

G R O U P E
AGÉCO



LES ÉLEVEURS DE POULETTES DU CANADA PLANIFICATION STRATÉGIQUE

RAPPORT FINAL

PRÉSENTÉ AUX
ÉLEVEURS DE POULETTES DU CANADA



MAI 2024

RÉSUMÉ

Les Éleveurs de poulettes du Canada (ÉPC) ont entrepris une réflexion approfondie sur la nécessité d'établir une organisation nationale pour représenter les éleveurs de poulettes. Afin d'identifier une orientation stratégique, les ÉPC se sont engagés dans une démarche impliquant une contribution significative et la participation de toutes les provinces. Le double objectif du projet était d'aider les ÉPC à identifier une orientation stratégique basée sur sa capacité à atteindre les objectifs du précédent plan stratégique, et d'améliorer et d'étendre la représentation des éleveurs de poulettes, des poulettes elles-mêmes et de l'intérêt public au niveau national.

Le projet a débuté par une réunion de démarrage en juillet 2023 à l'Île-du-Prince-Édouard, à laquelle ont participé les membres du conseil d'administration des ÉPC ainsi que les équipes de projet du Groupe AGÉCO et de Serecon. Cette réunion a permis d'établir des opportunités de collaboration et des contacts clés pour les consultations. D'août à septembre 2023, des entretiens avec les offices provinciaux de commercialisation des œufs membres des ÉPC, ont mis en évidence les lacunes en matière de représentation et de réglementation des poulettes dans l'ensemble du Canada. Ces consultations ont préparé le terrain pour d'autres entrevues avec des provinces non-membres d'octobre à décembre 2023, qui ont révélé une satisfaction générale à l'égard des Producteurs d'œufs du Canada (POC) en ce qui concerne les questions relatives aux poulettes, malgré le mandat limité des POC en la matière. Les provinces préfèrent qu'un comité sur les poulettes soit créé au sein des POC plutôt qu'une organisation distincte.

Une analyse de la réglementation réalisée en décembre 2023 a révélé des mises à jour minimales depuis 2014, mais a tout de même mis en évidence les lacunes réglementaires en matière de gestion des poulettes. Sur la base de ces résultats, l'équipe de projet a recommandé en janvier 2024 la dissolution des ÉPC afin de proposer la création d'un comité des poulettes dans le cadre des POC. Une stratégie a été élaborée pour sonder les éleveurs de poulettes et former un groupe de travail pour explorer cette option. De février à mai 2024, un sondage a permis d'évaluer les réactions des éleveurs à l'égard du comité et leur satisfaction quant à la manière dont les POC traitent les questions relatives aux poulettes. Les résultats ont indiqué une préférence pour la représentation des POC et ont souligné la nécessité d'une meilleure représentation des éleveurs de poulettes.

Dans le cadre d'un groupe de travail conjoint de mars à mai 2024, une représentation aux POC et aux offices provinciaux a proposé la formation d'un comité des poulettes. Trois provinces ont soutenu le groupe de travail conjoint, six l'ont refusé et une décision demeurait en suspens. Le rapport final de mai 2024 résume les activités du projet et fournit une recommandation finale pour les ÉPC, soutenant la formation d'un comité des poulettes sous l'égide des POC. Tout au long du projet, l'équipe a fourni des conseils stratégiques en fonction de l'évolution de la situation et des commentaires des parties prenantes.

Le projet a permis de conclure qu'il existe un désir clair d'améliorer la représentation des poulettes à travers le Canada, mais que cette représentation devrait provenir des POC plutôt que d'une organisation distincte comme les ÉPC.

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1. PLANIFICATION STRATÉGIQUE : RECOMMANDATIONS ET FEUILLE DE ROUTE

1.1 RÉSUMÉ DES CONSTATS

L'objectif de la démarche de planification stratégique des ÉPC était double :

- Aider les éleveurs de poulettes du Canada (ÉPC) à définir une orientation stratégique en tant qu'organisation, en fonction de sa capacité à atteindre les objectifs fixés dans son plan stratégique précédent.
- Soutenir les ÉPC dans son objectif d'améliorer et d'étendre la représentation des éleveurs de poulettes, des poulettes elles-mêmes et de l'intérêt public au niveau national.

Ces travaux ont été jugés nécessaires parce que les POC n'ont pas de mandat sur les poulettes et que la réglementation provinciale en la matière varie considérablement, ce qui représente un risque potentiel pour l'ensemble de la chaîne d'approvisionnement en œufs, étant donné que la qualité des poulettes influe en fin de compte sur les performances des poules pondeuses.

Afin d'identifier ces lacunes et les opportunités qui en découlent pour les ÉPC en tant qu'organisation, les offices provinciaux et les éleveurs eux-mêmes ont été impliqués et une analyse de la réglementation a été réalisée. Ce travail a permis de mieux comprendre le paysage de la gestion des poulettes au Canada, les besoins et les désirs des éleveurs et la position perçue des ÉPC en tant qu'organisation.

Les résultats des activités du projet reflètent un désir clair d'améliorer la représentation des poulettes dans tout le pays. Des entrevues (annexes 2 et 3 – disponible en anglais seulement) et un sondage (annexes 6 et 8 – disponible en anglais seulement), disponibles en anglais et en français, ont été distribués aux éleveurs de poulettes dans les dix provinces. Le sondage, auquel ont répondu 88 éleveurs de poulettes (intégrés = 86% ; indépendants = 14%), a mis l'accent sur la nécessité d'une représentation des poulettes. Par exemple, en réponse à la question « Dans quelle mesure pensez-vous que les Producteurs d'œufs du Canada (POC) comprennent actuellement les défis et les besoins uniques des éleveurs de poulettes ? », seulement 22 % des répondants ont estimé que les POC comprenaient parfaitement ces sujets (figure 1).

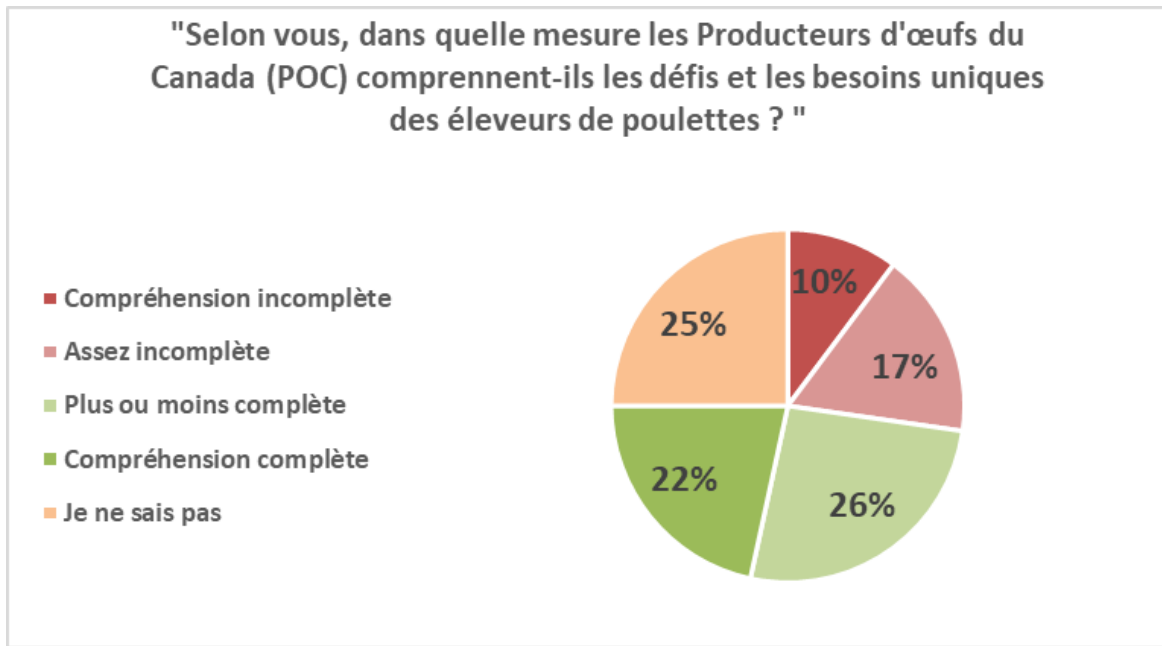


Figure 1

Alors qu'un quart des répondants n'étaient pas certain, 53% des participants ont estimé que les POC avaient une compréhension limitée des besoins des éleveurs de poulettes. Cette constatation fait écho à la question de savoir si un comité des poulettes créé par les POC répondrait à ces préoccupations, pour laquelle 50 % des participants étaient d'accord avec cette proposition (figure 2).

