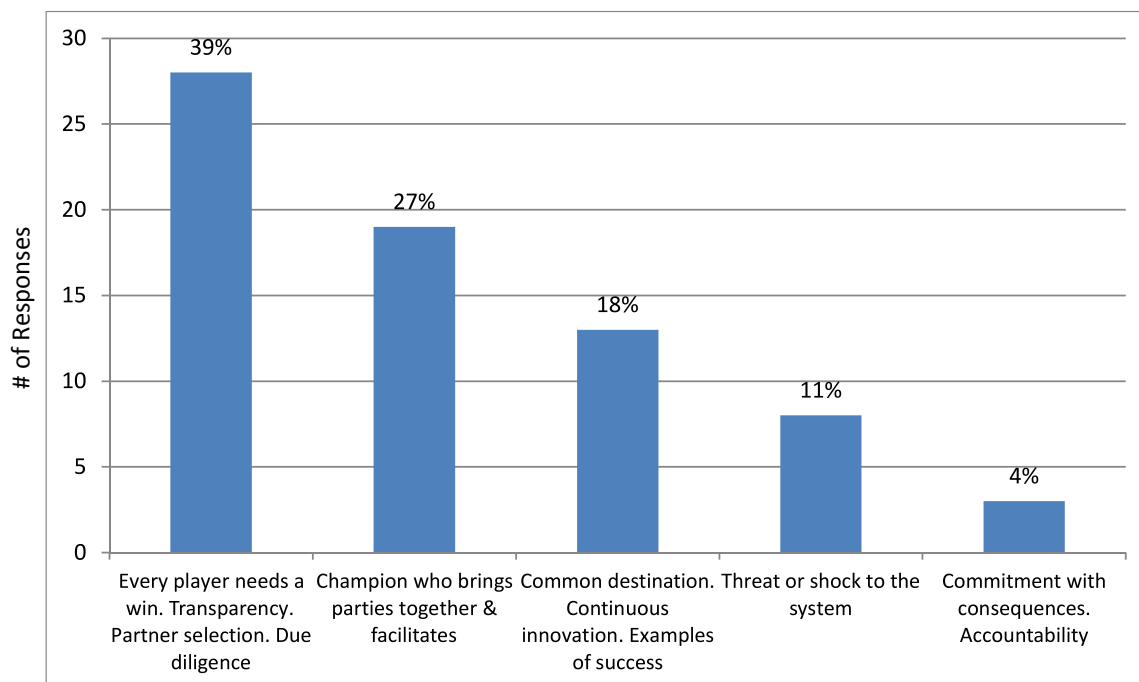
Table 5-4: What is preventing you from working more strategically with other members of a particular value chain? Percentage breakdown within respondent group

	Food Proc.	Ind. Ass.	Research	Gov't	Other
Others lack of willingness to change	57%	40%	18%	33%	29%
Nothing, I should just do it	14%	0%	29%	13%	18%
Lack of resources	0%	20%	12%	20%	6%
Lack of knowledge & skill	29%	20%	18%	20%	0%
Other	0%	10%	12%	7%	18%
N/A	0%	10%	12%	7%	29%

The importance of appropriate resources, including effective leadership, for enabling and motivating the development of innovative and competitive agri-food value chains was emphasized in the dialogue surrounding the enablers for establishing and maintaining successful value chains. The results, shown below in Figure 5-7, illustrate that delegates believe that the enablers of establishing sustainable innovative value chains relate to the participants sharing a common series for why they would support and remain committed to a value chain initiative.

The majority of delegates believed that process begins by carefully selecting the correct partners, then involving them in establishing a communication system that is open and transparent. The results also show the importance that delegates attach to having a value chain champion, along with examples of success and how it was achieved, to guide them in the process of establishing robust, innovative value chains.

Figure 5-7: What are the key requirements for establishment and ongoing success of a value chain?



As can be seen in the table below, respondents from Food Processors and Industry Associations were considerably more likely to consider transparency, mutual benefits, and the existence of a supply chain champion as critical to the success of a value chain initiative (86% and 80% respectively). Researchers/ Academia and Government were more split in their choices. Nearly a third of Researchers/Academia chose that a “threat or shock to the system” would be necessary to establish and sustain a successful value chain.

Table 5-5: What are the key requirements for establishment and ongoing success of a Value Chain? Percentage breakdown within respondent group

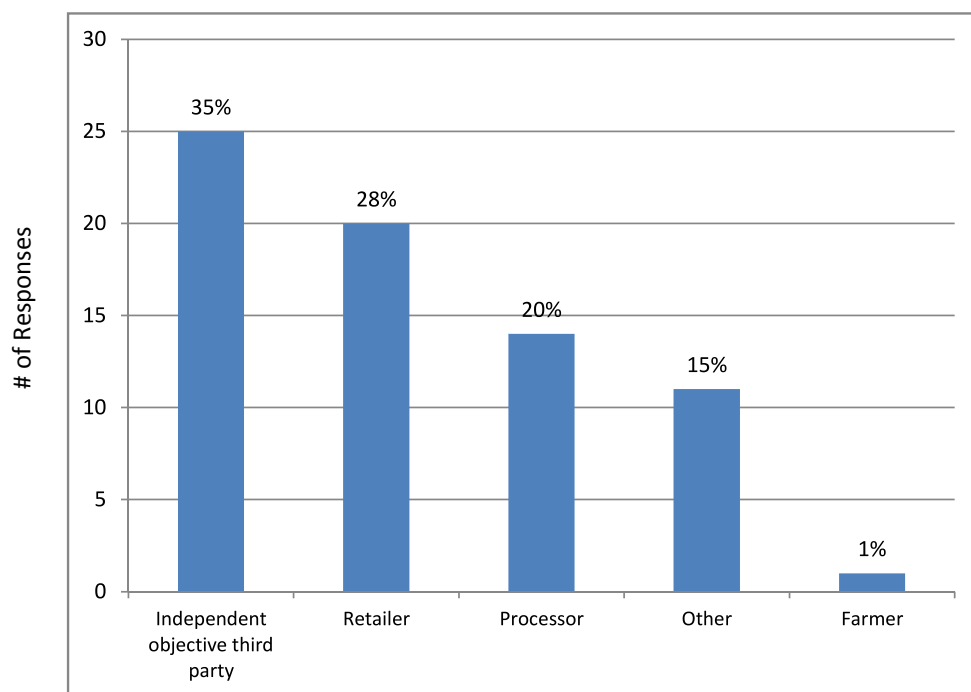
	Food Proc.	Ind. Ass.	Research	Gov't	Other
Every player needs a win. Transparency. Partner selection. Due diligence	57%	60%	29%	33%	29%
Champion who brings parties together & facilitates	29%	20%	6%	27%	41%
Common destination. Continuous innovation. Examples of success	0%	0%	18%	33%	12%
Threat or shock to the system.	0%	10%	29%	0%	0%
Commitment with consequences. Accountability	14%	10%	0%	7%	0%
N/A	0%	0%	18%	0%	18%

Value chain champions were identified as critically important to the development of innovative value chains.

The proceeding results show that, overall, value chain champions were identified as critically important to the development of innovative value chains and engaging businesses in the process of adopting VCM practices. Prior research completed by the VCMC also shows the critical importance of value chain champions. Delegates were asked to identify which stakeholder or organization was most appropriate to playing the role of value chain champion.

As shown below in Figure 5-8, independent third parties were identified by the majority of respondents as being most appropriate (35%), the reason being that they could make more objective decisions than commercial stakeholders. Of the businesses likely to be involved in value chain initiatives, retailers were considered the most appropriate business to act as chain champion, with 28% of the vote. Farmers were deemed least appropriate with 1%.

Figure 5-8: Which organization is most appropriate as chain champion?



