



Strategic Plan for the B.C. Pork Industry

Final Report

Conducted on behalf of:

**The British Columbia Pork
Producers Association**

Submitted by

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Strategic Plan
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Note to the Reader

This document presents a high level summary of the strategic direction for the B.C. Pork Industry. The summary is for the use of the British Columbia Pork Producers Association (BCPPA), the organization responsible for spearheading this initiative. In turn, it is our expectation that this document will be made available to the public at large as the BCPPA continues to promote the B.C. pork industry.

By way of background, the Strategic Plan for the B.C. Pork Industry comprises the individual strategies of two key value chains. These are:

1. A Strategy and a Marketing Plan for Johnston Packers and the producers supplying hogs to this processor.
2. A Strategy and a Marketing Plan for Donald's Fine Foods and the producers supplying hogs to this processor.

Combined, these two groups account for almost all of the hogs produced **and** processed in British Columbia. The two processors identified above operate in a very competitive environment and to some extent compete with each other. Thus the details of the individual plans that have been prepared for each processor as part of the project are confidential. Nevertheless the directions provided by the strategic plan provide key criteria and a framework for other producers and processors in the province to develop their own individual strategies.

In summary, this document provides a general overview of the strategies as well as highlighting the common challenges and/or changes both value chains face if they are to remain as competitive players in the B.C. market place.

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Executive Summary

This document presents a high level summary of the strategic direction for the B.C. Pork Industry. As part of this strategy, two detailed marketing plans have been prepared; one for the Johnston Packer value chain; one for the Donald's Fine Foods value chain. Since these are private businesses that compete in a very competitive marketplace, the details of the individual plans are kept confidential.

Market research conducted in Phase 1 of this project confirms that there is interest in locally produced B.C. pork products. However the actual size of this market and the level of premium that consumer may be willing to pay are not known and can only be determined by 'testing' the market. Such 'market tests' need to be supported by professional marketing and be carefully monitored.

The Strategic Plan for the B.C. Pork Industry is committed to positioning B.C. produced pork as the product of choice within the B.C. market place. Three overriding strategic objectives are identified:

1. To foster the formation of value chains that have the potential to develop and deliver B.C. based branded pork products to the B.C. market place.
2. To facilitate the development and implementation of a marketing strategy for each value chain to achieve the overriding strategic objective.
3. To assist in the transition process in moving the B.C. pork industry from its current position to the more competitive position as the preferred supplier of pork within the B.C. market.

Detailed marketing plans for two value chains have been prepared. The first, Johnston Packers will build on an already strong locally based supplier-customer relationship strategy; the second, Donald's Fine Foods will introduce a differentiated product.

Individual marketing strategies within B.C. face a similar set of critical success factors. These are:

1. Increased market focus – the need to increase marketing and customer relations activities.
2. Supply chain management requirements – the need to work closely with producers in a spirit of partnership and to do so in an ongoing and continuous manner.
3. Transparency and trust – the need for both processors and producers to better understand each others costs and risks to develop mutually satisfactory pricing arrangements.

4. Continuous Feed back – the need to ensure that continuous and ongoing feedback is being received from consumers to processors and from processors to producers.
5. Developing a Further Processed Meat Strategy – the need to develop a B.C. based further processed meat strategy.

In summary, one thing is clear:

The B.C. pork industry cannot compete head to head with low cost commodity pork production systems located in other parts of Canada and the USA¹.

Thus the B.C. pork industry has only one choice:

To compete as a value added branded industry supplying high quality products targeted to distinct customer segments who value this offer.

The Strategic Plan for the B.C. Pork Industry as outlined by this document will determine whether this can be achieved.

¹ The pork industry is being led by large integrated production and processing systems such as Smithfield and Cargill. One major advantage characteristic of these systems is having sufficient volume to operate a double shift at the processing plant. This advantage alone accounts for a \$8 to \$12 per head reduction in processing costs in comparison to smaller single shift processors such as those operating in B.C. The province also has the disadvantage of being a feed deficit region, thus all feed prices paid by producers have the added cost of freight and transaction costs compared to pigs being fed in Prairies, Ontario and the U.S. Midwest.