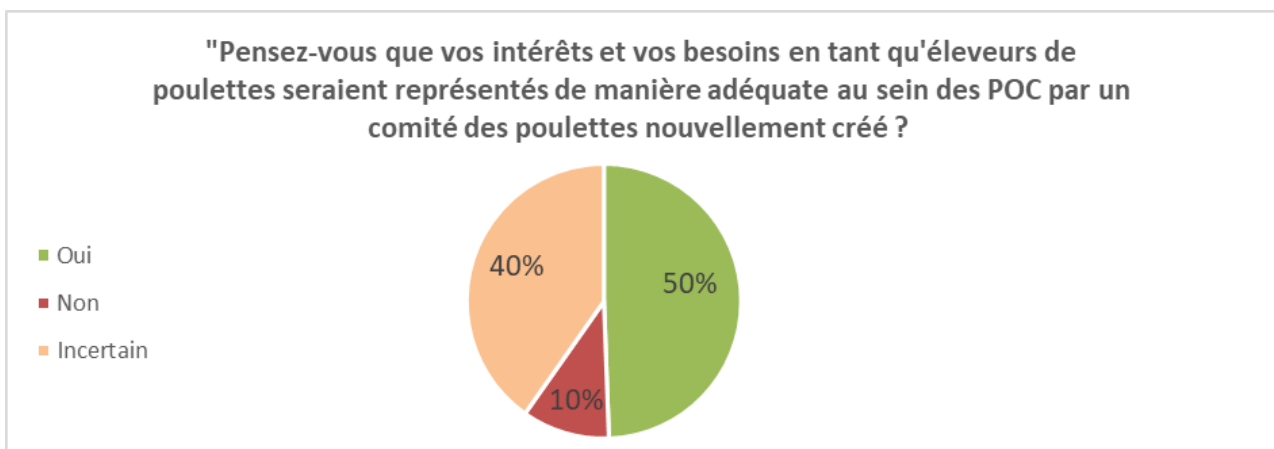


Figure 2

Cependant, il y a peu d'intérêt à ce que cette représentation provienne d'une deuxième organisation, c'est-à-dire des ÉPC, avec près de 60 % des participants ayant un sentiment positif quant à la dissolution des ÉPC et à son intégration dans les POC (c'est-à-dire l'intégration de son mandat sur la représentation des poulettes) (Figure 3).

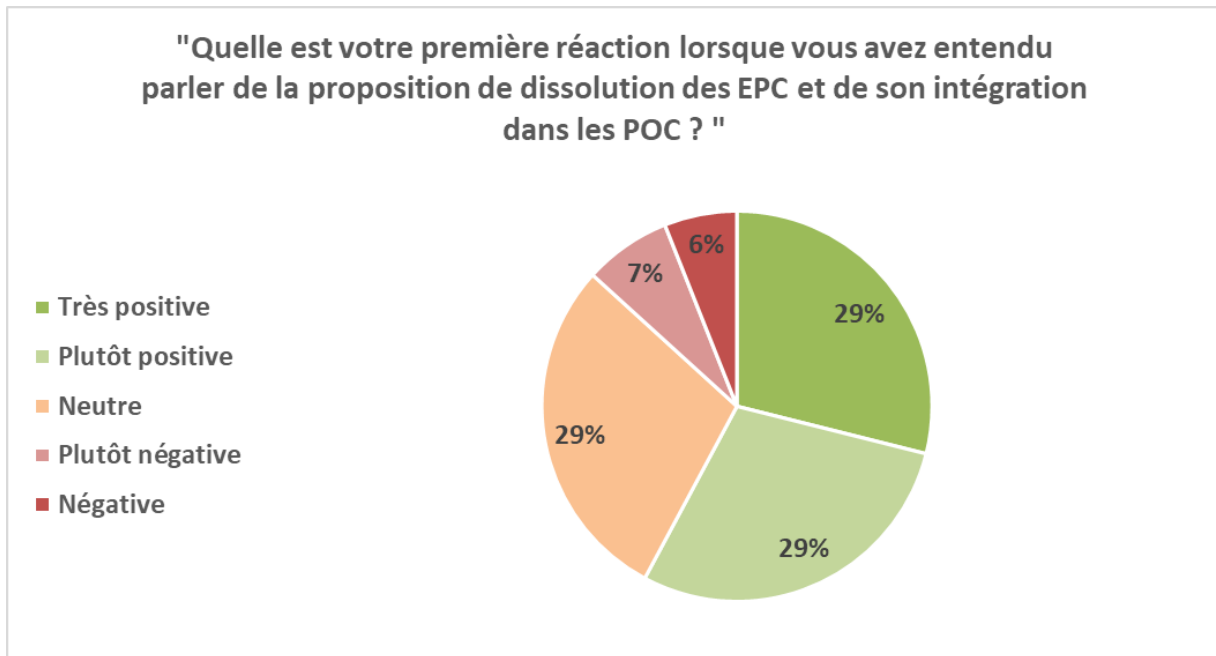


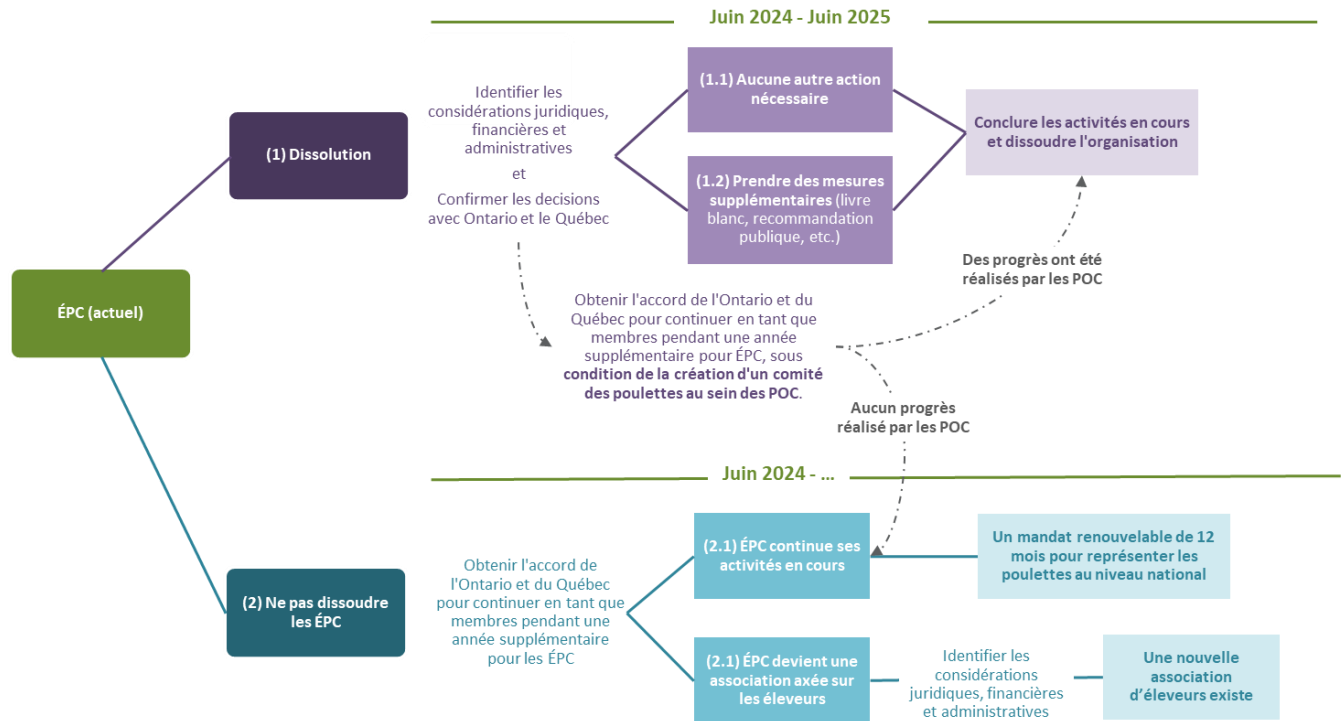
Figure 3

Le souhait qu'une seule organisation soit chargée de recevoir, de représenter et d'aborder les préoccupations des éleveurs de poulettes et les questions connexes reflète la perception exprimée par les parties prenantes selon laquelle les poulettes font partie de la chaîne d'approvisionnement en œufs et ne constituent pas une chaîne d'approvisionnement distincte en soi ; en d'autres termes, les poulettes sont considérées comme un intrant pour la production d'œufs. Le fait est que la plupart des éleveurs de poulettes sont également des producteurs d'œufs, élevant pour eux-mêmes ou pour d'autres producteurs d'œufs en tant que « producteurs intégrés », et sont donc déjà représentés par les POC. Si les producteurs de poulettes indépendants ne sont pas représentés au niveau national, les parties prenantes ont estimé qu'il était préférable de laisser la représentation des indépendants aux offices provinciaux de commercialisation des œufs.