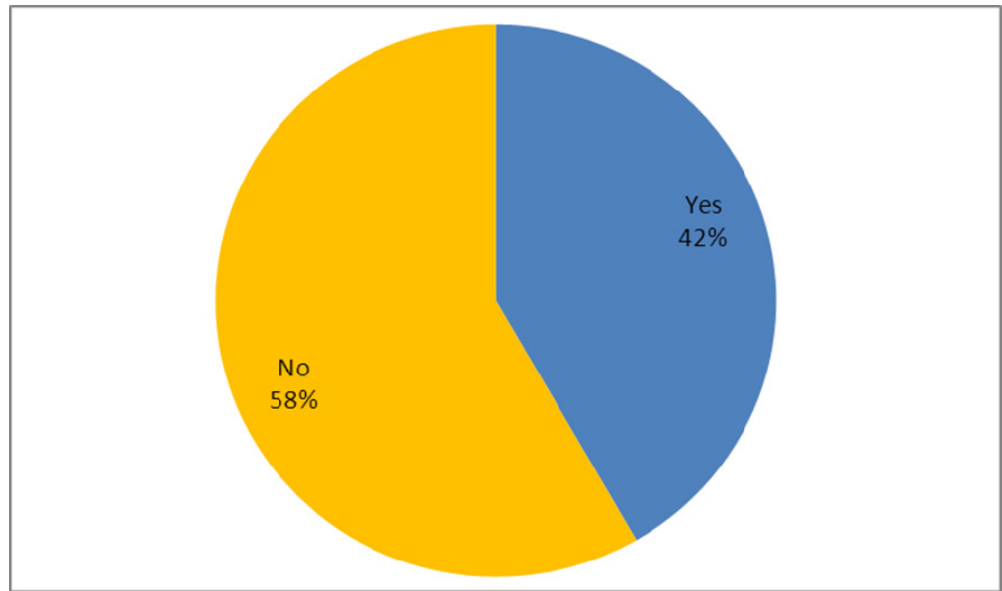
As seen in the figure above, an “independent objective third party” was the main choice overall. However, there were differences by value chain groups. Fifty-seven percent of Food Processors indicated that a “processor” would be the most appropriate choice as a champion while Industry Associations were more likely to select a “retailer” (40%). Almost half of Researchers/Academia and “Other” selected an “independent third party” (47% each). Those from Government were split. This group was the only one to identify “farmer” as the most appropriate choice as chain champion (7%).

Table 5-6: Which organization is most appropriate as chain champion? Percentage breakdown within respondent group

	Food Proc.	Ind. Ass.	Research	Government	Other
Retailer	14%	40%	18%	27%	29%
Processor	57%	20%	12%	20%	12%
Farmer	0%	0%	0%	7%	0%
Independent objective third party	29%	10%	47%	20%	47%
Other	0%	10%	12%	27%	6%
N/A	0%	20%	12%	0%	6%

Delegates involved in value chain initiatives were asked whether the chain(s) in which they operate had a recognized chain champion. As can be seen from the results presented below in Figure 5-9, a considerable percentage (42%) said that indeed they did. The majority (58%), however, stated that the value chain(s) in which they belong did not have a recognized chain champion.

Figure 5-9: Does the value chain to which you belong currently have a recognized chain "champion"?



We can see from Table 5-7 that those who identified themselves as Food Processors were most likely to be in a chain, with only 14% not answering this question. However, the majority did not have a recognized chain champion (57%). Non response was the most popular choice for those representing Industry Associations (60%), suggesting they are not part of a current chain. About 40% of Researchers and Government are not part of a chain, and among those who are, another 40%, do not have a recognized chain champion. "Other" was the group most likely to have a recognized chain champion (41%).

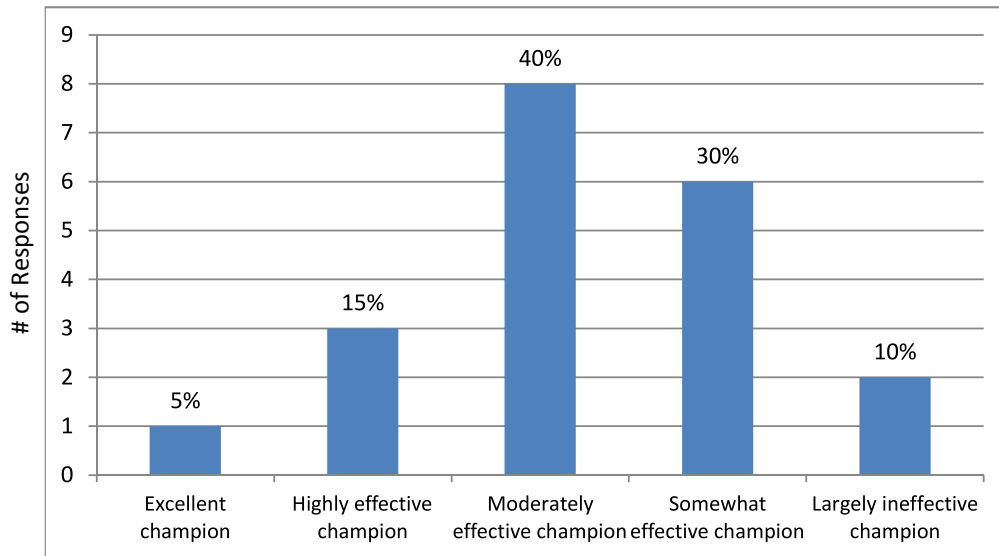
Table 5-7: Does the value chain you belong to currently have a recognized chain "champion"? Percentage breakdown within respondent group

	Food Proc.	Ind. Ass.	Research	Government	Other
Yes	29%	10%	18%	20%	41%
No	57%	30%	41%	40%	29%
N/A	14%	60%	41%	40%	29%

Of the 20 delegates who indicated that the value chains in which they were involved possessed a chain champion, a question was posed about how effective these individuals performed their role. As can be seen below, the vast majority of the 20 respondents gave their champions a pass mark or less. Forty percent indicated their champion is "moderately effective", and another 40% indicated they are only somewhat or largely ineffective.

Just four out of the 20 respondents (20%) believed that the champions were either highly effective or excellent champions. Clearly, there is room for improvement, even among the value chains fortunate enough to have a recognized champion.

Figure 5-10: Are they effective in their role as chain champion?

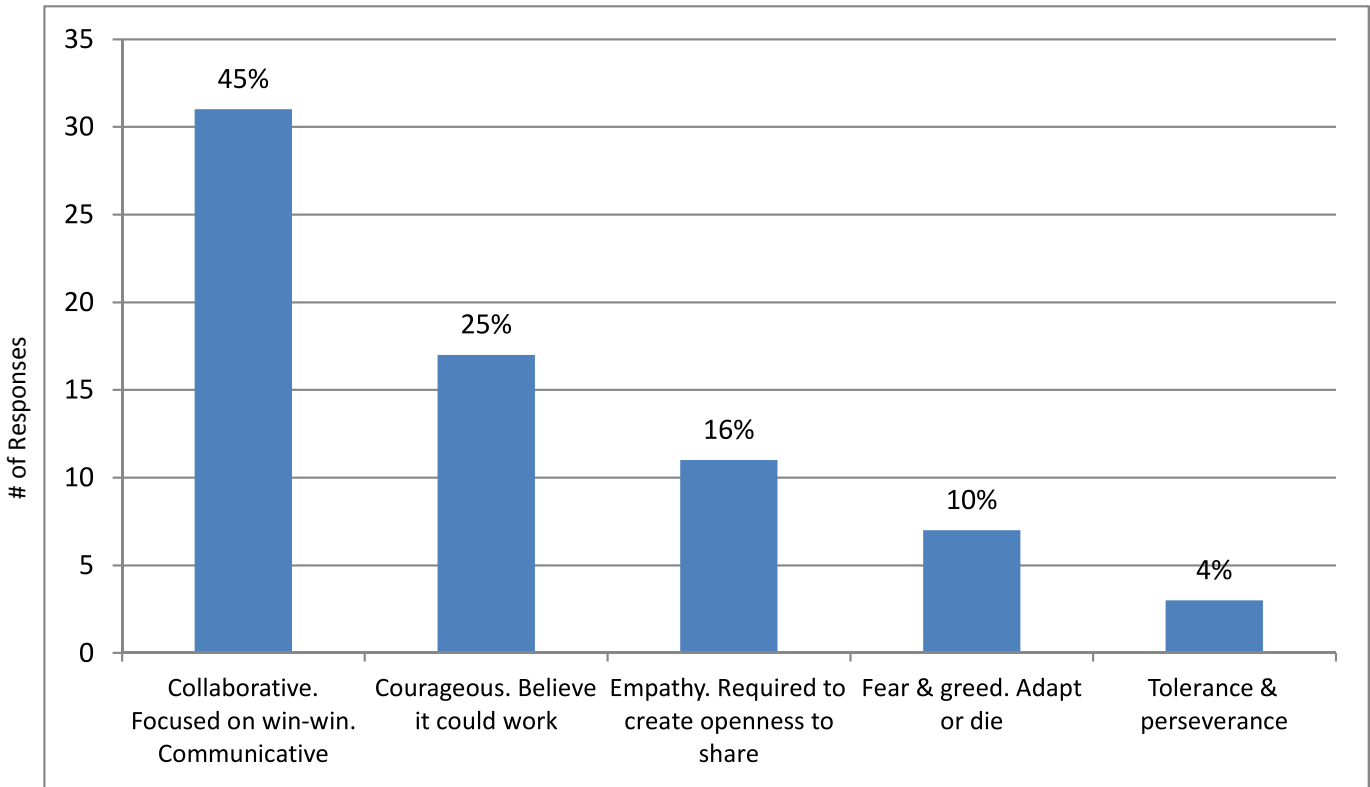


With the majority of businesses involved in value chains that do not possess a champion and the majority of champions that do exist being rated as only moderately or somewhat effective (70%), all of the delegates were asked to identify changes that would result in the emergence of more effective value chain champions. The dialogue identified that the effectiveness of chain champions rested not only on the capabilities of those playing the champion role; it also rested upon all of those involved in a value chain initiative possessing mindsets and attitudes that have not historically existed in Canada’s agri-food industry.

