Small-Scale Meat Sector Survey:

A ROADMAP TO GROWTH FOR LOCAL MEAT IN BC

Prepared by

CLOSED LOOP
AGRICULTURAL CONSULTING

SSMPA
Small-Scale Meat Producers Association

April 2022

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Executive Summary

Defining the small-scale meat sector is a difficult task. Small-scale producers tend to have a limited land base, raise multiple types of livestock and crops, practice integrated farming methods and market their products directly or through outlets that focus on local foods. They are not typically represented by supply management systems or marketing boards and, until the creation of the Small-Scale Meat Producers Association (SSMPA), did not have an industry association exclusively dedicated to representing their interests. Small-scale producers, admittedly difficult to reach, tend to be very under-represented in most studies and consultations. Their contributions to food security and local economies have been historically underestimated and difficult to quantify. Valuable data is also missed due to the alarming attrition of small-scale operations. There is no "exit interview" when a farm or ranch goes under or chooses to leave the industry, and a wealth of information is lost along with them.

Until now, no repository of information has existed about the small-scale meat producing sector in BC. This survey aims to fill this gap in understanding to provide a foundation from which to support the sector to grow and thrive.

The small-scale meat sector survey was conducted over the Summer and Fall of 2021. Responses were received from 708 operations, representing 2110 employed individuals across all 27 regional districts in the province. Following the online survey, 8 focus groups were held in all of BC agricultural regions.

What was heard from this survey is that many small-scale producers are desperate to scale-up their production to meet the increasing demand for higher-welfare and locally raised meat and to realize economies of scale but are faced with an array of challenges that preclude their building viable businesses. The challenges of conforming to the many regulations enforced over the last few decades have had an undeniable impact on small family farms, including small-scale meat producers, that make up the large portion of the agricultural land in BC. With increased pressure from real estate speculation, rising operating and transportation costs, and volatile markets arising from a globalized food system, the challenge of producing local food on a relatively small scale has never been greater. However, recent occurrences of wildfires, floods and pandemics have brought to the forefront the perils of our dependency on centralized food distribution systems. It is of the utmost importance that we become fully aware of and understand the mode of operation, challenges experienced by and needs of the existing producers who represent so much potential for resiliency in our province.

This survey's data and the recommendations that it informs will bolster SSMPA as it strategizes to support resilience and address gaps in the industry, such as between the growing demand for local, sustainable meat products and the processing restrictions that bottleneck supply. The survey will also inform further allocation of SSMPA resources toward development and delivery of pertinent training programs, regional Butcher Hubs, and other proposed projects.

It is our hope that these findings will be used by all levels of government and the private sector when making decisions around development, funding, and new business opportunities for meat producers. Post-secondary institutions and NGOs can benefit from this survey as well as it informs the need for future research and extension programming to support the sector.

About SSMPA

In 2017, founder Julia Smith started a group on a social media platform called Small-Scale Meat Producers to see if other producers were experiencing shortages of slaughter and processing options as she was. Responses poured in from producers from all over the province. Later that year, with a core group of 75 producer members, SSMPA registered as a non-profit with objectives:

- → To ensure a voice for small-scale meat producers. To help grow the market and support systems for small-scale meat producers
- → To provide resources and foster research to support the small-scale meat-producing industry.
- → To encourage the adoption of best practices by the small-scale meat-producing industry.
- → To grow a network of small-scale meat producers.

SSMPA's mission is to build greater stability for producers through a thriving small-scale meat industry producing well-raised, high-quality meat that contributes significantly to local food security.

Introduction

Project Background

When SSMPA formed as an association in 2017, it was immediately apparent that very little was known about small-scale meat producers in BC. Looking at census data, it was obvious that the number of meat producers across the province was severely underestimated. Consultations and government surveys were not reaching these producers who, in some instances harbored distrust in government and consequently chose not to engage with prior data collection efforts. In the meantime, the small-scale meat producing sector was experiencing market failure. Many farms were shutting down after a few years in operation, a majority couldn't find reliable processing for their animals, others struggled to abide by regulations designed for large conventional farms, all while unmet consumer demand for local meat grew.

To take a seat at the table and represent the interests of the sector, SSMPA needed to gain an understanding of the industry it serves. The need to complete this survey was identified in 2018 and finally, in 2020, funding was granted to the organization by the Investment Agriculture Foundation to complete this work.

Project Objectives

The survey's main objective was to capture vital information about the key players in the BC small-scale meat sector, and their needs, challenges, successes, and aspirations. It aimed to quantify the current states, modes of operation, economic contributions, and barriers of this sector, as well as the potential for this sector if those barriers are addressed. To gain an understanding of the causes of market failure, it also captured information on producers who have opted to close their farm businesses and the factors that influenced their decisions.

Methodology

Survey

The SSMPA survey was designed in consultation with 20 primary small-scale meat producers across the province. It contained questions about respondent demographics, operations, land use, business viability, husbandry practices, marketing and sales, challenges and collected additional comments.. There were two different surveys depending on if respondents identified as current or previous producers. One response was to be received for each participating operation. The survey contained questions about the other owners/operators and staff involved in the business to capture the number of individuals employed by the sector. Since it requested sensitive information about income and production practices, the survey was conducted anonymously. The full set of questions can be found here. The survey received responses for 2 months, from July 10th to September 12th. It was available online, by phone and in person via regional representatives. A phone line was set-up especially for the purpose of receiving survey responses. The online survey was administered with the Qualtrics survey management software.

Focus Groups

At the end of the online survey, respondents were asked if they wanted to participate in a regional focus group. By selecting yes, respondents were forwarded to an external signup sheet. 8 regional focus groups were held in September in every agricultural region. 5-12 producers were selected by region based on a pre-screening questionnaire ensuring that the participants were professional meat producers deriving a significant portion of their income from meat sales. The 1.5-hour long facilitated focus groups dug deeper into challenges identified in the survey as well specific regional perspectives and potential solutions.

Data Analysis

The survey contained several types of questions: multiple choice, open and close ended and ranking questions. Descriptive analysis was used to derive meaning from all of the numerical survey answers. The ranking questions were weighed based on the frequency and relative factor importance. The open-ended questions and the additional comments gathered during the focus groups were tabulated and analyzed for frequency and relative importance.

Communication Plan

Outreach was a major element of this survey project, to obtain high-quality data on the industry across BC. This phase of the project lasted nine weeks, much longer than most surveys.

We approached the outreach with the knowledge that producers in this industry had been sent several government surveys in the past few years on related topics, such as slaughter licensing. We suspected this might detract from their willingness to participate in this survey, which was quite comprehensive and involved to complete.

We developed a dedicated page on the SSMPA website that explained the project and invited participation; all promotions directed to this page. Our communications emphasized that the survey was being conducted by a non-governmental organization, and that anonymity would be strictly protected. As an additional incentive, we partnered with a popular business serving the industry with fencing supplies, FenceFast, to offer a discount for producers who completed the survey.

To achieve the desired high degree of engagement, we enlisted volunteer "regional representatives" assigned to each regional district in the province. They were tasked with contacting individual producers in their regions, as well as identifying key avenues of outreach such as farmers' institutes, local branches of commodity associations, agricultural advisory committees, livestock-related businesses, localized social media groups, and other key figures such as Ministry of Agriculture and Food (MAF) Regional Agrologists. We also engaged two "Regional Representative Coordinators" to meet regularly with the regional representatives and ensure that outreach stayed on track through a busy season.

Provincially, we reached out to commodity associations and agricultural organizations asking them to forward information to their members. We issued a press release and responded to interview requests. An additional, shorter press release was sent to the regional representatives to forward to their local papers as they saw fit, which included three non-English news outlets.

Partway through the outreach, we identified a few regional districts with lower participation than expected. We subsequently targeted these areas with advertisements in local print papers and developed a print poster and flyers for use in these regions (also translated into key languages as identified by the respective regional representatives).

Within our own established networks, throughout the outreach phase we posted weekly on social media (Facebook and Instagram) and reached current and past SSMPA members with newsletters and emails.

The above efforts were challenged by a record-breaking heat dome, drought and wildfire season across much of the province. In spite of this, we succeeded in achieving a very high response rate, including responses from every regional district in BC

Literature Review

BC Slaughter Regulations

The Meat Inspection Regulation of the BC Food Safety Act (MIR) was enacted in 2004 in response to the Bovine Spongiform Encephalopathy (BSE) incidences. The new regulation mandated that all meat slaughter in BC must occur at a federally or provincially licensed plant. Prior to this, unlicensed abattoirs and on-farm slaughter, overseen by regional health authorities, dotted the landscape. Farmgate meat sales, which were part of a vibrant rural economy, were eliminated with great impacts on communities' food security and farmer livelihoods (Miewald, Ostry, & Hodgson, 2013).

The changes and upgrades required by the new regulations were feasible for large-scale facilities but prohibitive to most community scale abattoirs. Capital costs to come into compliance and requirements to deal with up to eight agencies through the licensing process caused many to go out of business even if BSE was never found to originate from smaller facilities (BC Chamber of Commerce, 2018). In the North Okanagan Regional District, 7 out of 8 slaughter establishments shut down after the MIR were put into place (Johnson, 2008). The added costs of retrofit were passed down to producers via slaughter charges. With many smaller-scale abattoirs gone, travel distances to get livestock processed increased in the province.

To address the needs for slaughter services in remote areas, in 2010 the government issued two new Meat Inspection Regulation licenses, Class E and D. These licenses were available in 10 designated regions: Central Coast, Kitimat-Stikine, Mount Waddington, Northern Rockies, Powell River, Skeena-Queen-Charlotte, Squamish-Lillooet, Stikine, Strathcona (portions only of the Mainland and Discovery Islands) and Sunshine Coast. ***These regions were selected based on their meeting a combination of the following criteria:***

- → The absence of licensed slaughter facilities
- → Low population density
- → Small livestock numbers
- → Transportation barriers (e.g., required marine transportation or seasonal road closures)

Mobile Slaughter

Mobile abattoirs are fully contained units that serve the same functions and operate under the same license as a standard abattoir, but which can be moved to various locations. A mobile abattoir is typically a trailer 30 to 50 feet long that has separate areas for skinning or plucking, evisceration and carcass cooling, and that includes accommodations for an inspector, such as an office, head inspection hook and offal inspection trays and trolley. These units operate at designated docking stations, meaning the host farms each need substantial infrastructure developments. These requirements, and the large size of the unit, mean that the cost of development and operation becomes very high, while many of the challenges of a typical abattoir remain or increase without solving most of producers' problems. The mobile abattoir model was never fully successful in BC and many units are now collecting moss or operating as stationary abattoirs.

Small-Scale Abattoirs

Small-scale on-farm abattoirs are small or medium scale family-run operations interested in running viable businesses on their land. By taking care of production and processing of their livestock, these farms can offer products of superior quality at more affordable prices than if they had to travel to a processor. Many of these producers advertise their meat products as humanely raised, pastured-based and/or ethical and have direct accountability to their customers who appreciate knowing where their food comes from. Several producers reported in the survey that their only path forward for running a sustainable business was to do the slaughter themselves thereby gaining control over their production schedules, animal welfare and quality of their products.

Meat Regulations Review and Changes

The MIR met a lot of opposition from the onset (Amos, 2008., Carlito 2008). In 2016, the Union of BC Municipalities requested that the provincial government review meat processing regulations to facilitate the expansion of safe, local, slaughter and meat processing and reduce barriers for small-scale producers. In 2018, the BC Chamber of Commerce recommended that the Class D and E license program extend to all non-designated regions. The provincial government formed the Select Standing Committee on Agriculture, Fish and Food and tasked it with reviewing the Class D and E licenses in March and April 2018.

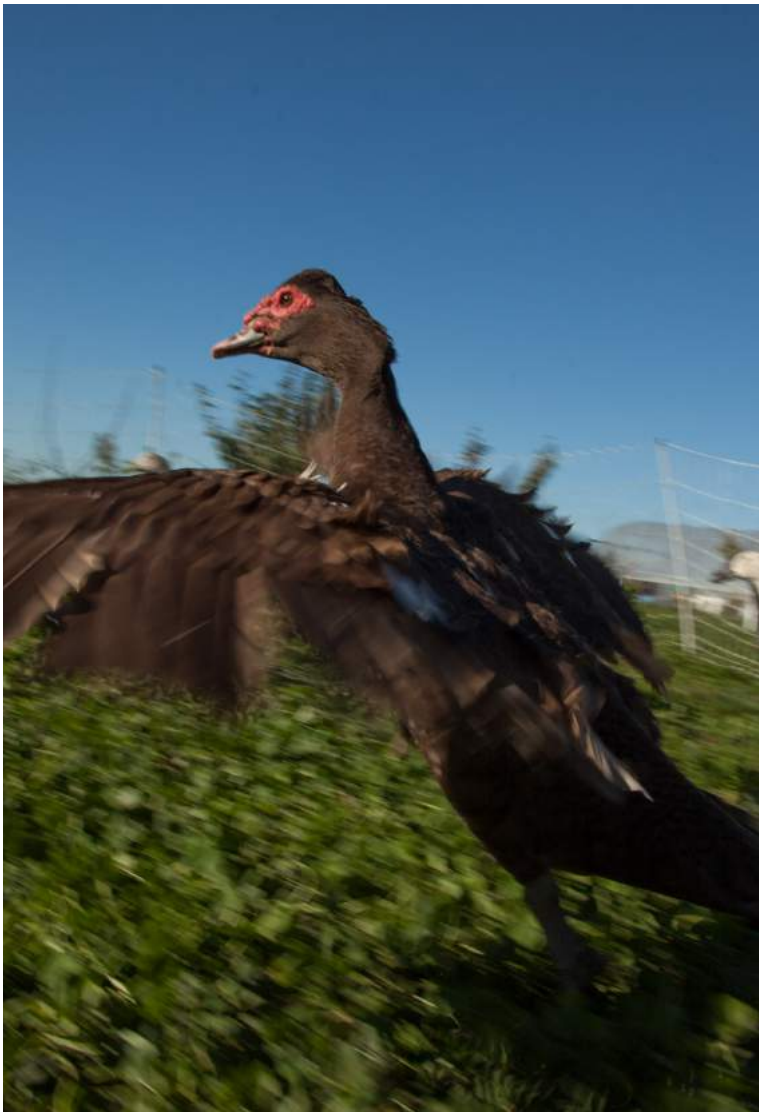
Despite the announcement of a "comprehensive consultation", an overwhelming number of small-scale producers, including many who held current Class E or D licenses, and others who were in different stages of the application process never received any requests for their input. The newly founded Small-Scale Meat Producers Association had concerns with regards to the impacts that these consultations could have on the livelihood of their members and proceeded to ensure that as many small-scale producers as possible would participate in the process underway, including producers who had held these licenses in the past. SSMPA was also successful in requesting an extension to the consulting process, enabling more participation from past and current licensees, and submitted a full industry feedback report. In September 2018, the committee released the results of their Local Meat Production and Inspection in British Columbia consultations.

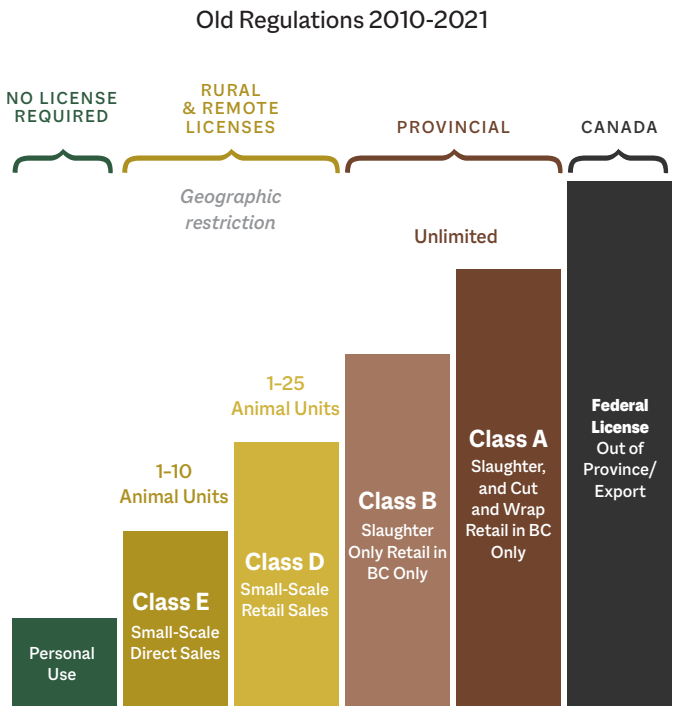
The conclusions yielded by the consultations included:

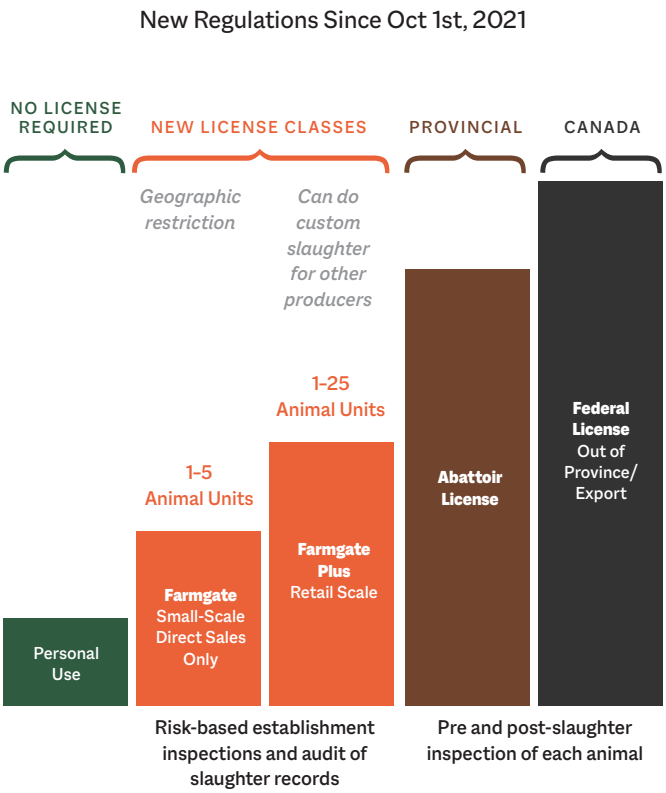
1. Lack of slaughter capacity was strongly identified as a problem by producers and processors alike
2. Some producers would like a change in the current production limits
   - → Many would prefer to have production limits expressed in terms of species
   - → Many producers were unsatisfied with the current policy for Class E license eligibility
3. Many respondents expressed that under an hour for transportation is reasonable, not the stated 2-hour policy
   - → The winter season further complicates transport
4. Producers who held Class E & D licenses raised concerns regarding the restriction of not being able to sell outside of their regional districts
   - → Many Class E license holders would like to be able to sell to retail like the Class D.

In September 2020, the Ministry of Agriculture and Food (MAF) published its Intentions Paper on Rural Slaughter Modernization which called for updated risk analysis and investigation into regulatory changes. In December of 2020, MAF consolidated oversight of all the license classes under its umbrella. The E and D licenses were previously under the responsibilities of regional health authorities.

The Small-Scale Meat Producers Association worked closely with the Ministry of Agriculture's Meat Inspection Branch and other industry and government officials to inform the development of new regulations. The SSMPA produced an extensive list of recommendations as a result of these consultations and in response to the Intentions Paper on Rural Slaughter Modernization. After much outcry, the MAF finally announced changes to BC slaughter regulations effective in October 2021. Many of the SSMPA's recommendations were incorporated into the new regulations. A Farmgate license was created to help new and small-scale farmers meet demand for their products throughout their regional district and within 50 km of the farm. Another category, the Farmgate Plus license, replaced the previous Class E and D licenses. This license no longer restricts on-farm slaughter or meat sales geographically; animals can be slaughtered on-farm and meat can be sold throughout the province.







At the moment of releasing this report (April, 2022), there are 57 licensed abattoirs, 4 Farmgate and 104 Farmgate Plus slaughter license holders.

Abattoir Capacity Study

In August of 2021, BC Association of Abattoirs, completed a study of the meat slaughter and processing capacity in BC. The study, which was commissioned by MAF for internal use only, concluded that the actual slaughter capacity is "more than adequate" to match demand since Class A and B (now Abattoir licenses) are only operating for slaughter 2-3 days a week. If abattoirs in BC could operate all week and year-round, the study found, slaughter capacity could be increased by 25% without any major investment. If investment were made, capacity at provincially-licensed abattoirs could increase even more. These predictions are predicated upon the industry being able to recruit more staff and a reduction in seasonal fluxes in demand for slaughter services.

This survey confirmed that staff shortage is a major limiting factor for both slaughter and cut and wrap facilities. It also identified a spike in slaughter needs in the Fall. A majority of small-scale meat producers are operating pasture-based operations which translates into slaughter being needed in the Fall for most species. It is not feasible for these producers to finish their animals throughout the year to accommodate the production prerogatives of abattoirs. As the demand for pastured-raised meat increases and a greater focus is placed on the development of regenerative livestock practices that mitigate climate change at the federal and provincial levels, the proportion of pasture-based meat operations is likely to increase. In February 2022, the Canadian government announced funding of $182 million to support on-farm adoption of 3 climate friendly practices: cover cropping, nitrogen management, rotational grazing; all practices that small-scale producers are early adopters of. SSMPA maintains that local food requires more small local abattoirs. The industry needs slaughter options that are as diverse as the producers that it seeks to serve.

Food Safety and On-Farm Small-Scale Slaughter

When concerns about on-farm slaughter are raised, they are almost always from the standpoint of food safety. Food safety is key to keeping high levels of consumer confidence in the local meat industry. Incidents of product recalls or contamination hurt everyone in the sector by association. The Farmgate Plus and Farmgate license allow for meat to be slaughtered on-farm without the mandatory presence of a food inspector. Instead, inspections will occur at least once per year with frequency depending on multiple factors, including compliance history. These new license classes have not been unanimously welcomed in the industry. Some commodity and industry groups remain concerned that "if something goes wrong, the entire industry will wear it" and that "allowing small farms to slaughter animals without an inspector present is both unfair and potentially dangerous" (Vancouver Sun, 2021).

Evaluating the Risks of Small-Scale Slaughter

In 2009, a year before the first on-farm licenses were issued in BC, the provincial government commissioned a comprehensive study on the risk factors of small-scale slaughter. The study, which had been confidential until 2020, was obtained and made public by SSMPA via a Freedom of Information (FOI) filing. The study concluded that small-scale slaughter presents significantly less inherent risks than slaughter occurring at larger plants.

The factors involved in making this analysis included:

Scale: Slaughtering fewer animals at once lowers food safety risks. Less automated operations mean higher accountability and attention to details. Time pressure is significantly less in a small-scale operation.

Timing: Fall and winter slaughter, as is most common for on-farm slaughter operations, reduce the incidence of pests and enteric infections. Pathogens are less present on the skin of animals and bacterial growth is reduced at that moment.

Animal Husbandry Systems: More traditional pasture-based systems are associated with a lower prevalence of E coli. Animal density also tends to be lower in small-scale operations with animals typically being exposed to the outdoors. High animal density is a risk factor for disease transmission and stress.

Pre-Slaughter Stress: It was found that this is an important risk factor from both a safety and quality perspective. Loading/unloading and transport of animals causes stress to animals and increases the change of skin, and subsequently carcass, contamination from feces. On-farm slaughter eliminates pre-slaughter stress. Moreover, it is possible to slaughter animals directly onto a clean field and limit contamination.

Machinery/Equipment: Proper equipment (hoists, knife, coolers) should be used to prevent contamination and bacterial growth. Small-scale farm operations seldom have all the specialized equipment typically found in larger facilities. However, this relative disadvantage can be remedied by the acquisition of cheaper scale-appropriate alternatives and enhanced sanitation protocols.

Commercial meat contamination is rare in BC and Canada, but the few documented occurrences all originated from large-scale facilities. Such instances include the BSE crisis of 2004, the E coli tainted meat found in 2015 in one of BC's largest meat plants and the 2019 meat recall that led the CFIA revoking the licenses of 3 Canadian meat packing plants.

COVID-19 has further highlighted the vulnerabilities in Canada's meat supply chain and the benefits of de-concentrating slaughter and building capacity at the regional level.