1.0 Introduction

Current pork production in British Columbia represents approximately 10 percent² of the pork that is actually consumed within the province. It is also important to understand that not all consumers are the same and in fact distinct segments with differing quality and price expectations exist. While the exact size and the specific characteristics of differing segments have not been confirmed through quantitative research, the qualitative assessment of the market we conducted in June of 2008, suggests the following segments exist:

- **Traditional price conscious consumers** – estimated to represent 65% to 75% of the market which is largely supplied by mainstream supermarkets and food retailers. The segment is primarily driven by price.
- **The Fanatic Consumer** – estimated to represent 1% to 3% of the market who diligently seeks organic or authenticated natural products from very specialized retail outlets.
- **The ‘interested in knowing more’ segment** – estimated to represent 20-30% of consumers who shop at specialty meat shops, butchers, and specialized or local retailers. The category also includes shoppers who are receptive to branded products at the larger supermarkets.

For the most part, Johnston Packers and Donald’s Fine Foods both operate within the third segment, namely the ‘interested in knowing more’ market segment. Based on our findings, we conclude that there are opportunities to increase the profile and the value of both Donald’s Fine Foods and Johnston Packer brands within the B.C. market place.

It should also be noted that Johnston Packers and Donald’s Fine Foods have fundamentally different strategies. Johnston Packers is a provincially inspected plant and targets individual retailers and specialty butcher shops in the lower Mainland. Donald’s Fine Foods is a federally inspected plant with established brand management and marketing experience. Donald’s offers an array of branded and generic fresh pork products and targets regional and national chain stores. Effectively the two companies compete in different market channels.

It should also be made very clear that real competition for the sale of pork in British Columbia is not other B.C. suppliers. Rather it is the vast majority of pork that moves into the province from out of the region supplied by large scale Canadian and American pork processors as well as importers who bring in products from Europe and South America.

² Based on per capita consumption data provided by Statistics Canada, B.C. pork production accounts for 10% of the total pork demand in the province.

Significantly there is a growing interest among consumers in local food, local economies and knowing where food actually originates. B.C. consumers are certainly at the forefront of this trend. Thus there is ample opportunity for both processors to expand market position without impinging upon each other's business.

The Marketing Plans for both value chains are built in response to two simple yet straightforward questions:

1. **What is possible?** In other words, what are the attributes that are sought and valued by current and potential new consumers of the respective customers?
2. **What is practical?** In view of the tremendous cost pressures being felt by the B.C. pork industry, what can at cost levels that can be recovered from market place both producers and the processor?

The answers to these questions were explored in a series of discussions with both packers and the pork producers who currently supply them. These discussions and further market and product explorations form the basis of the individual marketing plans.

2.0 Background to Strategic Plan

2.1 General

This section highlights some of the general findings derived from the qualitative market research conducted in June of 2008. These are provided as context to some of the opportunities and challenges to be addressed by the strategic plan.

1. Fresh pork is generally marketed in a generic manner. Thus at retail, consumers will generally see only the product without reference to either its geographical or packer origin.
2. Pork is presented as the low cost, cheap protein. Unfortunately, this translates into tremendous price pressure back on both processors and producers.
3. There is a strong and growing interest in knowing more about products such as where it comes from and how it is produced. There is a growing interest in locally based products with beneficial attributes among some consumer segments. Note: In comparative terms to other provinces within Canada, B.C. has a particularly strong regional/local orientation.
4. There is little or no awareness of B.C. Pork as an industry or B.C. pork as a product. Thus pork produced in B.C. has little or no profile.
5. Differentiated approaches are working in other countries and in regions within North America. Three examples bear noting:
 - Label Rouge in France.
 - Niman Ranch in the U.S.A.
 - Du Breton in Quebec which has become the largest supplier of anti-biotic free (ABF) pork in North America.
6. B.C. pork is seen as high quality, mainly because of the assumption that is as ‘fresh as pork can be’ since it is produced locally. Some retailers acknowledged that the freshness attribute may be a debatable point since they also source pork from Alberta and the northern United States that only requires a few additional hours of transportation to reach Vancouver. Nevertheless, ‘*locally produced and freshness*’ are two important attributes to consider in developing B.C. pork marketing strategies.
7. The larger retailers and food service companies display little or no loyalty to pork produced in B.C. Their primary concern is the ability to source federally inspected product, available at sufficient volumes and at competitive prices. Their ability to do so within B.C. is very limited. Consequently these retailers are quite indifferent with respect to

recommending pork based on locale, alone. This is evidenced by the fact that during our interviews we were shown pork from Alberta, Saskatchewan, Quebec, the U.S. and Chile - all of which was advocated to be of highest quality.

