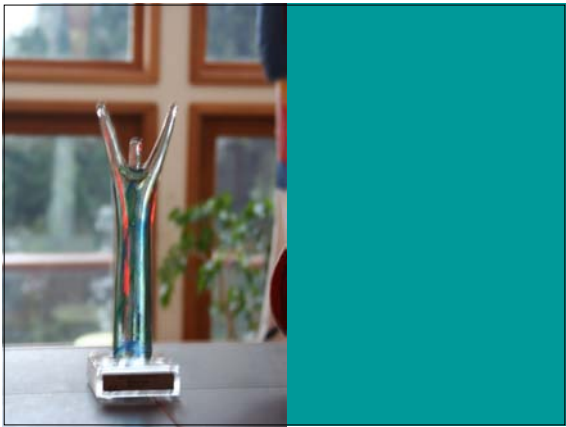
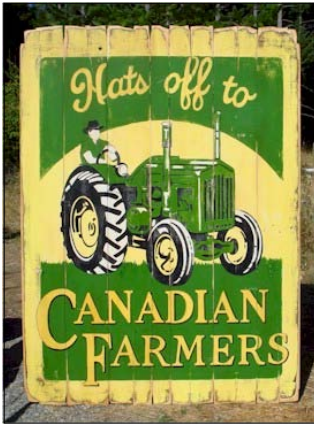


"Food security is as important to this country's future well-being – and the world's - as energy security. We need to produce more food. We need to do it sustainably. And we need to make sure that what we eat safeguards our health..."

UK Environment Secretary Hilary Benn
Food 2030 Strategy
Oxford Farming Conference
January 6, 2010

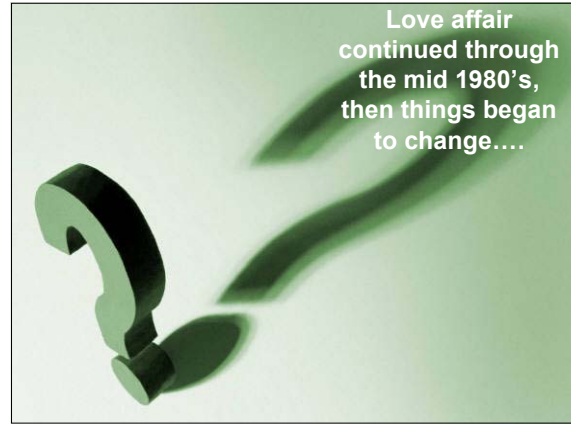




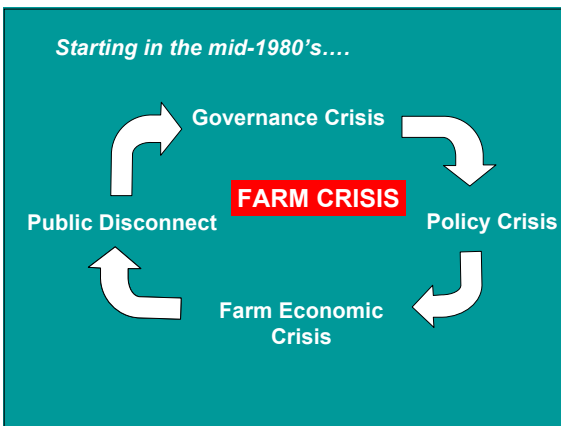
The 20th Century

BC Apple Marketing Board
 Canadian Wheat Board
 Supply Management
*milk, chicken, turkey,
 eggs. hatching eggs,*

RESPECT
 for
FARMING



Love affair
 continued through
 the mid 1980's,
 then things began
 to change....



