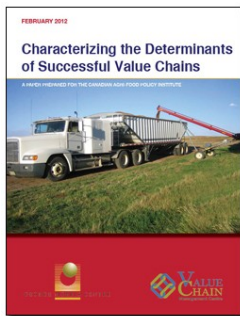


Characterizing the Determinants of Successful Value Chains



Value chain management (VCM) is more than a theory. It is a strategic business approach that is helping a growing number of businesses increase their long-term competitiveness. It would be extremely difficult, if not impossible, to achieve such competitiveness by operating as an individual business within a fragmented value chain. This paper addresses misconceptions surrounding value chains and VCM. It provides an informed, objective perspective on VCM by demonstrating how value chains operate at the business level rather than the sector or sub-sector level. It also describes the factors required for effective VCM. In doing so, the paper provides businesses with a roadmap for improving their competitiveness. It also provides a basis for more informed discussions to occur on developing initiatives that could lead to a more competitive and profitable Canadian agri-food industry. Prepared for: Canadian Agri-Food Policy Institute.

Available online: http://www.capi-icpa.ca/highlights2012/GMvaluechains_19mar12.html

Assessing the Opportunities and Challenges Facing Canada's Specialty Food Industry



This report provides a platform for establishing a more informed debate on the nature and size of Canada's Specialty Food sector, and how industry and government can work together to increase the sector's long-term competitiveness. It achieves this through defining (at a high level) the size and nature of the Canadian Specialty Food sector and examples of the market opportunities that lie before it. In particular, the report focuses on: red meat, produced and marketed according to religious law (halal lamb and goat); grains produced, processed and marketed as gluten-free products (buckwheat and pulses); and seafood from the east and west coasts of Canada

(primarily shellfish and Kazunoko). The report also identifies challenges that, left unaddressed, could prevent the sector from taking full advantage of opportunities identified through the research. Prepared for: Agriculture and Agri-Food Canada.

Available online: <http://www.valuechains.ca/usercontent/documents/Specialty%20Food%20VCA%20FINAL%20English%202011.pdf>

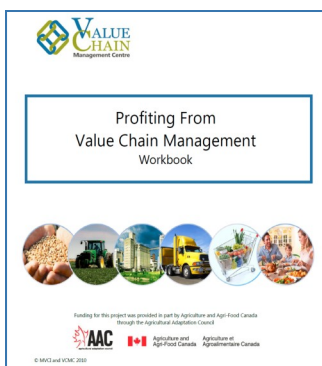
Consumer Market Research Strategic Study for Fresh Grapes and Fresh & Processed Apples and Tender Fruit & Orchard Fruit & Vineyard Quality Assessment throughout the Value Chain



The report serves three primary purposes. It quantifies consumers' satisfaction with and perception of Ontario fruit versus imported fruit. Specific fruits included in the research are apples (fresh and processed), pears, peaches, plums and table grapes. The report also assesses the effectiveness of current practices and procedures that Ontario's fruit industry uses to manage quality, and whether they result in Ontario fruit possessing attributes that meet consumers' definitions of quality and value. The report recommends changes to industry practices and initiatives that could enhance the profitability of Ontario fruit value chains through reducing costs and, potentially, increasing revenue along the entire value chain, from the orchard through to consumers. Prepared for: Vineland

Research Innovation Centre. Contact nicole@georgemorris.org for a copy of the report and consumer studies.

Profiting from Value Chain Management Workbook



This comprehensive workbook based on Lean Process Improvement principles will help you:

- Measure your current performance
- Identify the root causes of factors found to impact financial performance
- Define your customers and consumers
- Define exactly what your customers and consumers value, and why
- Limit the impact that factors you cannot control have on your business
- Define how best to manage factors that you can control
- Implement sustainable improvements
- Prioritize what to do now versus later
- Identify profitable market opportunities
- Implement the processes required to continually improve performance
- Establish effective governance systems
- Identify how to better manage risk
- Create an improved vision for the future and plan how to get there

More information at: <http://www.valuechains.ca/purchaseresources.htm>

Collaborating to increase the value of Ontario peaches



In conjunction with peach producers, Vineland Growers Co-operative Ltd., and Loblaw Companies Limited, the Value Chain Management Centre undertook research to identify whether innovative growing, packing and merchandizing practices could assist Ontario's stone fruit industry to capture greater value from the market. The research took three forms. A "production" experiment was undertaken to establish which of the factors derived from a visit to California had the greatest effect on yields and peach qualities: foil, summer pruning and/or leaf thinning. In-store interviews were conducted with 1,200 peach consumers to establish the relative importance of factors that drive purchasing behaviours. New processes were implemented along the value chain and their performance monitored.

Available online: <http://www.valuechains.ca/documents/Ontario%20Peaches%20%20Case%20Study.pdf>

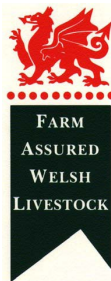
Taste the Difference: The memory of poor quality lasts longer than the memory of the price paid



Formed in 1978, Perfection Fresh Australia (PFA) is a family-owned company, headquartered in Sydney, Australia. Competing on price against 150 other commodity traders situated within the Sydney wholesale market, market share had come at a cost. By 1992, PFA was close to bankruptcy. Fifteen years later, PFA had expanded at an average of 12.8 percent annually into a 100+ million dollar national company, with operations in Sydney, Melbourne, Brisbane, Bundaberg and Perth. Learn how their management team achieved this dramatic turnaround through applying value chain management approaches to their business.

Available online: <http://www.valuechains.ca/documents/PERFECTION%20FRESH.pdf>

Decreasing costs and increasing revenue: Through trust, feedback, and attention to detail



Livestock Marketing is a case study in how producers can have greater control over their destiny. A small group of like-minded lamb producers in Wales formed a tri-party approach to supply Waitrose, a leading UK grocery chain. From its humble beginnings, the Livestock Marketing initiative has expanded greatly and now more than 400 producers supply over 200 Waitrose stores with Welsh, British and organic lamb. Integrity, open communication, loyalty, and strong governance at all levels of the chain have resulted in a level of trust that underpins the success of this initiative. Learn about the extensive benefits for all parties involved in this case study.

Available online: <http://www.valuechains.ca/documents/LIVESTOCK%20MARKETING.pdf>

Opportunities to Increase Profitability by Responding To Consumers' Definitions of Value: A Case Study in Fresh Pork



To illustrate the benefits that businesses operating in Canada's agri-food industry could gain from taking a collaborative approach to innovation, the Value Chain Management Centre coordinated an international team to study a value chain supplying fresh pork to consumers in Atlantic Canada. The project team was comprised of Australian, British and Canadian researchers who possess expertise in value chain management, systems theory, consumer marketing, primary production and agri-food innovation. This case study presents an objective point-in-time assessment of a specific value chain's ability to innovate in relation to a defined segment of the consumer market. It then proposes how the same businesses could work together more effectively and profit by delivering additional recognized value to its target consumers.

Available online: <http://www.valuechains.ca/usercontent/documents/Atlantic%20Pork%20Case%20Study%20-%20FINAL.pdf>

A full account of these case studies and others are available in an educational DVD set at:

<http://www.valuechains.ca/interactivedvd.htm>

