British Columbia's Pork Industry: Initial Assessment of Opportunities to Create Long-Term Competitive Advantage

Discovery Phase Outcome Report

Authors:
Martin Gooch, PhD
Benjamin Dent, PhD

Editor:
S. Caroline Glasbey

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Preface

Value Chain Management International (VCMI) conducted an initial assessment of how BC's pork industry could create a long-term defensible competitive advantage through adopting value chain management processes and behaviours. To achieve this, VCMI undertook a concise critique of "where stakeholders from BC's pork industry are now" through the completion of confidential discussions with 28 industry representatives from along the BC pork value chain. Insights from this series of discussions identified options for developing the capabilities required to enable sustainable performance improvements within BC's pork industry.

The work involved reviewing available data and reports produced from prior initiatives associated with BC's pork industry. Activities such as the collection and analysis of objective measurable data or the implementation of primary consumer research was beyond the project's scope. This assessment is primarily therefore a summation of experiences and perceptions expressed by stakeholders from BC's pork industry. The recommended next steps that form the conclusion of this report were developed from having analyzed respondents' perspectives and from VCMI's extensive experience in value chain research and development.

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Growing Forward 2
A federal-provincial-territorial initiative

British Columbia

Canada

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1 Introduction

Businesses' financial sustainability rests on creating greater value than it costs them to operate. Every business has suppliers from which it buys inputs. These inputs are transformed into products or services that businesses sell to customers who perceive them as offering greater value than those available from alternative sources. Every business therefore operates within a value chain.

The meat industry is unique. It constructs, deconstructs and converts products as they move along the value chain. For the most part, the traditional meat industry is a commodity based sector, with a significant number of production, processing, distribution and market-related factors impacting the profitability of individual businesses and their environmental footprint. Businesses' profitability rests on producing the attributes that impact consumers' perception of meat and willingness to pay as effectively and efficiency as possible. Achieving this from a whole of chain perspective offers opportunities to capture value in ways that are extremely difficult (or impossible) for competitors to replicate.

Effective management of the value chain rests on the involved businesses possessing the ability and motivation to make then implement management decisions in a structured reiterating process that reflects customers' and consumers' perceptions of value. To be effective at maximizing opportunities for creating value in the eyes of customers and end consumers and to be efficient in how it operates, a pork value chain operating in British Columbia (BC) must:

1) Understand what customers and consumers value in BC pork products and focus on creating and delivering this value,
2) Establish strategic collaboration and operational co-operation through having implemented complementary metrics and management routines along the pork chain, and
3) Strive for continuous innovation and improvements in both effectiveness and efficiency.

This report contains an initial assessment of the extent to which the BC pork industry appears to reflect the above description of factors critical to determining a value chain's effectiveness and efficiency. Concise conclusions drawn from reviewing reports on prior industry initiatives and confidential discussions held with key representatives from along the BC pork value chain during the week of July 17, 2017 are presented. This is followed by suggested next steps for how BC's pork industry can achieve long-term success by creating a sustainable competitive advantage.

2 Research Methodology

The research took two forms — the results triangulated to form an informed high-level perspective of the BC pork industry's current situation.

2.1 Reviewing Reports on Previous Industry Initiatives

Documents reviewed by VCMI and discussed with select industry stakeholders ahead of the visit to BC included strategic plans for BC's pork industry completed in 2008 and 2009, a biosecurity work plan completed in 2009, market research completed in 2014, and highlights from the BC Hog Marketing Commission's (BCHMC) strategic plan for 2017-2019.

While there has been considerable work completed on behalf of and by the BC pork industry, the review concluded that the work has not provided a solid market-orientated foundation on which producers, processors and other stakeholders can base informed business decisions and investments, then monitor progress. While terms like quality, niche and premium were regularly mentioned through the documents, without quantifiable specifics that can be acted upon, these terms are conceptual motherhood statements. Reasons for the lack of quantifiable specifics included that the market research largely comprised broad anecdotal references to segmentation existing in the consumer market. Efforts aimed at raising consumer awareness for BC pork reflected commodity thinking. The materials do not provide guidance for the BC government to determine cost-effective means to enable and motivate the province's pork industry to break away from the commodity-based mindset and business approach that typifies Canada's pork industry.