Producer Profiles:

Fresh Valley Farms

Name of operators: **Annelise Grube-Cavers and Steve Meggait**

Location: **Armstrong, Okanagan**

Livestock raised: **Cattle, hogs, chicken, turkey**

Years in operation: **7**

Slaughter license: **Abattoir Class (2016)**

"Running our local-oriented, regenerative farm business is reliant on having access to on-farm slaughter and processing. Direct marketing is an important component of our business so quality control and accountability to our customers is paramount. Quality and transparency include maintaining high animal welfare and low travel times and stress for our animals. As a certified organic operation accessing services that fit our needs was not an option off farm and managing the process ourselves allows us to maintain consistent and visually appealing packaging. A flexible processing schedule that can be adapted to the growth of livestock, high quality cutting and packaging, custom labels, bulk handling logistics, storage, and shipping are just some of the ways that processing at our home location has led to a profitable, and sustainable, multigenerational farm. We would not be running a hyper local, regenerative, certified organic farm business if it wasn't for being able to slaughter and process our meat on the farm."

Whiskey Creek Ranch

Name of operators: **Gaston and Michelle Schaeffer**

Location: **Rose Prairie, Peace Region**

Livestock raised: **Beef, hogs, broilers, laying hens and turkeys**

Years in operation: **7**

Slaughter license: **Farmgate Plus (2017)**

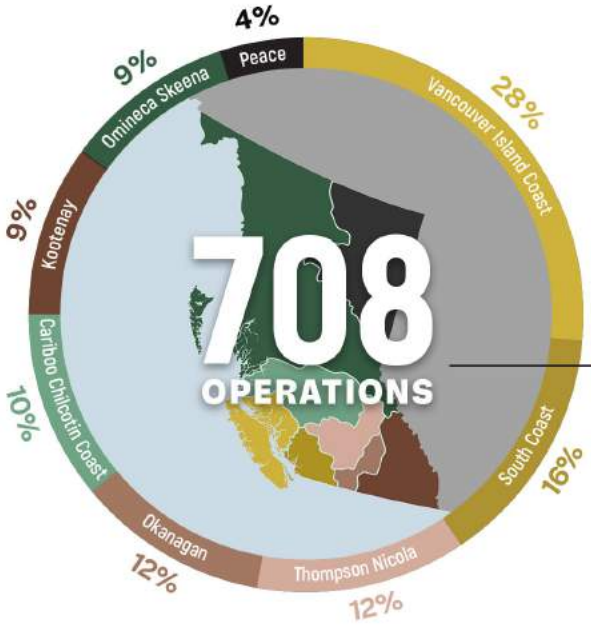
"We've worked tirelessly to weave together the threads of our farming values into our products: local, regenerative, pasture raised, high animal welfare, and community.

As first generation farmers, we've not been blessed with access to a multi-generational legacy of land or infrastructure, but it's afforded us the unique opportunity to be curious about what we want to, and can, do within the boundaries of our pastures and to make those choices intentionally.

Our livestock deserve the best of our stewardship in all phases of their lives. We believe that includes us being afforded choice in where and when we slaughter and process them. If the consumer demands choice, the farmer deserves choice."

Survey Results

Small-Scale Meat Sector — *Highlights*



27 Respondents came from each of BC's **REGIONAL DISTRICTS**

40% are **NEW** entrants!

12 YEARS **AVERAGE** time in operation

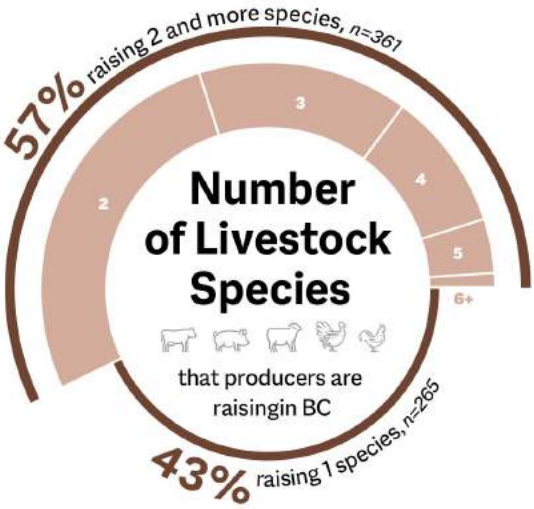
619 are currently operating + **89** ended their operations within the last 5 years

2110 Individuals employed

58% owners and operators

18% full-time staff

24% part-time or seasonal staff



94% supplement their income with other work not related to their meat business

30% striving to be full-time producers

96% sell directly to consumer

Top 3 challenges:

Access to slaughter

Access to cut and wrap

Profitability

41% are interested in getting an

Land-based practices:

43% Multiple species grazing

38% Intensive grazing

38% Regenerative agriculture

36% No till

36% Diversified forage

Survey Respondent Demographics

The online survey of BC small-scale meat producers received a total of **708 responses** representing 619 operations that are currently operating and 89 that ended their operations within the last 5 years. One response was received on behalf of each participating operation. A total of 2110 people are accounted for: 1224 owners and operators (58%), 375 full time staff (18%) and 511 part-time or seasonal staff (24%).

Gender, n=1224	
Female	48%
Male	51%
Other	0.5%

Age, n=1224	
<40	29%
40-65	55%
65>	16%

Producer status, n=2110	
Owners/operators	58%
Full-time staff	18%
Part time/seasonal staff	24%

Supplement income with other work not related to meat business, n=619	
Yes	96%
No	6%

Types of work, n=581	
Other types of farming	32%
On-farm agri-tourism	7%
Off-farm employment	63%
Self-employment	47%

Striving to be a full-time meat producer? n=581	
Yes	29%
No	44%
Off-farm employment	63%
Unsure	27%

Gender and Age

Out of the 1224 owner and operators BC wide, 601 people identify as female (48%), 634 identify as male (51%) and 6 people identify as other (0.5%). Those under 40 years old represent 29%, 41 to 65 years old represent 55%, and 66 years and older represent 16%. People under 40 and women are more widely represented within this industry as compared with Canadian agriculture demographics in which it was reported that 29% of farmers were women and 9% were young farmers in 2016 (Statistics Canada).

Geographic Distribution

Respondents came from each of the 27 regional districts that make up BC's 8 agricultural regions. 198 operations (27%) came from Vancouver Island and the Coast, 114 from the South Coast (14%), 88 from the Thompson Nicola (12%), 83 from the Okanagan (11%), 74 from the Cariboo Chilcotin Coast (11%), 73 from the Kootenay (10%), 67 from Omineca Skeena (10%), and 31 from the Peace (5%).

Table 1 Demographics of BC current producers

Figure 1 Geographical Distribution of Survey Respondents n=708 Operations

✓ CURRENTLY OPERATING ✗ NO LONGER OPERATING

Omineca Skeena — 10%

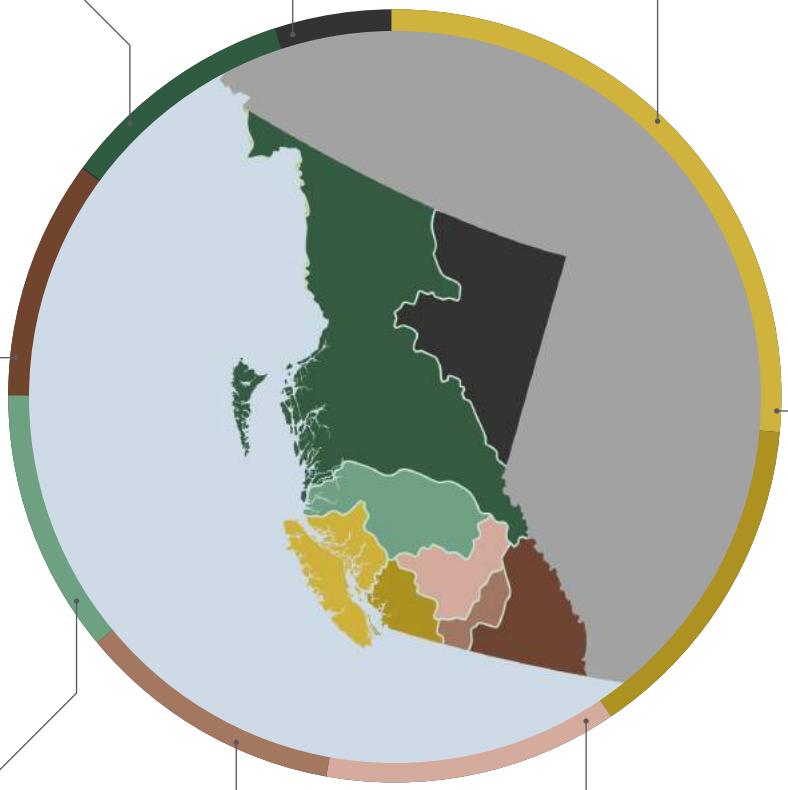
	✓	✗
Bulkley-Nechako	38	2
Fraser-Fort George	14	2
Kitimat/Stikine	9	
Stikine Region	1	
North Coast	1	
Total:	67	

Peace — 5%

	✓	✗
Northern Rockies	1	
Peace Region	28	2
Total:	31	

Vancouver Island/Coast — 27%

	✓	✗
Alberni-Clayoquot	19	5
Capital	35	5
Comox Valley	29	4
Cowichan	39	7
Mount Waddington	2	
Nanaimo	30	1
Powell River	16	
Strathcona	1	1
Total:	198	



Kootenay — 10%

	✓	✗
Central Kootenay	19	3
East Kootenay	16	1
Kootenay Boundary	28	6
Total:	73	

South Coast — 14%

	✓	✗
Fraser Valley	63	15
Metro Vancouver	13	4
Sunshine Coast	17	2
Total:	114	

Cariboo Chilcotin Coast — 11%

	✓	✗
Cariboo	64	6
Central Coast	4	
Total:	74	

Okanagan — 11%

	✓	✗
Central Okanagan	14	2
Columbia-Shuswap	19	5
North Okanagan	27	3
Okanagan-Similkameen	9	4
Total:	83	

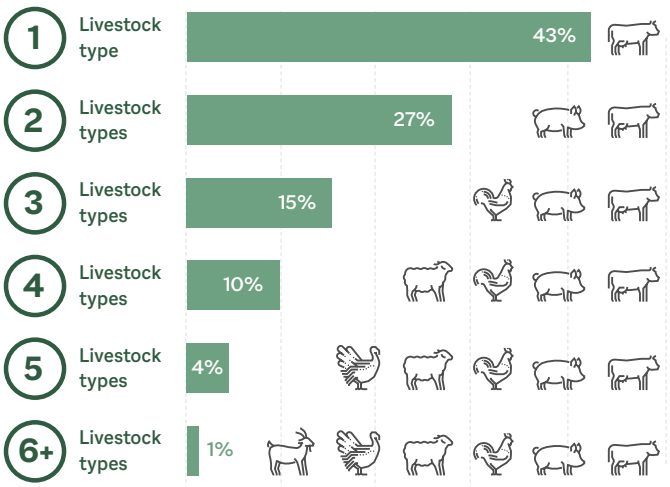
Thompson Nicola — 12%

	✓	✗
Squamish-Lillooet	8	
Thompson-Nicola	70	10
Total:	88	

Small-Scale Meat Industry Landscape in BC

Figure 2 Meat businesses years in operation

Figure 3 Number of different types of livestock raised



Years in Operation

63% of respondents reported that they have been running their operations for less than 10 years. Of this group, 39% are new entrants, having 5 years or less under their belts and 24% have been operational for 5 to 10 years. This trend is consistent across the province. Regions including the Kootenay, Okanagan, Peace, South Coast, and Thompson Nicola show the larger percentages of new entrants. Across BC, producers have been in operation for an average of 12 years.

63% of the producers no longer in operation quit producing after less than 10 years in business. A third of these were from the South Coast and reported ending their meat operations after less than 5 years.

Livestock Raised

Producers who participated in the survey raise a wide range of livestock and a great diversity of breeds.

Many producers (57%) are raising more than one species. 27% are raising two species, 15% are raising three, 10% are raising four, 4% are raising five, and 1% are raising six or more species. 43% of those raising only one species specialize in cattle production.

As seen in **Table 2**, the four species most widely raised among producers are cattle (47%), pigs (40%), broilers (37%) and sheep (36%). There is a wide scale range amongst respondents, some reporting as little as one head of a particular livestock. Most of these producers raise other species and this low reporting, according to associated comments, can be attributed to just starting to raise a particular species or having recently scaled back production.

The species raised by the no longer producing respondents differed. The top livestock raised by these respondents were broilers (65%), pigs (49%), turkeys (36%) and cattle (26%). This group were twice as likely to raise broilers than the group who are currently raising meat. This raises the question of why so many small-scale poultry producers are leaving the business.

Table 2 Livestock raised by producers in 2021

	LIVESTOCK	% OF OPERATIONS	MAX	MIN	MEDIAN	AVG
	Cattle	47%	3000	1	7	45
	Pigs	40%	800	1	7	26
	Broilers	37%	15000	8	100	560
	Sheep	36%	600	1	14	28
	Turkeys	20%	15000	2	28	240
	Goats	12%	1000	1	6	40
	Ducks	11%	8000	5	20	163
	Rabbits	8%	300	3	30	55
?	Other (unspecified)	2%	250	3	37.5	54
	Heritage Meat Birds	1%	100	20	50	53
	Geese	1%	40	40	5	16
	Bison	<1%	150	20	40	70
	Alpacas	<1%	14	14	14	14
	Quail	<1%	250	250	250	250
	Water Buffalo	<1%	22	22	22	22

Business Viability

Small-scale meat producers in BC are a diversified group raising multiple species at varying scale in many different bioregions. To understand the economic contributions of these producers and to gauge the health of the industry, the survey asked a series of questions about employment, market avenues and perceptions about profitability.

> *I would love to grow into a proper full-time producer but the hassle of finding good clean slaughter that isn't a day's drive away is nearly impossible. Pair that with very, very limited options on bulk grain sales and even those are three times the price of what Alberta pays and there is basically no point to even farm. I can't work full time to support my passion and work full time to build a business and profitable farm forever. One is going to have to go.*
>
> — Producer in the Cariboo

Producer Status

As seen in **Table 1**, 29% of producers reported that they are striving to be full-time meat producers, 27% reported they were unsure while 44% said they are not striving to be full-time producers.

A large majority of respondents (94%) reported supplementing their income with work outside their meat businesses. The remaining 6% are full-time meat producers.

Amongst the producers working outside of their meat business, 32% are involved in other farming-related operations. Another 58% maintain off-farm employment. Of these respondents, 63% work off-farm jobs and 47% are self-employed. Most producers maintain several income streams concurrently. 12% of respondents self-identified as full-time farmers, raising livestock for meat while engaged in other farming activities as well.

Profile:

Producers not supplementing income with work outside of meat business

Operators self-identifying as full-time meat producers make up 6% of respondents (38 operations). These operations have been in business for an average of 21 years, 8 years more than the overall survey average. 50% have diversified operations meaning that they are producing more than one type of species.

All sell direct to customers and 53% also use secondary and tertiary sales channels such as farmer's markets or restaurant sales. All make extensive use of social media to market their products. 68% are experiencing challenges to operating or growing their meat enterprises. The top challenge identified by this group is access to slaughter followed by access to cut and wrap which mirrors the challenges experienced by part-time producers as well. These producers suggested that the financial viability of their farms could be increased by increasing production, improved availability of slaughter services and on-farm slaughter access.

Within this group, only 16% hold slaughter licenses. The remaining 84% have their animals slaughtered at a provincially inspected abattoir (n=27), have animals slaughtered unlicensed on farm (n=2), or both (n=6). When asked if they would consider getting licensed to slaughter on farm, 45% were unsure, 37% said no, and 17% said yes. Those that said no affirmed being happy with their current slaughter arrangements. The transportation time to a slaughter facility for these producers averages between less than an hour to 1-2 hours. This contrasts with the survey responses province wide, where many producers reported travel times of 3-4 hours, 4-5 hours, or more than 5 hours to get to a slaughter facility.

This group is a small representation of the survey respondents and certainly of the small-scale meat industry where diversification of enterprises is the norm. While only 6% of respondents are full-time meat producers, 12% are full-time farmers and another 47% are self-employed. No correlation was found between a producer's full-time status and the way in which they rate the profitability of their operations.

> *"We definitely need to make this process [meat production] more user friendly and accessible to producers who desire to bring a high-quality product directly to the consumer... Today's consumers are demanding it.*
>
> — Full-Time Producer

Profitability

Producers were asked to describe the profitability of their businesses from operating at a loss, breaking even, low profit, moderate profit, or high profit. 37% reported that they were operating at a loss, 26% affirmed to be breaking even and 26% incurred a low profit. Only 1% reported operating their business at a high profiting scale.

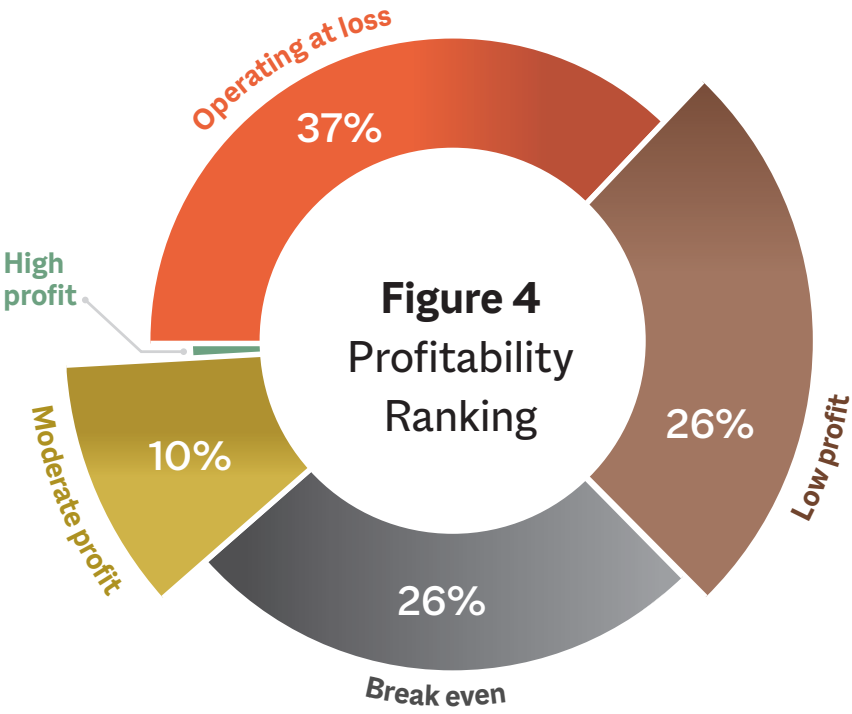


Table 3 Factors that would make business more financially sustainable, n=551

RANK	FACTOR
1	Lower feed costs
2	Increased availability of slaughter services
3	Improved availability of on-farm slaughter
4	Increased access to cut and wrap services
5	Increasing production
6	Less local government bylaw restrictions
7	Ability to have additional housing on the farm for farm staff/help (including family)
8	Ability to generate other/more diverse income off the property
9	Increased proximity of feed suppliers
10	More demand for my product
11	Business management support
12	Other

Respondents that selected that their profitability was "low profit" and under were asked to select then rank factors that would help increase their financial sustainability

Financial Sustainability

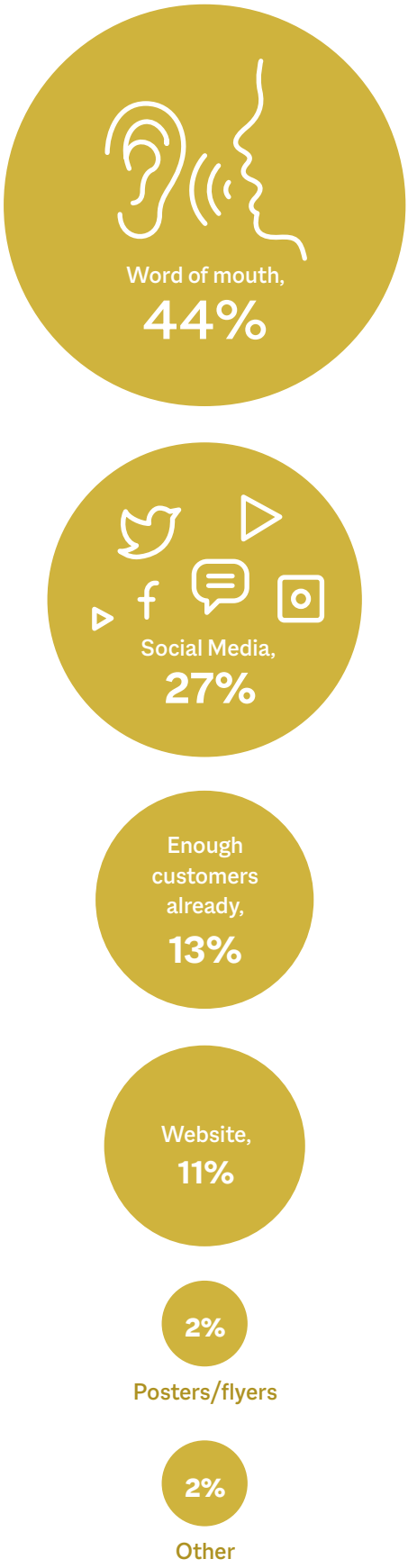
When asked which factors would help increase financial sustainability, as defined as paying oneself a living wage, the three most selected factors were lower feed costs, increased slaughter services, and increased cut and wrap services. **Table 3** shows the other factors selected and their rankings.

Effect of COVID-19 Pandemic on Producers Income

For producers who reported operating before the COVID-19 pandemic, 46% claimed their sales remained the same, and 37% reported their sales increased. Only 17% of producers reported that the COVID-19 pandemic reduced their meat sales. In times of uncertainty, buying from local producers may be the only option for many communities to ensure local food security. With the increase in COVID-19 outbreaks in meat processing plants during the pandemic, consumers are looking to regional producers to supply them with their meat products. This highlights the importance of strengthening and developing shorter food supply chains.

Figure 5 Effects of COVID-19 on 2020 meat sales

Figure 6 Marketing tools used



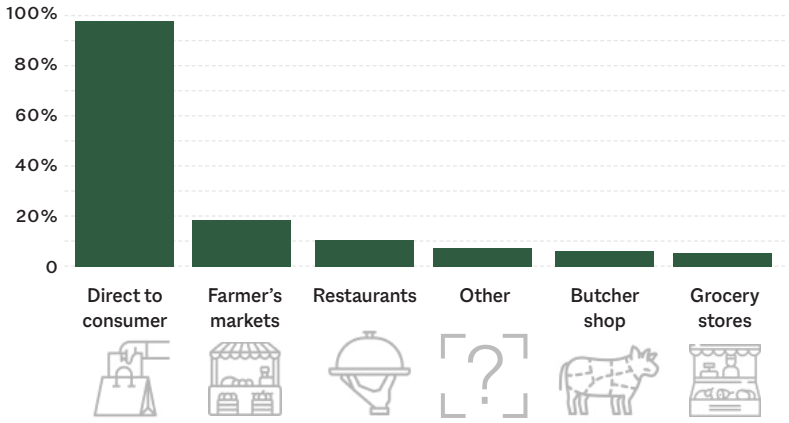
Market Channels

To better understand how producers market their meat, producers were asked to select the market channels that they utilize. Most producers (96%) sell directly to consumers, 17% sell at farmer's markets, 9% to restaurants and 6% to butcher shops.

All regions within the province follow the trend of selling their meat directly to consumers. As much as 98% of producers sell their meat directly to consumers in the South Coast, and 97% in both the Thompson Nicola and Vancouver Island and the Coast. The least common places producers sell meat to are grocery stores.

Small-scale producers vastly rely on "word of mouth" to grow their customer base. Social media is a close second followed by using a website. 25% of producers rely strictly on word of mouth.