Figure 5-11 shows the attitudes and mindsets that delegates stated as being essential to the development of innovative sustainable value chains, and increasing the effectiveness of value champions. The most important was identified as collaborative mindsets, leading to individuals who are focused on proactively developing win-win solutions to the challenges that they face, with 45% of the vote. The second most common response was individuals possessing the courage required to adopt new ways of working together (25%). A number of respondents stated that it was human behaviour related to “fear and greed” that pushed people to change.

The effectiveness of chain champions rested upon all of those involved in a value chain initiative possessing mindsets and attitudes that have not historically existed in Canada’s agri-food industry.

Figure 5-11: What are the required new mindsets or attitudes?



Those from Industry Associations, “Other”, and Government were most likely to choose “collaborative and communicative” attitudes as the most important, with 50%, 47% and 40% respectively. Food Processors were most divided as a group, with no one clear choice among delegates. Researchers/Academia were also quite divided as a group, with three quarters of this group split between the top three choices from Figure 5-11.

Table 5-8: What are the required new mindsets or attitudes? Percentage breakdown within respondent group

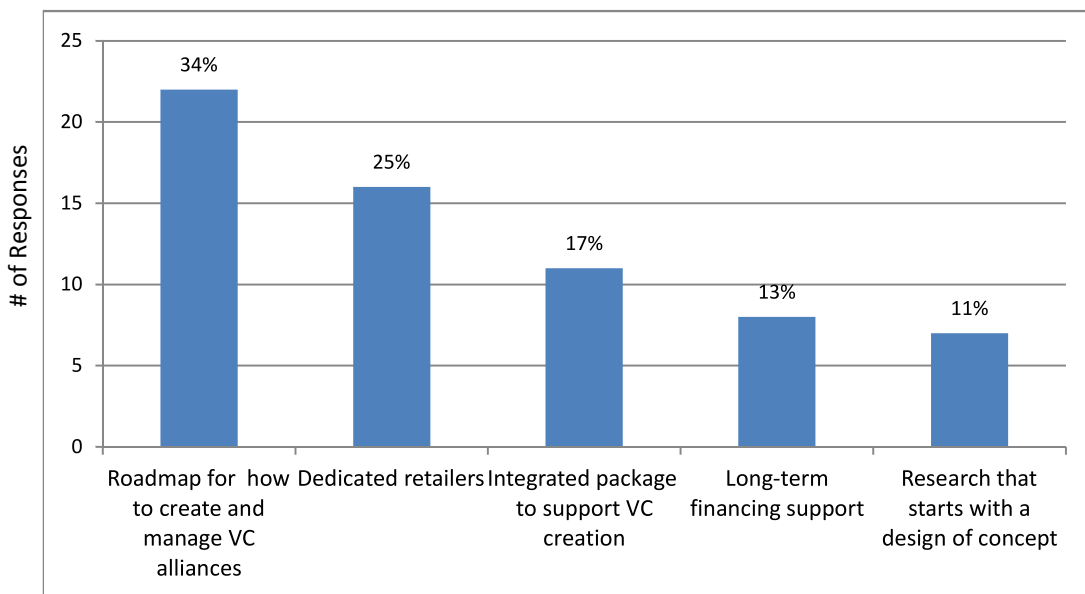
	Food Proc.	Ind. Ass.	Research	Gov't	Other
Collaborative. Focused on win-win. Communicative	29%	50%	29%	40%	47%
Courageous. Believe it could work. Chase the big picture	29%	10%	24%	33%	18%
Empathy. Required to create openness to share	14%	20%	24%	13%	12%
Fear & greed. Adapt or die	14%	10%	6%	13%	6%
Tolerance & perseverance	14%	0%	6%	0%	0%

The literature related to VCM and value chain innovation (VCI) states that the willingness to work collaboratively stems from the involved individuals possessing the ability to empathize with the challenges and opportunities that they both face. The motivation and ability to learn plays a crucial role in this process. Learning also plays a crucial role in shaping individuals' attitudes and mindsets, and increasing their problem solving skills. With this in mind, the facilitator's final question related to what resources could increase the motivation of individuals from the Canadian agri-food industry to learn about VCM and VCI, then act upon what they had learned.

The willingness to work collaboratively stems from the involved individuals possessing the ability to empathize with the challenges and opportunities that they both face.

Shown below in Figure 5-12 are the resources that delegates stated as being important to the development of innovative sustainable value chains, through leading to changes in the skills and capabilities of individuals from Canada's agri-food industry. Most commonly cited was the need for roadmaps that could guide respondents through the process of developing the mechanisms upon which successful chains are founded (34%). Presumably, these roadmaps would be an important element of the integrated support package that many delegates (17%) also cited as being important resources. The second most common response, with 25% of the vote, is the existence of a retailer who is dedicated to proactively supporting a value chain initiative.

Figure 5-12: What are the most important enablers and supports?



Like most of the questions in the interactive session, there were some differences in the way that the value chain groups responded to the question, “What are the most important enablers and supports?” Industry Association delegates were divided on the best choice and a third did not respond at all. Food Processors and Researchers were most likely to select the “Roadmap for the process” choice (43% and 41% respectively) and the “Other” group was most likely to select “Dedicated retailers” (35%).

Table 5-9: What are the most important enablers and supports? Percentage breakdown within respondent group

	Food Proc.	Ind. Ass.	Research	Gov't	Other
Roadmap for how to create and manage VC alliances	43%	20%	41%	27%	18%
Dedicated retailers	29%	20%	6%	20%	35%
Integrated package to support VC creation	0%	10%	18%	13%	18%
Long-term financing support	14%	10%	6%	20%	12%
Research that starts with a design of concept	14%	10%	18%	13%	0%
N/A	0%	30%	12%	7%	18%

6. Summary

The following section summarizes the presentations and dialogues that occurred during the VCIF, in relation to the determinants of effective value chain management (VCM). Descriptions are then given of specific presentations and discussions that related to each of the seven principles of effective VCM.