8. Nevertheless, several smaller retailers showed an interest in a B.C. supply or a B.C. brand of pork. This is a reflection of a growing interest in local food; being seen to support the B.C. or western Canadian economy; and in response to consumer questions about food, where it comes from and how it is produced. This interest is course qualified by the need to be price competitive.
9. Pork processors operating within the B.C. market are under extreme pressure. In effect they are caught in a most unenviable double bind: (1) having to operate in a business environment with some of the highest operating costs in the country³; (2) competing in a market that is inundated by low cost pork products sourced by major suppliers from large Canadian pork processors; U.S. sources as well as from Europe and South America. Consequently, they are very reluctant to invest in new marketing strategies that involve further cost or added risk.
10. While there is an interest in B.C. branded pork products within selected channels, it must be made very clear; this will take considerable time and effort to develop. Firstly, there is little or no image of the B.C. industry. Secondly, there is presently no value proposition or 'story' that conveys a clear compelling reason why the consumer would choose to select B.C. pork as a product of choice. Thirdly, the B.C. market in the main has been so overwhelmingly focused on price, that shifting to alternative attributes will require a carefully planned market entry strategy.

³ The B.C. pork industry has several cost items that are typically higher than other pork producing regions: (1) feed since it is a feed deficit region; and (2) labour; and (3) lack of scale – both at the processor and producer levels.

2.2 Implications for the Strategic Plan

Several key implications can be drawn from the market research findings:

1. The B.C. pork industry has little or no image within the B.C. marketplace. Thus there is both the need and the opportunity to develop and promote B.C. based pork brands that speak to the growing 'local food' interests.
2. The prevailing market driver underlying pork procurement among the major retailers and food service companies is price. Further, these channels place little or no value on B.C. supplied product unless it is price competitive. This conclusion speaks both to the challenge and the care that must be taken when developing alternative higher valued brand strategies that feature B.C. pork.
3. There is no lack of supply within the existing market place. It is clear the B.C. market has numerous suppliers who are ready and able to flood the market at any time. Again, this dynamic speaks to the care that must be taken in developing higher valued B.C. pork strategies. Indeed these strategies cannot affront the mainline strategies of major retailers. Rather they must seek out a minority of retail and food service market channels that seek to differentiate themselves from the mainstream.
4. There is a growing interest in locally based products with beneficial attributes among some consumers. The actual size of this segment and the level of premium that they may be willing to pay are not known and can only be determined by 'testing' the market. Such 'tests' need to be targeted and supported by professional marketing as well as carefully monitored.
5. Finally, there are no guarantees that higher valued branded pork strategies will be successful. However, the B.C. pork industry at this point in its history has no choice but to try and make its best efforts to do so. Clearly the industry has a compelling reason to test this strategy. Because of the industry's lack of scale in comparison to large integrated systems, it is a higher cost industry both in terms of pork production and processing costs. Consequently it is increasingly disadvantaged if it continues to compete against mainstream commodity production. Thus the B.C. pork industry must re-position itself as a value based local supplier of high quality, safe food that addresses a growing interest for such attributes among B.C. consumers.

3.0 Objectives

The Strategic Plan for the B.C. Pork Industry is committed to positioning B.C. produced pork as the product of choice within the B.C. market place. Fundamental to this objective is the selection of market channels that value B.C. pork and are willing to pay a premium for such products.

To this end, three overriding strategic objectives are identified:

1. To foster the formation of value chains that have the potential to develop and deliver B.C. based branded pork products to the B.C. market place.
2. To facilitate the development and implementation of a marketing strategy for each value chain to achieve the overriding strategic objective.
3. To assist in the transition process in moving the B.C. pork industry from its current position to the more competitive position as the preferred supplier of pork within the B.C. market.