Les ÉPC se sont distingués au niveau national par leurs efforts de défense des éleveurs de poulettes et de l'intérêt public. Ses activités comprennent des enquêtes sur les coûts de production et la représentation des éleveurs de poulettes dans des dossiers clés, tels que le redéveloppement du programme de soins aux animaux. Toutefois, la présence d'une deuxième organisation au niveau national a conduit certaines parties prenantes à décrire un sentiment de conflit ou d'inefficacité administrative, compte tenu de la nature largement intégrée de la chaîne d'approvisionnement en œufs. Au vu de ces résultats, des recommandations sont présentées ci-dessous.

1.2 RECOMMANDATIONS

Nous recommandons aux ÉPC de suivre l'un des deux scénarios suivants (figure 4).



Pour procéder selon les calendriers des réunions des conseil d'administration provincial de l'Ontario et du Québec, et selon les dates administratives clés, soit la fin de l'année civile en cours (décembre 2024, 6 mois) ou la fin de l'année fiscale des ÉPC (juin 2025, 12 mois)

Figure 4

La figure 4 présente un processus décisionnel pour les ÉPC entre juin 2024 et juin 2025, décrivant les actions potentielles de l'organisation. Le processus décisionnel est divisé en plusieurs étapes, commençant par une décision immédiate de dissoudre les ÉPC ou de poursuivre ses activités, les étapes suivantes étant basées sur les progrès et les décisions prises entre juin 2024 et juin 2025.

VOIE 1 : DISSOUDRE LES ÉPC

- 1. **Décision initiale** : Le premier point de décision consiste à déterminer s'il faut dissoudre les ÉPC. Si la décision est de dissoudre, les étapes suivantes consistent à identifier les aspects juridiques, financiers et administratifs et à confirmer les décisions avec les conseils d'administration des offices provinciaux de l'Ontario (ON) et du Québec (QC).
- 2. **Aucune autre action (1.1)** : Si aucune autre mesure n'est prise entre juin 2024 et juin 2025, l'organisation met fin à ses activités en cours et se dissout officiellement.
- 3. **Prendre des mesures supplémentaires (1.2)** : Si d'autres actions sont entreprises, telles que la préparation d'un livre blanc, la formulation de recommandations publiques ou d'autres activités, l'objectif est d'obtenir la volonté de l'ON et du QC de rester membres pour une année supplémentaire. Cette continuation est conditionnelle à la mise en place d'un comité des poulettes au sein des POC. En

fonction des progrès réalisés au sein de s POC, l'organisation pourrait soit se dissoudre après juin 2025, soit prendre d'autres mesures en fonction de nouvelles décisions.

VOIE 2 : NE PAS DISSOUDRE LES ÉPC

- 1. Décision initiale : Si la décision est de ne pas dissoudre les ÉPC, l'étape suivante consiste à obtenir la volonté de l'ON et du QC de rester membres pour une année supplémentaire.
- 2. Les ÉPC poursuivent leurs activités actuelles (2.1) : Si l'ON et le QC acceptent de continuer, les ÉPC peuvent poursuivre leurs activités actuelles. Inversement, si les provinces refusent, les ÉPC peuvent devenir une association représentant directement les éleveurs, en identifiant par la suite les considérations juridiques, financières et administratives pertinentes liées à la restructuration.
- 3. Un mandat de 12 mois renouvelable (2.2) : Si les ÉPC poursuivent leurs activités actuelles, ils visent à obtenir un mandat renouvelable de 12 mois pour représenter les poulettes. Cela garantit que les activités et la représentation de l'organisation peuvent se poursuivre sur une base annuelle, sous réserve d'un soutien continu de la part des conseils d'administration provinciaux.

CALENDRIER ET POINTS DE DÉCISION

Les voies respectent des calendriers spécifiques alignés sur les réunions des conseils provinciaux de l'Ontario et du Québec. Les dates administratives clés pour les décisions comprennent la fin de l'année civile en cours (décembre 2024, six mois) ou la fin de l'exercice financier des ÉPC (juin 2025, douze mois). Ces échéances sont cruciales pour s'assurer que les mesures appropriées sont prises dans les périodes désignées afin de dissoudre ou de poursuivre efficacement les activités de l'organisation.

2. RÉSUMÉ DES ACTIVITÉS

Dans le cadre de la planification stratégique des ÉPC, le Groupe AGÉCO et Serecon ont réalisé les activités suivantes :

Dates	Activités	Produits à livrer
JUILLET 2023	Réunion de démarrage à l'Île-du-Prince-Édouard avec le conseil d'administration des ÉPC	<i>Présentation (PPT)</i>
AUG-SEP 2023	Entretiens avec les membres actuels du conseil d'administration des ÉPC	<i>Guide d'entretien (Word)</i> <i>Rapport de synthèse (Word)</i>
OCT-DEC 2023	Entretiens avec les provinces qui ne sont pas des membres actifs des ÉPC	<i>Rapport de synthèse (Word)</i> <i>Guide d'entretien (Word)</i>
DEC 2023	Analyse réglementaire de la représentation provinciale des poulettes	<i>Rapport de synthèse (Word)</i>
JAN 2024	Recommandation stratégique	<i>Présentation (PPT)</i>
FEB à MAY 2024	Sondage auprès des éleveurs de poulettes	<i>Projet de questionnaire EN / FR (Word)</i> <i>Sondage en direct EN / FR (en ligne)</i> <i>Mises à jour hebdomadaires (courriel)</i> <i>Résultats du sondage (PPT)</i>
MAR à MAI 2024	Groupe de travail conjoint	<i>Participation et présentation à une réunion des POC à Ottawa pour soutenir le ÉPC (PPT)</i> <i>Examen de la lettre du ÉPC aux conseils provinciaux et conseils stratégiques continus</i>
MAI 2024	Résultats du sondage	<i>Présentation (PPT)</i>
MAI 2024	Rapport final	<i>Rapport final (Word)</i>
JUILLET 2023 à MAI 2024	Conseils et soutien stratégiques continus, le cas échéant	<i>Appels (téléphone, zoom)</i> <i>Séances de travail (PPT)</i>

2.1 JUILLET 2023 : RÉUNION DE DÉMARRAGE

En juillet 2023, une réunion de démarrage a été organisée lors de la réunion du conseil d'administration des ÉPC à l'Île-du-Prince-Édouard. Le Groupe AGÉCO et Serecon (l'équipe du projet) étaient présents en personne pour animer la discussion, répondre aux questions et décrire globalement le déroulement probable du projet en termes d'activités planifiées. Les ÉPC ont identifié les opportunités de collaboration et les contacts clés pour les consultations de rencontre de démarrage, et ont fourni le contexte expliquant la nécessité du projet.

2.2 AOÛT À SEPTEMBRE 2023 : ENTRETIENS AVEC LES PROVINCES MEMBRES

Afin d'établir une compréhension fondamentale de la valeur et des besoins perçus par les ÉPC, l'équipe du projet a interviewé des représentants des offices provinciaux des œufs qui étaient membres des ÉPC à ce moment-là. Les résultats de ces consultations ont indiqué qu'il pouvait y avoir des lacunes à travers le pays en termes de représentation des éleveurs de poulettes et de la réglementation concernant l'élevage de poulettes, y compris la façon dont les programmes à la ferme (Propreté d'abord – Propreté toujours et le Code de protection des animaux) sont audités.

Les entretiens ont fourni le contexte nécessaire pour guider la prochaine série d'entretiens avec les représentants des conseils provinciaux qui n'étaient pas membres des ÉPC à ce moment-là.

2.3 OCTOBRE À DÉCEMBRE 2023 : ENTRETIENS AVEC LES PROVINCES NON-MEMBRES

L'équipe du projet a mené des entretiens avec des représentants des offices de commercialisation provinciaux des œufs qui n'étaient pas membres des ÉPC. L'objectif de ces entrevues était de déterminer les raisons pour lesquelles ils n'ont pas maintenu leur adhésion aux ÉPC, ce qui a fourni un aperçu indirect de la valeur globale perçue des ÉPC en général. Les participants ont également été interrogés sur leur satisfaction quant à l'implication actuelle des POC et à leur compréhension des problèmes liés à l'élevage de poulettes. Enfin, plusieurs scénarios pour l'avenir des ÉPC en tant qu'organisation ont été présentés aux participants afin de fournir une orientation stratégique à l'organisation.