6.1 The Determinants of Being Able to Form an Innovative Value Chain

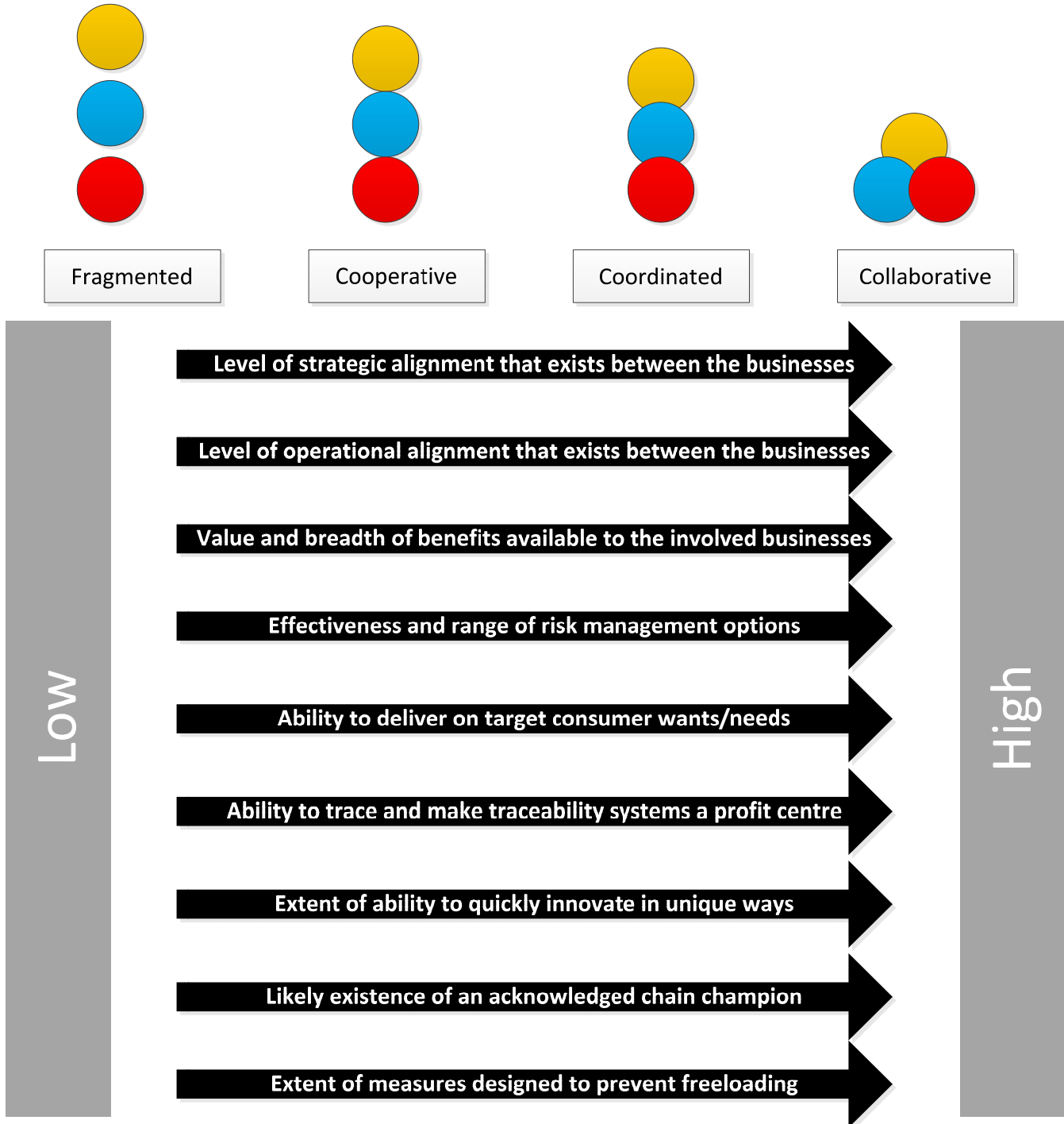
The overall messages presented at the VCIF showed why innovation, competitiveness, and profitability are the outcomes of effective VCM. In purposely working together, businesses acquire the opportunity to learn and innovate as strategic partners rather than individual businesses. This provides the ability to adapt to market demands, reduce costs, increase productivity, and increase revenues in ways that would not otherwise be possible - resulting in increased profitability and long-term competitive advantages that are extremely difficult for competitors to replicate.

Ultimately, how the chain is managed dictates its success. Its organizational structure, strategic orientation, and business culture are the drivers that determine the chain's competitiveness and the benefits that its members derive from their participation.^{viii} The VCIF showed that a value chain's structure is predominantly an outcome of the leadership, culture, attitude, and management processes of the businesses and individuals that together comprise the chain. Combined, these factors create the enabling environment within which the businesses operate and the relationships that bond the businesses together.

Figure 6-1 summarizes the extent to which a value chain's structure and associated characteristics determine its ability to innovate in ways that are difficult for competitors to imitate. It shows how the more that businesses align their strategies and operations, the more opportunities they have to set themselves apart from the wider industry, through having the ability to learn and innovate directly in line with the demands of their target market.

Innovation, competitiveness, and profitability are the outcomes of effective VCM.

Figure 6-1: Characteristics and benefits associated with each value chain structure



As reflected in the presentations by key note speakers and during the panel sessions featuring successful Ontario value chain initiatives, the closer that a value chain mirrors a collaborative (vs. coordinated or cooperative) approach, the more it will reflect the seven principles of effective VCM.^{ix} These are:

1. Share a clear vision and common goals,
2. Possess capabilities to create value,
3. Have a culture that supports cooperation and learning,
4. Have compatible partners and proactively manage the relationship,
5. Regularly evaluate and report,
6. Continually adjust to changing circumstances, and
7. Motivate and enable the adoption of new business models.

6.1.1 Share a clear vision and common goals

Professor Peter Hines outlined how a company's activities need to be vertically integrated to make change effective. The management team must enable deployment by sharing the company's vision and goals, strategy, and direction, so that every employee, at every level, is able to answer questions, such as "What are we trying to achieve over the next five years? What are you and your team doing to contribute to this plan?" Sharing a clear vision and common goals helps organizations, and the value chains to which they belong, become more effective, leading to higher levels of efficiency than otherwise possible.

These goals must be based on known consumer perceptions of value. As Martyn Jones stated, "Value chains start and end with the consumer." Businesses need to identify the characteristics of target consumers, including their drivers of behaviour. For example, Morrisons worked with chicken producers to develop on-farm practices that ensured everyone remained profitable. By coordinating operations from the design of chicken sheds to a new pricing schedule, the value chain was able to successfully respond to consumer concerns surrounding animal welfare, quality, and price.

Zespri's ability to capture added value and reduce costs is enabled by the company's unwavering determination to identify the determinants of taste, experience, and convenience. It then works with stakeholders to deliver on these consumer desires, through coordinating everything from the genetics chosen and how orchards are managed, to how the fruit is graded, distributed and merchandized, and category management arrangements.

6.1.2 Possess capabilities to create value

The ability to innovate directly in line with market demands requires skills not traditionally associated with the agri-food industry. It includes the ability to learn from different sources, and then translate new knowledge and skill sets into a different way of doing business. It also relies on businesses possessing the ability to develop and maintain close strategic relationships with customers and suppliers. The skills required to achieve these outcomes include human resource, financial, and marketing.^x

Sharing a clear vision and common goals helps organizations, and the value chains to which they belong, become more effective.

"Value chains start and end with the consumer." (Martyn Jones, Wm Morrison Supermarkets PLC)

The most powerful enabler of VCI is the attitude of participants.

The most powerful enabler of VCI is the attitude of participants.^{xi} Attitude shapes individuals' perceptions of the world around them, their relationship to other inhabitants of that world and the opportunities that this offers. For example, attitude determines whether someone is customer centric, can recognize inter-firm collaboration as critical, views open communication as necessary, is motivated and able to adapt to change, factors people into every decision, invests in information technology, and is obsessed with performance measurement.^{xii}

Each of the companies represented by the key note speakers has developed a governance system that rewards behaviours that enable the value chain to meet or exceed market requirements, and penalizes those whose behaviour does not. An effective governance system must guide decisions on who belongs to the value chains, their role within the value chain, how their performance is monitored, how and what information is shared, and how this relates to the financial arrangements which ultimately drive behaviour. It will also clearly state the processes that will be followed if an organization or individual's performance continually fails to meet expectations, resulting in them being expelled from the system.

6.1.3 Have a culture that supports cooperation and learning

VCIF delegates indicated throughout the interactive session that the enablers of establishing sustainable innovative value chains relate to the participants sharing a common series for why they would support and remain committed to a value chain initiative.

The corporate culture required to facilitate the cooperation and learning that enables the value chain to constantly adapt to a changing market results from the chain possessing effective leadership and governance systems. It also results from the members having clearly communicated participants' roles and responsibilities, reasons for why the practices are necessary, the practices for which they will each be accountable, and how these practices directly relate to customers' and consumers' perceptions of value. Each member must also be treated respectfully, regardless of whether the participants agree on a particular course of action.

The primary reasons why value chains are unable to develop the culture necessary to support cooperation and learning, or do not respect each other, stems from a lack of trust and understanding. This invariably stems from an inability to communicate effectively, or the value chain being comprised of individuals and businesses that do not possess the necessary attitudes and capabilities. Delegates believed that a lack of trust and understanding between businesses and stakeholders is the primary factor hindering the development of closely aligned agri-food value chains.

The primary reasons why value chains are unable to develop the culture necessary to support cooperation and learning, or do not respect each other, stems from a lack of trust and understanding.

6.1.4 Have compatible partners and proactively manage the relationship

The existence of constructive relationships relies on ensuring the value chain involves only those individuals and businesses suited to participating. They must possess an attitude that supports the concept of partnering and believe that collaboration is important to the success of their business. Involving only suitable, committed partners and having effective leaders are also important determinants of having the ability to proactively manage relationships. Effective leaders are individuals who are respected for the capabilities, and are trusted due to the behaviour that they exhibit to those around them.

The importance of the factors described above is shown by 45% of VCIF delegates believing that “collaborative mindsets”, leading to individuals being focused on proactively developing win-win solutions to the challenges that they face, are essential to the development of innovative sustainable value chains.

6.1.5 Regularly evaluate and report

During the interactive session, one of the most significant benefits associated with value chains was identified as the ability to share information and engage in market driven research and innovation. Other benefits associated with communication and information included the ability to increase profitability and mitigate risks. The only way that these outcomes can occur is through having the ability to make informed decisions, through possessing objective, timely and accurate information. Jack Barclay’s presentation emphasized that the same applies to whether the entire chain is being evaluated or the evaluation is focused on measuring the performance of a particular business in relation to the value chain within which it operates.