- ➔ ✓ **POLICY CRISIS**
- ✓ **Economic Crisis**
- ✓ **Public Engagement**
- ✓ **? Alberta Elk Ranchers**

- ### POLICY CRISIS
- ✓ erosion of regulatory & policy sovereignty
 GATT ➔ WTO ➔ FTA ➔ NAFTA
 - ✓ market concentration pre/post farm gate
 e.g. beef, hogs, grain, dairy
 - ✓ weakening of Canada's Competition Act
 - ✓ erosion of local infrastructure
 - ✓ drop in farm policy support
 - ✓ loss of domestic market share

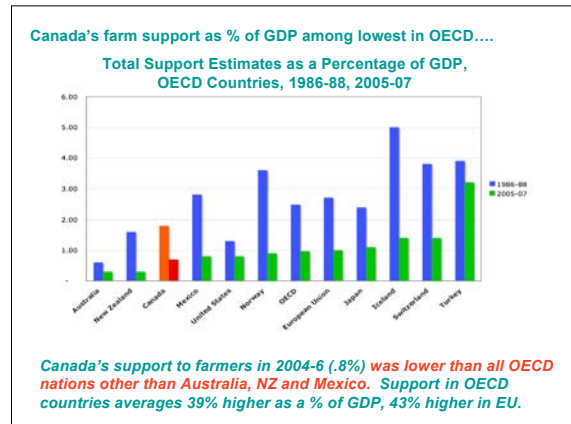
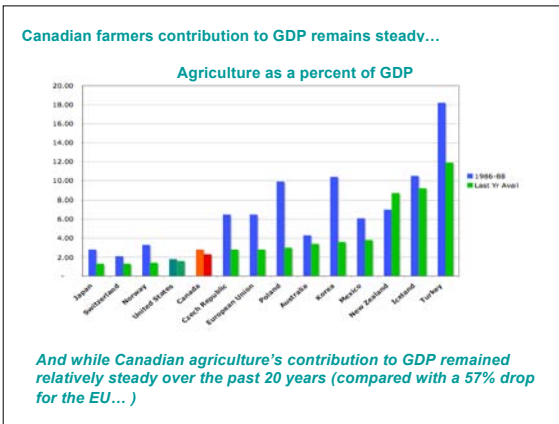
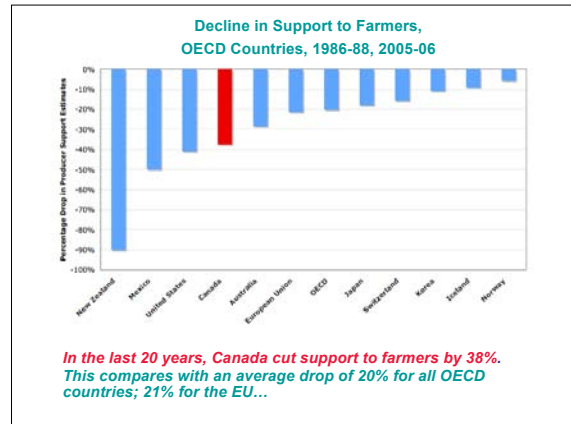
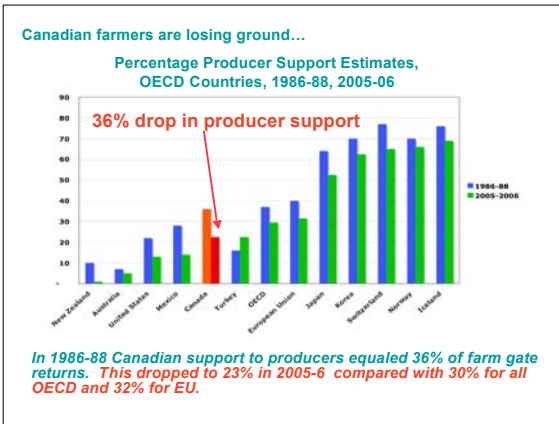
- ### POLICY CRISIS
- ✓ **BEEF**
 - ✓ mid 80's - imports of boxed beef displace Canadian beef
 - ✓ packer concentration + ownership feeder cattle
 - ✓ BSE - Ottawa's failure to act
 - ✓ **GRAIN**
 - ✓ CWB = premiums \$35-40/tonne due to price+transport
 - ✓ big grain companies, US farmers and "ginger group" driving attack
 - ✓ electoral interference, muzzling, board interference
 - ✓ unprecedented government attack on good farm policy
 - ✓ **HOGS**
 - ✓ Right wing think tank solution
 - ✓ Disaster for farmers and communities