2.2 Gathering Stakeholder Perceptions

During the week of July 17, 2017, the confidential perspectives of 28 industry stakeholders were gathered through personal meetings and phone calls. Participating stakeholders included producers, processors, distributors to retail and foodservice, retailers, as well as service providers, including veterinarians and feed manufacturers. Insights sought during the discussions, some of which lasted close to two hours, pertained to opportunities and challenges faced by the BC pork industry. Stakeholders' perspectives towards the comparative impact of specific factors on management decisions and overall businesses' performance was also explored. The focus of this exploratory visit was to provide an initial assessment of opportunities to improve the performance of BC's pork industry.

Factors explored during the discussion included

- Where along the value chain impediments to improved performance occur and potential root causes; and
- Lessons learned from innovative value chain initiatives implemented in pork or other food industry sectors that BC's pork industry could benefit from their implementation.

Discussion with industry stakeholders took the form of semi-structured interviews. This approach produces standardized responses for subsequent analysis, while simultaneously allowing the researcher to drill into key areas of interest as they arise. The overarching questions used to guide stakeholder discussions, along with a concise summary of stakeholders' responses, forms the Appendix.

Stakeholders' responses to issues and opportunities impacting the BC pork industry, and how the industry could transform into a more commercially viable and sustainable sector than at present, can be grouped into the five categories listed below:

1. Production systems, including pricing
2. Processing, distribution and marketing
3. Retail and foodservice
4. Consumer perceptions towards pork, BC products
5. Stakeholder relationships, interactions

An appetite exists for change. All of the stakeholders who contributed to this exploratory study voiced an openness to participate in initiatives that can reverse (at minimum arrest) the historical decline that has impacted BC's pork industry. The enthusiasm and interest individual respondents voiced towards engaging in collaborative value chain orientated efforts – and the extent to which they believe pragmatic sustainable solutions can be developed to reverse industry's fortunes – differ, largely due to prior personal experience and their current situation.

The following section presents conclusions drawn from the data gathered from having reviewed prior documents and the in-depth stakeholder interviews. It describes factors that have shaped the BC pork industry and individuals' perspectives of realizable future opportunities.

3 Research Conclusions

3.1 Current State

The situation in which the BC pork industry finds itself is not the fault of any specific person, organization, governance arrangement or regulation. The present situation has been arrived at over decades, driven largely by a belief that doing things better within the same overarching system will produce a stronger more sustainable pork industry in BC. This has led to some operational and tactical innovations, often in isolation at various points along the value chain. It has not led to the strategic market-driven innovation required to produce robust sustainable value chains, which would collectively amount to a viable BC pork industry.

Stakeholders voiced concerns about the future of BC's pork industry, some citing the problems of the Atlantic region as an example of BC's future. In general, stakeholders believe that unless transformative change occurs in BC within the next five years, particularly in hog production, the industry will continue to decline. Many believe that within five years critical mass could reach a tipping point, where the professional services and infrastructure required to sustain a commercial industry can no-longer exist. Factors driving this change include 1) tired hog barns, 2) the need to invest in changing production practices such as loose housing, 3) farm debt, 4) endemic disease, and the age and skillsets of producers and their workforce. These factors are symptoms of underlying issues.

Opportunities undoubtedly exist to achieve strategic market-driven innovations that can result in a more robust economically healthy BC pork value chains. The BC market is segmented, with distinct consumer choices driven by a range of influences. These include 1) quality factors associated with a superior eating experience; 2) experiential factors, such as the place of purchase and meal occasion; and 3) credence factors, such as the BC environment. Segmentation also exists in pork export markets supplied from BC. Innovative, commercially savvy entrepreneurs exist at all levels of the industry. Interest exists amongst influential industry stakeholders to secure domestic and export market opportunities, some of which can only be secured by businesses situated along the value chain collaborating strategically and operationally.