The ability to evaluate and report performance rests upon the value chain possessing an effective communication system, having identified the determinants of success, developing a means of objectively measuring those determinants, and having the ability to analyze the relationships that exist between multiple determining factors and performance. This can be incredibly difficult. The motivation to establish and maintain a regular reporting system commonly relies on one organization taking a leadership role in how the chain is managed.

A company can exemplify its leadership role by demonstrating a willingness to share strategic and often confidential information with other value chain members, as well as advocating values and long-term goals that will generate enthusiasm among the other members to also share information. Participants develop a greater understanding about each other’s needs and how, along with why, their operations impact the performance of the overall value chain.

“Collaborative mindsets” are essential to the development of innovative sustainable value chains.

One of the most significant benefits associated with value chains was identified as the ability to share information and engage in market driven research and innovation.

The presenters emphasized that their businesses, and the value chains to which they belong, have succeeded by devising, implementing, and enforcing a structure that reflects their core strategic intent.

6.1.6 Continually adjust to changing circumstances

Having an organization or individual that takes a leadership role in the value chain, the ability to make informed decisions relating to customer and consumer needs, and participants who are willing to act in unison to achieve a common goal, together provide the ability for value chains to continually adjust to changing circumstances. They also provide value chains with the ability to continually improve performance through involving multiple points along the value chain in the innovation process.

The presenters emphasized that their businesses, and the value chains to which they belong, have succeeded by devising, implementing, and enforcing a structure that reflects their core strategic intent.^{xiii} They also emphasized that VCM is more often about continual incremental change and innovation versus radical innovation, and the importance of implementing and enforcing effective governance structures for enabling the value chain to possess the ability to innovate more quickly and attain a higher level of sustainable competitive advantage than the wider industry.

6.1.7 Motivate and enable the adoption of new business models

The speakers described that the adoption of new business models, regardless of how attractive they may appear, brings an element of risk. This lessens businesses' willingness to explore new ways of doing business. International and Canadian speakers described how government funding programs had motivated and enabled them to explore new business models, through reducing their exposure to financial risk by enabling them to engage experts to assist them through the process of value chain innovation. Speakers also mentioned the important role that a combination of government funding and extension programs had played in providing VCM related training. Public funding had also provided greater opportunity to undertake academically rigorous research that had assisted them, and ultimately the wider industry, to address market driven challenges.

An example of the former was provided by Dr. David Tanner, who described how public funding had enabled the company to engage more producers in lean thinking and process improvement workshops than could otherwise have been achieved. An example of the latter was provided by Martyn Jones, who described how working with Bristol University had enabled Morrisons and their farmers to cost-effectively meet consumer demands for loose-housed chicken. Lessons learned were shared with industry through presentations and case studies. Canadian presenters also described how they had benefited from public funding programs that motivated and enabled them to work closely with other stakeholders, resulting in higher levels of strategic innovation.

7. Recommended Actions

The VCIF identified a number of recommended actions. The success of these actions and the speed with which they can be implemented will be determined by industry, government, and academia possessing the ability and motivation to learn and interact in new and innovative ways.

A value chain's success is determined by the capabilities and motivation possessed by managers from the businesses that together comprise the value chain, from farm inputs through to retailers and foodservice operators. The recommended actions are thus predominantly focused on enhancing the knowledge, skills, and motivation of the individuals who together comprise the industry.

The primary role of government is ensuring that policies, legislation, regulations, and programs are developed and delivered in a manner that enables and motivates industry and academia to purposely act upon the resulting opportunities, resulting in market driven innovation.

7.1 Devise Methods for Increasing Managers' Awareness and Understanding of VCM

Possessing greater understanding of what the term "value chain management" means could lead to a significant shift in the attitude and behaviour of the individuals and businesses that comprise Ontario's agriculture and agri-food industry. It could also lead to a sea change in government employees' and politicians' attitude towards the industry and how to strengthen its long-term competitiveness. The VCIF identified that relatively few individuals within industry and government, and academia to a lesser degree, understand what the term "value chain management" means and its relation to innovation and competitiveness.

Many within industry and government remain at the level of viewing value chains and supply chains as being wholly different entities. This incorrect duality-based assumption, where specific entities can only exist in isolation (*the "it must be X or Y" argument*) discourages many from learning about VCM and exploring how they could use VCM approaches to incrementally increase the performance of their business. Addressing this situation relies on encouraging dualistic thinking, where opposites or extremes can exist simultaneously and lead to new levels of understanding or opportunity. An example of this is an individual perceiving VCM as a strategy that enables business to manage its supply chain more effectively, leading to improvements in capabilities, competitiveness and profitability.

This level of thinking can only come from increasing individuals' understanding of VCM as a business strategy, the opportunities that it offers, and the determinants of success. It is expected that this would lead to individuals feeling more motivated to explore and adopt VCM practices. Possessing even a basic understanding of successful value chains and factors that determine their performance would assist governments to deliver services and develop then enact policies and legislation more effectively.

Possessing greater understanding of what the term "value chain management" means could lead to a significant shift in the attitude and behaviour.

An individual perceiving VCM as a strategy that enables business to manage its supply chain more effectively [leads] to improvements in capabilities, competitiveness and profitability.

To encourage this level of discourse and understanding, it is recommended that a repository be established of introductory information on what the term “value chain management” means in practice – along with proven examples of the benefits achieved by those who had adopted VCM practices. To encourage their widespread use, the materials would be produced in easily-digestible terms and formats, and made available to educators, industry, the media, and government. Organizations and businesses would be encouraged to reference the materials in meetings and refer to them when communicating with both industry and government. By the same token, government would be encouraged to use the language contained in the materials when communicating to industry. Materials would also be developed specifically for schools.

7.2 Develop and Deliver Strategically Targeted Training Initiatives

The ability of Canada’s industry to compete globally will rely on the existence of a skilled and capable workforce, one that is able to foster organizational innovation.

The ability of Canada’s agricultural and agri-food industry to compete globally against increasingly capable and market-focused competitors will rely on the existence of a skilled and capable workforce, one that is able to foster organizational innovation. Strategically targeted education and training courses are required to address the gaps in value chain leadership and management capabilities identified by VCIF delegates. Numerous nations’ universities have developed VCM courses that are delivered at the level of undergraduate and postgraduate. Examples include the Supply Chain Management courses delivered by the University of Queensland (Gatton, Australia), and the Value Chain Management and Marketing courses delivered by the Kent University (UK). These and other universities (along with colleges) also deliver value chain related extension courses to businesses operating along the entire value chain.

Compared to scientific innovation, relatively little Canadian funding has been invested into developing education and training initiatives that can enable and motivate organizational innovation.

Compared to scientific innovation, relatively little Canadian funding has been invested into developing education and training initiatives that can enable and motivate organizational innovation. Training would be tailored to meet the needs of target groups, such as senior versus middle managers from agri-food businesses, farmers, researchers, and government personnel. Training would be tiered to reflect different levels of past experience, current knowledge, and differing levels of sophistication. To suit a range of audiences, training and education would be offered as tertiary degrees or certificates, along with individual standalone (more informal) training sessions.

To maximize the effectiveness and value of the training and education delivered to academic students and graduates, business executives, and other stakeholders, a central organization would be charged with coordinating the development and delivery of VCM training and education materials that could be modified by delivery agents as required. Through regular objective evaluation, the materials would be constantly updated and refined.

7.3 Invest in the Development of Resources

The effectiveness of the above recommendations would be greatly enhanced through the strategic investment in effective awareness and training resources. VCIF delegates identified that individuals and businesses alike (from sole

proprietors and family-owned farms through to multi-million dollar processors, retailers, or foodservice operators) need to have ready access to practical resources that they can access to guide them through the process of incrementally improving performance, and developing closer constructive relationships with customers and suppliers. Compared to jurisdictions such as the UK, the availability of sophisticated, academically rigorous resources that appeal to a range of audiences and differing needs is quite limited in Canada.

In manufacturing, organizations, such as Excellence in Manufacturing Consortium (EMC), have played an important role in providing training to progressive businesses and motivating changes in how businesses are managed, through sharing stories of success and facilitating meetings where managers can informally network to learn from each other. Capacity building initiatives, such as the UK's European Food and Farming Partnerships, have led to farmers and downstream businesses proactively adopting VCM practices. Similar approaches, adapted and delivered by Canadian VCM experts, could greatly increase the speed at which innovative value chains are occurring across Ontario and Canada's agri-food industry, thereby improving the industry's long-term competitiveness.

European Food and Farming Partnerships has also facilitated the development of robust innovative value chains through enhancing the management capabilities of producer-operated businesses. It is a practical, implementation-focused organization that works closely with universities, colleges and industry organizations to develop materials, which are delivered to industry through reports, case studies, and forums. Funded initially by a multi-year federal government grant, the organization is now primarily funded by individual projects developed in conjunction with regional development agencies and private "fee-for-service" projects.