Figure 7 Where BC small-scale producers sell their meat in BC

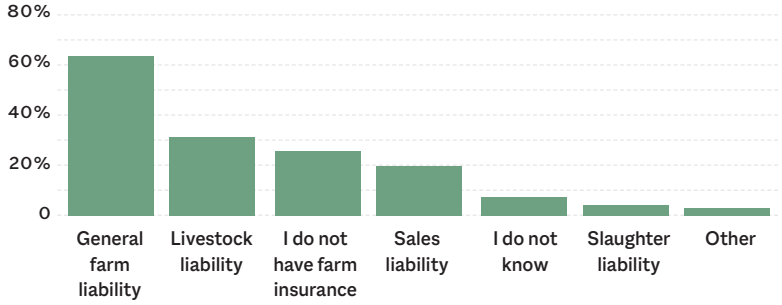


The Question of Farm Insurance

63% of operations carried general farm liability insurance, another 31% carried livestock liability and 19% carried sales liability. Only half of the producers with slaughter licenses carried slaughter liability insurance. 26% of respondents did not carry any type of farm insurance for their farm.

As discussed later in this report, access to insurance was identified as the sixth most important challenge to small-scale meat producers in BC. Feedback received in the focus groups and in-survey comments confirmed the severity of this issue. The price of farm insurance is prohibitive to small-scale producers and in some instances not available at all.

Figure 8 Aspects for which small-scale meat operations carry insurance



Producers Challenges

To understand the challenges faced by the small-scale meat sector in BC, producers were asked to select, then rank challenges that prevented them from growing or maintaining their meat businesses at the desired scale.

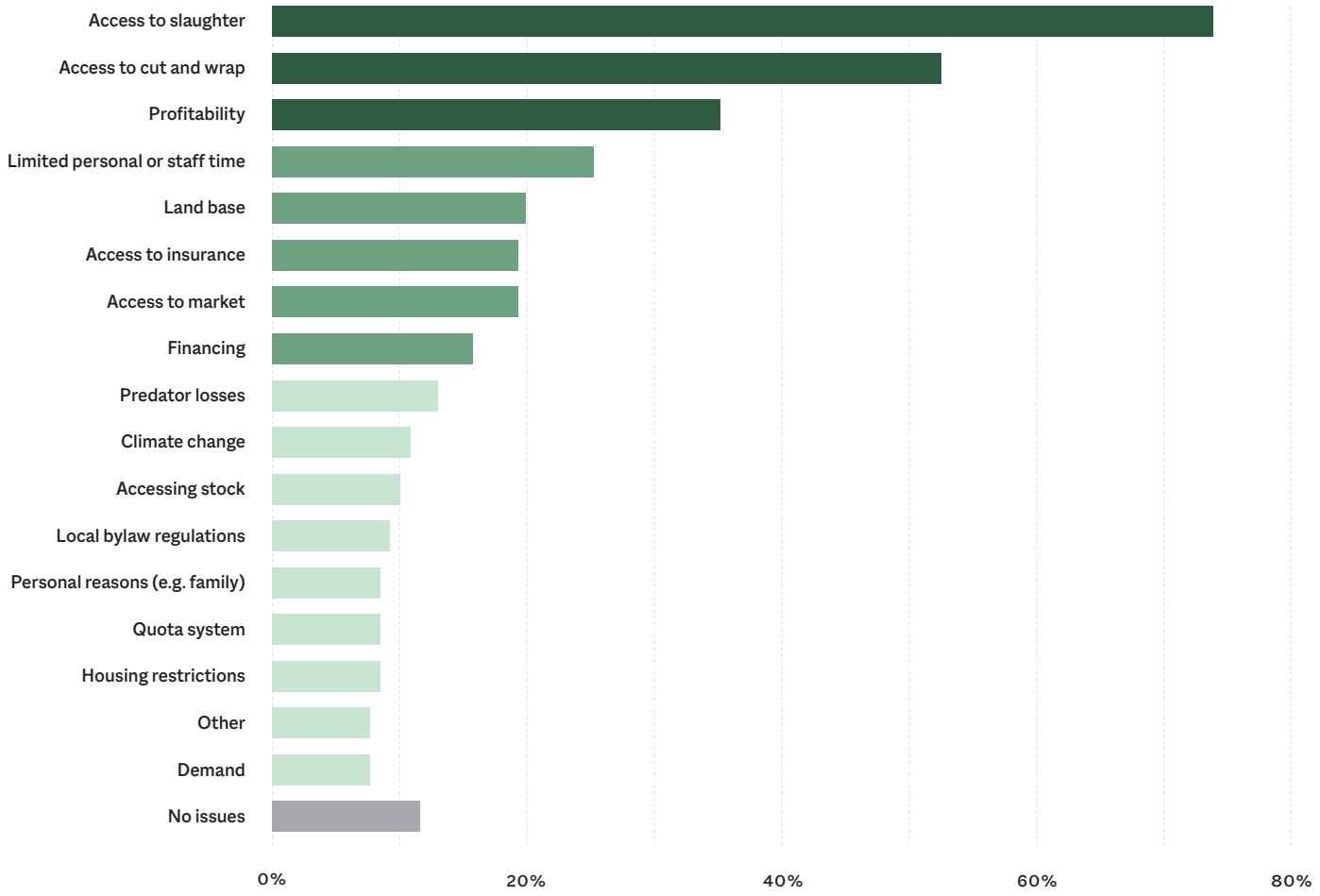
The top three challenges across all demographics, as well as within the current and no longer producing groups, were the same: **access to slaughter, access to cut and wrap, and profitability.**

88% of all producers indicated that they are experiencing some challenge growing their meat businesses.

Producers in business for under 40 years are experiencing the same challenges with factors preventing them from growing their meat business. However, producers who have been in the business for over 40 years ranked staff shortages higher than the rest of respondents. This suggests that producers aging in the industry are in need help to support their operations, creating a potential for jobs and mentorship in the industry.

Regional differences in the top challenges were found, however. Access to market is an important challenge in the Peace while land access was highly ranked for South Coast producers. Climate change was identified as a considerable issue in the Okanagan, right behind "land base". Regional challenges are discussed in more details in the Regional Reports section of this report.

Figure 9 Challenges producers experience in growing their meat business in BC, n=619



This represents the percentage of respondents who selected these factors as applying to their operations.
This graph represent the percentage of respondents who selected each factors as applying to their operations

Interestingly, demand is one of the least important challenges amongst producers across all years in operations and regions. This is consistent with many comments received in the survey and the focus groups about producers not being able to meet the existing demand for their products due to other challenges, especially access to slaughter. Only in the sparsely populated regions of Cariboo Chilcotin Coast and Omineca Skeena did a number of producers select demand as a challenge.

Access to insurance is ranked high as a challenge across the province but especially on Vancouver Island and Coast as well as in Cariboo Chilcotin Central Coast where it ranks amongst the top 5 challenges. As revealed in the regional focus groups, access to insurance is an important factor affecting profitability. Participants reported that lack of access to insurance is also an impediment to the acquisition of on-farm slaughter licenses. Insurance is scarcely available for on-farm slaughter operations and costs are prohibitive when they are.

> *"The low small-lot limits in poultry are extremely frustrating and are keeping us from growing a promising segment of our business. We are discouraged that we are unable to find underwriters to insure our business. We have invested heavily in a multi-species on-farm abattoir and cut floor, so I hope that the future is promising for our neighboring small-scale meat producers.*
>
> — Producer in the Thompson Nicola

Table 4 Ranking of factors preventing growth of meat business per region

Factors	BC	CARIBOO CHILCOTIN	KOOTENAY	OKANAGAN	OMINECA SKEENA	PEACE	SOUTH COAST	THOMPSON NICOLA	VANCOUVER ISLAND COAST
Access to slaughter	1	1	1	1	1	1	1	1	1
Access to cut and wrap	2	2	3	2	2	2	2	2	2
Profitability	3	3	6	3	4	6	3	3	3
Limited personal or staff time	4	9	2	4	3	2	5	4	4
Land base	5	7	4	6	6	7	4	5	6
Access to market	6	4	7	5	5	3	6	9	10
Financing	7	5	5	8	7	4	8	8	9
Access to insurance	8	5	8	10	8	12	9	6	5
Predator losses	9	8	5	9	12	9	10	7	8
Climate change	10	11	11	7	17	10	14	12	11
Accessing stock	11	17	12	14	16	13	7	16	7
Local bylaw regulations	12	15	9	16	9	n/a	12	11	12
Quota system	13	13	13	11	15	11	16	10	16
Personal reasons (e.g. family)	14	12	14	15	14	15	13	15	13
Other	15	16	9	13	10	8	15	17	14
Housing restrictions	16	14	n/a	12	13	16	11	13	14
Demand	17	10	16	17	11	14	17	14	17

Producers were asked to rank the challenges they had previously selected as applying to their operations. Factors were ranked from most important to least and weighed based on their rankings and frequency

Lessons from Past Producers

To gain insight into the future of the industry, it is important to learn about producers who have had to fold their businesses and understand the challenges that they faced. Previous producers raised the same challenges as the ones identified by the current producers, which indicates that these issues aren't new.

A primary reason reported by producers for ending their meat businesses was the unavailability of slaughter services which includes factors such as the difficulty of booking dates, long travel distances, the unreliability of the booking process or the lack of options for desired species. Many producers reported having dates canceled last minute even when bookings had occurred months in advance. Some abattoirs are allegedly overbooked and poorly managed and prioritizing their own animals over their customers' especially if they are small-scale. Smaller batches of broilers are rarely accepted by abattoirs and cut and wrap is almost impossible to find for poultry. Rabbits and turkeys are also near impossible to find slaughter for. Many producers reported scaling back their operations to only raise animals that they could find slaughter for. A situation that severely limits consumer choice.

In addition to the lack of available slaughter, respondents expressed that travel time to slaughter facilities was often not financially sustainable. The stress on animals from long travel times decreased the quality of the meat producers could offer to customers and increased the price producers had to charge for their products.

Access to cut and wrap was also identified as a limiting factor. Some producers reported the lack of access to specialty butcher services that understand the needs of a craft meat market.

The price of feed was also touted as an important factor for leaving the business. Small-scale producers don't often have enough animals to enjoy bulk feed discounts, paying large shipping fees for small batches and not taking advantage of any economies of scale.

Although there was an increasing demand for their products, these producers chose to exit meat production because there were not enough profits to be made.

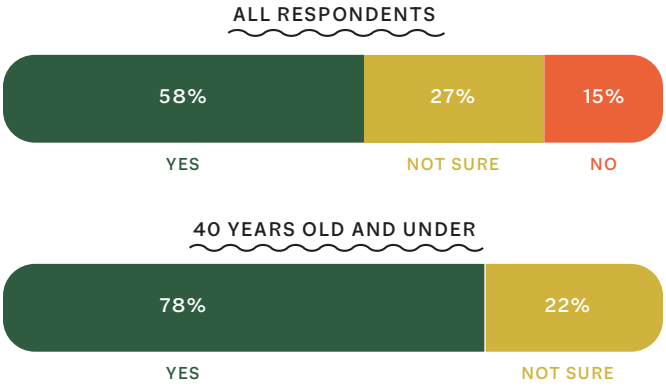
Past Producers Returning to Business

Past producers were asked if they would return to producing meat if their issues were to be resolved. 58% said that they would consider returning to production; 27% were unsure and 15% said that they were not interested in returning. Within those not interested in returning to production, half are retired.

If only the answers from the 40-year-old and under are considered, the willingness to return to production rises to 78% while 22% said that they were unsure, and no one reported not wanting to return to production.

There is a definite strong desire to return to business from these producers. Addressing these challenges is paramount to retaining current producers and may translate into past producers returning to business.

Figure 10 Past producers intentions to return to production if enough of the identified challenges are addressed, n=89



Slaughter Needs of the Small-Scale Meat Producers

Slaughter availability is the most reported challenge by small-scale meat producers trying to run viable businesses. The survey contained a series of questions around producer's experiences and methods of slaughter. These aimed to provide an understanding of where and how small-scale producers slaughter their animals, how many possess slaughter licenses, how far they must travel to get their animals processed and whether they are satisfied with their current arrangements.

Slaughter Licenses

Only 54 (9%) out of the 619 operations province-wide held slaughter licenses at the time of the survey. This survey was conducted after the Ministry of Agriculture and Food (MAF) announced the Farmgate and Farmgate Plus license levels that replaced the Class E and D designations. When asked if, in the context of these changes, they would be interested in acquiring an on-farm slaughter license, 41% said yes, 25% said no and 34% remained uncertain. The percentage of producers interested in participating in the new licensing program was highest in the Kootenay (52%) and the Peace (52%). Those who were not interested in acquiring a license under the new regulations selected the following reasons: 39% lacked the skills and knowledge to slaughter on farm, 26% mentioned that the cost of getting licensed is prohibitive, 5% were happy with their current slaughter arrangements, 6% said that the animal limit of the new licenses was not enough and a further 30% said that another reason was the cause. When asked to elaborate on these other reasons, comments included: lack of time or physical ability, too busy raising animals, not being equipped for it, being close to retirement, lack of economy of scale for small producers, customers preference for fully inspected meat, currently building a Class A facility, licensing not solving the cut and wrap issue and the inability to get insured for on-farm slaughter.

Figure 11 Interest in getting on-farm slaughter license in the context of new regulations in effect October 2021, *n=565*

On-farm slaughter class at the KPU Farm School

Slaughter License Holders

License holders represented 10 Class A licenses, 6 Class B licenses, 19 Class D and 19 Class E licenses. The highest proportion of slaughter licenses to respondents was found in the Kootenays (14.3%). The survey captured an estimate of 26% of the Class A licensees, 33% of Class B licensees, 31% of Class D licensees and 43% of Class E licensees according to total license numbers in BC from 2019 (BCAA, 2021). Among the license holders, 44% said that their facilities were available for custom kill while 56% said that they weren't. 44% of license holders still require additional slaughter services outside of their license's allotment.

Table 5 Complete list of licensed slaughter establishments in BC in 2020 versus slaughter establishments captured by the 2021 survey

ESTABLISHMENTS LISTED TO SLAUGHTER	CLASS			
	A	B	D	E
BC establishments, total**	38	18	60	44
Survey respondents with slaughter licenses, total	10	6	19	19
License holders captured by survey	26%	33%	31%	43%

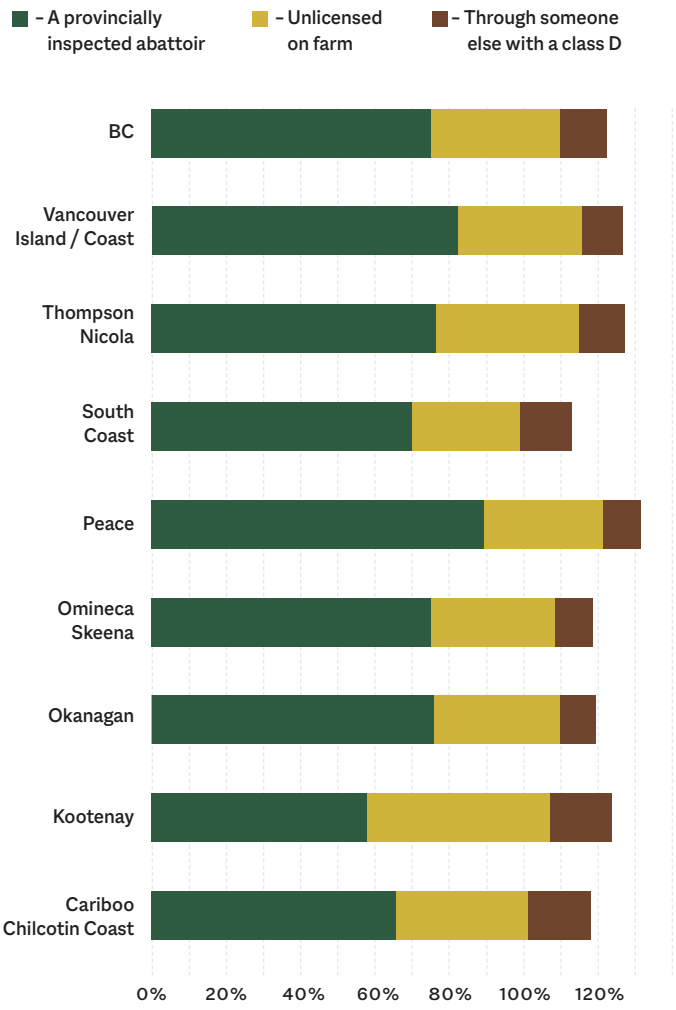
***July 2020 BCAA Capacity Study*

This table demonstrates the potential population captured by the survey

Slaughter Processing for Non-License Holders

Most producers use a mix of methods for getting their livestock slaughtered. When asked where they were currently processing their animals, 71% answered they used the services of a provincially inspected abattoir, 35% practiced unlicensed on-farm slaughter and 12% slaughtered through someone else's D license. Different slaughter means are used depending on livestock species or according to the availability of slaughter services at the time of need.

Figure 12 Methods of slaughter used by operations per region



This question was answered by non-license holders as well as license holders needing extra slaughter services in addition to their licenses. The numbers are not additive as respondents could choose several options.

Provincially Inspected Abattoirs

Out of the 71% that use the services of a provincially inspected abattoir (Class A or B), 89% reported experiencing some form of issue with their slaughter facilities. **Table 6** ranks the issues selected by producers. The top 3 being difficulty booking dates, travel time and cost.

Table 6 Ranking of issues with provincially inspected abattoirs amongst producers using the services of abattoirs, n=375

RANK	FACTOR
1	Can't get the dates that I need
2	Travel Time
3	Cost
4	Cannot accomodate the number of animals
5	My booked dates have been canceled or delayed
6	Quality concerns
7	Animal welfare concerns
8	I have special requirements that cannot be met
9	Missing product
10	Selective booking
11	Abattoir closed
12	Unavailable to slaughter broilers
13	Don't support small-scale
14	Unavailable slaughter for desired species
15	Uncleanliness
16	Unavailable travel route (ferry, etc)

These factors were ranked from most important to least. All the responses were weighed based on their rankings and frequency

The remaining respondents were asked to provide reasons for not using the services of provincially licensed abattoirs. Difficulty booking dates, travel time and cost are the top 3 reasons BC wide. Animal welfare concerns are not far behind across the regions but figures as the second most important reason for not using an abattoir in the Peace and Vancouver Island/Coast regions. In the South Coast, producers are reporting less issues with booking dates and canceled bookings. The top reasons why producers choose not to use abattoirs in the South Coast are travel time, cost, animal welfare and quality concerns. ***Other reasons submitted via the additional comments included:***

- → Difficulty finding abattoirs that serve certain species especially rabbits, waterfowls, and specialty poultry breeds
- → Abattoirs not accepting small number of animals at a time (scale)
- → Abattoirs impossible to reach (not answering phone, not returning calls/emails)
- → Abattoirs being selective in who they want to book in

Table 7 Reasons respondents did not use a provincially licensed abattoir, n=282

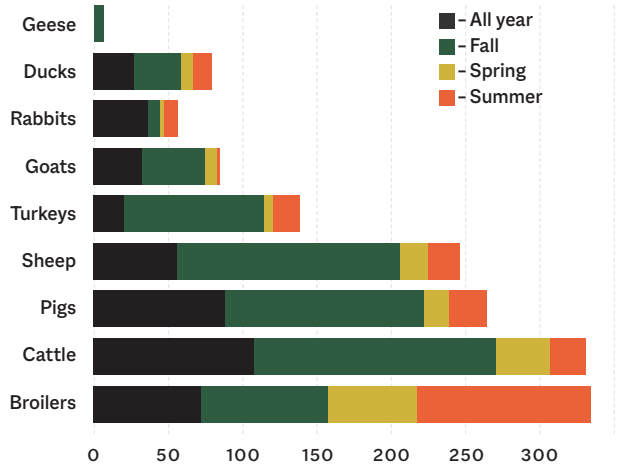
RANK	FACTOR
1	Can't get the dates that I need
2	Travel Time
3	Cost
4	Animal welfare concerns
5	Quality concerns
6	My booked dates have been canceled or delayed
7	Other
8	I have special requirements that cannot be met

282 respondents not using the services of a provincially inspected abattoir were asked to list the reasons why they did not. These factors were ranked from most important to least. All the responses are weighed based on their rankings and frequency.

Slaughter Timing per Species

Survey respondents selected what time of year and for what species they need or use slaughter. There is a high and dynamic demand for slaughter services year-round for all species but there are markedly higher needs in the Fall. 49% of cattle producers need slaughter in the Fall as well as 50% of pig producers, 61% of sheep and lamb producers, 52% of goat producers and 66% of turkey producers. Broiler slaughter needs are more evenly distributed throughout the year with 35% needing slaughter in Summer, 26% in the Fall and 21% all year. Many small-scale producers raise their animals on pasture taking advantage of the summer months hence why an influx of slaughter needs is observed in the Fall.

Figure 13 Timing of slaughter needs per species in BC, n=619

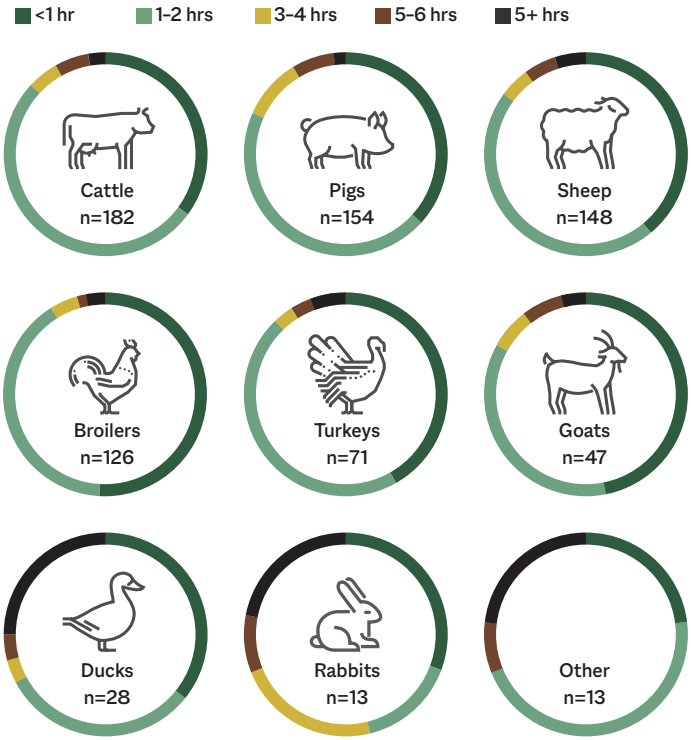


The numbers in this table represent the number of operations that selected each option. "All year" was an exclusive choice but a combination of other seasons could be selected.

Time Driven to Slaughter

A majority of BC small-scale producers (78%) drive 2 hours or less to bring their animals to slaughter across all species; 38% drive less than an hour and 40% drive between 1-2 hours. Still 7% of respondents travel 3-4 hours, 10% are driving 4-5 hours and another 10% are driving over 5hrs. The largest proportion of long driving times are found on Vancouver Island & the Coast, Chilcotin & Coast and Omineca Skeena. The South Coast and the Okanagan have relatively few operators that need to drive their livestock to slaughter for more than 3 hours. Comparatively large proportions of ducks (25%) and rabbits (23%) need to be driven over 5 hours to slaughter. Several producers expressed that it was very difficult to find processing options for these species; many having scaled down or abandoned raising duck and rabbit altogether for this reason.

Figure 14 Time producers are driving to get their animals slaughtered



Producers were asked to select how long they needed to drive to get their animals slaughtered. Respondents could select a different answers based on the different livestock species that they raise. Many producers are having to bring their animals to different facilities based on species.

Cut and Wrap

Most producers use the services of a cut and wrap/butchering service provider. This includes slaughter license holders since only a Class A facility is licensed to do cut and wrap. Cut and wrap was identified as a major bottleneck in all regions by participants in the focus groups. Distance of cut and wrap providers from slaughter facility was also identified as a challenge with producers needing to pick up their carcasses from the abattoir to then bring them to the cut and wrap location.

77% of respondents said that they used a cut and wrap facility, 12% said they only sold their meat uncut (whole or sides), 10% do the cut and wrap themselves without a permit and only 2% are licensed to do cut and wrap.

Issues with cut and wrap

The producers who answered that they use cut and wrap services were in turn asked if they were experiencing any issues with their providers. 64% reported having issues. The top issues identified were unavailability (37%), cost (34%) and the lack of ability to accommodate special requests such as cuts, packaging, specialty breeds and more (18%).