The root causes of challenges faced by the BC pork industry (subsequently resulting in the current situation) include factors associated with the wider pork industry (over which BC stakeholders have little to no control) and factors specific to how individual enterprises and value chains operating within the BC pork industry operate (over which BC stakeholders do have control). Listed below are wider industry and BC specific factors identified during the research. That these factors have not previously been explicitly teased out from each other appears to be one of the reasons that less progress has been made by industry in securing the promising opportunities that undoubtedly exist. This has led unconsciously to a history of defaulting to looking for solutions in detailed, common operational issues, while both strategic and nuanced opportunities are overlooked.

3.2 Macro (Wider Industry) Specific Causes

- The present accepted model of tying hog prices (directly or loosely) to Iowa-Minnesota carcass hog prices quoted by the United States Department of Agriculture or Chicago Mercantile Exchange issued futures and options is entirely detached from consumers' perceptions of value and the cost of hog production in BC. Competing directly against commodity hogs/pork raised on the Canadian Prairies or in the US is not an option for producers in the Lower BC Mainland, particularly given the lower productivity and higher COPs that typify BC hog operations.

- A focus on efficiency in production and processing has come at the expense of creating consumer recognized value beyond that associated with a commodity. The lack of grading standards related to meeting different segments of the consumer markets' perceptions of quality and value have exacerbated the disconnects that exist between production and consumption.

- Consumers perceive pork to be a good dependable, though unexciting, low-cost alternative to beef and chicken, in particular, though also to veal and lamb. Consumers perceive pork to be a commodity, resulting in them being comparatively detached from pork as a food item. Fresh pork in particular is viewed more from a sustenance than experience perspective. The industry's historic approach to production, processing and marketing has done nothing to challenge this perception — despite some enterprising value chains clearly finding differentiated opportunities.

3.3 Micro (BC) Specific Causes

- The BC pork industry comprises some innovative, entrepreneurial market-oriented individuals. These individuals have, however, operated in relative or complete isolation, leading to initiatives and innovations that they fostered failing to attain their full potential. Reasons for this include the lack of an enabling environment suited to value chain formation existing in BC, resulting in individuals being unable to untie themselves from a commodity-centric environment.

- As finances and economics tightened, individuals' perspectives became increasingly polarized, with strong adversarial individuals coming to the fore and shaping the industry's culture. This progression is a natural human behaviour in challenging circumstances, though has resulted in steadily weaker business relationships, less effective communication and defensive behaviour.

- Each group of stakeholders that together comprise the BC pork industry knows that the other exists; however, minimal (if any) interactions occur between the individual groups — beyond that required for them to operate from a transactional perspective. This has led to a lack of common understanding and little empathy existing between individual stakeholders.

- Producers do not cooperate well. The analogy that could be used to describe producer groups, such as the BCHMC, is of a brotherhood composed of members who talk the language of collaboration, though in practice do not act collaboratively.

- Producers have historically left the marketing of pork to processors and businesses operating further downstream. This has resulted in marketing becoming a promotional speech, trying to persuade shoppers to buy BC pork, rather than engage in a dialogue where the factors which drive shoppers' purchasing decisions are identified and then communicated up the chain to inform the decisions of retailers, foodservice, distributors, processors, abattoirs and producers. Combined with factors described above, this has resulted in producers and the BCHMC being disconnected from consumers. It is also the reason why marketing efforts undertaken by the BC pork industry have proven relatively ineffective and unsustainable.