POLICY CRISIS

- ✓ MILK
 - ✓ Small cooperatives merge
 - ✓ Parmalat and Saputo take over
 - ✓ Butter-oil sugar blends replace milk in ice cream
 - ✓ Milk protein concentrates replace milk in cheese
 - ✓ Legal challenge of CFIA's cheese regulations won but being appealed
- ✓ SUPPLY MANAGEMENT
 - ✓ Consistent undermining at WTO
 - ✓ Internal Agreement on Trade (technical standards)
- ✓ ESCALATING FEED AND FERTILIZER PRICES
 - ✓ ethanol
 - ✓ soon only two major fertilizer suppliers
- ✓ PLUMMETING FARM SUPPORT VS TRADING PARTNERS



MEASURING UP...
Where Canada Stands
in support for farmers

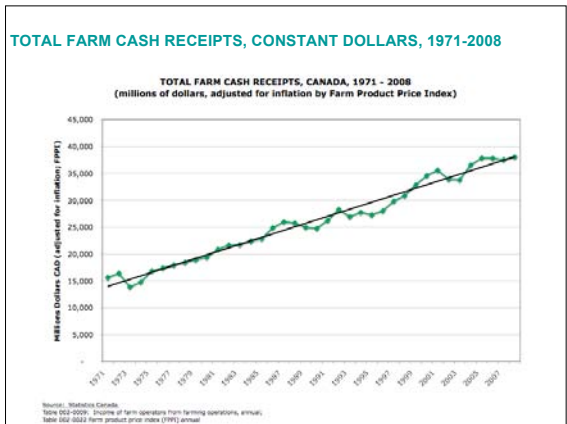
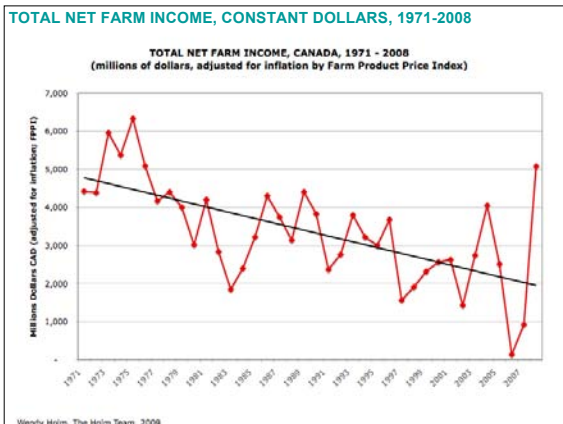
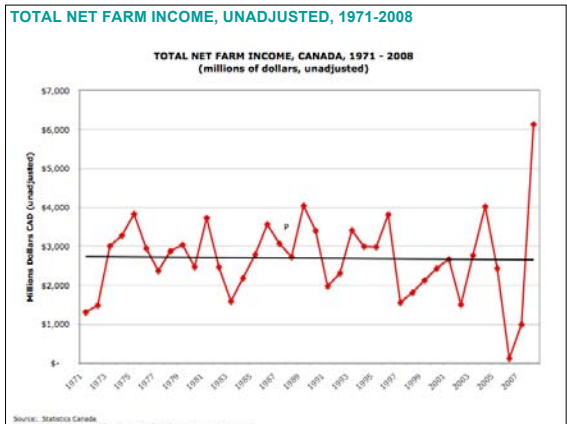


How has this affected farm income?



- ✓ Policy Crisis
- ➔ ✓ ECONOMIC CRISIS
- ✓ Public Engagement
- ✓ ? Alberta Elk Ranchers

- ECONOMIC CRISIS**
- ↑ operating costs, debt
 - ↓ net farm income
 - ↑ age of Canadian farmers