Other issues identified via comments include that cut and wrap providers:

- → Are short on staff
- → Abattoirs will only cut and wrap if slaughter also happens on site
- → Poor customer service
- → Distance from abattoir
- → Meat skimming (cut and wrap provider keeping meat for themselves)

Figure 15 Issues with cut and wrap providers, n=396

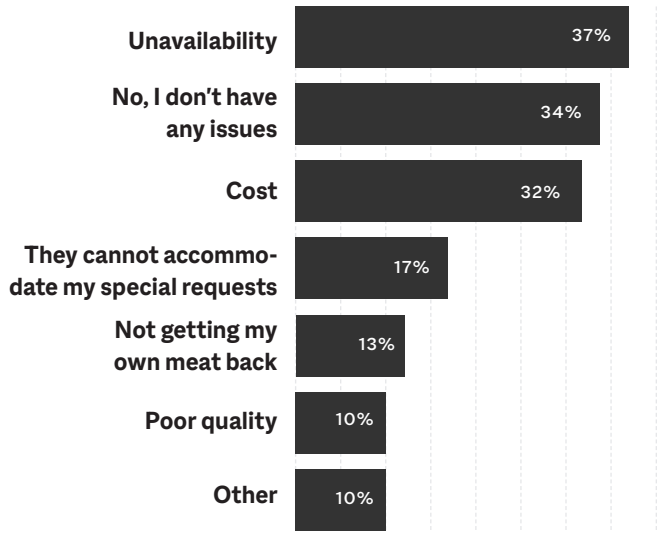
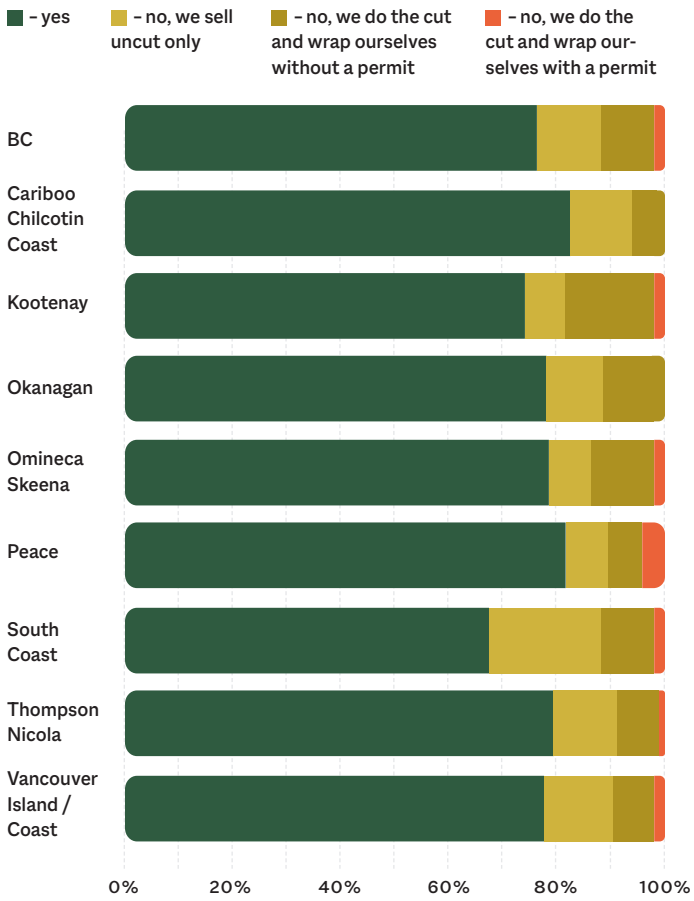
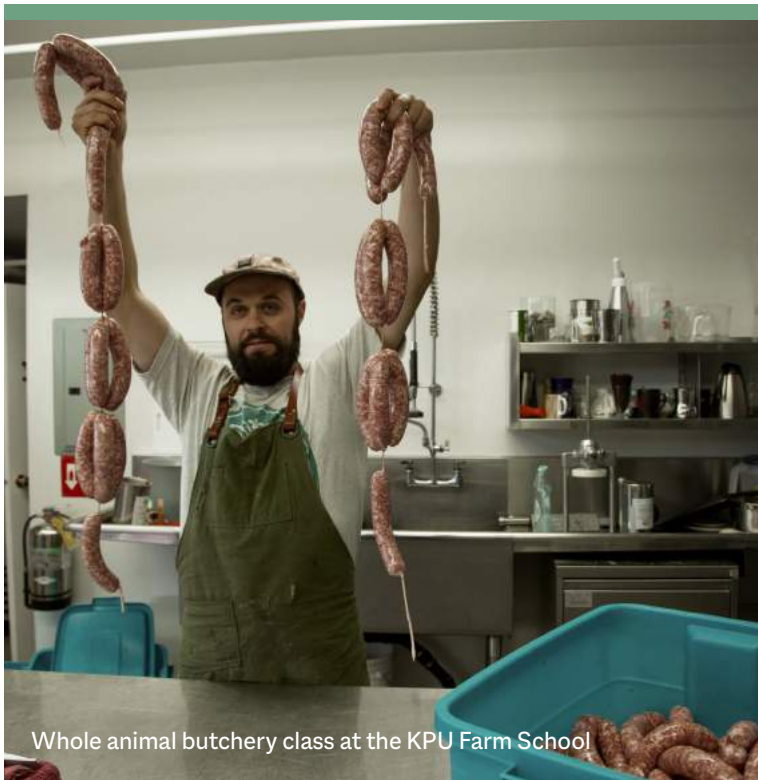


Figure 16 Do you use the services of a cut and wrap provider? n=619





Whole animal butchery class at the KPU Farm School

Profile:

Operations that practice unlicensed slaughter

It has been assumed for a long time that unlicensed slaughter is occurring on BC farms. The survey set forth to estimate how frequently producers practice unlicensed slaughter and understand the myriad of circumstances in which it is practiced.

It was reported that 35% of all operators practiced unlicensed slaughter at some point. From this group, 52% use unlicensed slaughter exclusively, 41% also use the services of provincially inspected abattoirs and another 13% occasionally slaughter under another operation's D license. Their reasons for using that method vary widely from the lack of availability of other viable options, animal welfare and preference. One producer explained that when their slaughter dates was canceled with a short notice, they opted to do the slaughter themselves to avoid the additional costs of keeping their animals over many more months. Many expressed that they would prefer using the services of an abattoir if it was available.. Some exclusively sell to acquaintances while others have established customers who trust their practices.

"I have a very strong outlook on sustainable, ethical meat production. I will not put my livestock through the unethical stress of transport and feedlot practices that currently dominate the regulatory bodies. It's animal abuse and costly. On farm slaughter is by far a superior humane option and allows for a cost-effective option for producers. After having to pay a slaughterhouse $6/bird and feed costs there is no room left for profit in small-scale free-range broiler production. And transport costs on top...not to add the stress hormones in the meat after. It's not ethical and it's not sustainable.

"I have plans to upscale but will not and cannot until we are able to have more access to reliable slaughter and cut wrap that is licensed. I do not sell to anyone other than immediate family. I have the market to sell my product but cannot do it in a way that makes me comfortable, so I don't.

"One of our largest problems is that even if we could get spaces for slaughter, our ferry has no provision for allowing priority access for livestock. We do not want animals waiting for multiple sailings.

Operations that practice unlicensed slaughter exclusively

109 operations practice unlicensed slaughter exclusively. These producers have 10 years of experience on average. 23% are striving to be full-time producers, 33% are unsure and 56% are not interested in becoming full-time meat producers. Nevertheless, 86% reported challenges to growing their meat businesses and the top challenge identified was access to slaughter (**Table 8**). Their slaughter needs are concentrated in the Fall. When asked if they would be interested in acquiring a slaughter license under the new regulations, 53% responded yes, 39% said they were unsure and 8% said no. This represents 12% more respondents who are interested in getting a slaughter license when compared to all survey respondents.

Producers who practice unlicensed on-farm slaughter exclusively, n=109

Figure 17 Interest in getting an on-farm slaughter license in the context of new slaughter regulations in effect October 2021

Table 8 Top challenges impeding growth of meat business

#	TOP CHALLENGE IDENTIFIED
1	Access to slaughter
2	Land base
3	Accessing stock
4	Quota system
5	Limited personal of staff time
6	Financing
7	Demand
8	Profitability
9	Other

Factors are weighed based on rankings and frequency.

Table 9 Reasons for not using an abattoir

1	Travel time
2	Can't get the dates that I need
3	Animal welfare concerns
4	Cost
5	Quality concerns
6	Other
7	I have special requirements that cannot be met
8	My booked dates have been canceled or delayed

Factors are weighed based on rankings and frequency.

Land Use and Land Management

Land Base

The producers accounted for in this survey farm a total of 137,000 acres across the province which constitutes an average of 169 acres (median of 20) acres per operation. Acreage use differs greatly across the regions. The largest farm acreages are found in the Peace region whereas the smallest are found on Vancouver Island & Coast and on the South Coast.

Figure 18 Average and median farm acreage per region. Number of operations with grazing tenures

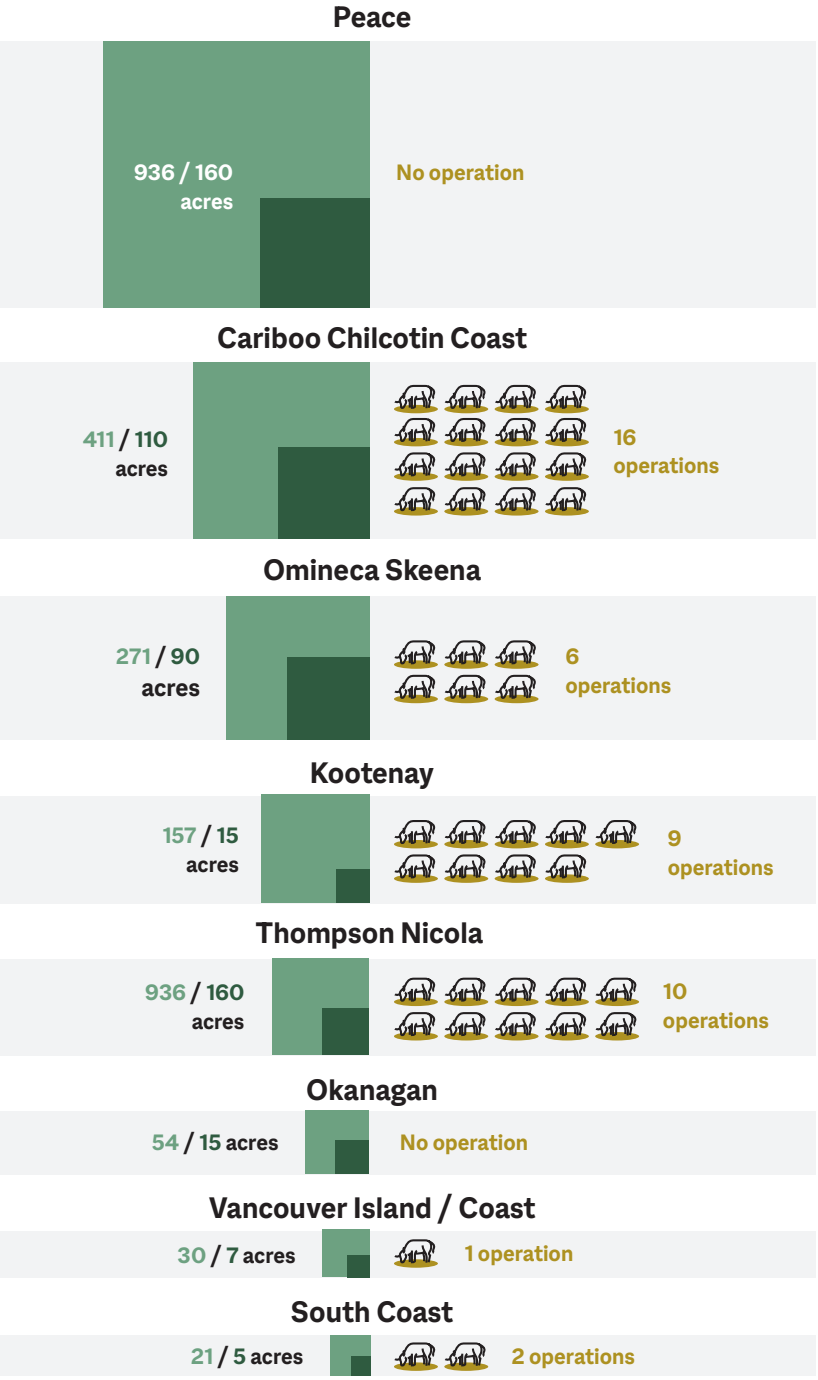
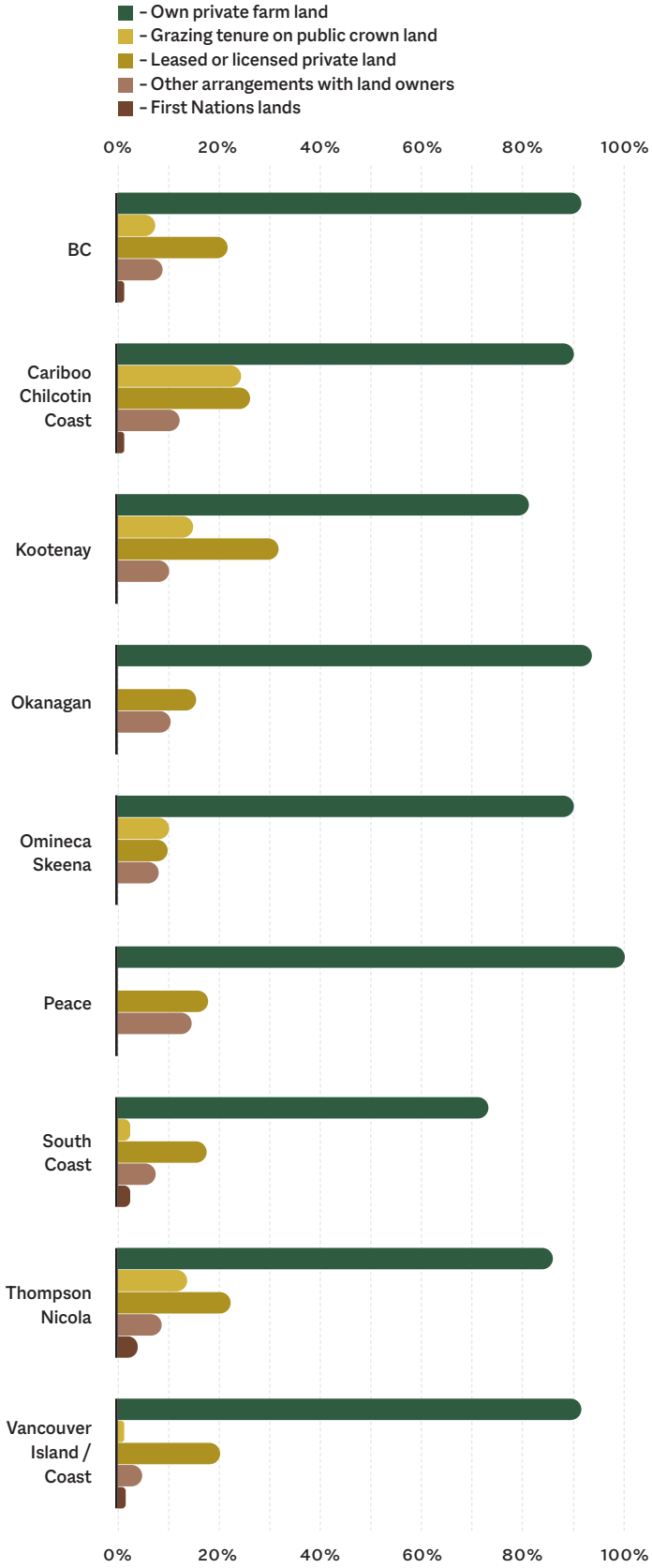


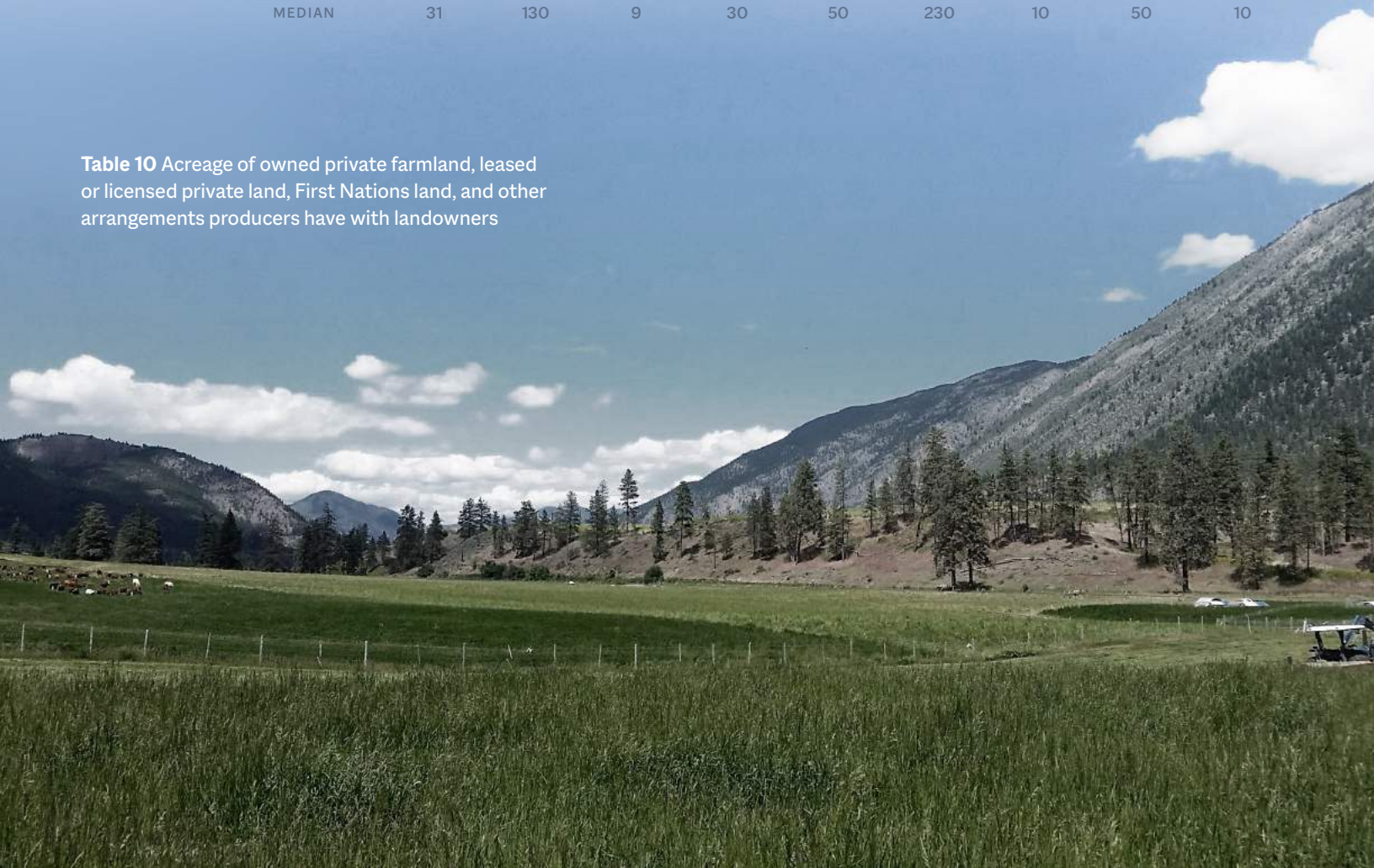
Figure 19 Percentage of operations raising livestock in each land types per region



Respondents could select many options so the percentages are not additive

ACREAGE IN LIVESTOCK PRODUCTION	BC WIDE	CARIBOO CHILCOTIN COAST	KOOTENAY	OKANAGAN	OMINECA SKEENA	PEACE	SOUTH COAST	THOMPSON NICOLA	VANCOUVER ISLAND / COAST
Own private farm land	**64%**	**51%**	**66%**	**60%**	**87%**	**89%**	**75%**	**28%**	**58%**
AVG	156	298	156	41	278	1087	21	92	23
MEDIAN	15	110	10	10	80	160	5	21	7
Leaser or licensed private land	**22%**	**37%**	**33%**	**32%**	**13%**	**7%**	**19%**	**20%**	**23%**
AVG	229	730	202	129	383	500	22	266	40
MEDIAN	33	180	125	20	150	300	10	86	10
First Nations lands	**8%**	**<1%**	**0%**	**0%**	**0%**	**0%**	**<1%**	**49%**	**1%**
AVG	1,580	3	0	0	0	0	3	3,667	50
MEDIAN	50	453	0	0	0	0	3	4100	50
Other arrangements with land owners	**6%**	**12%**	**1%**	**8%**	**1%**	**4%**	**6%**	**3%**	**18%**
AVG	163	551	20	50	47	380	18	100	123
MEDIAN	31	130	9	30	50	230	10	50	10

Table 10 Acreage of owned private farmland, leased or licensed private land, First Nations land, and other arrangements producers have with landowners

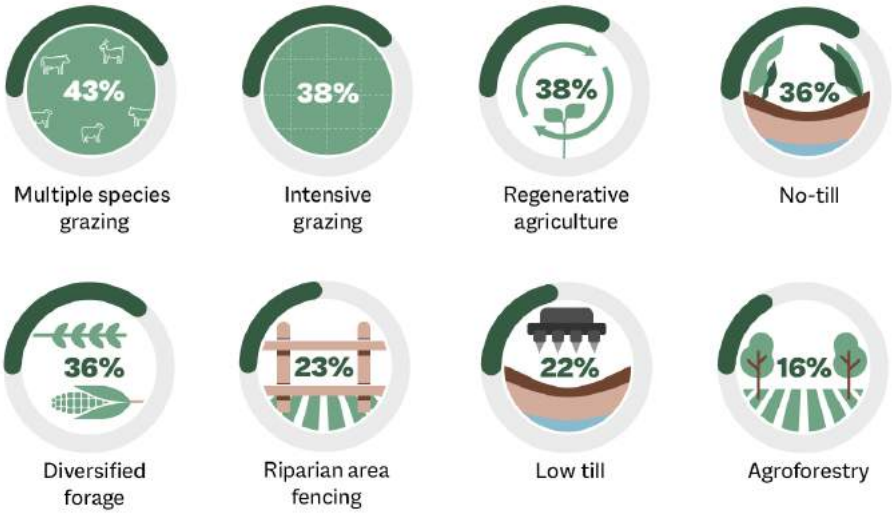


Land-Based Practices

Producers were asked if they used any recognized practices to steward their land. They were asked to select from the following list of practices: multiple species grazing, intensive grazing, regenerative agriculture, no till, diversified forage, riparian area fencing, low till, and agroforestry. 97% of respondents reported using one or more of these practices to steward their land.

BC wide, the most reported practices were multiple species grazing (43%), Intensive grazing (38%), regenerative agriculture (38%), no-till farming (36%), and diversified forage (36%). Small-scale producers often use a variety of these land stewardship methods depending on the makeup of their land, the resources available to them and the livestock being raised.