7.4 Research the Influence of Policies on the Adoption of VCM Practices

A factor identified during the VCIF is that a greater, more informed perspective needs to be developed on the effect that policies, legislation and regulations developed and implemented by Canadian governments and institutions have on the development of robust innovative and competitive agri-food value chains. An extensive analysis of current policies, legislation and regulations from a value chain perspective of the relationship therefore appears to be warranted. The results would provide valuable insights that feed into the development of policies, legislation and regulations, leading to the development of a more innovative and internationally competitive agricultural and agri-food industry.

This analysis must be undertaken objectively, be academically rigorous, and come from a practical business perspective. The activities must be focused on producing pragmatic approaches that can be acted upon and implemented effectively. Therefore, the body(ies) responsible for this analysis must be independent and objective, and charged with developing solutions that will enable industry to achieve specific and meaningful outcomes over the short, medium, and long term. Means must also be developed for measuring the effectiveness of proposed changes to policies, legislation and regulations.

Similar approaches could greatly increase the speed at which innovative value chains are occurring across Ontario and Canada's agri-food industry, thereby improving the industry's long-term competitiveness.

The results would provide valuable insights that feed into the development of policies, legislation and regulations, leading to the development of a more innovative and internationally competitive agricultural and agri-food industry.

Providing businesses with access to funding that enables them to experiment with new business approaches has proven an effective way for encouraging businesses and the wider industry to engage in the process of developing innovative, robust value chains.

7.5 Invest in Value Chain Demonstration Initiatives

VCIF delegates identified that the adoption of VCM practices is viewed by many as a potential source of inherent risk. Therefore, even businesses who may view the adoption of VCM approaches as offering distinct commercial opportunities are discouraged from acting. Providing businesses with access to funding that enables them to experiment with new business approaches, in exchange for acting as a demonstration project with generic results shared with the wider industry, has proven an effective way for encouraging businesses and the wider industry to engage in the process of developing innovative, robust value chains. To be effective, projects must reflect long-term strategic objectives. Similar to successful international initiatives, such as the UK's Food Chain Centre, they should be accepting in-kind contributions from businesses, versus solely accepting cash contributions. As projects may challenge current thinking and behaviour, and initially benefit individual businesses versus the broader industry, their funding should not rely upon the support of industry associations. To ensure the validity and appropriateness of investments, those determining funding decisions should be chosen for their competencies, not because they represent sectors or organizations.

The development of projects should also reflect lessons learned from elsewhere. In the UK, programs that can only be accessed by multiple producers working together has led to the wider development of strategic producer groups that possess the technological and management capabilities required to work more collaboratively with major retailers and other members of the value chain. In Australia, some programs only support projects that directly reflect value chain concepts and can show that encouraging and enabling collaboration is a fundamental aspect (and outcome) of the project.

7.6 Market-Led Industry, Government, and Academic Research Partnerships

Presented at the VCIF were examples of the importance of ensuring research and innovation (whether technological, genetics based, marketing, or management / businesses focused) is led by commercial industry having identified a need for the research to be undertaken, then involved in the research process and commercializing outcomes. Taking this approach provides the opportunity for universities and researchers to create new streams of income, and ensures that public funding is being used wisely. It also ensures that strong links are established and maintained between industry and academia.

Examples described at the VCIF included "Sundown", a variety of pear from Vineland Research and Innovation Centre, that has been licensed to Vineland Growers Cooperative. Other examples of research/business partnerships included Zespri's annual multi-million dollar investment in the development and commercialization of new market-focused varieties of kiwi fruit. Some varieties are purchased by Zespri's competitors, though Zespri always has first right of refusal. In Australia, the ability to secure proprietary licensing agreements can rely on businesses investing in the development of promising varieties. An example is "Calypto", a variety of mango developed by CSIRO in conjunction with One Harvest.

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Appendix 1: Forum Coordinators



The Value Chain Management Centre (VCMC) was established in 2008, as a division of the George Morris Centre, with seed funding provided by Agriculture and Agri-Food Canada through the Agricultural Adaptation Council. The VCMC is Canada's only initiative dedicated to improving the profitability and competitiveness of businesses operating in the agriculture and agri-food sector, through promoting and enabling the development of closely aligned value chains. In addition to commercial projects, the Centre partners with governments to develop policies and programs designed to enable and motivate businesses to adopt value chain management practices. Furthermore, the VCMC assists governments and industry stakeholders to deliver the services required by businesses.

The VCMC translates insights acquired through academically rigorous research and private consulting into education and training initiatives, designed to increase management expertise. It works with businesses of all sizes - from sole proprietors through to multi-nationals, whether they want to partner in the formation of new value chains, or are looking to improve the performance of an existing chain. The VCMC team has collaborated with some of the world's leading innovators and researchers on projects relating to value chain development, lean process improvement, co-innovation, and strategic business development.



Vineland Research and Innovation Centre (Vineland) is an independent, not-for-profit organization that was created to be a world-class centre for horticultural science and innovation. Through partnerships with industry, academia and other research institutions, Vineland is developing valuable research and innovative solutions for the fruit and vegetable, greenhouse, nursery and ornamental, and grape and wine sectors. These initiatives will promote growth and profitability for the horticulture industry across Canada. Vineland is funded in part by Growing Forward, a federal-provincial-territorial initiative.

With a full team of researchers in Horticultural Production Systems, Applied Genomics and Consumer Insights and Product Innovation, Vineland offers horticulture industry associations and private businesses a responsive and efficient environment to conduct research. Vineland's Business Development Office aligns business and science interests by assisting with commercialization, technology scouting and technology transfer activities.

Appendix 2: Additional Speakers

Hon. Ted McMeekin, Ontario Minister of Agriculture, Food and Rural Affairs

Ted McMeekin represents the riding of Ancaster-Dundas-Flamborough-Westdale. He was first elected in a by-election in 2000. In October 2011, he was appointed Minister of Agriculture, Food and Rural Affairs. Previously, he served as the Minister of Consumer Services, the Minister of Government Services, and as Parliamentary Assistant to the Minister of Education and to the Minister of Training, Colleges and Universities.

Before entering provincial politics, McMeekin served as mayor of Flamborough, as a Hamilton city councillor, and as a leader in several community organizations. He has been a strong advocate for children with special education needs, seniors, the environment, and community development.

McMeekin holds a MSW from Wilfrid Laurier University and served as Assistant Practicum Professor at the university. He served as executive director of the Burlington Social Planning Council, chair of part-time studies at Mohawk College, was a regional staff person responsible for social justice issues for the United Church of Canada, and owned and operated the original Chapters bookstore in Waterdown, Ontario.

Virginia Clack-Zimm, President Faye Clack Communications Inc.

With more than 25 years' experience in the food and beverage industry, Ginny is the architect of Faye Clack Communications' growth and is personally connected to every facet of the food sector. She develops lasting relationships within the value chain that have earned her the respect of its members.

Whether it is with the trade, the complex network of foreign and Canadian government agencies, growers/producers, manufacturers, wholesalers/distributors, the retail or foodservice environment, or the media and ultimately the consumer, her ability to understand each segment's needs and deliver to the benefit of each of those value chain members and their individual objectives, is impressive. Her drive, passion and intrinsic knowledge of the food and beverage industry, from seed to table, are unmatched.

A Ryerson alumna, she is a member of the Canadian Produce Marketing Association, the Canadian Retail Council, the Canadian Culinary Federation, the International Association of Culinary Professionals, the Canadian Restaurant and Food Association, a board member of the Canadian Cheese Society, and is a founding member of Les Dames D'Escoffier, Toronto Chapter.

Dan Laplain, Associate, Value Chain Management Centre and Owner of ABI Inc.

Dan is an associate with the Value Chain Management Centre, and has contributed significantly to many of the Centre's projects. With 30 years' progressive experience, Dan is a recognized expert in developing, marketing, and delivering quality management and process improvement initiatives, with a specific focus on Lean Enterprise and Six Sigma implementation, including Black Belt training, project selection, and coaching.

Gordon Stock, Project Coordinator, Agricultural Adaptation Council

Gordon Stock was born and raised on a family farm in Tavistock, Ontario. In 2007, Gordon graduated from the University of Guelph with a Bachelor of Commerce, Agricultural Business. For the past four years, Gordon has been employed as a Project Coordinator for the Agricultural Adaptation Council (AAC). In this role, Gordon works with AAC applicants to grow their agribusiness ideas by providing assistance from the very first stages of their idea until project completion.