TOTAL OPERATING EXPENSES, CONSTANT DOLLARS, 1971-2008



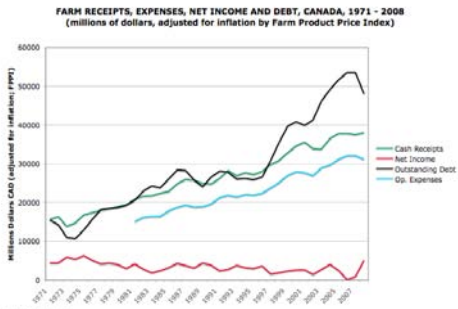
Source: Statistics Canada
Table 002-0005: Farm operating expenses and depreciation charges, annual
Table 002-0002: Farm product price index (1987=100)

OUTSTANDING FARM DEBT, CONSTANT DOLLARS, 1971-2008



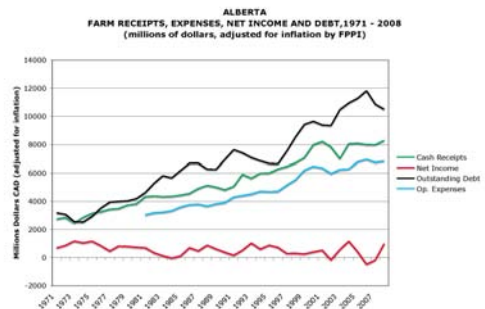
Wendy Helm, The Helm Team, 2009

JAWS OF THE CROCODILE...

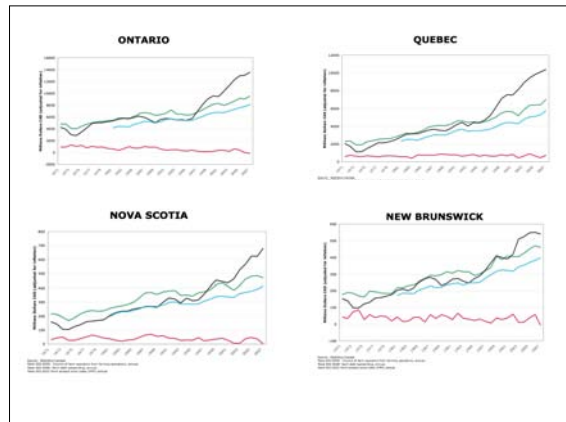
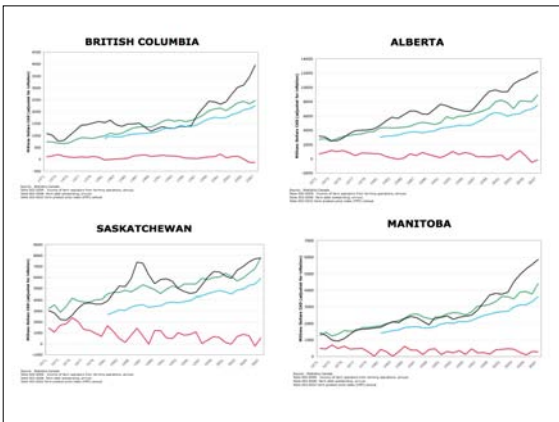


Source: Statistics Canada
Table 002-0006: Income of farm operators from farming operations, annual
Table 002-0008: Farm 000 (debt), annual
Table 002-0005: Farm operating expenses and depreciation charges, annual
Table 002-0002: Farm product price index (1987=100) annual

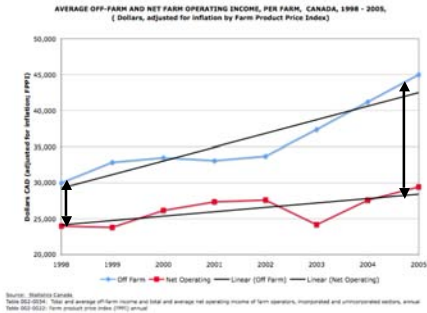
THE ALBERTA CROCODILE...



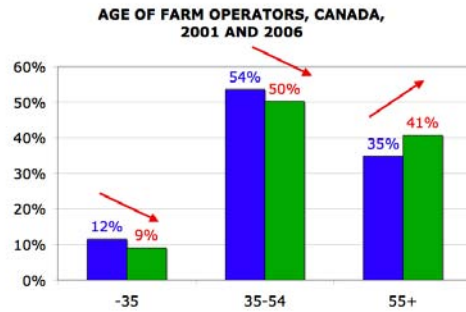
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OFF FARM WORK IS PAYING THE BILLS...