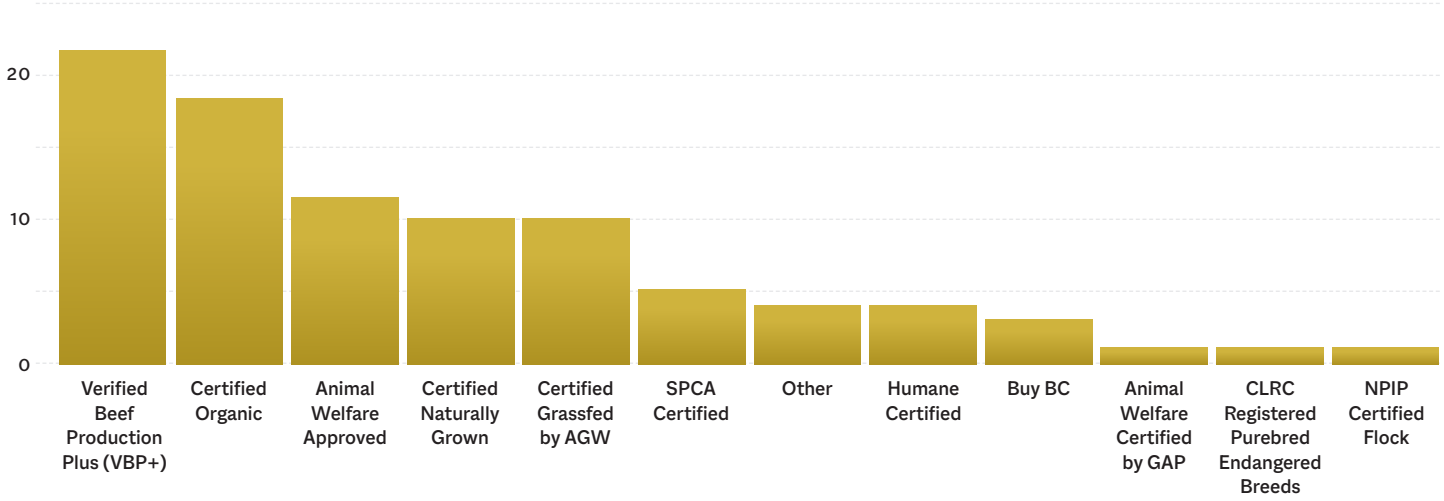
Figure 20 Recognized practices producers use to steward their lands



Farming Practices and Certifications

The survey asked producers if their production methods were certified by any third parties. These certifications include Certified Organic, Certified Naturally Grown, Verified Beef Production Plus (VBP+), Animal Welfare Approved, SPCA Certified, Humane Certified, Animal Welfare Certified by GAP, Certified Grass Fed by AGW, Grass Fed Pro-Cert Certified or any other form of certification. The most common certification is VBP+ and Certified Organic, as 22 respondents reported they are VBP+ certified and 18 reported they are Certified Organic. Interestingly this number of VBP+ Certified farms consists of 18% of the total number of farms that carry this certification in BC. This is significant since many of these farms are cow-calf operations that sell their livestock at auctions and are unlikely to identify as meat producers. More producers in the Okanagan were Certified Organic than anywhere else in the province.

Figure 21 Number of operations who are certified by third parties



Summary of Findings

BC's small-scale meat producers are a very diversified group: they raise more than 15 types of livestock, they have varying income and profitability levels, many have been in the business for more than 30 years and others are just getting started, some own their land while others rent it, some drive over 5 hours to get their animals slaughtered while others travel less than an hour. Given the great diversity of the sector, it is all the more striking that the challenges identified in this survey are so uniformly felt by all producers across all regions of the province.

It was heard loud and clear that access to slaughter, access to cut and wrap and low profitability are challenges that have created a market failure in the industry. This is characterized by many farms starting to raise livestock for meat then quitting the business in a short order or producers scaling back and not achieving growth despite strong and growing consumer demand for their products.

The lack of slaughter capacity has created a context for the widespread use of unlicensed slaughter in the province. 35% of all producers reported using unlicensed slaughter for meat destined to market at one point or another. We have found, however, that this method was rarely selected as the first choice by respondents. Many producers reported resorting to unlicensed slaughter when no other option was readily available. This is a very important factor to consider when evaluating meat regulations; if too restrictive, regulations may actually increase the amount of unlicensed slaughter in the province, thereby reducing overall food safety and oversight.

Other challenges ranked high amongst respondents across the province. Access to insurance is a serious impediment to meat operations, especially those that hold slaughter licenses. One respondent mentioned that the insurance for their small abattoir was terminated with no possibility of renewal and no reason was provided. This gap in understanding between producers and insurance companies regarding the risks associated with running on-farm slaughter operations urgently needs to be addressed.

Feed costs are another widely felt issue which is slated to become worse. Droughts, fires, climate disruption, global unrest, sanctions and raising fuel costs are sure to further increase the price of all inputs in the next few years. Land access continues to figure prominently in the barriers to growth in the province and especially in the more densely populated regions such as the South Coast and Vancouver Island.

Many producers affirmed that they would like to scale up their operations, that there is ample demand for their products but that they are unable to meet it for reasons beyond their immediate control. Some have lamented being "stuck" in the hobby farm scale, others would gladly take on meat production as their full-time occupation if the barriers that they experience were removed.

Previous producers echoed the same challenges as reasons why they left the industry. Interestingly, when asked if these problems were resolved if they would be interested in getting back into the meat business, 78% of the operators that were not of retirement age said yes.

In the face of food price inflation, more extreme weather events, global unrest and ecological crises, we need to preserve the diversity of our agricultural landscape in order to realize the resiliency afforded by strong regional food systems. The COVID-19 pandemic and unprecedented natural disasters have demonstrated the importance of preserving and elevating these systems. Large food distribution networks and conglomerates are susceptible to supply chain disruptions that are not as acutely felt by small family farms. While the pandemic was impacting a few large meat plants across the country, small-scale meat producers were emptying their inventories at a record speed selling directly to neighbours and community members. This is what true food security, self-reliance and resilience looks like. We are urging all levels of government and our industry partners to take on further actions that will solve the challenges identified in this survey for the preservation and growth of this diverse and promising sector.

Cattle in the haze of the 2021 forest fires

Recommendations

List of Acronyms

BCAA British Columbia Association of Abattoirs

BCCA British Columbia Cattlemen Association

BCCMB British Columbia Chicken Marketing Board

BCFC British Columbia Forage Council

BCIT British Columbia Institute of Technology

BCSARA BC Search and Rescue Association

BCT British Columbia Turkey Marketing Board

BHN Butcher Hub Network

EMBC Emergency Management BC

FCBC Foodland Cooperative of British Columbia

FIRB Farm Industry Review Board

FLNROD Forests, Lands, Natural Resource Operations & Rural Development

IBABC Insurance Brokers Association of BC

IRCC Immigration, Refugees and Citizenship Canada

ITA Industry Training Authority

KPU Kwantlen Polytechnic University

MAF Ministry of Agriculture and Food

NFU National Farmers Union

NLC Northern Lights College

SSFPA Small-Scale Food Processor Association

SSMPA Small-Scale Meat Producers Association

TRU Thompson Rivers University

UBCM Union of BC Municipalities

YA Young Agrarians

CHALLENGE	POTENTIAL SOLUTIONS & RECOMMENDATIONS	POTENTIAL PARTNERS
1 Access to Slaughter	1.1. Launch a BC Butcher Hub Network (BHN)	SSMPA, MAF, Regional Food Hubs, Meat Producers, Abattoir Operators, Slaughter Truck Operators, Butchers
	1.2. Create a Slaughter Truck Pilot Program	MAF, SSMPA, BHN
	1.3. Create a Slaughter Training Program Tailored to Small-Scale Operations	BHN, SSMPA, MAF, BHN
	1.4. Increase Meat Inspection Capacity	MAF
	1.5. Promote the Farmgate and Farmgate Plus License Program	SSMPA, MAF, BHN
	1.6. Modernize Meat Processing Communications and Record Keeping	MAF, SSMPA, TRU, BCIT, BCAA, BHN
2 Access to Cut and Wrap	2.1. Support and Expand Butchery Education Programs in BC	SSMPA, TRU, NLC, ITA, BHN
	2.2. Increase Cold Storage Capacity	MAF, Food Hubs, Butcher Shops, BHN
	2.3. Improve Access to Foreign Workers for the Small-Scale Meat Industry	AAFC, NFU, SSMPA, IRCC, Migrant Worker Organizations
3 Access to Insurance	3.1. Develop Insurance Options for On-Farm Slaughter	MAF, SSMPA, BCAA, IBABC
4 Feed Prices	4.1. Promote Greater Feed Use Efficiency Methods	SSMPA, NFU, BCFC
5 Land Access	5.1. Develop Low Interest Loans for Farmers to Purchase Land	MAF, Farm Credit Canada
	5.2. Explore Options for Increasing Land Access for Farmers	MAF, FLNROD, YA, FCBC
6 Supply Management in the Poultry Industry	6.1. Investigate New Path to Growth for Small-Scale Pastured-Based Poultry Producers	MAF, FIRB, BCCMB, BCT
7 Climate Change	7.1. Support a Thriving Small-Scale Meat Sector in BC	SSMPA, MAF, BHN
	7.2. Develop Better Emergency Prevention and Response Systems	EMBC, MAF, UBCM, BCSARA, AGSAFE, Regional Districts, First Nations, Local Businesses
8 Knowledge Gaps	8.1. Develop and Administer Educational Guides for Producers and Processors	SSMPA, TRU, KPU, BCCA, SSFPA, BHN, BCAA

***List of potential actors and partners is not exhaustive and the organizations listed have not agreed or committed to being involved in the projects stated. This is a list of entities which are believed to be well-suited to play a role in the proposed projects by SSMPA.*

Description of Proposed Recommendations

① Access to Slaughter

1.1. Launch a BC Butcher Hub Network

a) WE RECOMMEND the immediate development of one or more "Butcher Hubs" in BC

The lack of processing options in our province has resulted in a clear market failure. Abattoir operators are struggling to keep up with the demand for custom processing. Most are booking dates over a year in advance and some are canceling bookings all together. BC producers need reliable options for processing that address their diverse needs and market opportunities.

Butcher Hubs can provide producers and their food system collaborators with the infrastructure and networked support they need to supply local consumers with high quality BC meat products. Like successful Food Hubs across the province, individual Butcher Hubs will cater to the needs of the producers in the region where they are located, providing infrastructure, expertise and mentorship through collaborative partnerships.

We believe the synergies in a more collaborative system will result in shared resources like refrigerated transport and freezer storage, optimize marketing opportunities and food aggregators, and generally improve the quality and food safety of every product that passes through this system.

b) WE RECOMMEND the development of a resource sharing network to deliver administrative and educational support to proposed Butcher Hubs

This concept borrows ideas from the Food Hub network and goes a step further to address the unique regulatory and logistical challenges of meat processors. Many of the requirements for getting a license to operate are not specific to each farm and butcher shop. A resource network will help to unify standard operating procedures (SOP's) between slaughter, transport, primary processing, value added processing, storage, distribution, and traceability.

The barriers to entry for most farm businesses and small-scale meat processing enterprises are extremely complex. By having a framework for the delivery of resources, such as the Butcher Hub Network, that deals in real world logistics and can help to shape regulatory compliance documents, we hope to increase the viability of regional food systems aiming to market their own product, and attract entrepreneurial food businesses processing and marketing small-scale local meats.

The Small-Scale Meat Producers Association is uniquely positioned to deliver this programming with knowledge, skills, experience and the good-will and trust of producers across the province.

1.2. Create a Slaughter Truck Pilot Program

It is clear from this survey that diversification of slaughter options across all regions is key to offering small-scale producers a clear path to growing their businesses and to meet growing consumer demand for their products. Many producers expressed that they liked the idea of on-farm slaughter but were not interested in undertaking the slaughter process themselves. The new Farmgate program allows opportunity for on-farm slaughter with less capital investment and simpler infrastructure than a traditional, inspected mobile abattoir. Focus groups with current slaughter truck operators indicated that they can play a key role in bridging the gap between FarmGate licensees who are comfortable managing their own slaughter needs and those who are not interested in pursuing this opportunity. There are producers who do not want to slaughter their own animals at all, but there are also producers who just feel overwhelmed and unprepared to deal with the requirements of the new FarmGate license program. We see a role for professional slaughter truck operators to assist these producers in meeting the requirements and becoming properly licensed.

WE RECOMMEND the development and implementation of a slaughter truck pilot program

A number of slaughter trucks fitted to travel to farms and humanely slaughter, safely prepare, and transport carcasses to a refrigerated space should be designed and built with input and support from MAF and operated in select regions while collecting data that can help inform best practices and identify opportunities for improvement. The goals of the program will be to reduce the instances of unlicensed slaughter occurring at currently reported levels, elevate the quality of carcasses being taken to the butcher shops, develop best practices for integrating this service with the Farmgate license program, and investigate alternative ways to incentivize and license slaughter truck operators. The feasibility of relieving some of the insurance burden currently faced by licensed Farmgate producers through alternative insurance models that could be offered by employing professional slaughter truck operators should also be explored.

1.3. Create a Slaughter Training Program Tailored to Small-Scale Operations

75% of survey respondents were either interested (41%) or unsure about (34%) acquiring an on-farm slaughter license. One of the main barriers to enrollment in the Farmgate licensing program for these producers was the lack of know-how. Current Farmgate education programming is focused on the development of food safety plans and does not include practical training in slaughter practices.

WE RECOMMEND that SSMPA develop and administer a slaughter training program through the Butcher Hub Network.

The training will be focused on hands-on best practices for safely and humanely slaughtering animals on-farm or at community-scale abattoirs and be hosted across the province. Ongoing peer support, mentorship and continued education is to be provided via the Butcher Hub Network.

1.4. Increase Meat Inspection Capacity

Booking in-person slaughter inspection has been reported as a major hurdle by abattoir operators. Remote and low-volume abattoirs struggle to book reliable inspection schedules. When those inspections are canceled at the last minute, it creates difficult situations for producers who had booked their slaughter dates often a year in advance. The cost of providing inspectors for remote and low-volume facilities is high. The demand for, and cost of, inspection services will continue to increase as more Farmgate licensees transition to Abattoir licenses.

WE RECOMMEND that MAF develop a remote meat inspection option.

Carrying out inspection via video would increase slaughter capacity and reduce cost immediately. Countries such as Norway are already using virtual meat inspections and the USDA has developed a set of standards for such inspections. Another option is the use of cold post-mortem inspections of carcasses, which could take place at any time between slaughter and cut and wrap and would reduce the cost of inspecting low-volume facilities.

What is a slaughter truck?

A slaughter truck is substantially different from a mobile abattoir (described in the Literature Review) in that it is not designed to obtain an Abattoir License. A slaughter truck is designed to allow an experienced operator to assist with on-farm slaughter, either under the personal use exemption, or in accordance with Farmgate or Farmgate Plus license requirements. The truck is outfitted to transport half or quartered carcasses to a meat shop for continued cooling, aging and further processing.

Requirements for truck (or trailer) designs will vary depending on the needs of farms they serve, what species are to be slaughtered, distance from the cooling unit and more. Typically, a slaughter truck will have an exterior hoist, interior rail system, a hand washing station and washdown hose. Some trucks may have on-board potable water, space to haul inedible offal and hides and refrigeration. A slaughter truck that is part of the Butcher Hub Network could be operated by a farmer serving their own and other local farms, by a butcher shop that offers cut and wrap services, or as a stand-alone business. Slaughter trucks operated by professional butchers or slaughtermen have the potential of increasing on-farm slaughter food safety and animal welfare as well as regulatory compliance.

Ray Orchard from Homekill doing his daily job in New Zealand

1.5. Promote Farmgate and Farmgate Plus License Program

The new Farmgate and Farmgate Plus licenses offer unprecedented opportunities of stability and resilience to the meat sector in BC by offering producers a clear path to growing their businesses. However, many producers remain unaware of the program and many more have not been sufficiently informed about the requirements and their eligibility. A high proportion of the survey respondents, including the majority of those practicing unlicensed slaughter, are interested in acquiring a license but need more information about parameters, plans, requirements, costs, insurance options and more.

WE RECOMMEND **that MAF support outreach, programming and extension regarding on-farm slaughter through SSMPA.**

SSMPA is the only small-scale meat producer-facing organization that specifies the growth of on-farm slaughter options in its mandate. SSMPA has already been working with the government and producers to facilitate the flow of information about these programs and have a positive reputation among our members and other producers.

1.6. Modernize Meat Processing Communications and Record Keeping

WE RECOMMEND **the development of a Meat Processing Enterprise Resource Planning application integrating existing traceability programs and regulation.**

The application would collect required information, including animal and premise identification and communicate this information along with processing instructions from producer to processor. The ability to track and record important information such as cooling and hanging times and storage locations would be incorporated into the app. When a producer uses the app to book services, a deposit will be procured in order to reduce the incidence of last minute cancellations. If the desired dates are not available at the chosen processor, alternative dates and/or alternative processors will be recommended. This app will improve communication and efficiency between producers and processors, as well as help to reduce concentration of demand.

2 Access to Cut and Wrap

2.1. Support and Expand Butchery Education Programs in BC

a) WE RECOMMEND **working with existing educational programs such as the Meatcutter program at Thompson Rivers University (TRU) to expand butchery training programs.**

There is a particular need for training in craft and whole animal carcass butchery, with the goal of increasing both general cut-and-wrap labour and the development of new businesses that raise the bar for quality butchery.

b) WE RECOMMEND **assembling a task force to identify and resolve the issues leading to the extremely high rate of attrition in the meat processing industry.**

Whole animal butchery class at KPU Farm School

TRU reports that 5 years after graduation, only 14% of graduates are still working in the industry. This is a multi-stakeholder, systemic problem and needs a holistic approach to ensure a reliable labour pool and high quality, desirable working conditions.

2.2. Increase Cold Storage Capacity

WE RECOMMEND **continuation of funding for meat cut and wrap facilities that cater to Farmgate license holders to increase their cooler capacity.**

Container or trailer cooling units should be considered, as these can be added onto existing butcher shops, are cost effective and do not require expensive retrofit. The Butcher Hub Network can help facilitate these connections and inform about and assist with funding applications.

WE RECOMMEND **the development of rentable centralized freezer storage facilities.**

There is an opportunity to work with the Food Hub Network and commissary kitchens to increase access to cold storage. Freezer storage is an expensive piece of infrastructure that is vital for producers selling their meat direct-to-consumer but is often only needed seasonally or even short-term. Rentable facilities would allow the costs and benefits to be shared among producers, as well as other farmers and food processors whose seasonal needs are complementary. Centralized facilities offer a path to growth for small-scale producers until they reach the scale that warrants the acquisition of their own freezer units.

2.3. Improve Access to Foreign Workers for the Small-Scale Meat Industry

WE RECOMMEND **that Immigration, Refugees and Citizenship Canada work with industry and Agriculture and Agri-Foods Canada to develop an employment and immigration program similar to the Agri-Food Pilot program that specifically caters to the unique needs of regional food systems.**

The Agri-Food Pilot program offers a clear path to permanent residency for foreign workers but does not address many of the needs of small business operators who depend on seasonal production and decentralized processing and distribution methods. These operations tend to be more flexible and could offer more training opportunities and a wider range of skill development to foreign workers but require more flexibility from the program in turn. Workers could be involved in livestock production operations in the Spring and Summer then transition to meat processing for the Fall and Winter seasons. A worker may, in-fact, start out as a temporary foreign worker in a business that will subsequently be able to offer full-time, non-seasonal employment as it grows. There needs to be a seamless transition between these programs to ensure that Canadian small businesses can access the scale appropriate labour required to help build more robust regional food systems and that foreign workers contributing to Canadian food security are offered that same security in return.

3 Access to Insurance

3.1. Develop Insurance Options for On-Farm Slaughter

There is an insurance crisis in the small-scale farm industry in BC. The market to insure diversified farms is slim and almost completely non-existent for farms wanting to practice on-farm slaughter. Rates for insurable farms are so high as to render them uninsurable for all intents and purposes. Consequently, many producers are forced to decide between operating without insurance or not operating at all. As disaster recovery programs roll out across the province, we are seeing the fallout of this issue with many producers finding that they are ineligible for recovery programs because their losses were technically insurable. Many small on-farm abattoirs have received notifications of their insurance providers terminating their coverage without any offer of alternative after obtaining a Farmgate slaughter license. The Ministry of Agriculture developed these new regulations after 4 years of consultations with primary consideration being made for the health and safety of our food system; it is unreasonable that a legal, licenseable, safe part of our food system is uninsurable. Processing and selling it without insurance is undesirable for both producers and consumers and for the industry as a whole.

With farmland values increasing year over year, many producers are being forced into more remote regions. Suitable land for grazing may be found at an affordable price far from urban centers but these properties are often off the grid. This poses another obstacle for producers to overcome as most insurers will not consider off-grid properties. Insurance for on-farm abattoirs may be even more central to the success of this sector than the insurance for producers, which still seems to be available, even if prohibitively expensive.

WE RECOMMEND **that the government of BC should work in conjunction with SSMPA and the insurance industry to develop insurance options for the province's meat producers.**

4 Feed Prices

Repeated cycles of extreme climate events and ensuing inflation have almost doubled the price of feed grains and hay compared to just a number of years ago. High feed prices particularly affect small producers who operate on thin margins and seldom benefit from the economies of scale of larger operations. This is one of the top factors affecting profitability.

4.1. Promote Greater Feed Use Efficiency Methods

WE RECOMMEND **the development of educational material about feed use efficiency in the context of regenerative agriculture.**

This would include topics such as precise feeding, feeding according to age, stage, weather, local feed alternatives, stockpile grazing, silage, feed fermentation, regenerative pasture management, growing and harvesting grains for feed, etc.

5 Land Access

5.1. Develop Low Interest Loans for Farmers to Purchase Land

WE RECOMMEND **making financing more accessible to small-scale farmers with a solid business plan to purchase farmland.**

5.2. Explore Options for Increasing Land Access for Farmers

WE RECOMMEND **further exploration and continued support of land arrangements such as the Foodlands Cooperative and the Young Agrarians Land Matching programs to increase land access to new farmers.**

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6 Supply Management in the Poultry Industry

6.1. Investigate New Path to Growth for Small-Scale Pastured-Based Poultry Producers

Over 65% of the survey respondents that have left the meat business raised poultry. It was reported that it is very difficult to find slaughter and processing services for broilers in all of BC, especially in small batches. Moreover, the small-lot quota exemption of 2000 broilers per year is not enough to warrant investing in proper husbandry infrastructure (watering, moveable shelters, etc) to be profitable. Pastured poultry is not the same product as the quota regulated chicken widely available. Small-scale producers tend to grow slower growing breeds that are raised on pasture. As consumer demand increases for this product, so should production limits or available quotas for small pasture-based poultry operations.

a) WE RECOMMEND **increased support for small-lot permit holders in applying for New Entrant quota through the Chicken and Turkey Marketing Boards and allow for a graduated program to allow direct marketers to manage the growth of their businesses and their market.**

b) WE RECOMMEND **the designation of regular, seasonally appropriate custom processing dates for small-scale producers at poultry processing facilities.**

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7 Climate Change

7.1. Support a Thriving Small-Scale Meat Sector in BC

WE RECOMMEND **supporting the growth and vitality of this sector by working to address the issues stated in this report. Diversified, regenerative farming is key to reducing the carbon footprint of the entire agricultural industry.**

Small-scale meat producers are innovators and early adopters of climate smart and carbon neutral farming practices. The newly announced Federal On-Farm Climate Action Fund objective is to support farmers to adopt practices that reduce greenhouse gasses in areas such as nitrogen management, cover cropping and rotational grazing practices. Small-scale meat producers do not need to be incentivized to adopt these beneficial practices; they are already applying them. Pasture-raised, regenerative and diversified, these farms market their meat to a customer base increasingly aware and discerning regarding the provenance and environmental accountability of their food. In turn, farms that use these methods are more resilient to extreme weather events. Moving towards a food system that gets us closer to our climate goals means fostering greater accessibility to local foods grown with regenerative practices.

7.2. Develop Better Emergency Prevention and Response Systems

WE RECOMMEND **working with Emergency Management BC, local governments, First Nations and industry groups to develop better emergency prevention and response systems.**

Climate related weather events and disasters are an inevitable part of our future. We must take advantage of local knowledge, skills and resources in order to build more resilience and protect our local food supply.

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8 Knowledge Gaps

8.1. Develop and Administer Educational Guides for Producers and Processors

Many producers mentioned that they felt that educational resources specially tailored towards small-lot production was lacking.