The development of the two marketing plans described in this document is a first step in this process. The B.C.P.P.A. will continue to play an active role toward the realization of the strategic objectives.

4.0 Overview of the Johnston Packer Strategy

Johnston Packers competes as a supplier of pork to independent retailers, meat shops and butchers in the Lower Mainland. It holds a good reputation as a high quality and reliable supplier. However, in-depth knowledge about Johnston Packers and its pork products among both its retail customers and actual consumers is limited.

The fundamental objective of the Johnston Marketing Plan is to develop and deliver the Johnston Brand Promise. To this end, the strategy will increase specific awareness and strengthen the connection between customers and the Johnston Brand as a B.C. based business and supplier of B.C. Pork. An important step in this process is to clearly define the value proposition or what can be termed the Johnston ‘story’.

More specifically the strategy addresses several key questions: (1) what is special about Johnston’s and the pork it supplies? (2) How is the pork produced? (3) Who produces the pork? (4) What are the animals being fed? (5) How are the animals housed and handled? (6) Where and how are they processed? (7) How is the product different than other suppliers or sources of pork?

These questions are predicated on the premise that consumers are increasingly interested in knowing more about the food products they consume. Further there is growing interest in and support for ‘local food’ and knowing who actually produces the food available for consumption. Johnston Packers has the opportunity to address these questions in a most positive manner and build on this position to increase market position and profitability.

In the fall of 2008, we met with a group of Johnston Packer producers and discussed common production practices to learn more and identify what could be part of the Johnston Packer story. This discussion generated a number of defined attributes that will be used to build what is termed as the ‘Johnston Brand’ strategy. This in turn provided the basis to develop specific objectives, a set of initiatives and a detailed action plan to achieve these initiatives.

In summary, the strategy seeks to given definition and detail to the Johnston Brand; communicate the Johnston Brand Promise; create awareness; and strengthen the connection and loyalty with customers. The plan provides Johnston Packers with a detailed road map of how to implement this strategy in a step by step manner.

5.0 Overview of the Donald's Fine Foods' Strategy

Donald's Fine Foods competes as a high quality supplier of pork within an intensely competitive market within the retail and food service sectors. As a federally inspected plant, it competes head to head with suppliers from across Canada and the U.S.A.

The fundamental objective of the Donald's Fine Foods strategy is to develop a differentiated product strategy for B.C. pork. The purpose of the strategy is to present a differentiated pork product with supporting marketing programs that breaks the clutter of the general pork category. The strategy will deliver a fresh pork product that has unique attributes and addresses values or outcomes sought by consumers.

In response to consumer inquiries and in recognition of the need to differentiate, Donald's Fine Foods Packers identified the opportunity for Antibiotic Free (ABF) pork. This interest is being driven by consumers who want to better understand where their food comes from, how it is produced and processed. These consumers are seeking safer, 'healthier' food products.

The demand for Antibiotic Free (ABF) pork stems from this shift in demand by a select group of consumers. The concern is focused on the desire to avoid drug residues that might still be present in the meat and over time lead to antibiotic resistance in humans. This consumer segment is willing to pay a premium for pork originating from hogs that have not been fed any antibiotics or growth promotants. Many of these consumers also feel that pork raised in such a manner is of better quality than conventional pork. There is an anticipation of superior taste, a more uniform color, more marbling and a more tender and juicy product. It is interesting to report that the State of California has just introduced legislation to restrict the use of antibiotics in raising both poultry and meat (including pork). A schedule is proposed whereby on January 1, 2012, a school or school district will be prohibited from serving meat with antibiotics. A total ban is scheduled to be in place by January 1, 2015. This action is clearly a precursor of things to come.

The ABF project comprises three distinct phases:

1. Testing and certifying production practices at the producer level. The hog raising and processing stages must be certified by an independent external organization recognized by the Canadian Food Inspection Agency (CFIA). The certification process ensures that all feeding, management and processing procedures are documented and audited.
2. Developing and testing a branded product program with a targeted retailer over a six month to one year trial period.
3. Scaling the program (up or down) further to results of the market test. It should be stated that most of the efforts to date have revolved around the production test.⁴

⁴ The production test commenced in October of 2008. Just recently however, some production concerns have occurred and the ABF program is currently being reviewed.