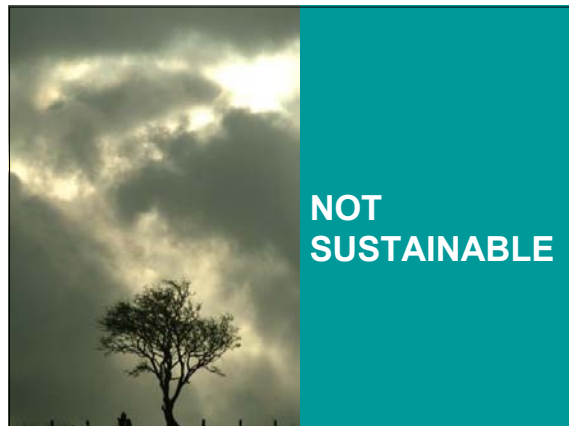
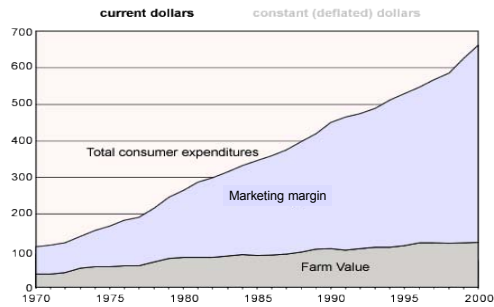


Where will our future farmers come from?



PUBLIC DISCONNECT

Trends in Food Spending, Marketing Bill, and Farm Value, 1970-2000
billion dollars

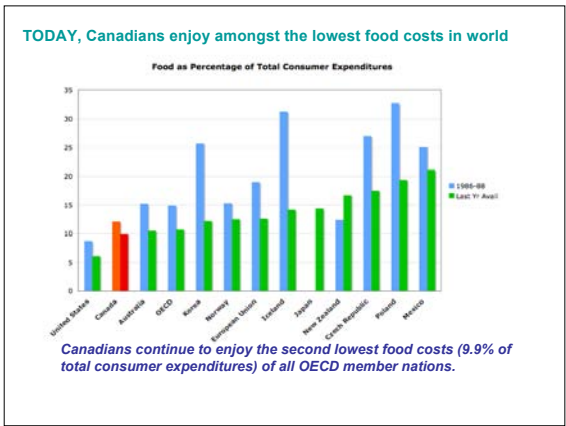


- ✓ Policy Crisis
- ✓ Economic Crisis
- ➡ ✓ PUBLIC ENGAGEMENT
- ✓ ? Alberta Elk Ranchers



"Food security is as important to this country's future well-being – and the world's - as energy security. We need to produce more food. We need to do it sustainably. And we need to make sure that what we eat safeguards our health..."

UK Environment Secretary Hilary Benn
 Food 2030 Strategy
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Sustainable (Bruntland):
Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

Unsustainable (Pollen):
To call a practice or a system unsustainable is not just to lodge the objection based on aesthetics, say, or fairness, or some ideal of environmental rectitude. What it means is that the practice or process can't go on indefinitely because it is destroying the very conditions on which it depends.



FOOD SECURITY means that food is available at all times; that all persons have means of access to it; that it is nutritionally adequate in terms of quantity, quality and variety; and that it is acceptable within the given culture. Only when all these conditions are in place can a population be considered "food secure."

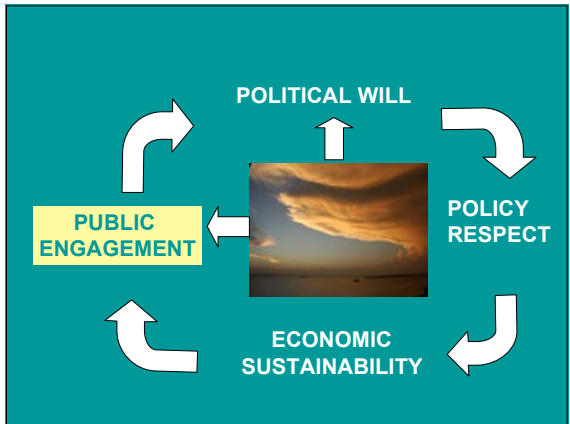
United Nations Food and Agriculture Organization