- While the production, processing and marketing of round hogs is a tactical rather than strategic innovation that has occurred in BC, its existence illustrates that a "made in BC" hog pricing model can be developed and sustained over the long term. That round hogs are sold to a price conscious segment of the consumer market underlines the opportunity to develop an effective and sustainable price discovery model for BC pork that targets higher-value market segments — if it is sufficiently differentiated and based on evidence, not anecdote, of what determines purchasing decisions.
- From a pork marketing perspective, there is relatively little direct competition between the two Lower Mainland processors (Britco/Donald's and Johnston's). The two processors do, however, directly compete on the procurement of hogs. That cordial transactional relationships, not strong strategic relationships, exist between producers and processors is an important reason for why competition for hogs has not benefited BC producers in a significant long-lasting way.
- Stakeholders possess conflicting definitions of quality and value. That the majority of stakeholders' definitions of quality are based on assumption and lack objective measures speaks to their disconnection from consumers and industry's transactional culture.

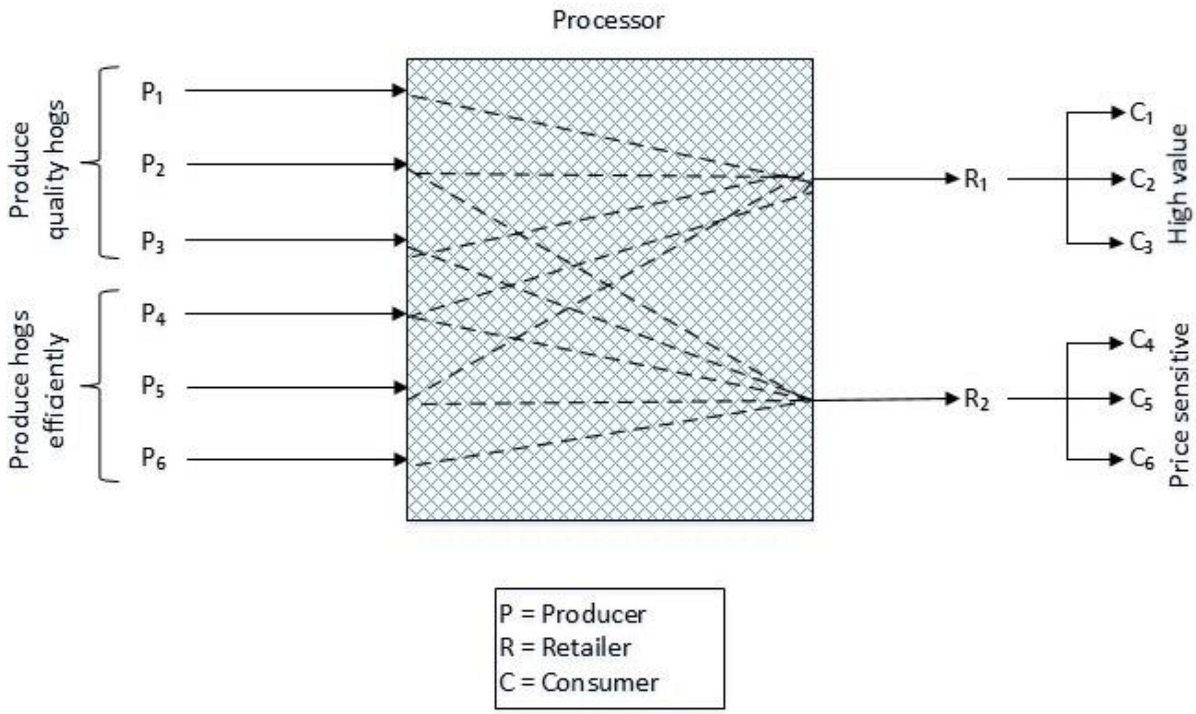
3.4 Current versus Future State

The schematic diagrams and descriptions presented below present contrasting perspectives. The perspective shown in Figure 1 is how BC's pork industry currently operates and the reasons why this has translated into a pork industry that faces significant challenges on a number of fronts. The perspective shown in Figure 2 is how BC's pork industry could operate and the resulting sustainable benefits that this would produce.