6.0 Organizing the Supply Chain

There are several different organizational structures that can be considered in the development of collaborative approaches in the supply and marketing of a product. These are described briefly as follows.

1. The Traditional Transactional Model

This is simply a business relationship whereby the processor owns the brand, takes responsibility for all processing and marketing while producers agree to supply the required hogs, subject to agreed production protocols. The processor agrees to a pricing mechanism that is presumably based on traditional pricing methods plus some premium to ensure supply and to offset any additional costs.

All processing and marketing risks remain with the processor. All production risks remain with the producers. Most if not all of the leadership to drive the initiative is provided by the processor.

The major advantage to this approach is its sheer simplicity to the extent that it is an extension of the practices already in place. This is also the major disadvantage since nothing much has changed. The success of this approach relies largely on the trust and good will between the processor and producers.

2. Shared Benefit-Risk Models

a. The Value Chain Model – involves a group of producers who organize themselves either formally or informally to establish a contractual relationship with the processor. Fundamentally, neither party takes an ownership position in the other party's business. Rather, agreement is reached regarding a mutually beneficial enterprise wherein both parties are better off by working together in a longer term arrangement. Within the context, the processor and the producer group agree to a number of key points:

- Establishment of a Steering Committee with representation from producers and the processor. Ideally, the target marketer should also be included as part of the Steering Committee – this will keep the committee's focus firmly on the market objective while dealing with the usual range of processing and production concerns.
- Agreement to a set of business and market objectives.
- Clear product specifications and associated protocols.
- Quality assurance programs that are subject to inspection or audit.
- Volume/production levels on a weekly or monthly basis.
- Agreement to cover base costs – both production and processing.
- Agreement on a process or formula to cover additional costs and/or added risks.

- Agreement to identify and/or quantify added revenues (benefits) that are being achieved.
- Agreement to a formula on how to share added revenues.
- Regular review process.
- Establish dispute resolution mechanisms.

The major advantage of this approach is that it can begin on the basis of agreements (or contracts) that are built on the pursuit of mutual interests. It does not require the establishment of new legal structures. Trust, transparency, mutual respect and regular communications are key. Strong leadership and a commitment to the success of all parties are essential.

The major disadvantage is the time and effort required before clear measures of sustained success are established. It is easy for the relationships to breakdown if the leadership is lacking and communications, trust etc. begins to weaken.

- b. **The Corporate Model** – this takes the value chain model to the next level wherein both parties (the processor and the producers) establish a separate corporate entity that becomes the structure within some or all the required activities associated with the enterprise in question, takes place. All the elements described in the value chain approach must be addressed, however a corporate structure is established – thus mutual financial interests in the enterprise are formalized.

An example may make this approach somewhat clearer:

- Establish a corporate entity - let's call it "BRAND NAME" BC Pork Inc. for discussion purposes only.
- Shares to be jointly owned by the processor and participating producers (share structure to be determined). Allow for the inclusion of other investors such as a retailer.
- "BRAND NAME" BC Pork Inc. to contract a range of agreed services including the purchase of qualified pigs at an agreed price; cost of processing etc.; required management and operation services etc.
- "BRAND NAME" BC Pork Inc. to be responsible for all sales, marketing, and promotional activities.
- "BRAND NAME" BC Pork Inc. will of course maintain a complete set of financial records. Net surpluses (or losses) to be distributed in accordance to share structure and/or a portion are kept as retained earnings to fund growth.

The major advantage is that all 'value added' activities take place within the corporate structure and are therefore fully transparent.

The major disadvantage is the need to establish the separate corporate structure with all the necessary legal and financial obligations.

General Discussion

The above models provide a general idea of the differing approaches. Clearly there are variations that can be considered within each approach.

We recommend that the business structure should be kept simple and proceed one step at a time. To this end we recommend that some form of the Value Chain Model be used as a starting point. If this approach proves successful, one can always move to the Corporate Model should volumes and business activity levels be large enough.

Whatever the choice, the following elements are critical:

- A shared vision of what is to be accomplished.
- Leadership that is respected by all parties.
- A recognition and appreciation of all parties' concerns, issues and risks.
- Clear benefit to all parties.
- Trust.
- Transparency.
- Regular and open communications.