WE RECOMMEND the development of educational resources in the following areas:

- → Raising livestock for meat sales including proper finishing
- → Proper kill and cut and wrap methods including booking customers and proper customer service
- → Pasture management and feeding
- → Marketing and branding
- → Online veterinary services and preventative livestock health
- → Adoption of climate adapted feed stock such as drought resistant grains and alternative sources such as insect protein
- → Research methods of coping with drought and related issues through the planting of different crops and improved water usage
- → Regenerative agriculture and agroforestry for livestock production
- → Accessing grazing tenures
- → Emergency preparedness and response
- → Natural disaster mitigation and resilient production methods

Tusi monitoring her herd on Spray Creek Ranch

Regional Reports

Cariboo Chilcotin Coast

	CURRENTLY OPERATING	NO LONGER OPERATING
Cariboo	64	6
Central Coast	4	

TOTAL

74

The agricultural region of the Cariboo Chilcotin Coast comprises the regional districts of Cariboo and Central Coast. 10% of all survey respondents came from the Cariboo Chilcotin Coast. The top livestock species being raised in this region are cattle, pigs and sheep. 15% of all cattle farmers who responded to the survey are in this region, and they raise 20% of the total reported cattle in the province with almost half of the participating members of the Verified Beef Production Plus program (VPB+) located in this region. 50% of producers raise 2 or more livestock species, which is slightly less than the provincial average (57%). Producers in this region farm on an average of 411 acres (median of 110 acres) and 16 operations reported having access to grazing tenures.

96% of producers in the region are working outside of their meat businesses, of which 40% are striving to become full time producers. 11% of producers self-identified as full-time farmers with diversified on-farm ventures.

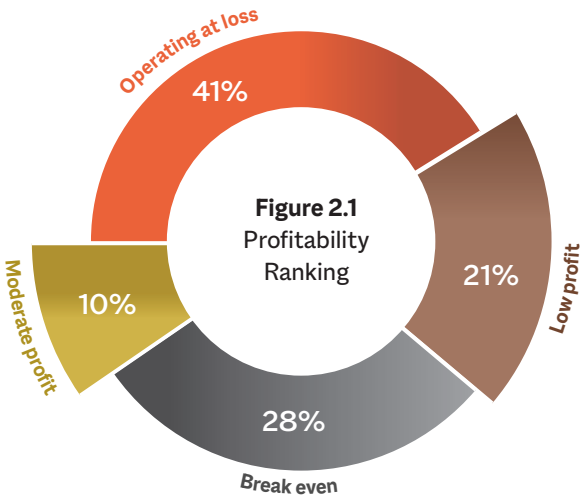


Figure 2.1 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=68

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

Producers in the Chilcotin Coast complained of a shortage of slaughter options for their livestock. Slaughter facilities are either too far (defined as more than 2.5hr drive away) or/and too hard to book dates for. Cut and wrap services are also difficult to come by and sometimes the distance between the abattoir and the cut and wrap provider is prohibitively far, especially if producers need to pick up their animals and bring them to the butcher shop themselves. Several producers reported having had dates canceled last minute both for slaughter and cut and wrap which forces them to keep their animals longer, cutting into their profit margins due to added feed and husbandry costs as well as compromising the quality of their meat. Most species have a specific timeframe in which animals should be killed to maximize yield and quality (i.e., grass finished). Producers have lost customers when unable to deliver a product in time due to a slaughter or butcher cancellation. On-farm slaughter licenses, though garnering interest, do not solve the cut and wrap shortage and so producers in this region are skeptical about whether it presents a real solution for their region. All producers unanimously acknowledged that the region experienced serious labor shortages. More skilled butchers and inspectors are particularly needed. Some producers in this region had a hard time envisioning how their farms could scale up from hobby scale to business scale considering these challenges. Other producers felt unsupported by their local health authority when trying to inquire about the slaughter licensing program and others struggled with understanding government regulations such as the BC assessment farm status and well registry.

Table 2.1 Factors preventing producers from growing their meat businesses in the Cariboo Chilcotin Coast

RANK	FACTOR
1	Access to slaughter
2	Access to cut and wrap
3	Profitability
4	Access to market
5	Financing
6	Access to insurance
7	Land base
8	Predator losses
9	Limited personal or staff time
10	Demand
11	Climate change
12	Personal reasons (e.g. family, health)
13	Quota system
14	Housing restrictions
15	Local bylaw regulations
16	Other
17	Accessing stock

The factors were weighed based on selection rankings and frequency

Table 2.2 What it would take for businesses to be financially sustainable in Cariboo Chilcotin Coast

RANK	FACTOR
1	Increased access to cut and wrap services
2	Improved availability of on-farm slaughter
2	Increased availability of slaughter services
2	Lower feed costs
2	Increased proximity of feed suppliers
6	Less local government bylaw restrictions
7	More demand for my product
7	Increasing production
7	Business management support
7	Ability to have additional housing on the farm for farm staff/help (including family)
7	Ability to generate other/more diverse income off the property

The factors were weighed based on selection rankings and frequency

Opportunities in the Cariboo Chilcotin Coast

There are good opportunities for growth for farmers and ranchers in this region. There is a lot of underutilized ranching land, especially around the Quesnel area, and plentiful water availability. Many young people have been coming to this area looking to start farms and there is a well-established community of experienced farmers and ranchers with generations of knowledge. This region has a long-standing history of cattle production and provides a solid foundation upon which to grow and develop more beef production. There is a good transportation route through highway 97 and there is an international airport in Prince George.

Region-Specific Recommendation

We recommend revisiting the work that was done on the BC Meats Centre of Excellence in this region in and around 2018. The goal of this proposed centre had been to provide abattoir services with a focus on teaching and improving slaughter techniques, knife skills and cutting into primals NAMP Codes and packaging and labeling etc. and was intended to be a complement to the existing Retail Meat Cutting program currently offered through Thompson Rivers University. It was also intended to build the reputation of a high end butchery trade in BC.

> *"In our experience the demand for meat is there, and specifically people are interested in and want pasture raised, farm slaughtered meat. The responsibility of ensuring a farmer is producing safe, healthy meat should lie with the consumer wanting to buy directly from the ranch. If a consumer is involved with purchasing directly from a farm they have a relationship with the farmer producing the meat, and therefore should know how that animal was raised. In addition, in order to have a sustainable, long-term business the farmer producing the meat needs to produce safe and healthy meat — a farmer who does not practice good husbandry, cleanliness and disease prevention is also a farmer that is not going to be in business for long.*
>
> — Producer from the Cariboo Chilcotin Coast

> *"We have specialty meat animals, goats and highland cattle. It is important to have specific cuts and wrap for clients. A good European cut, not just cut and wrap. Having to book your animal in to slaughter the day it is born and then travel 2 hrs to get to the slaughter plant is hard on animals and humans. These days we tend to sell most of our animals at auctions to avoid dealing with the lack of slaughterhouses and butchers in the region.*
>
> — Producer from the Cariboo Chilcotin Coast

Kootenay

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Central Kootenay	19	3	**73**
East Kootenay	16	1	
Kootenay Boundary	28	6	

The Kootenay agricultural region comprises the regional districts of Central Kootenay, East Kootenay, and Kootenay Boundary. 10% of all survey respondents came from the Kootenay Region. The top livestock species being raised in this region are cattle, pigs, and sheep but a relatively large number of producers also raise goats (15%), turkeys (17%) and broilers (35%). 68% of producers raise 2 or more livestock species, which is considerably more than the provincial average (57%).

Producers farm an average of 157 acres of private land (median 15 acres) and 9 operations reported the use of grazing tenures.

93% of producers in the region are working outside of their meat businesses, with 41% striving to become full time producers. 12% of producers self-identified as full-time farmers with diversified on-farm ventures.

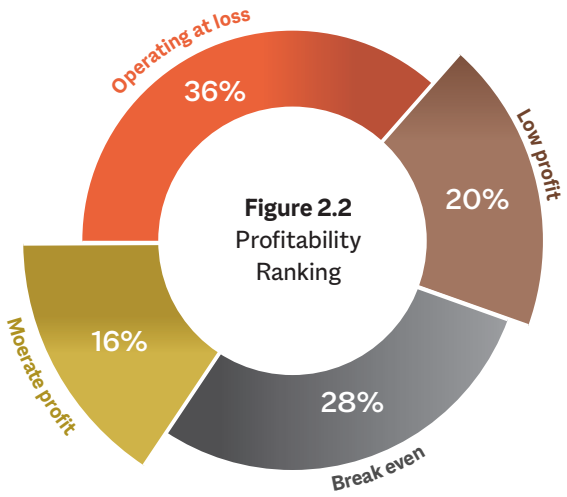


Figure 2.2 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=63

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

Although there are available options for slaughter in and around this region, producers expressed dissatisfaction at certain aspects of their abattoirs such as the availability of booking dates, the booking process, the reliability of service and poor management in general. Some producers mentioned that they would be willing to travel further to an abattoir that provided outstanding service. Producers have had slaughter dates canceled last minute; others affirm that abattoirs are selective with which animals they slaughter, prioritizing cattle over other species. Some reported that it is hard to find processors for pigs and almost impossible for sheep. Difficulty in finding viable options to slaughter animals has resulted in loss of clientele, producers having to sell at auction or give away their animals. Some will engage in unlicensed slaughter as a last recourse. Several producers affirmed that the Farmgate Plus license will not solve the cut and wrap option shortages that are common in this region.

Additionally, the allowable Animal Unit of the Farmgate Plus license is considered too low to make a living as a meat producer. For small-scale producers that strive to sell products of superior quality, it is even harder to find cut and wrap providers that can deliver a compatible product. Specialty butcher skills are particularly hard to come by. It is unanimously recognized that there is a labor shortage in slaughter and butcher establishments.

Animal welfare figures prominently in the priorities of these producers. Long distances to abattoirs raise concerns over animal stress in transport. There is also a lack of available farm veterinarians in the Kootenay. Land price is also a concern. Finally, some producers have mentioned requiring housing infrastructure support as it is hard to hire staff without available housing. Cost of rental housing is high in the Kootenays, and it is a deterrent to seasonal farm employees.

Price of land has been steadily increasing in the last decade. The proximity to Alberta has resulted in many Albertans buying farms as vacation homes, thereby taking valuable farmland out of production.

Until conditions are more favorable, some producers feel unable to make the shift from their off-farm jobs and commit fully to their meat businesses.

Table 2.3 Factors preventing producers from growing their meat businesses in the Kootenay

RANK	FACTOR
1	Access to slaughter
2	Limited personal or staff time
3	Access to cut and wrap
4	Land base
5	Financing
6	Profitability
7	Access to market
8	Access to insurance
9	Local bylaw regulations
9	Other
11	Climate change
12	Accessing stock
13	Quota system
14	Personal reasons (e.g. family, health)
15	Predator losses
16	Demand
17	Housing restrictions

The factors were weighed based on selection rankings and frequency

Table 2.4 What it would take for businesses to be financially sustainable in the Kootenay

RANK	FACTOR
1	Increased availability of slaughter services
1	Increased access to cut and wrap services
1	Lower feed costs
1	Increased proximity of feed suppliers
1	Ability to generate other/more diverse income off the property
1	Other

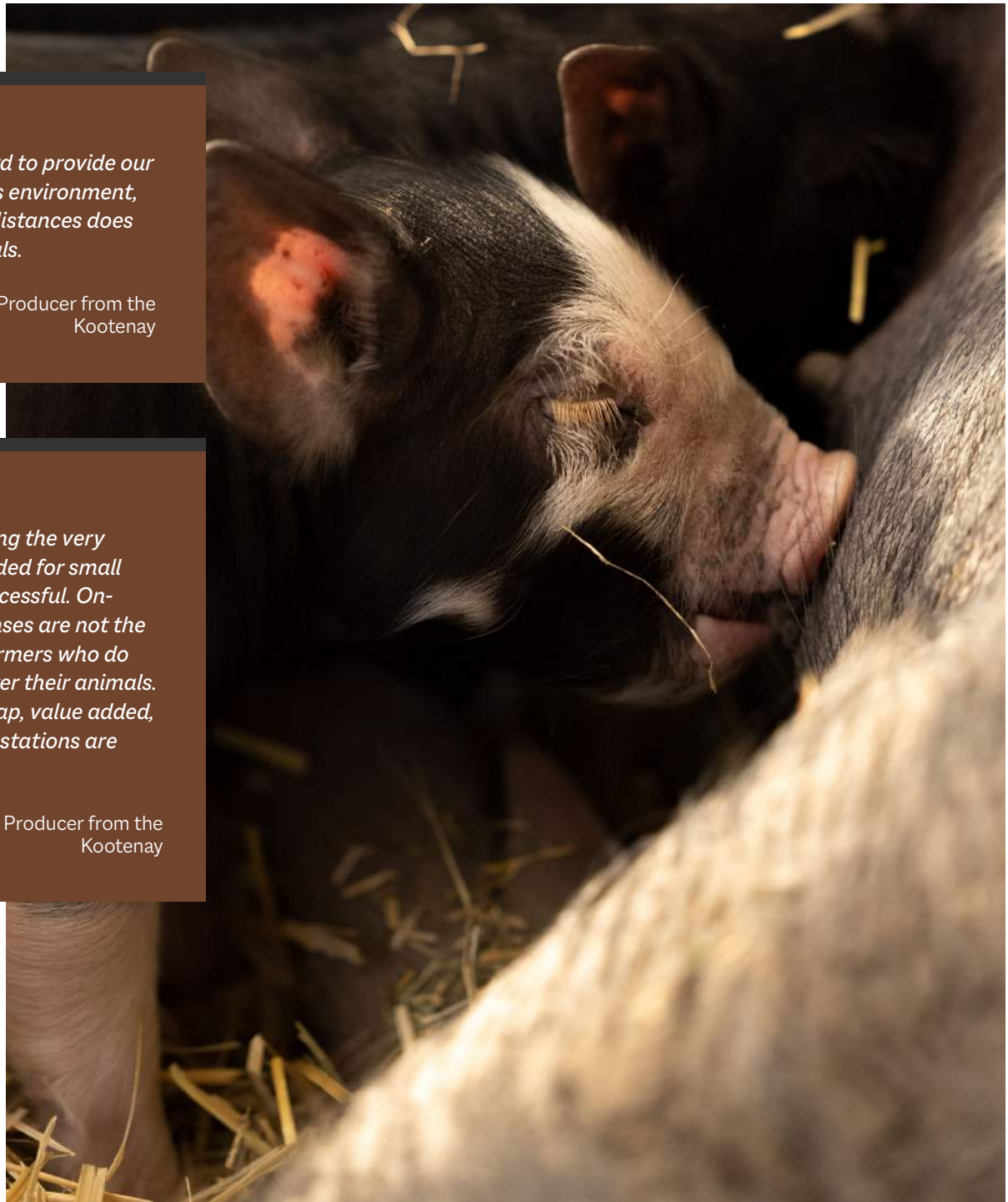
The factors were weighed based on selection rankings and frequency

Opportunities in the Kootenay

The Kootenays abound with programs and resources for farmers. Several organizations are active in supporting agriculture in the region and there are many farmer's markets and local fare markets where local farmers can sell their products. There is a lot of unmet demand for higher-welfare and pastured meat in this region. The Windermere District Farmers Institute recently acquired an abattoir that is rented to a private operator

Region-Specific Recommendations

- → Provide Financing for community infrastructures (coolers, etc).
- → Collaborate with Windermere District Farmers Institute to rent out abattoir facility to producers.
- → Identify local or support the development of a Shipping/transport company with large trailers to move animals to the abattoir.
- → Develop partnerships between producers and abattoirs as well as between producers to share resources.
- → Local government lead initiatives for waste disposal, water potability.



> *"We work hard to provide our animals a low stress environment, hauling them long distances does not support our goals.*
>
> — Producer from the Kootenay

> *"We are lacking the very infrastructures needed for small producers to be successful. On-farm slaughter licenses are not the answer for many farmers who do not want to slaughter their animals. Slaughter, cut & wrap, value added, packaging, grading stations are what we need.*
>
> — Producer from the Kootenay

Okanagan

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Central Okanagan	14	2	
Columbia-Shuswap	19	5	**83**
North Okanagan	27	3	
Okanagan-Similka-meen	9	4	

The Okanagan agricultural region comprises the regional districts of Central Okanagan, Columbia-Shuswap, North Okanagan and Okanagan-Similkameen. 12% of all survey respondents came from the Okanagan Region. The top livestock species being raised in this region are cattle, pigs, and lamb but a relatively large number of farmers also raise broilers (25%) and turkeys (12%). 47% of producers raise 2 or more livestock species, which is 10% less than the provincial average.

Okanagan producers farm on a median of 15 acres of private land. There were no reported grazing licenses in this region.

98% of producers in the region are working outside of their meat businesses, of which 18% are striving to become full time producers. 9% of producers self-identified as full-time farmers with diversified on-farm ventures.

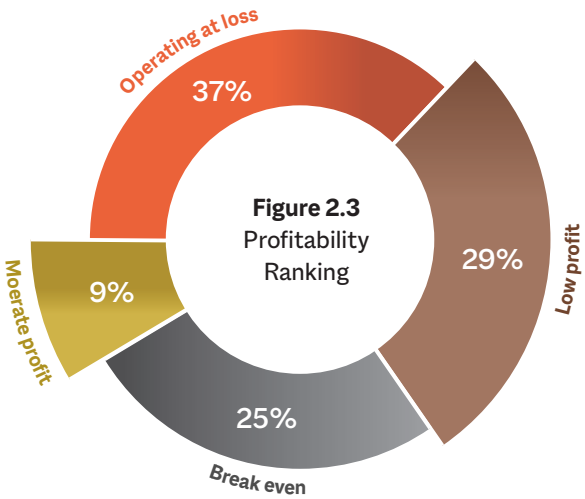


Figure 2.3 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=69

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions, and to brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

There is a general lack of slaughter facilities in the Okanagan. At the time this survey was conducted, several processing establishments were changing ownership and in a state of transition, causing uncertainty for producers. It is difficult to book slaughter dates and often bookings need to be placed a year or more in advance. Advance bookings withstanding, producers have had their slaughter dates canceled last minute. Some abattoirs are very hard to reach, not answering their phones. It is most difficult to book slaughter in the fall but keeping animals over the winter is expensive and requires infrastructure upgrades. Long distances between producers and abattoirs also raise animal welfare concerns for these producers. Some producers also require third-party certification, such as Animal Welfare Approved, or Certified Organic, further limiting their availability of appropriate slaughter.

Some producers have complained of the difficulty in making a profit raising broilers for meat and using the services of an abattoir. They affirm that if they pay $7 plus transport fees per chicken to be processed then it is impossible to realize a profit. Cut and wrap services are hard to come by and there is limited capacity at poultry abattoirs in the region.

Land prices are too high and there is a general shortage of available farmland according to these producers. Liability Insurance is hard to get and too expensive. Hay shortages are also affecting farms in the Okanagan.

The effects of climate change have been acutely felt in this region in the past few years. Instances of fires, droughts and flooding have been occurring more frequently with greater severity.

Table 2.5 Factors preventing producers from growing their meat businesses in the Okanagan

RANK	FACTOR
1	Access to slaughter
2	Access to cut and wrap
3	Profitability
4	Limited personal or staff time
5	Access to market
6	Land base
7	Climate change
8	Financing
9	Predator losses
9	Access to insurance
11	Quota system
12	Housing restrictions
13	Other
14	Accessing stock
15	Personal reasons (e.g. family, health)
16	Local bylaw regulations
17	Demand

The factors were weighed based on selection rankings and frequency

Table 2.6 What it would take for businesses to be financially sustainable in Okanagan

RANK	FACTOR
1	Increased availability of slaughter services
2	Improved availability of on-farm slaughter
2	Increased access to cut and wrap services
4	Increasing production
4	Ability to have additional housing on the farm for farm staff/help (including family)
4	Ability to generate other/more diverse income off the property
4	Less local government bylaw restrictions
8	Lower feed costs
8	Increased proximity of feed suppliers

The factors were weighed based on selection rankings and frequency

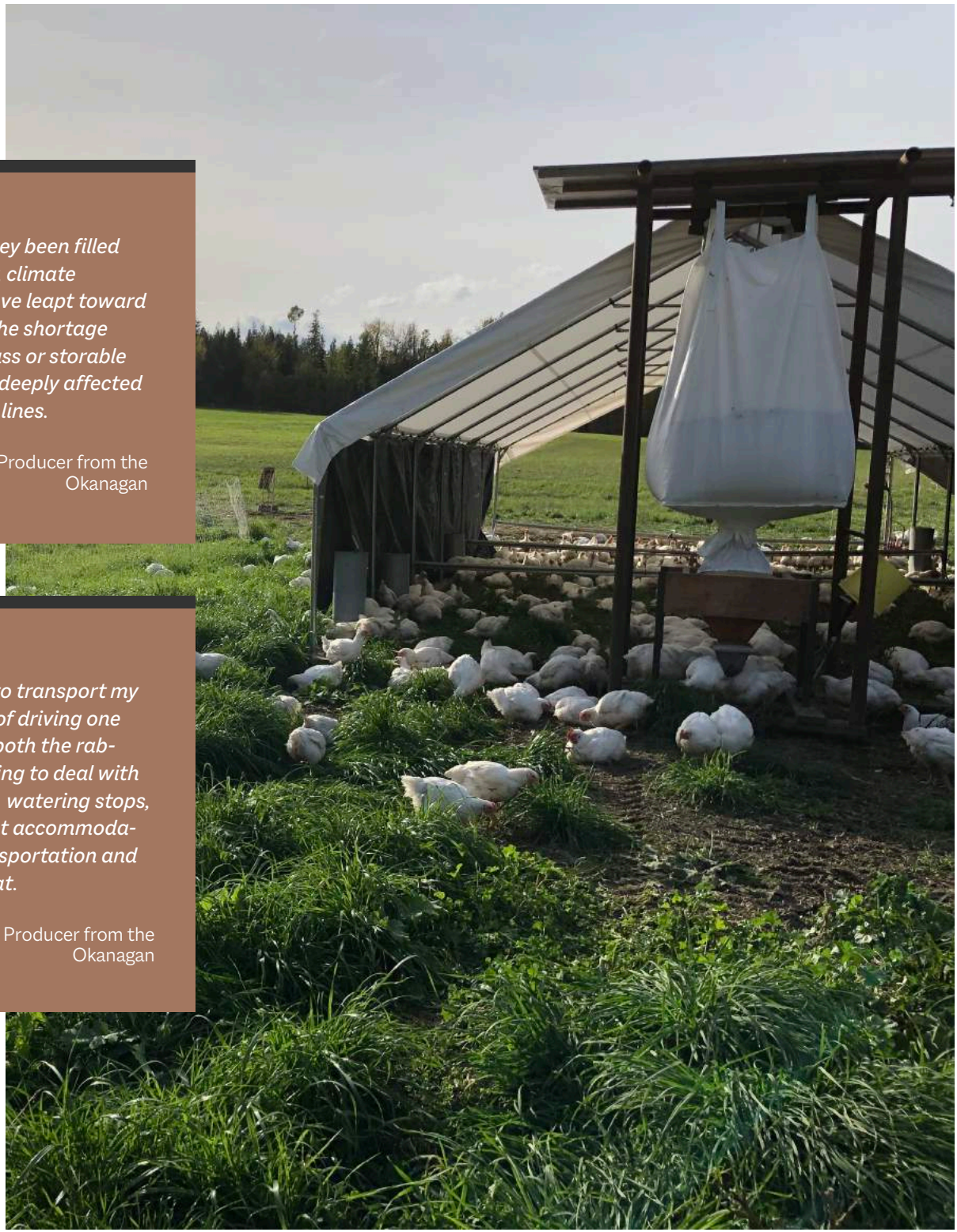
Opportunities in the Okanagan

The Okanagan has long standing agricultural roots and a vibrant farm community. It is central to BC and in relatively close proximity to many potential markets. Many of the farm and ranch related supplies, including feed stores, are readily available in this region. Many young new farmers are looking to that region to settle which provides a potential for farm succession.