3.4.1 Current State

- Processors do not sufficiently understand requirements of their customers, nor their shoppers/diners.
- This results in processors not possessing effective metrics to determine how to allocate which pork goes to which customers and consumer markets, and how to pilot the entry of new products into market segments.
- This results in retailers/foodservice customers typically being supplied with the most convenient batch of products, not most suitable in terms of quality. Sometimes customers' shoppers/diners will get high quality, sometimes low quality. It also results in transactional and static, not strategic and continually improving, supply arrangements.
- This variability/unreliability of value for money and eating experience perpetuates consumers' lack of respect for pork product, especially amongst those who would be willing to pay more for the attributes they value, but, from experience, find they cannot be sure they will get those attributes even if they pay more.

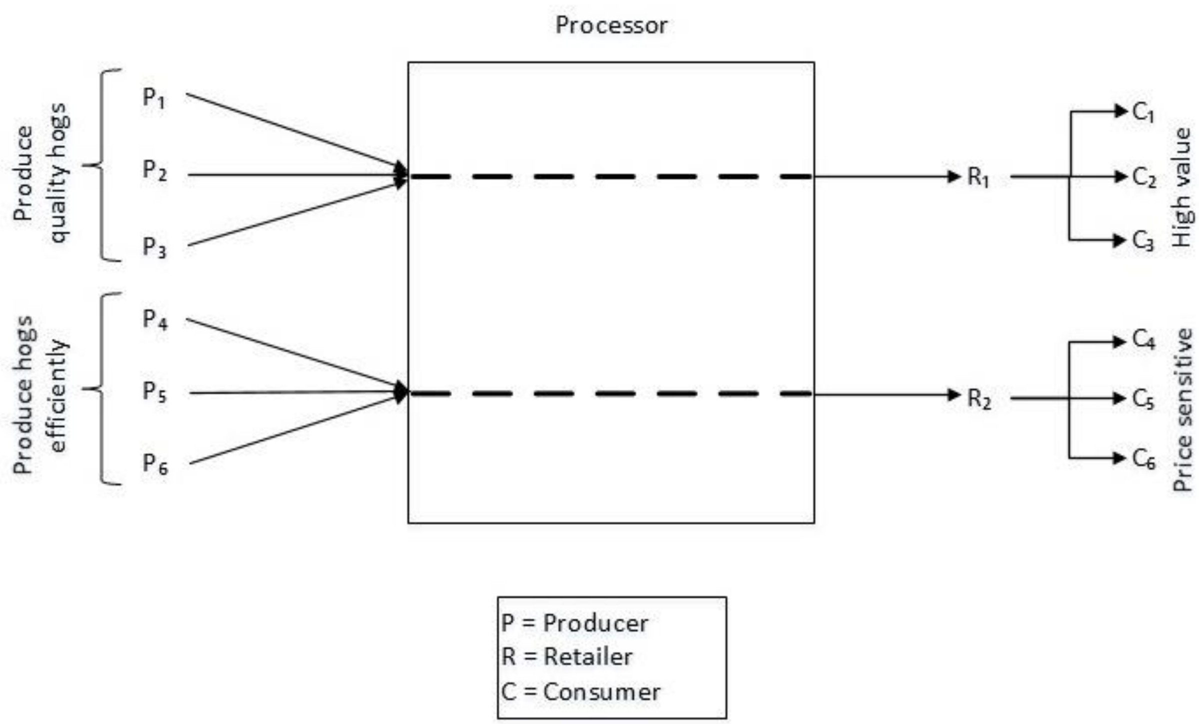
Figure 1: Current State



3.4.2 Future State

- Processors understand the attributes required by particular customers, based on the market segments of their shoppers/diners (what attributes they value, and for which they are willing to pay).
- Processors identify the metrics of assessing hog carcass quality, and upgrade their own processes, so that hogs can be allocated to appropriate types of customers and markets.
- Armed with insights into specific markets and metrics associated with their supply, processors work with producers to match producers' resources, ability and motivation with demand for different quality/volumes of hogs, and develop appropriate pricing models.
- In practice, this means the processors are able to ensure that high quality pork consistently goes to high-end market segments, while efficiently produced pork goes to price-sensitive market segments. Market segments supplied may be both domestic and export, thus enabling the most effective and efficient carcass balance and value generation possible.