Les résultats des entrevues indiquent qu'en général, la plupart des provinces sont satisfaites de la participation des POC à l'apport des producteurs de poulettes. Bien que la plupart des participants reconnaissent que les POC n'ont pas nécessairement un mandat sur les poulettes, leur prise en compte des questions relatives aux poulettes et des préoccupations des éleveurs est adéquate. L'un des principaux résultats de ces entrevues est que la majorité des représentants des organisations provinciales étaient en faveur d'un scénario dans lequel les ÉPC seraient dissous et un comité des poulettes sous l'égide des POC serait établi.

2.4 DÉCEMBRE 2023 : ANALYSE RÉGLEMENTAIRE

Une analyse des réglementations disponibles publiquement au niveau national, provincial, des offices provinciaux et des POC a été réalisée pour vérifier si des changements réglementaires majeurs avaient eu lieu depuis l'analyse réglementaire réalisée en 2014, lors de la soumission des ÉPC au Conseil des produits agricoles du Canada en vue d'établir un organisme de commercialisation des poulettes. L'analyse réglementaire a révélé que peu de mises à jour importantes avaient été apportées à la réglementation des poulettes. L'analyse réglementaire a toutefois permis à l'équipe de projet de mieux comprendre les lacunes dans la gestion des poulettes d'une province à l'autre, et a contribué au projet en décrivant le contexte national de la réglementation des poulettes.

2.5 JANVIER 2024 : RECOMMANDATION STRATÉGIQUE

Les résultats de toutes les activités précédentes ont indiqué qu'une organisation distincte pour les poulettes, c'est-à-dire les ÉPC, n'était pas perçue comme souhaitable par la majorité des principales parties prenantes. Conformément à l'objectif global de ce projet, à savoir identifier le meilleur mode de représentation pour les éleveurs de poulettes, les poulettes elles-mêmes et l'intérêt public, et identifier la prochaine étape pour les ÉPC en tant qu'organisation, l'équipe du projet a recommandé que les ÉPC poursuive l'option de proposer qu'un comité de poulettes soit établi par les POC.

Pour soutenir cette orientation, l'équipe du projet a collaboré avec les ÉPC pour développer une stratégie qui impliquait de sonder les éleveurs de poulettes intégrés et indépendants à travers le pays, et de demander aux offices provinciaux de se joindre à un groupe de travail qui identifierait les mérites d'un tel comité de poulettes et, plus généralement, le meilleur mode de représentation pour les éleveurs de poulettes en général.

2.6 FÉVRIER À MAI 2024 : SONDAGE AUPRÈS DES ÉLEVEURS

Le sondage auprès des éleveurs a été rédigé pour les ÉPC par l'équipe du projet. Le sondage contenait une combinaison de questions qualitatives (ouvertes) et quantitatives (fermées). Les questions du sondage visaient à évaluer les réactions des éleveurs de poulettes face à la proposition de créer un comité des poulettes et leur satisfaction actuelle quant au niveau de compréhension des POC à l'égard des questions relatives à l'élevage de poulettes. Le sondage était anonyme, mais des données relatives à la localisation, à la taille de l'élevage et au type d'élevage ont été collectées. Les répondants ont été invités à communiquer volontairement leur adresse électronique pour s'abonner au bulletin d'information des ÉPC.

Les résultats du sondage reflètent ceux des entretiens : il y a simultanément un désir d'élargir la représentation des poulettes, mais aussi un souhait que cette représentation provienne des POC plutôt que d'une deuxième organisation, par exemple des PGC. Cette constatation reflète la répartition des types d'élevage à travers le pays, où la majorité d'éleveurs de poulettes sont également des producteurs d'œufs, et sont donc déjà représentés par les POC. Si les résultats confirment le désir d'efficacité administrative sous la forme d'une organisation unique, ils montrent aussi clairement la nécessité d'une plus grande représentation des préoccupations des éleveurs de poulettes.

2.7 MARS À MAI 2024 : PROPOSITION DU GROUPE DE TRAVAIL CONJOINT

Afin d'aider les ÉPC à mettre en œuvre la recommandation de proposer la formation d'un comité des poulettes des POC, l'équipe du projet et les ÉPC ont préparé une présentation qui a été donnée lors d'une réunion des POC à Ottawa. Le but de la présentation était de partager avec les offices provinciaux les résultats du travail des ÉPC au cours des mois précédents, ainsi que de présenter la recommandation résultante d'un comité de poulettes au lieu d'une organisation distincte (ÉPC), de même que le désir d'une représentation élargie des poulettes sous une forme ou une autre. Les personnes présentes étaient, pour la plupart, les mêmes que celles qui avaient été interrogées précédemment, dont beaucoup soutenaient activement le scénario d'un comité des poulettes. Lors de la réunion, la grande majorité des personnes présentes ont apporté leur soutien verbal au comité proposé et ont accepté de distribuer le sondage auprès des éleveurs et de partager la proposition de formation d'un groupe de travail conjoint avec leurs conseils d'administration à une date ultérieure. Les POC eux-mêmes ont fait part de certains commentaires, indiquant qu'ils étudieraient une telle proposition si la demande émanait des provinces et des éleveurs eux-mêmes, et qu'ils attendraient avec intérêt les résultats du sondage.

Après la réunion d'Ottawa, l'équipe de projet a fourni des conseils et un soutien continu aux ÉPC au fur et à mesure que les réponses des offices provinciaux étaient renvoyées. À ce jour, trois provinces ont accepté de soutenir le groupe de travail conjoint, six ont rejeté la demande et une est toujours en attente. L'équipe de projet a assisté à une réunion du conseil d'administration des ÉPC pour discuter de ces résultats et partager un aperçu des résultats du sondage auprès des éleveurs.

2.8 MAI 2024 : RAPPORT FINAL

À la suite des décisions des provinces et aux résultats du sondage auprès des éleveurs, un rapport final (le présent document) a été préparé pour résumer les activités du projet, y compris tous les livrables joints en annexe au rapport (en anglais seulement). Le rapport final synthétise les résultats de toutes les activités sous la forme d'une recommandation finale pour les ÉPC.

2.9 MAI 2024 : RÉSULTATS DU SONDAGE

Les résultats préliminaires du sondage ont été présentés au conseil d'administration des ÉPC et aux provinces membres. Les résultats ont été présentés afin d'éclairer les prochaines étapes et décisions des ÉPC en tant qu'organisation et d'aider l'organisation à comprendre les différentes voies possibles et les éventualités qui peuvent influencer ou résulter de chaque décision.

2.10 JUILLET 2023 À MAI 2024 : CONSEILS ET SOUTIEN STRATÉGIQUES CONTINUS SELON LES BESOINS

Tout au long du projet, l'équipe du projet était disponible pour fournir des conseils et un soutien aux ÉPC lorsque des problèmes se posaient et que les circonstances évoluaient. L'équipe de projet a formulé des recommandations basées sur les changements de personnel, de ressources et de besoins, et a reçu des commentaires d'autres parties prenantes en vue de l'objectif du projet d'étendre ou d'améliorer la représentation des éleveurs de poulettes au niveau national.