FarmVille

- 73.8 Million users per day after only 6 months (CBC)
- social media game about farming most popular among Facebook's 350 million users.
- allows city folks to become virtual country folks
 - virtual crops virtual animals virtual little red tractors
- WHO is playing?
 1. United States
 2. Turkey
 3. Philippines
 4. United Kingdom
 5. Italy
 6. Canada

Career choices

- 7 out of 10 students at UBC Faculty of Land and Food Systems now say they "want to farm"
- SAIT's culinary program projected to grow from 200 students this year to 400 within next 2 years





FOOD POLICY:
(FOOD AS A BASIC HUMAN RIGHT)

Every Canadian has the right to a secure daily supply of affordable, accessible, safe and nourishing food produced in a manner that respects the soils, the farmer, the environment and the community.



FOOD SOVEREIGNTY

...the right of peoples, communities, and countries to define their own agricultural, labor, fishing, food and land policies which are ecologically, socially, economically and culturally appropriate to their unique circumstances.

Institute for Food and Development Policy




TRIPLE Bottom Line

1. **Economics:** locality, security
2. **Environment:** sustainability
3. **Community:** accessibility, affordability, safety, locality, security



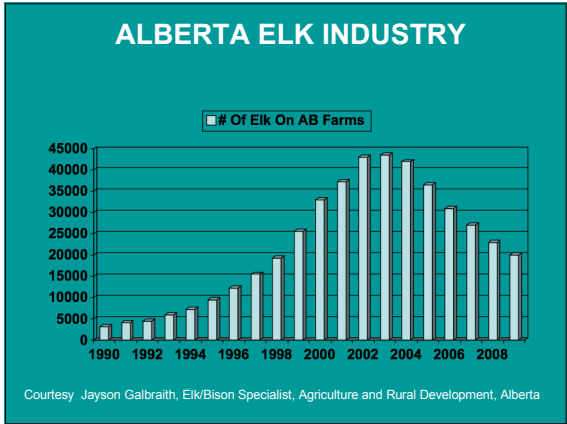
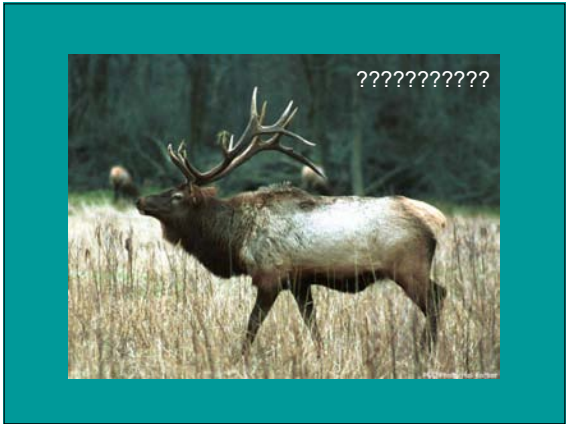
SUSTAINABLE Bottom line

4. **Sovereignty:** right to develop a made-in-Canada food policy. A GOVERNANCE issue. Starts at the community level.

LOCAL GOVERNMENT PRIORITIES

- Access and availability of food
- Permanent Farmers' Markets
- Develop food security plans as part of social and economic planning
- Food Policy Councils
- Systems to redistribute surpluses
- Food banks vs. Long Term Food Security
- Leadership at regional, provincial and national level

- ✓ **Policy Crisis**
- ✓ **Economic Crisis**
- ✓ **Public Engagement**
- ➔ ✓ **ALBERTA ELK RANCHERS**



Alberta Elk Industry Today (2009)

290 licensed producers
19,983 elk
 11,478 male
 8,505 female

Total sales: \$8.6 million
Antler: \$3.7 million
Trophy: \$1.8 million
Meat: \$3.1 million

Meat:

- 86% in federally-inspected plants
 - Bouvry Exports, Ft McLeod (EU certified)
 - Prairie Pride, Lacombe
- 14% in provincially-inspected plants (15-20)

⇒ **ACCESSIBILITY**

Velvet/Antler:

- Royal Elk Products
- On farm micro-processing (dried, frozen , pills)

⇒ **ACCESSIBILITY**

STRENGTHS - Alberta Elk

Item	Calories (kcal)	Fat (gr)	Cholesterol (mg)	Protein (gr)	Iron (mg)
Elk loin	167	3.84	75	31.00	3.96
Buffalo loin	171	5.65	86	28.05	3.47
Lamb Chops	188	7.80	85	27.63	2.48
Chicken Breast with skin	197	7.78	84	29.80	1.07
Pork Tenderloin broiled	201	8.11	94	29.86	1.39
Beef Loin (broiled)	308	22.21	86	25.26	3.15

Source: AWAPCO Website

CALORIES

FAT

CHOLESTEROL

IRON

PROTEIN

Culinary Panache ...ANDREW WHAT DO YOU AS A CHEF THINK OF ELK MEAT?

I love elk meat. I am using right now in my classes to make elk pate en croute.

It has a great game/wild flavour, not too strong, beautiful dark red or burgundy color to the meat and cooked properly (no more than medium rare) it is wonderfully juicy and tender. This would refer to cooking the better cuts, tenderloin, rack or strip loin. Tougher cuts also great in a stew or braise. Again, great gamey flavour good for a hearty meal on a cold winter night. Definitely a regional product that reflects the Rocky Mountain cuisine.

Chef Andrew Hewson, CCC | Culinary Instructor
 School of Hospitality and Tourism, SAIT

STRENGTHS - Alberta Elk

Health: lowest cholesterol, carbohydrates, fat, highest iron, protein

Ethics: raised on sustainable family farms, marketed through producer cooperative, humane harvest of elk and elk products

Safety: no feed containing protein supplements derived from rendered animals or bone meal, 100% confirmed negative for CWD, full trace-back system, herd certification program, higher SRM & veterinary regulations...

Environment: raised naturally, free of hormones and steroids, and on fresh open pasture...

CED: put \$8.6 million into Alberta's economy in 2009

Quality: Great taste and Culinary Panache!

STRENGTHS - AWAPCO

Cooperatives are more nimble, fit economic players with very special advantages...

(e.g can collude to build market share, exempt from Combines, special tax benefits...)

represent farmers, speak with one voice.



Policy Objectives - GOVERNMENT

Rationalize regulatory regime

Justification for continuing classify farmed Elk under Wildlife Act? inter-provincial movement
can trailer live animals fm Alberta to Nova Scotia but can't ship elk meat from one side of Lloydminster to another... corridor to ship to federal plant in Dawson Creek (30% elk in Peace)

Facilitate access to federal slaughter

mobile slaughter facilities

Open export markets for velvet/antler in Korea and China

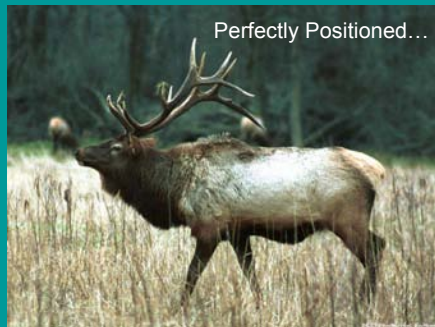
is product differentiated in market?
if not, some one is getting the margin...
WTO challenge (sound science and risk not precautionary principle)

Support Develop of reliable live testing for CWD

Strategic Objectives - SECTOR

Expand local markets for ranch-raised Alberta Elk

- Champion health benefits
- Develop strong relationship with consumer
- Maximize culinary/restaurant linkages
- Ensure consumer can identify at retail (COOL)



MYTHS

"Farmers are only 3-5% of population so it is hard to come up with money for..."

"Difficult for government to invest more than the size of the industry justifies..."

"Farmers need to undergo transformational change..."

"Farmers need to become more competitive..."

RESPECT



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THE HOLM TEAM

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