Figure 2: Future State



The final section of this report proposes initiatives for enabling BC's pork industry to transform from a stagnant industry with a questionable future to a dynamic industry with enormous opportunity.

4 Recommended Next Steps

Industries typically comprise multiple value chains. Examples of exemplary meat value chain initiatives that succeeded by purposely taking a value chain perspective to the raising of animals and processing, distribution and marketing of meat possessing attributes desired by target markets include Blade Farming, Livestock Marketing, and Murrellen Pork. An example of Canadian innovation in pork is Conestoga. These initiatives share commonalities that, if replicated in BC, the exploratory study suggests would enable BC's pork industry to succeed by establishing market-orientated business practices that are currently beyond its grasp. Common factors that ultimately determined the success of the initiatives identified above are that businesses took a

1) Systemic (vs. systematic) approach to creating value for customers and consumers,
2) Chain-based (vs. solely business-based) to monitoring and incentivizing performance,
3) Determinants (vs. outcomes) approach to establish then manage processes used to create customer and consumer-recognized value, and
4) Collaborative approach, only partnering with likeminded visionary partners who were not distracted by factors commonly associated with the wider industry.

These, like other value chain initiatives operating in the agri-food industry, benefit the industries in which they operate by fostering unique market-drive innovations.

The following are VCMI's recommendations for motivating and enabling the development of value chain initiatives in BC's pork industry. The extent to which the recommended initiatives focus on domestic versus export opportunities would be determined through consultations with industry and the BC government.

4.1 Value Chain Pilot Options

To achieve transformative change in the BC pork industry, a strategy needs to be developed where each member of the chain recognizes that facilities, aspirations and attitudes vary across the industry. Rather than look for silver bullet solutions for the whole industry – which tend towards unrealistic expectations or the lowest common denominator – the need exists for a strategy based on nurturing distinctive value chains, composed of businesses possessing similar goals and capabilities. This approach needs to be based on a coherent, indivisible process that produces insights and opportunities which benefit businesses operating in BC's pork industry. VCMI recommends the following:

1) VCMI will undertake a value chain analysis (VCA) that builds upon the exploratory investigation. The VCA will produce a detailed diagnosis that ensures subsequent activities produce long-term benefits for BC's pork industry.

2) Through consumer research, VCMI will determine the drivers of purchasing decisions amongst different market segments: where to shop, what to buy, what to pay. This will ensure that processors' and retailers' interest is engaged, resulting in their committed participation.

3) Through process analysis, VCMI will determine the drivers of processing efficiency, which are important for all value chains, and especially those which are targeting price-sensitive consumer segments. This will ensure processors' interest is engaged.

4) Consequently, VCMI will identify the value-based critical control points along value chains. These will be the priorities for upgrading current practices, from input supplies to point-of-sale, to ensure that the value chains operate effectively. Upgrades must not be implemented in isolation, otherwise value created in one part of the chain is destroyed in another.

5) VCMI with industry will propose value-based hog pricing models that reward those in the chain who meet the metrics associated with the critical control points and target markets for which pork is being produced.

4.1.1 Consumer Research Methods

The consumer research undertaken as part of the VCA and/or other activities described above will encompass local and/or export markets, chosen in conjunction with industry stakeholders. The research will focus on consumer behaviour and drivers of behaviour, not consumer attitudes. Research methods that achieve these outcomes include the following:

1. **Sensory testing.** As shown by programs such as Meat Standards Australia,[1] testing the comparative eating experience of meat produced using a combination differing genetics and production/processing practices can provide detailed actionable insights that can be acted upon by industry to capture added value along the entire value chain.

2. **Loyalty card data analysis.** This approach assists in building relationship with retailers. Potentially combined with the piloting of test products, packaging options and other merchandizing mechanics, it provides explicit insights into the actual behaviour of individuals across and within different segments of the market.