ANNEXE 1: JUILLET 2023: RÉUNION DE DÉMARRAGE



PULLET GROWERS OF CANADA STRATEGIC PLANNING WORKING SESSION



www.groupeageco.ca

Summer Meeting
12 July 2023

G R O U P E
AGÉCO

Agenda

Summer Meeting

90 min

12 July 2023

- 1 Introductions
- 5 minutes
- 2 Pullet Growers of Canada: Project Background
- 15 minutes
- 3 AGÉCO + Serecon: Proposal Presentation
- 15 min
- 4 Current and Potential Value Creation for
the Pullet Growers of Canada
- 40 min
- 5 Step 1: Subscriber Survey Overview
- 10 min
- 6 Concluding Remarks and Next Steps
- 5 min

MEETING'S OBJECTIVES

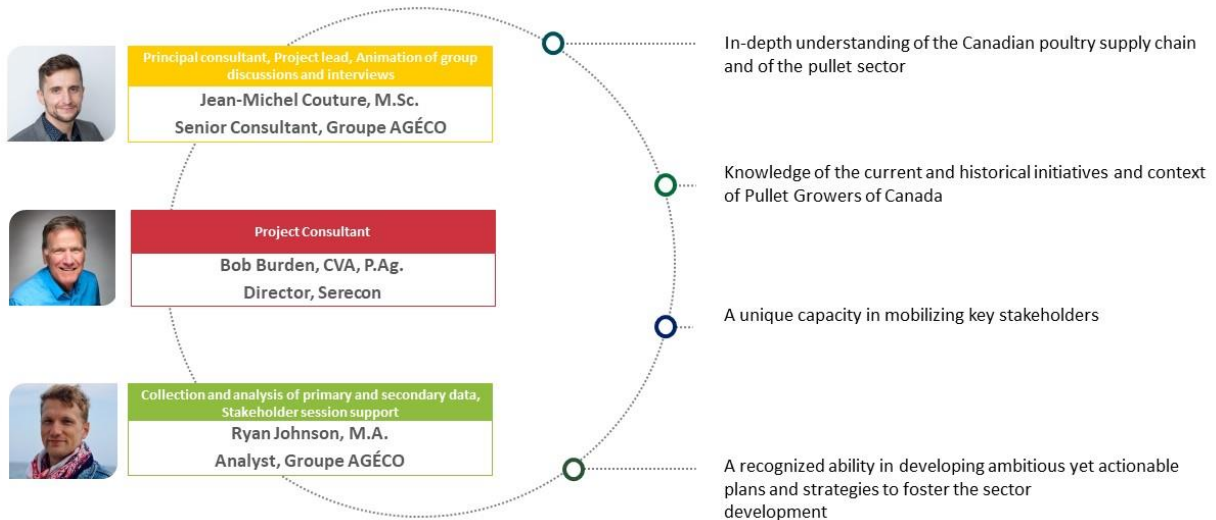
- Confirm our understanding of the organization's current status, and challenges
- Present and confirm our proposed approach
- Understand current value created by PGC and collaboratively explore potential value creation opportunities
- Present preliminary survey overview for discussion
- Consolidate and share next steps

3

5 min

ROUNDTABLE OF INTRODUCTIONS

ABOUT THE TEAM



5

15 min

PULLET GROWERS OF CANADA: PROJECT BACKGROUND

PULLET GROWERS OF CANADA: PROJECT BACKGROUND

- Recent history
 - Difficulty in achieving BP objectives
 - Loss of some members
 - Unwavering support from current members
 - Relevance called into question
 - Loss of contact with EFC committees (PMC and ACP redevelopment team)
- Current issues
 - Code of practice implementation (ACP, SCSC,...)
 - National representation (no agency status,...)
 - Blurred authority over pullets
- New direction in 2023
 - New leadership
 - Increased contacts with stakeholders (e.g. EFC, FPCC, federal ag. minister, NFACC)
 - COG study

VISION

PGC strives to solidify its reputation and enhance its recognition as the source of support and expertise for all problems and processes related to pullet production. This includes but is not limited to the Animal Care Policy for Pullets and the national Code of Practice, as well as ensuring the financial stability and viability of the industry by helping achieve a fair price to the grower.

Mission

We defend the interests of Canadian pullet growers, working to ensure their success as critical partners in the Canadian egg industry.



7

15 min

PROPOSAL PRESENTATION

PROPOSAL PRESENTATION

OBJECTIVE

“To support Pullet Growers of Canada in clearly defining its value and strategic positioning as a representative organization in the egg value chain.

“To answer the question: ‘Is there a role for PGC in this sector?’ and, subsequently, to provide a corresponding action plan.”

- **Understand** stakeholders’ perception of PGC’s value
- **Advise and collaborate** with PGC and its partners on a future direction
- **Strategize** for the future of the organization by providing a business plan which responds to the collected feedback

What should be the outcome of this project?

What should this project avoid doing?

What could help or hinder this objective?

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PROPOSAL PRESENTATION

APPROACH

Stage 1: Stakeholder Consultation

- Identify the key risks and benefits of PGC according to its stakeholders
- Inform the directions available for PGC to take as an organization

Related Activities

- 1.1. Survey
- 1.2. Stakeholder Interviews

Outputs of Stage 1

- Survey design and interview guide
 - (Word document, English)
- Consultation results and recommendations
 - (Word document, English)
- Consultation results and recommendations presentation
 - (PowerPoint, English)

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PROPOSAL PRESENTATION

APPROACH

Stage 2: Strategic Plan Development

- Provide options for PGC's organizational position, purpose, and future direction
- Provide a plan for the 2024–2028 period and an implementation plan for the first year

Related Activities

- 2.1. Workshop with PGC and partners
- 2.2. Development of a business plan and an action plan for the first year of implementation

Outputs of Stage 2

- 2024–2028 Business plan
 - Word document (English, French)
- 2024 Action plan
 - Word document (English, French)

What key considerations should we keep in mind at each stage of the project?

What opportunities or threats could help or hinder the success of the project?

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PROPOSAL PRESENTATION

TIMELINE

- A project to take place between July 2023 and March 2024

Key milestones will include the following:

- | | | |
|--|-------------------|--------------------------------------|
| • Kick-off meeting in PEI: | July 12, 2023 | |
| • Survey designed and distributed: | July 21, 2023 | |
| • Survey closed: | August 25, 2023 | |
| • Interview guide developed, invitations sent: | September 1, 2023 | |
| • Interviews completed: | October 6, 2023 | |
| • Consultation results prepared, validated: | October 20, 2023 | |
| • Consultation results presented: | November 2023 | |
| • Workshop with PGC and partners: | November 2023 | Decisive milestone |
| • Business plan | | |
| – Draft 1: | December 2023 | A first draft by the end of the year |
| – Review 1: | December 2023 | |
| – Preliminary draft: | January 2024 | |
| – Review 2: | February 2024 | |
| – Final draft: | February 2024 | |
| – Final review: | March 2024 | |

Are there key milestones to account for during this period (e.g., AGMs, board meetings)?

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PROPOSAL PRESENTATION

GOVERNANCE

Project Team

- Project manager:
 - Jean-Michel Couture (**Groupe AGÉCO**)
- Subject matter expert:
 - Bob Burden (**Serecon**)
- Analysis and materials preparation:
 - Ryan Johnson (**Groupe AGÉCO**)

Pullet Growers of Canada

- Project manager:
 - Renaud Sanscartier
- *Internal committees?*
- *Working groups?*

Check-In Meetings

- *Frequency?*

Who is responsible for signing-off on the decisions / deliverables?

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40 min

CURRENT AND POTENTIAL VALUE CREATION FOR THE PULLET GROWERS OF CANADA

ROUNDTABLE DISCUSSION

CONSIDERATION 1 – THE BASELINE

- As of now, what are PGC's main activities that bring the most value to the industry (*i.e., what are the key strengths of the PGC as representatives of pullet growers*)?
 - How so?
 - Who is benefitting from them?

- Could the value of these activities be increased?
 - If so, how?
 - If not, what are the internal / external barriers or limitations?

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ROUNDTABLE DISCUSSION

CONSIDERATION 2 – PRODUCERS' AND MEMBERS' NEEDS AND EXPECTATIONS

- To what extent does PGC's current value creation fall short with respect to non-members' expectations?
 - What would it take to bring members back?

- What are the expectations of pullet growers from the PGC?
 - Can the organization better align its activities and initiatives with these expectations?

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ROUNDTABLE DISCUSSION

CONSIDERATION 3 – FUTURE SCENARIOS

- What would be the consequences of closing the PGC?
 - Who would be impacted the most? The least? How so?
 - How would the gap be filled?
- What if PGC were to become a “committee” of the Egg Farmers of Canada?
- What are the potential opportunities for the organization to expand its influence and create greater value for its members and pullet growers?

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10 min

SUBSCRIBER SURVEY OVERVIEW

SUBSCRIBER SURVEY OVERVIEW

- **Purpose and Participants**
- Questions

Purpose: To understand, at a high level, the perceived role of PGC and the value it brings to meeting the needs of Canadian pullet growers and inform the design of interviews.

Participants: Newsletter subscribers

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SUBSCRIBER SURVEY OVERVIEW

- Purpose
- **Questions**

- What are the key strengths of the PGC as representatives of pullet growers?
 - How can these strengths be leveraged to enhance their value?
- How effectively does PGC communicate and advocate for the interests of pullet growers within the egg supply chain?
 - Are there gaps or missed opportunities in these activities?
- As of now, what are the main activities that bring the most value to the industry?
 - How so?
 - Who is benefitting from them?
- Others?