Region-Specific Recommendations

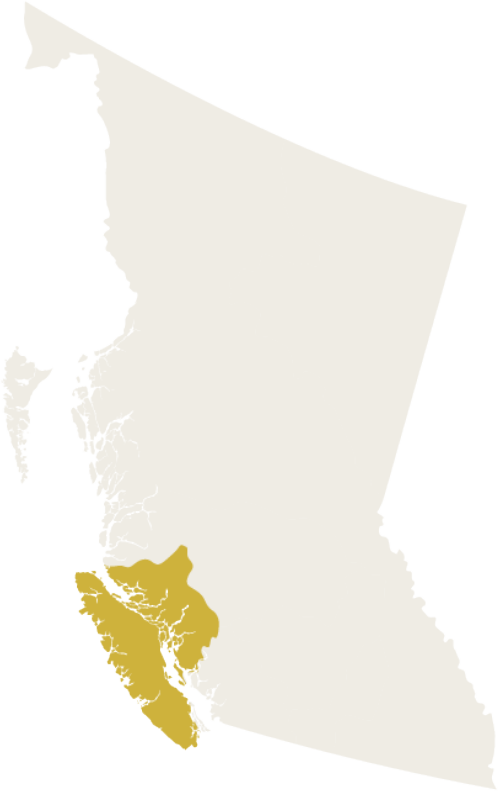
→ Identifying and fostering new and alternative ways to expand humane and reliable access to animal processing.

→ Develop or expand networking platforms where farmers can share resources, buy and sell and more.



> *"Had the survey been filled out later in the year, climate change may well have leapt toward the top of the list...the shortage of feed, either in grass or storable feed supply, having deeply affected most of our bottom lines.*
>
> — Producer from the Okanagan

> *"I am having to transport my rabbits for 8 hours of driving one way. This stresses both the rabbits and myself having to deal with weather conditions, watering stops, gas prices, overnight accommodation for myself, transportation and cooling of fresh meat.*
>
> — Producer from the Okanagan



Vancouver Island and Coast

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Alberni-Clayoquot	19	5	
Capital	35	5	
Comox Valley	29	4	
Cowichan	39	7	**198**
Mount Waddington	2		
Nanaimo	30	1	
Powell River	16		
Strathcona	1	1	

The Vancouver Island and Coast Agricultural Region comprises the regional districts of Alberni-Clayoquot, Capital, Comox Valley, Cowichan, Mount Waddington, Nanaimo, Powell River and Strathcona. 28% of all survey respondents came from the Vancouver Island and Coast Region. The top livestock species being raised in this region are broilers, pigs, and sheep but many producers also raise cattle, turkeys, ducks, goats, and rabbits. 63% of producers raise 2 or more livestock species, which is slightly more than the provincial average (57%).

Vancouver Island and Coast producers farm on a median of 15 acres of private farmland. Only 1 producer reported the use of a grazing tenure.

98% of producers in the region are working outside of their meat businesses, of which 22% are striving to become full time producers. 22% of producers self-identified as full-time farmers with diversified on-farm ventures which is almost twice what was reported in the rest of the province.

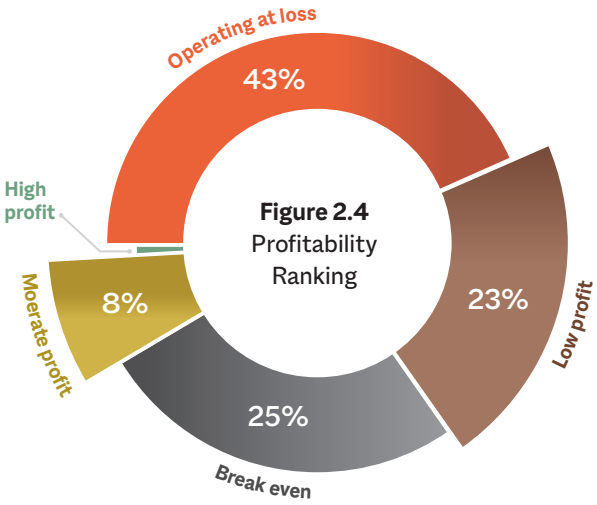


Figure 2.4 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=175

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

The Vancouver Island and Coast region faces unique challenges due to being separated from the mainland. Ferry transport to get to an abattoir is deemed unfeasible for Vancouver Island's producers yet that is what many are forced to do. Several abattoirs have been lost on the island in the past few years which has exacerbated the need for local options. Unreliable ferry travel and long drives present serious animal welfare issues for farmers who spend a great deal of effort raising animals stress free. Slaughter booking dates must be set a year in advance and even then, they may still be canceled. Due to the processing shortages, producers have been forced to sell their livestock at live auction even if they had customers lined up to buy the meat. Some producers reported wanting to diversify their offerings and to meet demand but will only raise the species that can be slaughtered reliably. For example, it has been reported that there are no processing options for lamb, cattle, chicken, and rabbits. Without options to scale up due to processing, many producers feel that they are stuck at the hobby farmer scale.

Feed accessibility and cost is also an issue in this region, especially organic and non-GMO feed. Bylaw regulations that were enacted in the 1970s need updating because they restrict allowable farm activities around some municipalities according to some producers. Housing and subdivision pressure is negatively impacting farms. For example, development in some areas has increased flooding of farm fields.

Finally, producers spoke of a disconnect between the customer perception of what they should pay for meat and the bottom lines of producers faced with a myriad of obstacles and extraneous costs.

Table 2.7 Factors preventing producers from growing their meat businesses on Vancouver Island and Coast

RANK	FACTOR
1	Access to slaughter
2	Access to cut and wrap
3	Profitability
4	Limited personal or staff time
5	Access to insurance
6	Land base
7	Accessing stock
8	Predator losses
9	Financing
10	Access to market
11	Climate change
12	Local bylaw regulations
13	Personal reasons (e.g. family, health)
14	Housing restrictions
14	Other
16	Quota system
17	Demand

The factors were weighed based on selection rankings and frequency

Table 2.8 What it would take for businesses to be financially sustainable in Vancouver Island and Coast

RANK	FACTOR
1	Lower feed costs
2	Increased availability of slaughter services
3	Improved availability of on-farm slaughter
4	Increasing production
4	Less local government bylaw restrictions
6	Increased access to cut and wrap services
7	Ability to have additional housing on the farm for farm staff/help (including family)
7	Ability to generate other/more diverse income off the property
9	More demand for my product
10	Increased proximity of feed suppliers
11	Other
12	Business management support

The factors were weighed based on selection rankings and frequency

The Case of the Saltspring Island Community Abattoir:

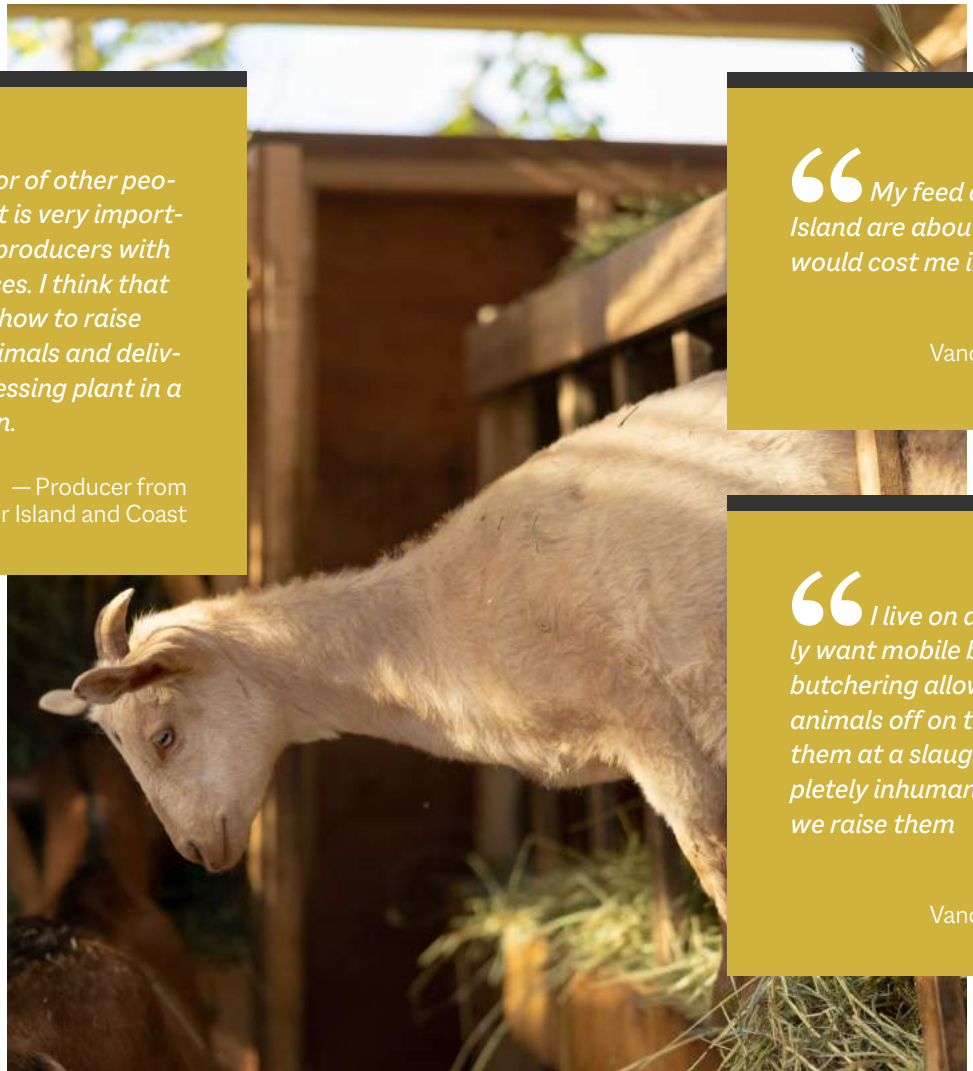
Community owned abattoir on Salt Spring Island offers slaughter and butcher services to meat producers. This is a great food security asset for the community, but it is not without issues. There is no local meat inspector and it is difficult to get one to travel to Saltspring Island. There also is a consistent labor shortage. Quality of the final products is variable due to the lack of access to qualified trained staff.

Opportunities in the Vancouver Island and Coast

Almost all farms on Vancouver Island are on the smaller-scale and share many commonalities and needs. As such, solutions developed in this region are likely to serve a majority of farmers. Vancouver island has a thriving and rapidly growing community of young farmers. There is a great variety of species being raised on Vancouver Island like ducks, rabbits and specialty birds and this may represent a great opportunity for small-scale abattoirs. For example, the Farmgate Plus license allows for the slaughter of 25 Animal Unit, that is 25,000lbs of live animal unit or more than 6,000 rabbits.

Region-Specific Recommendations

- → Develop a diversified landscape of small local abattoirs and cut and wrap processors to process the diverse livestock raised which includes abattoirs and slaughter trucks working with farms with on-farm slaughter licenses.
- → Develop extension programs and other educational resources, notably to write food safety plans.
- → Promote the implementation of regenerative agriculture to increase productivity of limited land and offer resilience in times of drought.



> *As a processor of other people's animals, I feel it is very important to reach out to producers with some of these courses. I think that many need to learn how to raise healthy, well-fed animals and deliver them to the processing plant in a clean, safe condition.*
>
> — Producer from Vancouver Island and Coast

> *My feed costs on Vancouver Island are about 5 times what it would cost me in Alberta.*
>
> — Producer from Vancouver Island and Coast

> *I live on an island and really want mobile butchers or farm butchering allowed as taking my animals off on the ferry and leaving them at a slaughterhouse is completely inhumane compared to how we raise them*
>
> — Producer from Vancouver Island and Coast

Omineca Skeena

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Bulkley-Nechako	38	2	
Fraser-Fort George	14	2	
Kitimat/Stikine	9		**67**
Stikine Region	1		
North Coast	1		

The agricultural region of Omineca Skeena comprises the regional districts of Bulkley-Nechako, Fraser-Fort George, Kitimat/Stikine, Stikine Region and North Coast. 9% of the survey respondents came from this region. The top livestock species being raised in this region are cattle, pigs and sheep & lamb but several producers also raise broilers (29%) and turkeys (16%). 53% of producers raise 2 or more livestock species.

Omineca Skeena producers farm on a median of 90 acres of private land and 6 operations reported the use of grazing tenures.

92% of producers in the region are working outside of their meat businesses, of which 42% are striving to become full time producers. 11% of producers self-identified as full-time farmers with diversified on-farm ventures.

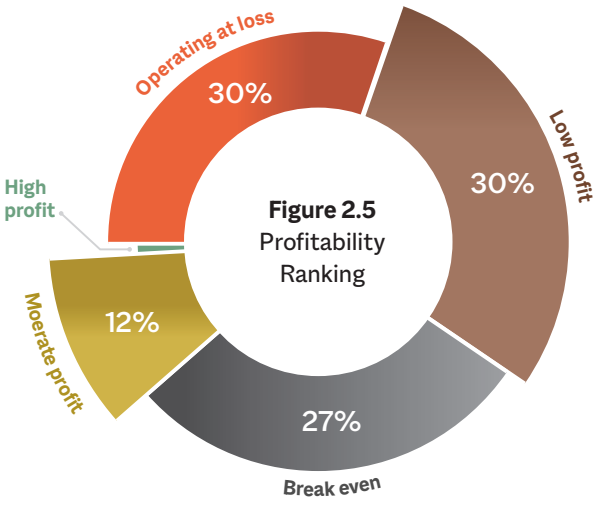


Figure 2.5 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=63

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

This very large region is sparsely populated when compared with the rest of BC. Traveling long distances to get their animals processed is the norm for many producers here. Lack of cut and wrap is the most reported issue in the Omineca Skeena, both by producers and abattoir owners alike. One abattoir owner reported that they could increase slaughter but that the real bottleneck is the cut and wrap. Labor shortage is partially responsible for this for the lack of capacity. It is hard to find and retain qualified butchery staff over the winter when the bulk of the work takes place in the Fall. Lack of staff also affects producers who have a hard time hiring ranch hands. Producers reported not being able to meet the growing demand for their products due to the lack of processing options. Some have been selling to auction instead of meeting that demand. Other producers have complained of droughts and severe water restrictions.

Table 2.9 Factors preventing producers from growing their meat businesses in Omineca Skeena

RANK	FACTOR
1	Access to slaughter
2	Access to cut and wrap
3	Limited personal or staff time
4	Profitability
5	Access to market
6	Land base
7	Financing
8	Access to insurance
9	Local bylaw regulations
10	Other
11	Demand
12	Predator losses
13	Housing restrictions
14	Personal reasons (e.g. family, health)
14	Quota system
16	Accessing stock
17	Climate change

The factors were weighed based on selection rankings and frequency

Table 2.10 What it would take for businesses to be financially sustainable in Omineca Skeena

RANK	FACTOR
1	Lower feed costs
1	Ability to have additional housing on the farm for farm staff/help (including family)
1	Ability to generate other/more diverse income off the property
4	Improved availability of on-farm slaughter
4	Increased availability of slaughter services
4	Increased access to cut and wrap services
7	More demand for my product
7	Increasing production
7	Increased proximity of feed suppliers
7	Less local government bylaw restrictions

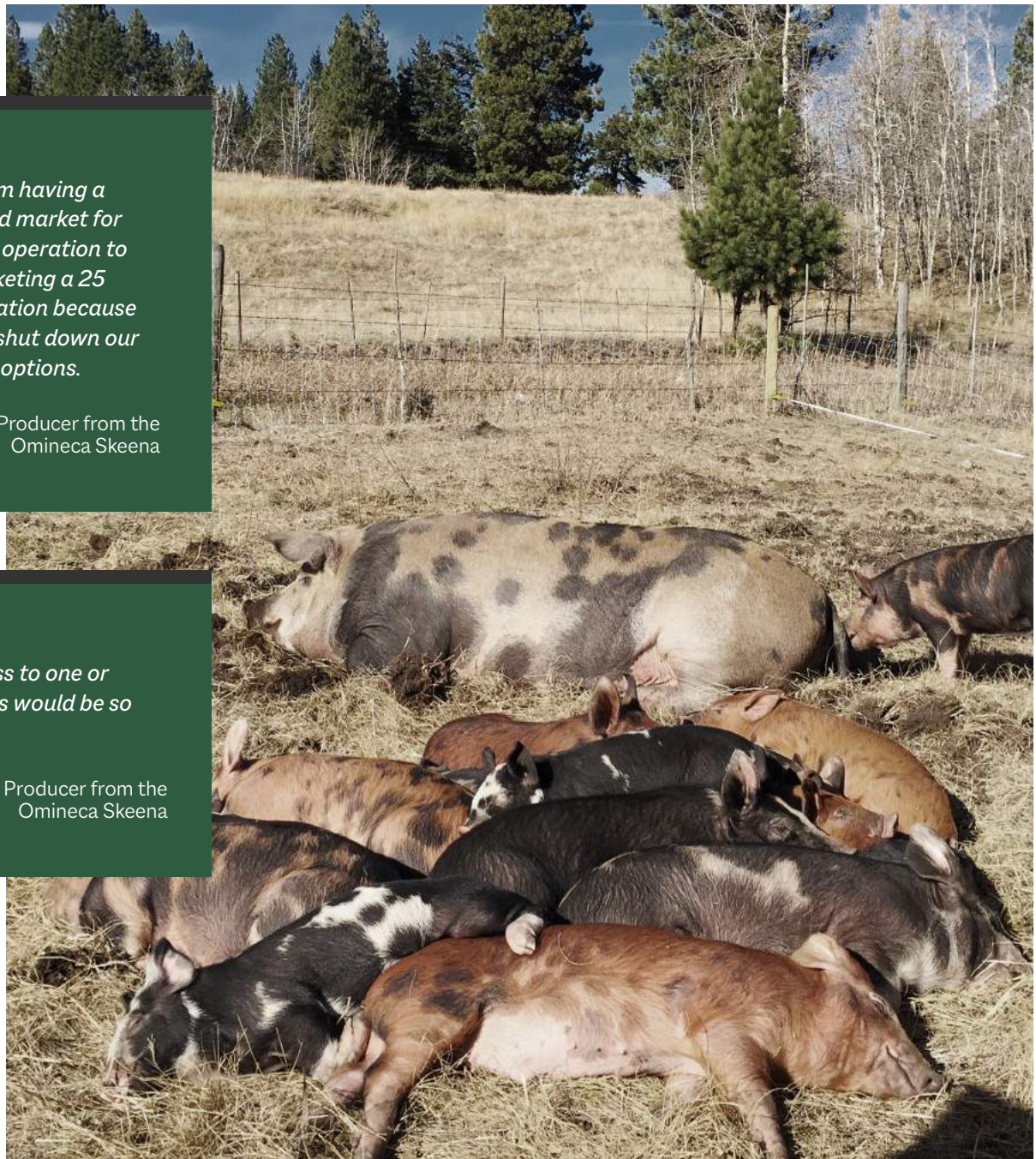
The factors were weighed based on selection rankings and frequency

Opportunities in the Omineca Skeena

- This region has a long history of cattle and sheep production and provides a solid foundation upon which to grow and develop these industries. Currently, very few producers are finishing their animals which represents tremendous lost opportunity.
- There is a wealth of knowledge and experience in this region but many producers are getting out of the business now and that knowledge will go with them.
- This region produces a large amount of hay and grains so is geographically well situated to support a cattle/sheep industry.
- There is a large land base that is not always well suited to other agricultural operations but is well suited to and can benefit from grazing ruminants.

Region-Specific Recommendations

- Support small-scale regional abattoirs (and/or slaughter trucks) and cut and wrap facilities to service producers in this region who want to grow their businesses.
- Support land-matching initiatives to connect retiring producers with land with aspiring young producers.
- Support a transition to farming practices that are less input dependent to reduce reliance on fertilizers which are becoming too costly and/or may not be available at all in order to ensure more sustainable production of local feed.
- Encourage regenerative production methods that improve soil quality and improve grasslands.



> *We went from having a lucrative established market for a 135 head lambing operation to having trouble marketing a 25 head llambing operation because of regulations that shut down our slaughter/cut wrap options.*
>
> — Producer from the Omineca Skeena

> *Having access to one or two mobile butchers would be so wonderful*
>
> — Producer from the Omineca Skeena

Peace

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Northern Rockies	1		**31**
Peace Region	28	2	

The agricultural region of the Peace comprises the regional districts of Northern Rockies and Peace Region. 4% of all survey respondents came from this region. The top livestock species being raised in this region are cattle, pigs, and sheep. 59% of producers raise 2 or more livestock species.

Producers in the Peace farm on a median of 160 acres of private land, all of which is in the ALR.

86% of producers in the region are working outside of their meat businesses, of which 48% are striving to become full time producers. 17% of producers self-identified as full-time farmers with diversified on-farm ventures.

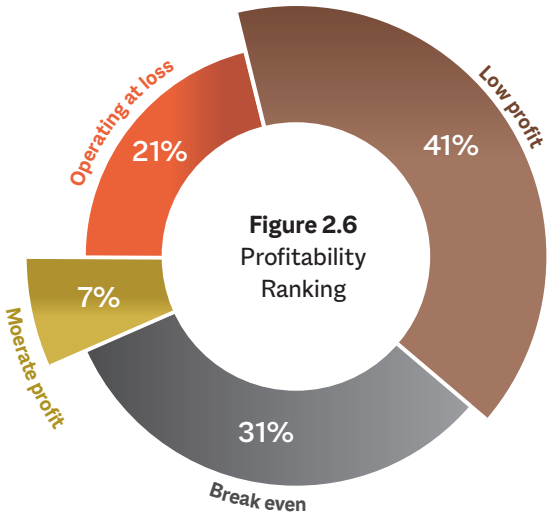


Figure 2.6
Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=29

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

Producers in the Peace have access to 2 commercial slaughter facilities that process red meat but lost their only option to have poultry processed about 5 years ago. Slaughter options have been steadily decreasing in the Peace until the adoption of the Farmgate and Farmgate Plus program. Availability of slaughter services also fluctuates with the production schedules of the facilities that prioritize their own animals before taking in customs from other producers. There are many bison producers in the Peace and their grievances are around the inherent difficulty of transporting the animals without creating undue stress. Some producers have had to ship their bison to Manitoba to be processed in the past. Other operations have wanted to diversify their offerings but have felt limited to raising the species that they can find slaughter services for. Chicken was mentioned several types as a problematic species to raise for that reason. Animal Welfare Certified farms don't have anywhere to slaughter their livestock as the abattoirs declined to do the annual audit required by the certification.

Cut and wrap access is less of an issue in the Peace due to the high demand produced by hunters. Producers have many options to get their animals butchered off the hunting season. However, cut and wrap quality remains a huge challenge. Quality is poor and product lacks consistency. The new slaughter regulations may usher in a new era of cut and wrap shortage

Other challenges include fierce competition for land with oil and gas companies. Producers have also mentioned that representatives from local or provincial governments are more concerned with the interests of the larger scale farming operations than the needs of small-scale producers. Acquiring new grazing tenures seems to be near impossible. Producers have a hard time sourcing organic or non-GMO feed or hay. Veterinary access is scarce, far, and expensive in this region.

Table 2.11 Factors preventing producers from growing their meat businesses in the Peace

RANK	FACTOR
1	Access to slaughter
2	Limited personal or staff time
3	Access to market
4	Financing
5	Access to cut and wrap
6	Profitability
7	Land base
8	Other
9	Predator losses
9	Climate change
11	Quota system
12	Access to insurance
13	Accessing stock
14	Demand
15	Personal reasons (e.g. family, health)
16	Housing restrictions

The factors were weighed based on selection rankings and frequency

Table 2.12 What it would take for businesses to be financially sustainable in the Peace

RANK	FACTOR
1	Improved availability of on-farm slaughter
2	Increasing production
2	Lower feed costs
4	Increased access to cut and wrap services
4	Business management support
6	More demand for my product
6	Increased availability of slaughter services
8	Increased proximity of feed suppliers
8	Ability to have additional housing on the farm for farm staff/help (including family)
8	Ability to generate other/more diverse income off the property
8	Less local government bylaw restrictions

The factors were weighed based on selection rankings and frequency

Opportunities in the Peace

- Increasing local demand for locally produced products at seasonal farmers markets, independently owned grocery stores and/or niche.
- Vast expanses of land not well suited for grain or crop production (ie lands considered marginal) can be used for livestock production.
- There is a large aging farmer/rancher demographic that presents opportunities for both generational and non-familial succession.
- Population growth caused by high paying resource sector employment is bringing more consumer potential.
- Municipal and local governments are supportive of the agricultural sector.

Region-Specific Recommendations

- Ensure the concept of just transition is adopted to ensure changes are viewed as attractive to those leaving the oil and gas industry to transition into full-time agricultural production.
- Region would benefit from federal abattoir because of the proximity to Alberta compared to the rest of BC.

