

## Feed Summit 2 (Oct 25/06) – Summary

A. 35 people attended – wide range of stakeholders

B. 4 Presentations

1. Ron Axelson – Livestock Competitiveness Study
2. Don Macyk – Feed for Thought
3. Jim Helm – Feed Quality and Supply
4. Ruurd Zylstra – Looking Ahead

C. Feed Summit 2 reached agreement that livestock feeding and livestock products processing industries were facing shrinkage not growth. If this happened feed markets would also shrink. Agreement that win:win solutions needed to be found to improving competitiveness

D. Feed Summit presentations and discussions identified the following areas for action with respect to feed competitiveness

1. Need to establish mechanism/structure for crop, livestock and feed industry to work together to improve competitiveness. This

would need to be accompanied by a strong communications effort to build understanding and willingness to “joint venture”

2. Fast track rapid methods of feed evaluation and link these to markets and pricing
3. Step change improvements needed in genetics for energy supply and utilization in crops and livestock
4. Get to work on developing knowledge base in utilization of byproducts as feedstuffs – eg DDGs, food manufacturing waste streams,...etc
5. Undertake development of both enabling policy and an improving feed competitiveness strategy to improve feed competitiveness. This would have to focus on several issues – eg policy and regulation, incentives, R&D, trade, ....etc
6. Advance feed processing and manufacturing technologies to reduce cost per unit and improve feed performance
7. Establish Western Canadian Feed Grain Institute
8. Improve market return from livestock and livestock products

E. Feed Summit 2 then focused on 3 of these priorities with the time remaining

1. Building Industry Structure/Mechanism to work together to improve competitiveness
  - a) Establish mechanism/structure and accompanying communications for an industry led effort – Mike/Ron to push discussions at upcoming Livestock Industry Competitiveness workshop, Grains and Oilseeds Summit, and Marketing Council strategy session
  - b) Conduct an indepth feed competitiveness analysis and possible solutions as early homework – Several Commissions with Industry Development Funds support to take this on
  - c) Conduct a study on future impact of biofuel industry growth on livestock sector – Several Commissions will discuss this with Minister and AAFRD
  - d) Undertake a multi stakeholder round table consultation – Ron/Mike to discuss with Minister
  - e) Livestock and crop industry groups explore options with government for short to medium term policy options

to keep livestock feeding industry on a level playing field with US and buy time for development of new technologies and products to reduce per unit costs and increase market revenues – part of roundtable discussion with Minister

2. Develop quality assessment linked to markets and pricing

- a) Fast track NIRS calibration development. Calibrations need to be effective in dealing with the large variability in feedstuffs – IFASA Feed Program in partnership with Pulse and Barley Commissions, CIGI, Canada Grain Commission, ACIDF, AARI....etc have work underway with significant initial financing
- b) NIRS developers work with livestock, crop and feed manufacturers to develop and test the calibrations relative to pricing – IFASA Feed Program
- c) Longer term, commercialize and maintain ownership of the NIRS developments here – IFASA Feed Program

- d) Development and roll out of NIRS must be accompanied by a robust information and communications approach to build understanding and support for it's use in the market place – to be determined
  - e) Meet with feed manufacturing industry to discuss their involvement – IFASA Feed Program and ACIDF
3. Improve crop genetics for energy yield (per unit and/or per acre) and livestock genetics for feed efficiency
- a) Engage crop, livestock, feed and biofuels manufactures, and crop breeding programs in setting targets – ACIDF and AARI have this underway
  - b) Push for regulatory changes eg KVD, PNT, variety registration....etc – several industry organizations pushing CFIA and Health Canada for reform
  - c) Over the longer term need to look at the energy of the whole crop – eg kernals, fibre, byproducts...etc – IFASA Feed Program
  - d) Develop improved feed efficiency genetics in livestock – IFASA Livestock Genomics Program

F. Feed Summit 2 did not work on the other areas identified under D above. Feed Summit 2 also did not work on other issues such as labor, trade, ....etc that are also important to improving competitiveness

G. Support to look to another Feed Summit type get together early in the new year