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NEXT STEPS

- Begin survey development and deploy
- Analyze results and build interview guide
- Prepare and distribute minutes from today's meeting
- Set next meeting date



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THANK YOU

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G R O U P E
AGÉCO

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ANNEXE 2: AOÛT À SEPTEMBRE 2023 : ENTRETIENS AVEC LES PROVINCES MEMBRES

G R O U P E AGÉCO

MEMBER INTERVIEWS: SUMMARY NOTES

PRESENTED TO
PULLET GROWERS OF CANADA



SEPTEMBER 2023

PROJECT TEAM

AGÉCO

Jean-Michel Couture, Principal Consultant, Project Lead

Ryan Johnson, Analyst

Serecon

Bob Burden, Project Consultant

3. INTERVIEW SUMMARIES

3.1 MEMBER INTERVIEWS

Interviews were conducted with members of Pullet Growers of Canada, namely, the egg boards of Quebec, New Brunswick, and Ontario. The purpose of these interviews was to test the hypothesis that there is a gap in support for pullet growers regarding program implementation and compliance for Start Clean-Stay Clean and the Animal Care Program, and the additional hypothesis that Pullet Growers of Canada could play a role in filling this gap.

The interviewees expressed support for the Pullet Growers of Canada and for national representation of pullets and pullet growers in general. It was felt that the organization could play a role in standardizing, managing, and supporting pullet management and program implementation, but integrated growers tend to be less supportive than independent growers who would benefit from this representation to a greater extent.

The interviews revealed that there is a need to further explore the status quo for pullet management and oversight, and to define in what capacity Pullet Growers of Canada can intervene as a representative authority for both pullet growers and for the public interest. There remains some uncertainty around regional differences in how pullet growers are represented and monitored, and what Egg Farmers of Canada considers to be practical and appropriate for the same.

In brief, the takeaways from the member interviews are as follows:

- Gaps exist in authority over and guidance for pullet management
- There are regional differences in program implementation and compliance for pullet growers
- There are regional differences in the authority of provincial egg boards
- Pullet growers could benefit from greater support or representation on key management concerns
- Representation and standardisation at the national level would be a benefit to mitigating risks, ensure fair pricing, and advocating for a healthier industry, particularly for independent growers who have no market guarantees

Our recommendations for next steps would be to complete the interviews with non-members, beginning with Egg Farmers of Canada to better understand their perspective on these topics to better understand the perceived and actual role Pullet Growers of Canada could take on.

3.1.1 FÉDÉRATION DES PRODUCTEURS D'OEUF DU QUÉBEC

The recent PSA program aims to align with the code, but faces evaluation challenges. Achieving uniformity and jurisdiction for the program implementation remains a concern, especially for independent growers. There is little differentiation in program compliance for independent and integrated pullet growers, emphasizing the need for clarity. While closed-loop systems work well for most growers, independent growers' smaller volumes pose challenges in oversight but are an important buffer for the sector. Future considerations revolve around the uncertain role and future of independent pullet growers who have no market guarantees.

3.1.2 EGG FARMERS OF NEW BRUNSWICK

The Egg Farmers of New Brunswick have no authority over pullet management in their province and everything done with pullets is voluntary. Seven out of eight pullet growers in the province are also egg producers. There

is a legislative gap in authority for pullets and different groups cover it in different ways. Pullet growers in New Brunswick therefore feel that they lack support on pullet care, management, and pricing, and hope that Pullet Growers of Canada may offer guidance in these areas. The interviewee representing the Egg Farmers of New Brunswick was not able to speak to why other provinces withdrew their membership, but expressed a need for a national voice for pullets, especially in light of new animal care requirements which are a pass/fail.

3.1.3 EGG FARMERS OF ONTARIO

The Egg Farmers of Ontario highlighted that the Start Clean-Stay Clean program is mandatory for pullet growers in Ontario and that Egg Farmers of Canada performs annual audits at all the farms. There is no Animal Care Program for pullets in Ontario, but Egg Farmers of Canada is currently developing one. Pullet pricing is done via collaboration with Quebec, with which Ontario has a close working relationship; 90% of Ontario's imported pullets originate in Quebec.

Pullet production volumes and pricing considerations are managed through a quota system and the board administers this for pullets. However, the Egg Farmers of Ontario believe a national and unified voice for pullets is essential, especially in the national environment. Pullet Growers of Canada should be empowered to advance the national interest for pullets to help provincial pullet sectors. They highlighted that Pullet Growers of Canada should have a clear mandate to which they should be held accountable, and that an annual evaluation of its progress and impact should be undertaken in order to ensure a benefit for the sector.

Egg Farmers of Ontario would like to see pullets under supply management across the country, as it would promote a healthy industry.

ANNEXE 1

INTERVIEW GUIDES

INTERVIEW GUIDE FOR MEMBERS

INTERVIEW GUIDE Pullet Growers of Canada – Strategic Plan 2024-28

Context

Pullet Growers of Canada strives to defend the interests of Canadian pullet growers as the source of support and expertise for all problems and processes related to pullet production.

To this effect, Pullet Growers of Canada is undertaking a strategic planning exercise to identify what, if any, aspects of pullet management could potentially benefit from greater representation throughout the egg value chain. In order to achieve its objective, Pullet Growers of Canada has engaged Groupe AGÉCO and Serecon to conduct interviews with the egg boards in each province.

Objectives of the interview

Given this context, the objective of the discussion is to better understand, on a province-by-province basis, how the authority to implement and monitor the Egg Quality Assurance™ certification, and the related requirements of the national Animal Care and Start Clean-Stay Clean® Programs, are ensured at the pullet stage of production.

More specifically, the objectives are to:

- **Identify the entities responsible for ensuring the programs implementation and compliance**
- **Identify how this may or may not differ for pullet growers, whether they are independent or integrated**
- **Identify the advantages and disadvantages of the current situation**
- **Clarify the value of representation for pullet growers**

Organization :

Name (title) :

Date:

Question 1 – What is your role in your organization? How familiar are you with the implementation of the Egg Quality Assurance (EQA) Certification Program and related requirements?

Question 2 – In your jurisdiction, what entity is responsible for implementing the Animal Care and Start Clean-Stay-Clean Programs amongst pullet growers?

Question 3 – How are implementation conducted and compliance monitored (e.g., verification, third-party auditing, record-keeping, reporting)? Does the process differ from that for egg producers?

Question 4 – When it comes to pullet growers, do program implementation and compliance differ for independent and integrated pullet growers (that is, pullet growers who are also egg producers)?

Question 5 – If there is no entity with the aforementioned authorizations, can you comment on why this is this the case? How are the related risks (e.g., reputational, biosecurity, financial) managed in your jurisdiction?

Question 6 – With respect to production management, how are pullet production volumes and pricing considerations managed in your jurisdiction?

Question 7 – In light of the above considerations with respect to animal care, biosecurity and production management, is the egg supply chain operating at optimal capacity in your jurisdiction?

Question 8 – If your organization is or was a member of Pullet Growers of Canada, what factors contribute to the maintenance or withdrawal of your organization's membership?

ANNEXE 3: OCTOBRE À DÉCEMBRE 2023 : ENTRETIENS AVEC LES PROVINCES NON-MEMBRES



**PULLET GROWERS OF CANADA STRATEGIC
PLANNING: SUMMARY OF NON-MEMBER
INTERVIEWS**

PRESENTED TO
PULLET GROWERS OF CANADA



DECEMBER 2023

PROJECT TEAM

AGÉCO

Jean-Michel Couture, Project Manager

Ryan Johnson, Analyst

Serecon

Bob Burden, Project Consultant and Subject Matter Expert

4. INTERVIEW SUMMARIES

4.1 NON-MEMBER INTERVIEWS

Interviews were conducted with 12 representatives of provinces or other agencies which are not currently members of the Pullet Growers of Canada. Representatives included pullet growers, egg producers, and members of the provincial egg boards from:

- British Columbia;
- Alberta;
- Saskatchewan;
- Manitoba;
- Newfoundland & Labrador;
- Nova Scotia;
- Prince Edward Island;
- Canadian Egg Industry Reciprocal Alliance;
- Farm Products Council of Canada;
- and Egg Farmers of Canada;

The objectives of these interviews were:

- regarding *Start Clean-Stay Clean* and the *Code of Practice for the Care and Handling of Pullets and Laying Hens*, to identify whether the *status quo* of pullet management was optimal in each province;
- to identify the basis for which a province may have withdrawn membership from Pullet Growers of Canada;
- to identify what criteria would need to be met for a province to renew membership with Pullet Growers of Canada;
- and to identify operational scenarios for the Pullet Growers of Canada and to explore the perceived advantages and disadvantages of each.