> *Bison don't transport well because of the stress (animal welfare). On-farm slaughter produces better meat for consumers*
>
> — Producer from the Peace

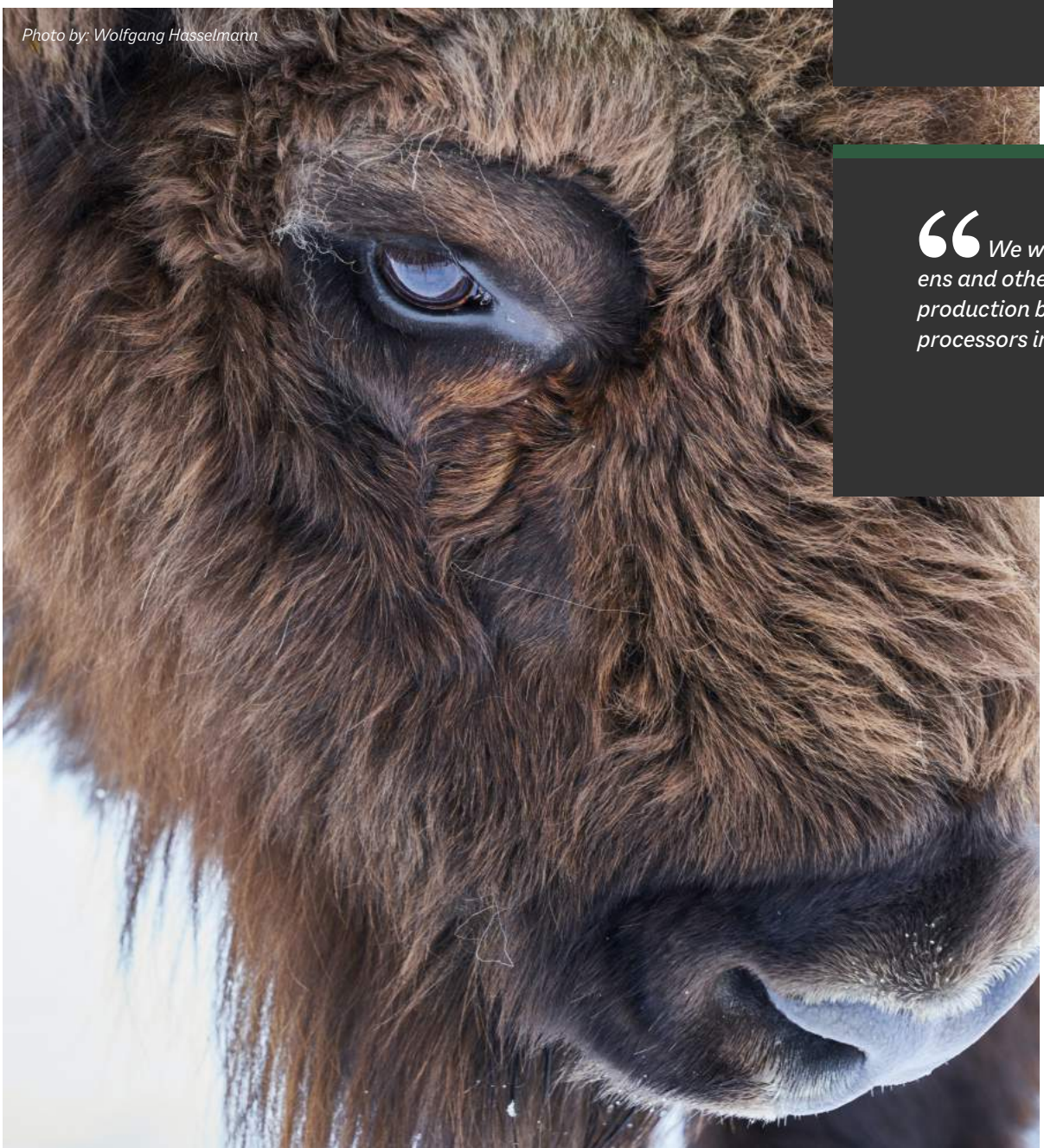
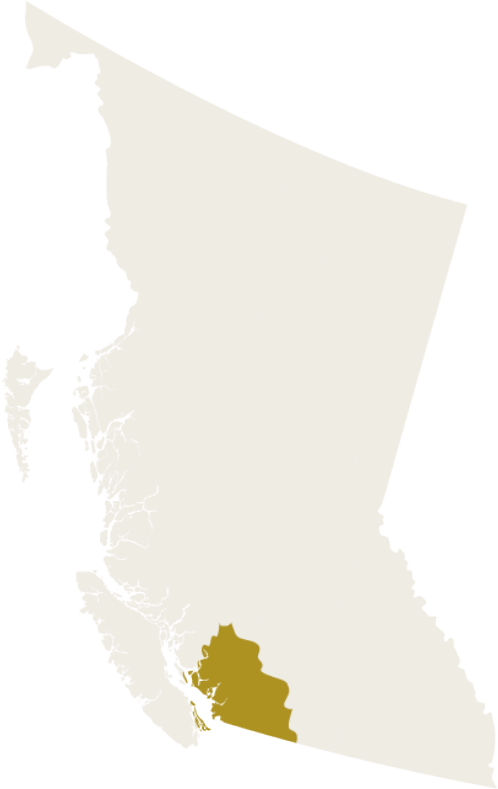


Photo by: Wolfgang Hasselmann

> *We would like to add chickens and other waterfowl to our production but there is no inspected processors in our area*
>
> — Producer from the Peace



South Coast

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Fraser Valley	63	15	
Metro Vancouver	13	4	**114**
Sunshine Coast	17	2	

The South Coast agricultural region comprises the regional districts of Fraser Valley, Metro Vancouver, and Sunshine Coast. 16% of all survey respondents came from this region. The top livestock species being raised in this region are cattle, pigs, sheep, and broilers. 45% of producers raise 2 or more livestock species.

Producers in the South Coast farm an average of 21 acres of private land (median 5 acres), all of which is in the ALR. 2 producers reported the use of grazing tenures.

94% of producers in the region are working outside of their meat businesses, of which 23% are striving to become full time meat producers. 14% of producers self-identified as full-time farmers where livestock comprise one element of diversified on-farm ventures.

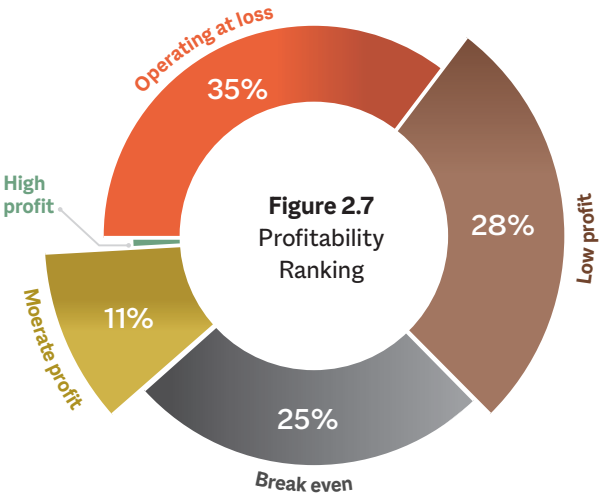


Figure 2.7 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses, n=93

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

The South Coast region is made of regional districts that have very distinct challenges. For this reason, Metro Vancouver and the Fraser Valley will be discussed separately from the Sunshine Coast.

Table 2.13 Factors preventing producers from growing their meat businesses in the South Coast

RANK	FACTOR
1	Access to slaughter
2	Access to cut and wrap
3	Profitability
4	Land base
5	Limited personal or staff time
6	Access to market
7	Accessing stock
8	Financing
9	Access to insurance
9	Predator losses
11	Housing restrictions
12	Local bylaw regulations
13	Personal reasons (e.g. family, health)
14	Climate change
15	Other
16	Quota system
17	Demand

The factors were weighed based on selection rankings and frequency

Table 2.14 What it would take for businesses to be financially sustainable in South Coast

RANK	FACTOR
1	Improved availability of on-farm slaughter
2	Lower feed costs
3	Increased availability of slaughter services
3	Ability to have additional housing on the farm for farm staff/help (including family)
3	Less local government bylaw restrictions
6	Increasing production
6	Increased access to cut and wrap services
6	Business management support
6	Increased proximity of feed suppliers
6	Ability to generate other/more diverse income off the property

The factors were weighed based on selection rankings and frequency

Metro Vancouver and the Fraser Valley

Metro Vancouver and the Fraser Valley are the most densely populated and urban of the BC regions. This presents a set of unique challenges. Interestingly however, many of the same challenges evoked over the province are echoed here as well.

There has been an significant decline in slaughter facilities in this region (from 8 to 2) in the past few years. Before the change in slaughter regulations, producers in this region have not been able to apply for on-farm slaughter licenses. Many have expressed that they are leery that the new regulations will still not apply to them due to overreaching municipal bylaws. Producers who have attempted to get mobile abattoirs into the regions in the past have been "stonewalled" by municipalities. Although most of the survey respondents farm on ALR, they reported encountering many obstacles to their livestock operations from municipalities and residential neighbours. Many urban neighborhoods are opposed to having abattoirs nearby for example. Addressing these factors would reduce the occurrence of unlicensed on-farm slaughter in this region.

There are many small-scale producers in this region who only need to slaughter a few animals at once and don't have proper stock trailers and would find it more viable to either do it themselves or have someone slaughter their animals on their farm. Producers reported that climate change has degraded pasture quality and restricted water access in this region.

Opportunities in Metro Vancouver and Fraser Valley

- Demand is high for specialty slaughter and butchery.
- Producers in the South Coast are near their market.
- Land is more productive than other regions and can sustain more animals per land unit.

Recommendations

- Support the development of mobile slaughter services in conjunction with FarmGate licenses to support the high number of small-scale operations in close proximity to urban centers.
- Develop extension services to provide agricultural support to farmers.
- Develop protocols for getting rid of slaughter waste to garner confidence in the viability of small-scale abattoirs coexisting with residential areas. For example, composting does not have to happen on site. Animal by product can be picked up by Westcoast Reduction.
- Provide directed support for producers facing conflict with regional governments regarding acceptable uses in the ALR. Currently, the ALC will not provide this support and it is up to individual producers to pursue legal avenues of conflict resolution that are generally cost prohibitive and too time consuming to be considered a reasonable solution.

Sunshine Coast

17 current meat producers and 2 previous producers responded to this survey from the Sunshine Coast. It was estimated by the SSMPA Regional Representative that there are about 20 small holders on the Sunshine Coast. These operations, which farm on an average of 11 acres, identified access to slaughter, access to cut and wrap, profitability as their top challenges. Additionally, many reported that feed and hay costs (have increased by 30% in the past 2 years) and transport times to abattoir are negatively impacting their ability to run profitable meat businesses. There is no licensed abattoir and only one butcher that caters to livestock producers at the moment of writing this report.

A lot of the agricultural land (ALR or not) is being purchased by cannabis farms or for non-farming uses. Several producers mentioned wanting to expand their operations but accessing new land to farm is increasingly difficult and costly.

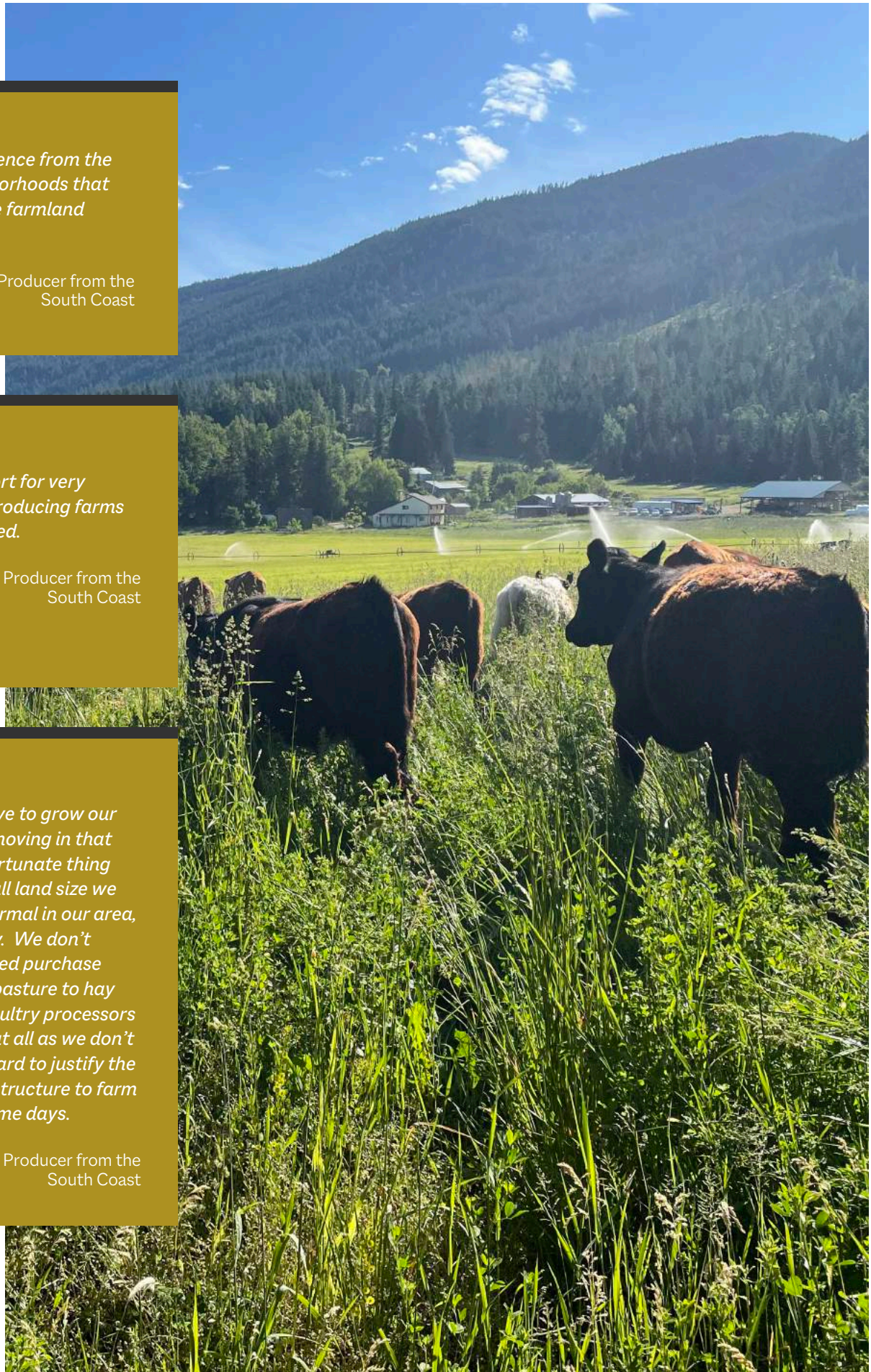
Due to the requirement of ferry transport, farmers pay some of the highest costs for farm inputs and have very few services like veterinary care. Due to higher costs, restrictive regulations and lack of local and provincial government support local livestock farmers are dwindling in numbers. Many are abandoning meat production as they can no't afford to continue. The Sunshine Coast has been experiencing stage 4 water shortages almost yearly for the past decade and many farmers are concerned about the future of their farms in the context of accelerating climate change.

Opportunities for the Sunshine Coast

- → Land class capacity is mostly 4 and 5, which is more suitable for perennial crops or livestock than vegetables.
- → The Sunshine Coast Farmer's Institute is active and the local government is aware of the issues and has shown willingness to work towards solutions.

Recommendations

- → Installation of bulk hay and feed infrastructures and services like grain trucks, silos and round bale delivery.
- → Support the development of cooperative infrastructure to support meat processing on The Sunshine Coast including cold and freezer storage and a facility for cutting and wrapping and value adding locally produced meat products.A facility for local Farmgate and Farmgate Plus licensees will increase local food security and provide ethical and sustainable meat to a particularly vulnerable community in times of supply chain uncertainties.
- → Provide directed support for producers facing conflict with regional governments regarding acceptable uses in the ALR. Currently, the ALC will not provide this support and it is up to individual producers to pursue legal avenues of conflict resolution that are generally cost prohibitive and too time consuming to be considered a reasonable solution.



"Less interference from the city, and the neighborhoods that are closing in on the farmland would be beneficial

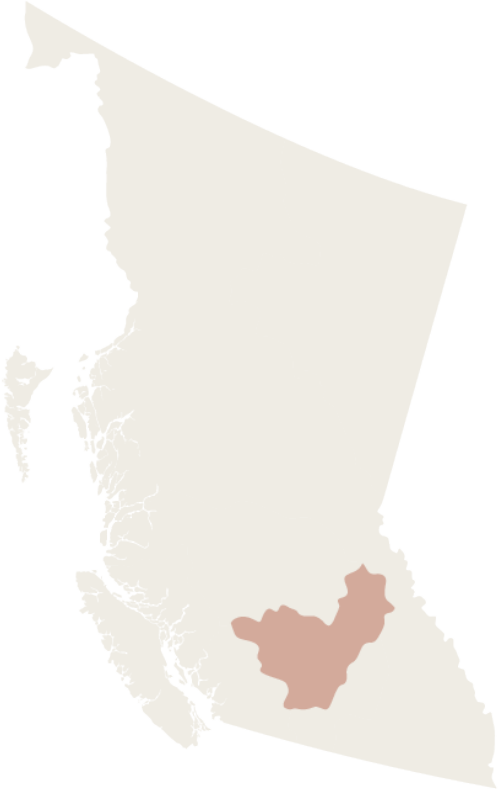
— Producer from the South Coast

"Better support for very small-scale meat-producing farms is desperately needed.

— Producer from the South Coast

"We would love to grow our operation and are moving in that direction. The unfortunate thing is that with the small land size we have, and that is normal in our area, we have to diversify. We don't benefit from bulk feed purchase prices and endless pasture to hay and graze. Most Poultry processors won't deal with us at all as we don't have a quota. It's hard to justify the investment in infrastructure to farm just over 8 acres some days.

— Producer from the South Coast



Thompson Nicola

	CURRENTLY OPERATING	NO LONGER OPERATING	TOTAL
Squamish-Lillooet	8		88
Thompson-Nicola	70	10	

The agricultural region of Thompson Nicola comprises the regional districts of Squamish-Lillooet and Thompson-Nicola. 12% of all survey respondents came from this region. The most raised livestock is cattle with 66% of producers being cattle ranchers followed by broilers (45%), sheep (37%), pigs (36%) and turkeys (29%). 63% of producers raise 2 or more livestock species.

Producers reported the use of 966,800 acres of grazing tenure for an average of 96,000 acres per licensee and they farm an average of 157 acres of private land (median 28 acres).

94% of producers in the region are working outside of their meat businesses, of which 32% are striving to become full time producers. 10% of producers self-identified as full-time producers with diversified on-farm ventures.

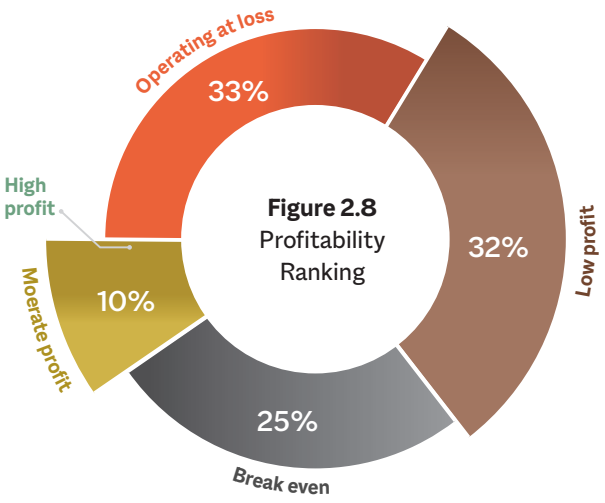


Figure 2.8 Profitability Ranking

Producers were asked to describe the profitability of their meat businesses. n=78

Producer Challenges Identified in the Focus Groups

Following the completion of the online survey, SSMPA hosted a series of facilitated regional focus groups. Producers were encouraged to further discuss the issues that they face in their regions and brainstorm potential solutions. The following is a summary of the findings from the region's focus group.

Slaughter access has been getting worse over time in this region. 3 poultry processors have retired in the past 10 years which is problematic in a region with many poultry producers. Slaughter dates need to be booked months before animals are born, which leaves no margins of errors possible as abattoirs are typically unwilling or unable to accommodate changes in producer's schedule. Cut and wrap is a major bottleneck of production since abattoirs can slaughter more animals than they can cut and wrap. Labor shortages are felt at every level of the supply chain and the pandemic has exacerbated the issue. Many producers who have started slaughter facilities have felt that this was necessary to make their businesses profitable. The rise of feed costs, veterinary access, and the lack of viable options for insurance are other challenges contributed by Thompson Nicola producers.

Table 2.15 Factors preventing producers from growing their meat businesses in Thompson Nicola

RANK	FACTOR
1	Access to slaughter
2	Access to cut and wrap
3	Profitability
4	Limited personal or staff time
5	Land base
6	Access to insurance
7	Predator losses
8	Financing
9	Access to market
9	Quota system
11	Local bylaw regulations
12	Climate change
13	Housing restrictions
14	Demand
15	Personal reasons (e.g. family, health)
16	Accessing stock
17	Other

The factors were weighed based on selection rankings and frequency

Table 2.16 What it would take for businesses to be financially sustainable in Thompson Nicola

RANK	FACTOR
1	Increased access to cut and wrap services
2	Increasing production
3	Increased availability of slaughter services
3	Lower feed costs
3	Improved availability of on-farm slaughter
5	Ability to have additional housing on the farm for farm staff/help (including family)
7	Increased proximity of feed suppliers
8	Ability to generate other/more diverse income off the property
8	More demand for my product
10	Business management support
11	Other

The factors were weighed based on selection rankings and frequency

Opportunities in the Thompson Nicola

- This region has a long-standing history of cattle production and provides a solid foundation upon which to grow and develop more beef production. Currently, the overwhelming majority of the cattle raised in this region are finished in Alberta. Since virtually all the profit to be made on these animals comes after the animal is killed, it is very difficult, and often impossible for ranchers to actually earn a living in the cattle business in BC. Numerous cattle operations in this region have been run by the same family for many generations. The infrastructure and knowledge required to finish cattle is very similar to what is required to run a successful cow/calf operation so it isn't much of a pivot to go from selling calves in the fall to finishing them.
- Large quantity of underutilized farmland and water.
- Local governments are aware and supportive of the issues faced by farmers and ranchers.
- There are unregulated processors and butchers that are booked a year in advance and are running profitable businesses. The need and demand is well established for on-farm slaughter services.

Region-Specific Recommendations

- The primary barrier preventing this region from being a leader in BC finished beef is processing capacity. Labour shortages perpetuate this bottleneck. Thompson Rivers University hosts the only meat cutting program in the province and needs to be supported to address a number of issues including attrition and ensuring that graduates have the opportunity to learn the skills required to not only butcher carcasses but to produce value added products and run a successful craft meat business.
- This region would be particularly well suited to run a Butcher Hub with a pilot program whereby slaughter trucks were licensed to bridge the gap between on-farm slaughter and fully inspected abattoirs due to the relative density of producers in this area and a good network of roads and highways. Also, this region is a good place to pilot some virtual inspection due to relatively good internet/cell service throughout this region.

> *"Farms and ranches in this region were hit particularly hard by recent wildfires and floods. We have an amazing opportunity here to build this industry into something so much stronger and resilient and the key to that is increasing slaughter and cut & wrap capacity for this region. We have all the other pieces in place and the experience, land base, drive and determination to make it happen.*
>
> — Producer from the Thompson Nicola

> *"I used to raise ducks for meat but do not currently as there isn't an abattoir that will process ducks in my area. I would have to travel 3-4 hours and have a required minimum number of animals. However, when I was selling duck, I was doing really well as it is not common*
>
> — Producer from the Thompson Nicola

> *"We are getting out of it this year. I can't manage by having to book cut and wrap butcher services a year or more in advance. And, too much work for no profit. It's really a shame as we enjoy providing great meat to ourselves, family, friends and neighbours. Nobody wins by having small scale farmers like us quit.*

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