







Wrap-up

Value Chain Innovation Forum April 3 & 4, 2012

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Thank You To Our Sponsors

- Ontario Ministry of Agriculture Food and Rural Affairs
- Agriculture and Agri-Food Canada
- Farm Credit Canada



The Challenge

Stiffer competition from increasingly sophisticated competitors, possessing greater ability to compete



Plenary Sessions

- I can see a point when the academic model of value chains are widespread in the food industry
 » Martyn Jones
- Competitors allow you to differentiate yourself.
 Zespri 30% of kiwi export volume, 70% of value
 » David Tanner
- Need to identify opportunities to improve and develop solutions, to improve competitiveness
 » Danilo Hererra
- Immense opportunities exist to reduce costs through levering knowledge along the chain
 » Jack Barclay

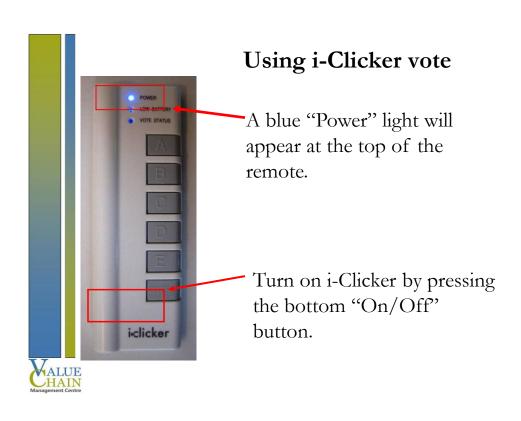
Sector Panels

- Field crops
 - » Paradigm shift required to grow the market pie
 - » Need market-driven fully integrated approach
 - » Regulations need to support, not prevent, innovation
- Horticulture
 - » Not all producers have the same vision and mindset
 - » Project lifted quality across entire crop, not only PP
 - » Collaboration enables effective consumer education
- Meat
 - » If educate the consumer, price is not an issue
 - » Innovation creates category extension at retail
 - » Must be greater information sharing along the VC

Determinants of Success

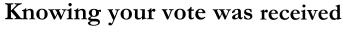
- Attitude is the primary ingredient
 - » Not latest technology, location, sector, market
 - » Enables businesses and value chains to learn, CI
- Ability to react quickly / effectively results from
 - » Creating the correct cultures and incentives
 - » Leadership creates the enabling environment
- Acting upon VCM principles at enterprise level
 - » Creates difficult to replicate levels of competiveness
 - » Not implemented the same in every value chain
- Understanding drivers of consumer behaviour
 - » In specific segments of the market
 - » Need not be expensive or complex process

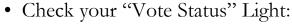




Benefits of Today's Forum

- A. Gained insights that will enable me to develop skills that can be applied to my business/role
- B. Acquired knowledge that will enable me to develop innovative value chain(s)
- C. Learned how others have succeeded through innovating from a value chain perspective
- D. Able to check my progress in developing an innovative collaborative value chain
- E. Saw opportunity to develop stronger valuecreating partnerships between industry, government and academia



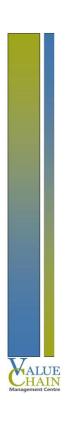


- » Green light = your vote was sent AND received.
- » Red flashing light = you need to vote again.
- Not sure you saw the light?
 - » Just vote again.
- Want to change your vote?
 - You can vote again as long as the timer is still going.

Reminder

- Please return i-Clickers
- On-line follow-up survey
- Reception

iclicker



Thank you