Interviewees were assured of the anonymity of their feedback in order to ensure an open and pragmatic dialogue; to this effect, the findings have been aggregated and presented according to the questions and operational scenarios which were proposed or emerged during discussions.

4.1.1 OVERARCHING SUMMARY

- Support for how Egg Farmers of Canada manages and consults with pullet growers on the two industry programs;
- Most egg producers grow their own pullets, so they understand the value in ensuring pullets are of a high quality, but acknowledge that growing pullets are simply a required step in producing eggs;
- There is no current reason compelling enough for provinces to consider membership with Pullet Growers of Canada;
- The scenario in which Pullet Growers of Canada is absorbed as a committee of Egg Farmers of Canada is the most desirable;

- Pullet quality and uniformity guidelines, supportive research, and representation of pullet growers as an association are additional activities which may bring value;
- There is no interest in having Pullet Growers of Canada complete inspections for the two industry programs.

4.1.2 PRODUCTION MANAGEMENT: REPRESENTATION OF AND SUPPORT FOR PULLET GROWERS

There are two primary programs in place to provide assurance that egg production is managed in a way which ensures the safety of eggs and the welfare of hens: *Start Clean-Stay Clean* and the *Code of Practice for the Care and Handling of Pullets and Laying Hens* which is the basis for the Animal Care Program; together, these programs comprise the consumer-facing assurance scheme, the *Egg Quality Assurance* program.

Interviewees expressed broad support for how Egg Farmers of Canada manages and consults with pullet growers regarding these two programs. The primary factor behind this support is that most egg producers grow their own pullets (integrated producers); they view growing pullets as a necessary step in producing eggs, i.e., growing pullets is simply a cost associated with producing eggs. Therefore, when an inspection takes place, inspectors look at both pullet barns and egg barns when on-site. Interviewees describe this arrangement as optimal and highlight that Egg Farmers of Canada has invested time into ensuring this relationship is effective and supportive, despite some frustration in previous years.

In the case of integrated producers (the majority), the feeling is widely that having a separate entity come onto the farm to conduct inspections would be sub-optimal. Not only was it described as administratively taxing, but it could present a biosecurity risk due to the increased foot traffic. Likewise, they describe little or no need for an additional entity to provide oversight or advice on changes to assurance schemes, as EFC and provincial boards are effectively ensuring pullet concerns are addressed.

In the case of independent growers, regulations exist in some provinces to ensure that independent growers are compliant with assurance schemes; where regulation does not directly address independent growers, egg producers appear to exert pressure on independent growers, since egg producers will not be able to produce eggs if their layers and facilities are not found to be compliant. Therefore, it appears to be the case in most provinces that inspections of independent growers are driven by egg producers.

Pricing is one aspect of pullet growing where there is little oversight or guidance. However, when a lack of a centralized price was raised as an issue, it was highlighted that having a such a price may not be desirable in every case since it could create market conditions in which pullet growers are not incentivized to improve the quality of their flocks.

4.1.3 PAST AND PRESENT RELATIONSHIP WITH PULLET GROWERS OF CANADA

Some of those interviewed represented provincial boards which had maintained membership with Pullet Growers of Canada, while others represented provincial boards which had not maintained membership at any time. Those that were members but withdrew felt that Pullet Growers of Canada no longer had a mandate following the decision of the Farm Products Council of Canada not to put pullets under supply management, feeling that other aspects of production management had sufficient oversight and support between Egg Farmers of Canada and provincial regulation.

It was noted that membership, in some cases, was maintained due to the motivations of individual board members who took with them the initial enthusiasm in Pullet Growers of Canada when they moved on. Where a provincial board never considered membership, it was due to the perception that what Pullet Growers of Canada aimed to do was either not sufficiently clear or was already addressed by provincial legislation or by Egg Farmers of Canada.

Related to the above was the notion of provincial influence. The loss of Manitoba as a member of Pullet Growers of Canada was seen as a major setback for the organization. It was perceived to be a critical province, the absence of which is perceived by other members as a signal.

In terms of what criteria would need to be met for provinces to consider membership, almost all interviewees describe that it is not desirable to have what they perceive as a duplication of effort and yet another organization to keep track of. It was expressed that a “compelling pitch” would need to be made for provinces to consider membership, but specific details on what qualifies as compelling were not readily volunteered. The general feeling is that membership would only be required if Egg Farmers of Canada were not satisfactorily managing pullet-related issues; if this were the case, however, most interviewees would prefer to work on improving the relationship with and management of Egg Farmers of Canada.

4.1.4 SCENARIOS

Interviewees were presented with or invited to suggest operational scenarios to test whether there is a perceived role for Pullet Growers of Canada in representing or advocating for pullets and pullet growers. The risks and benefits of each scenario were discussed, and some brief details offered on what would be required for these scenarios to be implemented.

IF PULLET GROWERS OF CANADA WERE DISSOLVED AS AN ORGANIZATION

The prospect of Pullet Growers of Canada ceasing to exist as an organization was presented to interviewees in order to prompt a reaction that may indicate whether there is perceived value offered by the organization and a risk in its loss. Among all interviewees, only one described this situation as a loss for pullet growers with the majority underscoring that Egg Farmers of Canada and the provincial boards are already integrating and acting on pullet and pullet grower interests well.

The participant who highlighted this as a risk suggested that the loss of Pullet Growers of Canada would represent a loss of the voice of pullet growers, noting that there are intricacies to growing pullets that the Egg Farmers of Canada doesn’t completely understand; interestingly, it was noted that Egg Farmers of Canada has no real mandate to manage pullets. The need for pullet grower representation was therefore emphasized in light of the increasing attention pullet production is receiving. These comments, however, were not substantiated with a suggestion for how Pullet Growers of Canada could effectively represent growers, while noting supply management is not the answer.

IF PULLET GROWERS OF CANADA WERE A COMMITTEE OF EGG FARMERS OF CANADA

Among all others, the scenario in which Pullet Growers of Canada dissolves as an independent organization but is absorbed by the Egg Farmers of Canada as a committee was the most positively received. Owing to the fact that pullets are a part of the egg supply chain, it is felt that having two separate organizations is not optimal, since it doesn’t reflect the reality of egg production. All participants felt that activities related to pullet growing should have greater representation at Egg Farmers of Canada, but that this representation should be built into the organization itself in order to ensure efficiency, reduce the administrative and financial burden on growers, and alignment on the needs and realities of pullet production and egg production.

One participant highlighted that this committee should be representative of the different types of production in place for pullet growing rather than according to geography.

In order for this to occur the following conditions would need to be met:

- Egg Farmers of Canada would need to be convinced of the benefit for egg farmers;
- the interpersonal conflicts which may exist between Pullet Growers of Canada and Egg Farmers of Canada would need to be resolved;

- Pullet Growers of Canada would have to be willing;
- and the purpose of the committee would need to be clearly defined.

Overall, it is believed that Egg Farmers of Canada has the existing infrastructure and willingness to ensure this scenario could be practical.

IF PULLET GROWERS OF CANADA WERE RESPONSIBLE FOR PULLET GROWER COMPLIANCE WITH START CLEAN-STAY CLEAN AND ANIMAL CARE CODE

The least popular scenario among participants was the one in which Pullet Growers of Canada becomes a kind of program manager for the two major programs under the Egg Quality Assurance program. Due to the majority of egg producers raising their own pullets, having separate entities come onto the farm to conduct inspections was not described as desirable for the following reasons:

- increased foot traffic in barns is a biosecurity risk;
- it is administratively inefficient;
- provincial egg boards and Egg Farmers of Canada are already managing these programs well, for pullets and layers, so this would be a duplication of effort;
- and it is financially undesirable.

On clarification that Pullet Growers of Canada would not be an additional entity coming onto farms, most interviewees described little need for additional oversight on code changes or other issues, due to the fact that most pullet growers are integrated growers and therefore represent themselves to provincial egg boards and Egg Farmers of Canada.

IF PULLET GROWERS OF CANADA ONLY REPRESENTED INDEPENDENT GROWERS

It was acknowledged by most participants that independent growers lack representation and that there are regional differences. However, it was noted that few jurisdictions have sufficient populations of independent growers for such an organization to have a meaningful impact on decisions regarding pullet growing and sale. They described this also as a risk due to the perception of a “two-tiered” system, where independent growers have official representation and integrated growers do not.