PANELIST PARTICIPANTS

James dePater, CEO, Sevita International (Field Crops Panel)

James dePater serves as CEO of Sevita International, a Canadian developer, producer, and exporter of Non-GMO soybean for food use. Sevita has operations in Ontario, Quebec, and PEI and exports to food and beverage manufacturers around the world. Sevita also operates Canada's leading-edge research and development program for Non-GMO soybean that includes genetic research, marker assisted selection, and plant breeding.

James holds a Master's degree in Economics from the University of Waterloo, an Honours BA, and Business Diploma from Niagara College. James provides Sevita with more than 20 years' experience in business development, including areas of strategic planning, finance and administration.

Archie Wilson, General Manager, C&M Seeds/Palmerston Grain (Field Crops Panel)

Archie Wilson is General Manager of C&M Seeds / Palmerston Grain. He is charged with the responsibility of further enhancing the market development and performance of both businesses. C&M Seeds is a leader in delivering new wheat genetics to Ontario farmers. Palmerston Grain is an innovator in developing new value added markets for Ontario's grain and oilseed producers.

Raised outside Grand Valley, Ontario, on a dairy farm, Archie has spent over 20 years in the farm supply and grain business at various locations across south-western Ontario. Archie lives with his wife, Lisa, and their two daughters on a farm west of Harriston, Ontario. Archie is a graduate of the University of Guelph, with a diploma in Agriculture as well as co-op in Agribusiness from Ridgetown College. Archie is an active Certified Crop Adviser and a former facilitator of Commodity Marketing courses. He currently sits on the board of the Canadian Seed Trade Association and the board of the International Seed Federation. He also serves on committees for the Ontario Agri Business Association.

Darcy Oliphant, Grain Merchandising Manager, Thompsons Limited (Field Crops Panel)

Darcy Oliphant has held several positions with Thompsons, with previous areas of responsibility in logistics and corn trading. He has also worked for Mars USA – M&M's Inc. as a Risk Management Officer and Grain and By-Products Buyer. Darcy holds a Bachelor of Commerce degree from the University of Windsor.

Darcy is the current Director of the Ontario Agri Business Association, and has been a past Chair of the Grain Section committee. He is also an Arbitrator for the National Grain and Feed Association.

Ezio Di Emanuele, Senior Advisor, Agri-Food Business Development at MNP LLP; President, Ezio Di Emanuele and Associates, Inc. (Field Crops Panel, Moderator)

Ezio is an accomplished Executive, Diplomat, Senior Trade Commissioner and Regional Director, with 31 years of experience with the federal public service. His work experience includes:

- Ottawa based international trade related assignments with Agriculture and Agri-Food Canada (AAFC) and the Department of Foreign Affairs and International Trade (DFAIT).
- Foreign assignments as a Senior Trade Commissioner with the Canadian Embassy, Tokyo, Japan and the Canadian High Commission, London, United Kingdom. While based in London, he was elected as the Chairman of the 32 member country International Grains Council.

- As AAFC's Ontario Regional Director, Ezio successfully co-managed the implementation of the \$300 million Canada-Ontario Agricultural Policy Framework (APF) and Growing Forward Agreements with key investments in innovation, food safety and traceability, business development services, and the environment.

He is a recent Board member of the Ontario Agricultural Adaptation Council, Soy 20/20, Bioenterprise, the Agricultural Research Institute of Ontario (ARIO), the Ivey School of Business Agri-Food Innovation Chair and the George Morris Value Chain Management Centre.

After concluding his career with the federal government in May of 2011, Ezio joined MNP LLP, a Canadian accounting, tax and consulting firm, as a Senior Advisor, Agri-Food Business Development.

Mike Buis, Buis Beef (Livestock Panel)

Buis Beef is a fourth generation family farm that retails its own beef, raised on fields and pastures south of Chatham Ontario. The farm's beef is raised the old fashioned way and hand selected from the herd, using modern ultrasound technology. This guarantees the perfect amount of marbling and finish for the finest eating experience. Electronic identification allows each retail cut to be fully traceable back to the individual animal with a full production history. At the Buis Beef store, customers can choose from a wide selection of premium cuts and enjoy the shopping experience of buying direct from the farm.

Arnold Drung, President, Conestoga Meat Packers Ltd. (Livestock Panel)

Arnold Drung is President of Conestoga Meat Packers Ltd, a wholly owned subsidiary of Progressive Pork Producers Co-operative Inc. He joined Conestoga in 2002 as General Manager and has been in his current position since 2009. Conestoga Meat Packers is a processor of fresh pork located in Breslau, Ontario, and is owned and supplied by over 150 hog farmers from south-western Ontario.

Prior to joining Conestoga, Mr. Drung held positions with J.M. Schneider Inc., Maple Leaf Consumer Foods and McNeil Consumer Products, primarily in the marketing and business unit management areas, and also worked in the consulting field. His career in the meat business began as a student, working on the Kill Floor at the Burns Plant in Kitchener, Ontario.

Raised in the Kitchener area, he received a Bachelor of Business Administration degree from Wilfrid Laurier University and subsequently completed a Master's in Business Administration, also from Laurier. Mr. Drung, his wife and three children live in West Montrose, Ontario.

Andrew Gordanier, Owner/Operator, Gordanier Farms (Livestock Panel)

Andrew grew up on a cow-calf operation north of Orangeville, Ontario. He ventured into sheep farming, along with his parents, in 2004. Their flock of about 425 head consists of Rideau Arcott (Canadian breed), Ile de France, East Friesen, and British Milk Sheep, for the production of both lamb and dairy milk products. He lives in Shelburne, Ontario, with his wife and two children (11 and 13) who keep them busy at the rink, where both his son and daughter play hockey. Andrew attended the University of Guelph, and has held seats on the CSF board since 2007, holding vice-chair and most recently the Chair positions. He has also sat on the Board of Directors for the Ontario Sheep Marketing Agency since August 2007.

John Groenewegen, President, JRG Consulting Group (Livestock Panel)

John Groenewegen operates JRG Consulting Group, an agri-food sector consulting firm that provides consulting services in the areas of business strategy, feasibility analysis, economic analysis, competitiveness reviews, sector profiles, agricultural policy, and in most commodity sectors to diverse range of clients. He has managed a number of projects for CAPI since its formation.

Before consulting, John was an agricultural economist at Agricultural Canada and at the USDA. John received his PhD from University of Minnesota in agricultural and applied economics. His first two degrees are from the University of Guelph. John has provided consulting services to the agri-food sector for over 25 years.

George Lepp, President, Lepp Farms Inc. (Horticulture Panel)

George Lepp is a life-long resident of Niagara-on-the-Lake and purchased his first farm at the age of 17. He was educated at the University of Guelph and Ontario Agricultural College. In addition to being president of Lepp Farms Inc., George holds many positions: Chair of Land Division for Niagara for 13 years, Crowned Grape King for best vineyards in 1997, Chair of Niagara Shoreline Growers (a packaging company), and Vice Chair of Vineland Growers Cooperative. George has a passion for family, good wine, and growing high quality products on Ontario's tender fruit lands.

Frank Pagliaro, Vice President Produce Procurement, Loblaw Companies Ltd. (Horticulture Panel)

Frank has been a Loblaw employee for 29 years. He started his career in 1977 with a part-time position at Fortinos Supermarkets while attending school, moved to full-time in 1982, and then was quickly promoted to Produce Manager. After gaining valuable retail experience, Frank was promoted to Buyer in 1985, which made him responsible for produce procurement.

In 1988, Frank was promoted to Director of Produce Operations, where he was responsible for the procurement, merchandising, and operations for Fortinos Produce Departments. Responsibilities included the day to day produce functions, development of new specs for all products, development of new SOPs for operations, review fixtures, store layouts and design, and the opening of new locations.

In July 2011, Frank was promoted to Vice President National Procurement Produce & Floral. His team is responsible for procuring Produce and Floral nationally for all Loblaw Companies' stores. His team includes the So Fresh division located in Fresno, California. It searches out new vendors, unique products, and inspects produce items right in the fields.

Michael (Mike) Ecker, President, Vineland Growers Co-operative Ltd. (Horticulture Panel)

Mike is the President of Vineland Growers Co-operative Ltd. (VCG). He has been employed by VCG for over 35 years and was promoted from the position of Vice President of Sales and Marketing after 15 years in that position. Michael is currently a Director of the Canadian Produce Marketing Association and sits on the Government Relations Committee. He is an appointee of the Vineland Research and Innovation Centre Stakeholders Committee, and sits on the Advisory Committee to the Ontario Tender Fruit Marketing Board and the Fresh Fruit Marketing Advisory Committee.