If any one of these elements is lacking, the ability to move forward successfully will be compromised.

7.0 Critical Success Factors

While individual business strategies may differ, we have identified several factors that are critical to business success for all players in the B.C pork industry. These are identified and discussed as follows:

1. **Increased market focus** – all marketing strategies requires a very strong market focus. This means working very closely with retail and food service outlets to determine what marketing and merchandising programs are required; what is working and what is not working; what new competitive opportunities and threats are emerging; what adjustments need to be made, etc. This is an ongoing requirement and may represent the acquisition of new personnel and skills to ensure success.
2. **Supply chain management requirements** – processors operating within the B.C. market will need to make organizational changes to work more closely with their producers. Technically this function is referred to as ‘managing the supply chain’. In all cases, producers will need to adhere to a set of production protocols that are more systematic than current production practices. To this end, it will be necessary to ensure these protocols are adopted, verified and can be authenticated at any time. In effect, supply chain management needs to ensure a steady flow of communications with producers and commit to regular updates or meetings that address such issues as:
 - Marketing Updates – what has happened; accomplishments; new developments; new challenges; opportunities etc; what is being planned?
 - Review of customer satisfaction, requirements, what do they want to know?
 - Review of the Packer Producer Protocols – what needs to be addressed? What are the concerns?
 - Making Adjustments – what needs to added, changed or undertaken to enhance the marketing program?

In addition, the person in charge of supply chain management will need to work closely with the marketing personnel to ensure that the necessary background and information between producers and consumers and vice versa is communicated and understood. For example, it will be important to translate market and consumer issues back to producers and how these related to changes or additions to production protocols and management practices.

The key point being made here is that the traditional transactional ‘arms length’ relationships between processors and producers need to change. Both parties have a vested interest in the success of the other party. Neither party can succeed without ensuring the success of the other party. Thus a great deal of mutual understanding,

communications and sharing of information needs to take place on an on-going basis.

- 3. Transparency and Trust** – further to the previous point, the relationship between the processor and the producer must be based on transparency and trust. In this regard, the issue that will test the relationship will be the issue of pricing. Clearly both parties need to create more value to cover the added costs of producing branded and/or geographically identified pork to be marketed at a premium in the B. C. market place. Thus both parties must be willing to disclose added costs (and risks) as well as discuss the necessary returns required to achieve financial viability for all parties. Thus, the discussions will require a measure of ‘give and take’ that is not characteristic of the way pricing decisions are currently made.
- 4. Continuous Feedback** – continuous and ongoing feedback from both the market (customers) to the processor and in turn to producers will be critical to the success of the B.C. Pork Marketing Strategy. The industry has the advantage of being located in the very market to which it is supplying. Thus the ability to adapt and to bolster the local nature of the industry is a competitive advantage. This will require a commitment to communications - a key role for the supply chain management function.
- 5. Developing a Further Processed Meat Strategy** – both strategies currently focus on the marketing of fresh pork. However a significant portion of the hog carcass is destined for further processed meats (hams, bacon, and processed meats). Currently, there is no definitive strategy for B.C. produced processed pork. While two major further processors are located in the Lower Mainland, both of these source large quantities of pork for further processing from out of province. To gain full value from the B.C. production base, it will be necessary to explore how a B.C. strategy can be developed.

7.0 Concluding Remarks

The research findings indicate that there are market opportunities for branded B.C. pork products. However this will take time and effort to develop – both in terms of developing a clear value proposition for the branded product, testing the proposition and finally, determining the expected revenues, costs and net returns to both processors and producers.

This plan is a step in this direction. It is not possible to forecast with precision what the final results will be. One thing is clear:

The B.C. pork industry cannot compete head to head with low cost commodity pork production systems located in other parts of Canada and the USA.

The industry has only one choice:

To compete as a value added branded industry supplying high quality products targeted to distinct customer segments who value this offer.

The Strategic Plan for the B.C. Pork Industry as outlined by this document will determine whether this can be achieved. Overall, the investment to proceed with this plan is modest. However, the key determinants of success will be the ability of the individual value chains to execute the added levels of marketing expertise and supply chain management required to market B.C. pork as a premium product.

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