3. **Intercept interviews at point of sale and shopper observation.** These produce considerably more accurate insights in consumers' reactions to products, packaging and merchandizing mechanics, by soliciting reactions in store than through static interviews or phone calls. Observing shopping behaviour increases the ability to translate consumer insights into commercial decisions. Intercept interviews and shopper observations can be undertaken in conjunction with the piloting of new products, packaging and merchandizing mechanics.

5 Value Chain Management International (VCMI)

VCMI is dedicated to improving the profitability and competitiveness of commercial businesses through promoting and enabling the management of closely aligned value chains. VCMI helps businesses develop closer strategic relationships with customers and suppliers, resulting in their being able to learn and adapt more effectively and realize greater profits than if operating unilaterally. VCMI has completed meat projects, including pork, in Canada and internationally.

VCMI's global consulting team is located in Canada, Europe, and Australasia, and comprises world leaders in quality management, value chain innovation, experiential management training, consumer marketing, and commercial-focused environmental sustainability. The team's expertise in lean thinking, six sigma, sales processes, management systems, consumer research, and value chain analysis has resulted in highly measurable improved profitability for their clients in the agri-food, aeronautical, automotive, pharmaceutical, and service sectors.

[1] https://www.mla.com.au/marketing-beef-and-lamb/meat-standards-australia/

6 Appendix: Stakeholder Interview Questions

1) In one or two sentences how would you describe the BC pork industry, and why?

- Unsustainable in its current form, resulting in it dying a death from a thousand cuts, because it cannot compete on the same footing as large scale, highly efficient prairie and US operations. It is a complex situation with factors such as new legislation (e.g. loose housing) and fluctuating exchange rates having the potential to exacerbate the BC industry's demise.

- Scarred by an emotional rollercoaster that has left many individuals harbouring resentment and distrust for each other. Because players operating in the BC industry are typically less aggressive than their US counterparts, or other sectors such as beef, these emotions have not broken out into outright hostility or acted as a pressure cooker driving broad market-orientated change.

- Fragmented and isolated, resulting in participants being uninformed and incapable of taking advantage of the market opportunities that exist or could be developed domestically and internationally through strategic collaboration. This has led producers to invest in perceived easy-win panaceas, such as "local," expecting this to enable them to capture premiums without having to fundamentally change.

The above factors were stated as being most evident in primary production.

2) Where do you see BC's pork industry five years from now?

- Unless fundamental change occurs, most respondents expect the industry to continue on its slow decline — with processors and downstream businesses forced to increase the importation of hogs and pork from other provinces, the US, or further afield to survive.

- Those producers that do exist will be niche, supplying farmers markets or other outlets that are relatively inconsequential in terms of the overall market.

3) On a scale of 1-5, how informed do you feel on attributes for which pork consumers value beyond that offered by commodity pork?

Shown below are responses according to respondents' role in the chain. A number of respondents commented on both their own level of knowledge and the level of knowledge that they feel is possessed by a typical producer (defined as a producer not involved in the direct marketing of pork). Respondents feel uninformed about attributes that pork consumers value and for which that are willing to pay.

A comment invariably voiced by respondents to this and the subsequent question (3a) is the lack of market research that would enable them to make informed management and marketing decisions.

Informed on attributes beyond commodity pork	**Median**	**Average**
Typical producer	2	2.0
Producer involved in direct marketing	4	3.9
Processors/distributors	3	2.7
Retailers/foodservice	4	3.8
All respondents	**3.5**	**3.3**

a. *On a scale of 1-5, how actionable is this information from a management perspective?*

Respondents feel even less knowledgeable about market insights that would enable them to make more informed management decisions than is presently possible.

Action ability of information on attributes	**Median**	**Average**
Typical producer	1	1.5
Producer involved in direct marketing	4	3.9
Processors/distributors	3	2.3
Retailers/foodservice	4	3.8
All respondents	3	3.1

4) What is your definition of quality hogs/pork? Does your definition include objective measures?