Mike is a past President of the Ontario Produce Marketing Association and served as a Director for several years. He was a past Director of the Agricultural Adaptation Council (AAC), serving on the AAC's Marketing and Communications Committee and on the Food and Beverage Industry Innovation Fund Committee. In 2007, Michael was named the Ontario Produce person of the year. His education includes a Graduate Diploma from Seneca College and a Certificate in Post-Harvest Technology from University of California (U.C. Davis). Mike and his wife, Debbie, have two children, Matthew and Laura.

Bren de Leeuw, Sr. Community Development & Food and Beverage Program Manager, Excellence in Manufacturing Consortium (Lean Panel Moderator)

Founded in the mid-1980s, the Excellence in Manufacturing Consortium (EMC) is a unique not-for-profit organization, dedicated to helping manufacturers grow and become more competitive, at home and around the world. In her role with EMC, Bren has worked in partnership with the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA), and the organizations' partners to facilitate the development of a sector-specific consortium for Food and Beverage manufacturers, processors, agri-business, and those who directly support that industry with opportunities to learn from each other, share best practices, and to leverage knowledge to enhance their competitiveness in today's global marketplace. She has diligently sought opportunities to encourage sector participation, building resources, and connecting community partners with those in industry across the provinces.

Prior to her involvement with EMC, she worked for many years in a plastics film manufacturing facility and brings to the table experience in Human Resources, Health and Safety, Continuous Improvement, and Management. Bren is a graduate of the University of Western Ontario, and also holds two Ontario Management Development Program Certificates from Conestoga College in Business Management and in Leadership Skills.

Kerry Oliver, Senior Director, Six Sigma Manufacturing, Maple Leaf Foods Inc. (Lean Panel)

Kerry Oliver is Senior Director, Six Sigma Manufacturing. Her responsibilities include leadership of Six Sigma Manufacturing deployment for Protein Business and Home Office. Kerry joined Maple Leaf in 2000 and has held a variety of roles such as Director, Purchasing and Logistics at Poultry and Home Office Director of Logistics.

Prior to joining Maple Leaf Foods, Kerry was in direct sales as a Sales Representative and later as a Branch Manager. After graduating with an MBA from McMaster University, she joined Imperial Oil, where she held three successive positions in the areas of field territory management, marketing, and training.

Wayne Stark, Pursuit Inc. (Interactive Facilitator)

Wayne is CEO of Pursuit Development Labs Inc., a Toronto based corporate strategy and culture development agency. Wayne is a strategy advisor to CEOs and their executive teams. He supports them in uncovering, engaging, living, and sustaining their authentic essential strategy to drive market relevance and enhanced value creation, resulting in sustainable performance and clear global thought leadership. Wayne has worked with Fortune 500 companies, NGOs, and governments both in agri-food and other industries. He brings extensive experience as both an operator and developer of branded packaged goods and food processing businesses.

In addition, Wayne is an active Board of Directors member of The Canadian Agri-Food Policy Institute (CAPI) and chairs the Health and Wellness panel. As well, Wayne shares his passion and insights in "Relational Strategy Transformation", "Effective Authentic Value Creation", and "Collaboration" with his students at the University of Toronto.

Appendix 3: Participant List



Dan LaPlain	Advanced Business Improvements
Viliam Zvalo	AgraPoint
Karl Van Klavekev	AgriBrands Purina Canada Inc.
Laura Beveridge	AgriBrands Purina Canada Inc.
Gordon Stock	Agricultural Adaptation Council
Abdel Felfel	Agriculture and Agri-Food Canada
Gary Nelson	Agriculture and Agri-Food Canada
Inge Vander Horst	Agriculture and Agri-Food Canada
Michael Metson	Agriculture and Agri-Food Canada
Sara Sarkar	Agriculture and Agri-Food Canada
Heather Rand	Agriculture and Agri-Food Canada
Margurite Thiessen	Alberta Agriculture and Rural Development
Barry Walker	Alliance of Ontario Food Processors
Jane Graham	Alliance of Ontario Food Processors
Emily Carere	Ballinahistle Farms Ltd
Marc Carere	Ballinahistle Farms Ltd
Art Corbett	BCI Marketing Partners
Richard Broadwith	BCI Marketing Partners
Jason Koudys	Beef Improvement Opportunities
Tony Hogervorst	Berryhill Farms
Mike Buis	Buis Beef
Archie Wilson	C&M Seeds / Palmerston Grain
John Groenewegen	Canadian Agri-Food Policy Institute
David McInnes	Canadian Agri-Food Policy Institute
Anne Fowlie	Canadian Horticultural Council
Javier Perez	CERES Top Talent
Ryan Ricci	CIBC
Arnold Drung	Conestoga Meat Packers Ltd
Louise Riendeau	ConsulTech Agroalimentaire
Maggie Van Camp	Country Guide
Jack Barclay	CRF (Colac Otway) Pty. Ltd
Sandra Mattes	Del's Pastry Ltd.
Bren de Leeuw	Excellence In Manufacturing Consortium
Ron Death	Farm Credit Canada

Virginia Zimm	Faye Clack Communications
Franco Naccorato	Friends of the Greenbelt Foundation
Megan Hunter	Friends of the Greenbelt Foundation
Myles Frosst	Future Fields
George Mitges	George Mitges & Associates Inc.
Bob Seguin	George Morris Centre
Hans Soer	Global Fruit
Andrew Gordanier	Gordanier Farms
Nicole MacKellar	Grain Farmers of Ontario
Janet Horner	Greater Toronto Agricultural Action Committee
Dan Borden	Grocery Business
Mike Sadiwnyk	GS1 Canada
Peter Henderson	Ideovation
Danillo Herrera	Inter-American Institute for Cooperation on Agriculture
Colin Siren	Ipsos Forward Research
Guillaume Guitard	Institut québécois du développement de l'horticulture ornementale
Marie-Claude Limoges	Institut québécois du développement de l'horticulture ornementale
Heather Copland	Lamb Producer
Lori Litherland	Litherland & Company
Frank Pagliaro	Loblaw Companies Limited
Michael Loh	London Agricultural Commodities
Rory McAlpine	Maple Leaf Foods Inc.
Kerry Oliver	Maple Leaf Foods Inc.
Kevin Martin	Martin's Family Fruit Farm
Mary MacDonald	Metcalf Foundation
Ezio Di Emanuele	MNP LLP
Ed Kneeshaw	National Bank
Verne Milot	Niagara Economic Development Corporation
Joe Dutchyn	Niagara Orchard and Vineyard Corp
Thomas O'Neil	Norfolk Fruit Growers' Association
Shane Patelakis	Nova Scotia Department of Agriculture and Fisheries
Daryl Ball	OMAFRA
Gregory Pate	OMAFRA
Jacquelynn Moody	OMAFRA
Jaya James	OMAFRA
John Schut	OMAFRA
Karen Chan	OMAFRA
Martin Bohl	OMAFRA
Oswald Zachariah	OMAFRA
Stuart Budd	OMAFRA
Tony Morris	OMAFRA
Kelly Ciceran	Ontario Apple Growers

Chris Lillie	Ontario Broiler Hatching Egg and Chick Commission
David Stewart	Ontario Cattlemen's Association
Richard Horne	Ontario Cattlemen's Association
Heather Nahatchewitz	Ontario Independent Meat Processors
Laurie Nicol	Ontario Independent Meat Processors
Heather Laidlaw	Orchalaw Farms
Majd Abdulla	PhD
Wayne Stark	Pursuit Development Labs Inc.
Peter Hines	S A Partners
Caroline Glasbey	SCG Communications
James dePater	Sevita International
George Lepp	Shoreline Packers, Lepp Farms
Tom Schell	Southwest Economic Alliance
Brenda Reinhardt	Sprucedale Quality Meats Inc.
Don Montgomery	Sprucedale Quality Meats Inc.
James Greaves	The Black Angus Farm Gate
Darcy Oliphant	Thompsons Limited
Vincent Thomson	Thoven Consulting Inc
Sateesh Ramkissoonsingh	Turkey Farmers of Canada
Amy McNaughton	University of Guelph
Andreas Boecker	University of Guelph
Ralph Martin	University of Guelph
Rita Hansen-Sterne	University of Guelph
Martin Gooch	Value Chain Management Centre
Nicole Marenick	Value Chain Management Centre
Mike Ecker	Vineland Growers Cooperative Limited
Tania Humphrey	Vineland Research and Innovation Centre
Isabel Dopta	Vineland Research and Innovation Centre
Kathryn Goodish	Vineland Research and Innovation Centre
Michael Brownbridge	Vineland Research and Innovation Centre
Charles Waud	WaudWare Incorporated
Martyn Jones	Wm Morrison Supermarkets PLC
Peter Mitchell	World Crops Project
David Tanner	Zespri International Ltd

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