Respondents' views on the most common definitions of quality hogs and pork are listed below. A common supplementary response was that the current process of grading and valuing hogs on leanness is a primary reason for why fresh pork has gained a reputation as being a dependable though unexciting meat amongst consumers. The order in which the definitions are listed reflects the approximate number of times on which they were mentioned.

Hogs	**Pork**
• Animal welfare	• Consistency
• Animal health	• Colour (pink, not red)
• Minimal (or zero) antibiotics	• Marbling
• Consistency	• Cut size
• Breed	• Packaging
• Traceability	• Firm (not sloppy due to PPS)

5) What are the top 3 to 5 factors that prevent BC's pork industry securing market opportunities?

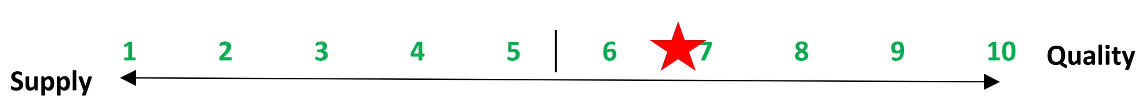
Listed in approximate order of the number of times mentioned, the most common factors identified by respondents as impacting the ability of BC's pork industry are presented below.

- Lack of consumer insights, combined with an inherently segmented marketplace.
- Producer attitudes and behaviours have not sufficiently evolved since BCHMC lost its legislative power; and BCHMC has itself not evolved to reflect this new dynamic in terms of the services provided to industry.
- Adherence to a US based hog pricing model for market hogs that has no correlation to cost of production and consumers' perceptions of quality.
- Disconnects between market demand / expectations and supply arrangements / processes due to industry fragmentation, horizontally within a sector (e.g. production) and vertically between sectors (e.g. production and processing). This and the previous point have resulted in a lack of true partnerships and strategic market-driven innovations.
- The three points listed above have translated into financial constraints, leading to tired outdated barns and infrastructure. In turn, this has created underlying disease and other herd health issues that have reduced productivity, increased COP, and led to the production of inconsistent hogs/pork compared to BC's major competitors (e.g. prairie and US producers).
- Geographic isolation increasing input and production costs (including feed and land values).
- Lack of emotional connectivity between consumers and pork compared to alternative meats, particular beef.
- Inability to viably compete on price against commodity pork.
- Lack of availability and high cost of skilled labour, and ability to employ skilled labour full time.

6) Where on this continuum does BC's pork industry need to focus its greatest efforts?

Respondents overwhelmingly believe that the BC pork industry must focus on improving quality ahead of increasingly supply. This does not negate the importance of supply, particularly (as can be seen) from the perspective of processors.

Where BC industry needs to focus effort	Median	Average
Typical producer	7	6.8
Producer involved in direct marketing	6	6.5
Processors/distributors	5.5	5.6
Retailers/foodservice	8	8.0
All respondents	6.25	6.7



7) What factors have the greatest impact on value and your willingness to source BC hogs/pork?

a. Please categorize each as "deal breaker," "important to have," and "nice to have."

Deal breaker	Important to have	Nice to have
Animal welfare	Breed	Clean labelled packaging
Price / margin	Meat colour	Consistent long-term pricing
Availability	Consistency	Predictable quality
Local partner	Marbling	
Food safety	Local	
Meat quality	Traceability	

8) If measuring the performance of a BC pork value chain, what metrics would you use?

- Animal welfare
- Cost of production
- Productivity (incl. sow birthrate, mortality, feed conversion rate, etc.)
- Processing efficiency (incl. meat yield, condemned parts/carcasses, etc.)
- Meat quality (incl. color, pH, marbling, etc.)
- Strength and nature of buyer/supplier relationships
- Inventory turns
- Predictability / consistency of supply and quality

9) What jurisdictions or initiatives would you like to see BC's pork industry emulate, and why?

- Niche pork (US)
- Grass fed beef/dairy
- Chicken industry
- Beef industry in general — including lobbying, awareness raising and marketing (BIC)