IF PULLET GROWERS OF CANADA WERE AN ASSOCIATION AND NOT AN AGENCY

A scenario which was proposed by one participant was one in which Pullet Growers of Canada were to aim for association status instead of agency status to simply advocate for pullet growers as a collective voice. Preconditions for this would primarily be an appetite among growers for such representation, and that there be no financial requirement to participate.

Reasons why this scenario would be desirable include the opportunity to discuss issues of pullet growing in a conceptual, apolitical way, and to convene growers to ensure the identification of needs. This scenario was perceived as likelier to be achievable given the lack of a financial requirement to participate and the understanding that the association would not be striving for any political power that may duplicate or come into conflict with that of the Egg Farmers of Canada.

It was acknowledged that this association status would not be needed if Pullet Growers of Canada were to be absorbed as a committee of Egg Farmers of Canada.

IF PULLET GROWERS OF CANADA BUILT AND MANAGED A “QUALITY” PROGRAM FOR PULLETS

A scenario which was proposed by one participant was one in which Pullet Growers of Canada were to develop a kind of quality standard for pullets. The standard should not be prescriptive or required, but could be used as a guideline for growers to ensure greater uniformity in their flocks. This scenario was proposed in light of the fact that Egg Farmers of Canada does not have a mandate over pullet quality in the same way that biosecurity and welfare are addressed by the two primary industry programs.

An example of why this might be desirable is that if a layer purchases a flock with 85% uniformity, the pullet grower may be eligible to receive a bonus payment and/or have the feed costs compensated. Such a pullet quality guideline could therefore represent a tool for pullet growers to negotiate on pricing.

However, it was also acknowledged that pullet quality, in some regions, is enforced by competition. The pullet-growing community is small enough that if there are quality concerns, egg producers can acknowledge these directly with pullet growers in an organic, informal way. Another critical issue would be how “quality” is defined and by whom. The criteria would need to be objective and collectively agreed-upon. Moreover, if a flock is deemed to be of an insufficient quality, the question of whether there would be corrective actions need to be answered.

The suggestion itself also represented the potential for Pullet Growers of Canada to adopt a primary function of “researching” issues related to pullets in order to recommend practices or other mechanisms which are in the interests of growers, egg producers, pullets, and the public. Across the board, the concept of a quality guideline and research support for pullet rearing was received with interest, but more information would be needed.

ANNEXE 1

INTERVIEW GUIDE

INTERVIEW GUIDE

PULLET GROWERS OF CANADA – STRATEGIC PLAN 2024-28

Context

Pullet Growers of Canada strives to defend the interests of Canadian pullet growers as the source of support and expertise for all problems and processes related to pullet production.

To this effect, Pullet Growers of Canada is undertaking a strategic planning exercise to identify what, if any, aspects of pullet management could potentially benefit from greater representation throughout the egg value chain. In order to achieve its objective, Pullet Growers of Canada has engaged Groupe AGÉCO and Serecon to conduct interviews with the egg boards in each province.

Objectives of the interview

Given this context, the objectives of the discussion are (1) to explore what mechanisms are in place or could be envisioned to ensure fair representation for pullet growers and the national interest, and if there are related gaps; and (2) to explore the role(s) Pullet Growers of Canada could play in addressing these gaps, if applicable.

Organization :

Name (title) : _____

Date:

Question 1 – How are pullet growers represented or supported with regards to Start Clean-Stay Clean, the Animal Care Code, production management, production risks, pricing considerations, and other concerns related to pullet management?

Question 2 – Please describe your past and present relationship with the Pullet Growers of Canada.

Question 3 – What criteria would need to be met in order for you to consider becoming a member of Pullet Growers of Canada?

Question 4 – In your opinion, would any of the below scenarios be viable as potential roles for Pullet Growers of Canada? Why or why not? Describe the potential risks and benefits.

Scenario 1 – If Pullet Growers of Canada ceased to exist entirely.

Scenario 2 – If Pullet Growers of Canada were a committee of the Egg Farmers of Canada instead of its own entity.

Scenario 3 – If Pullet Growers of Canada were to become the national program manager of Start Clean-Stay Clean and the Animal Care Program for pullet growers on behalf of other associations.

Scenario 4 – If Pullet Growers of Canada's only mandate were to provide oversight over and representation of independent pullet growers, and not integrated pullet-egg producers.

ANNEXE 4: DÉCEMBRE 2023 : ANALYSE RÉGLEMENTAIRE



**PULLET GROWERS OF CANADA STRATEGIC
PLANNING: REGULATORY SCAN**

PRESENTED TO
PULLET GROWERS OF CANADA



DECEMBER 2023

OVERVIEW

The Pullet Growers of Canada (PGC) (originally the National Pullet Growers Association) was established by Manitoba, Ontario, and Nova Scotia in 2009 to represent pullets and pullet growers to ensure this critical node in the egg supply chain is resilient, supported, effective, and profitable.¹

The existence of PGC acknowledges the reality that Egg Farmers of Canada (EFC) and several provincial egg boards have no real mandate over pullets and pullet growers,² due to the majority of pullet growers being “integrated,” i.e., most egg producers grow their own pullets, or those who do not grow their own pullets purchase them from other egg producers who do grow their own pullets. The existence of PGC also acknowledges the population of independent pullet growers who only grow pullets and are therefore not represented at the provincial and national levels. In the case of integrated growers, however, our interviews suggest that pullet barns and egg barns are inspected during the same visit. In terms of representation, there is a designated pullet grower currently on the Production Management Committee of the EFC.

In 2012, public hearings were completed by the Farm Products Council of Canada (FPCC) to determine whether a Canadian Pullet Marketing Agency should be established. The FPCC appears to have recommended such action be taken, however, the Minister of Agriculture took no action on this recommendation.³

Despite not receiving agency status, PGC has continued to advocate for and represent the needs of all pullet growers, also undertaking cost of growing (COG) surveys to equip growers with insights that may be used to ensure optimization and profitability.⁴

REGULATORY SNAPSHOT

Of all provinces, Manitoba has the highest number of regulations for pullets, while some provinces appear to have no regulation for pullets. Interviews suggest that where there is no provincial legislation for pullets, pullet concerns are able to be managed by the provincial marketing board due to the low volume of pullets produced in these regions; also clear from interviews is that EFC manages the relationship with these growers well enough that pullet concerns are effectively addressed between provinces and EFC.

Reviewing the legislation and feedback from interviews suggests that independent pullet growers are subject to the same requirements as integrated growers due either to legislation (in some areas) or downward pressure from egg producers, who require pullets be produced according to a standard which would enable them to pass inspections.

While mechanisms exist in some provinces to control pricing, pullet prices are determined by buyers and sellers in all provinces. Interviews suggest this is optimal, owing to the fact that most pullet growers are integrated and view pullet growing as a cost of producing eggs. However, interviews also highlighted that the study of cost of growing for pullets undertaken by Pullet Growers of Canada was valuable to ensuring growers had some visibility on costs. Some provinces, such as Quebec, also provide insight into pullet pricing trends for the current and upcoming year. Growers describe these tools as helpful to ensuring they receive fair pricing when selling to producers other than themselves.

¹ <https://epc-pgc.ca/our-organization/>

² <https://www.country-guide.ca/daily/pullet-producers-look-for-status-outside-the-egg/>

³ <https://www.canada.ca/content/dam/fpcc-cpac/images/50th/fpcc-50th-History-book-2022.pdf>

⁴ <https://epc-pgc.ca/our-actions/>

While all provincial egg boards highlight their producers comply with the Egg Quality Assurance program (and its two associated programs: Start Clean-Stay Clean and the Animal Care Program), no province directly addresses pullet flock quality through bespoke programs or legislation. Interviews suggest pullet flock quality is a key issue which, if addressed, could contribute to better pricing, a stronger and more resilient industry, and greater public assurance.

	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Pullet Regulations Exist	Y	Y	Y	Y	Y	Y	N	Y	N	Y
EQA (SC-SC + NFACC)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Pullet Quota is Established	N	N	N	Y	Y	N	N	Y	N	N
Pullet Pricing is Regulated	N	N	N	?	N	Y	N	N	N	N

BRITISH COLUMBIA

REGULATIONS

- [Natural Products Marketing \(BC\) Act \[RSBC 1996\] Chapter 30](#)
 - Current as of 2023 December 06
 - Does not address pullets
 - Allows for the marketing board to establish biosecurity programs
 - Stipulates the constitution and authority of the marketing board
- [British Columbia Egg Marketing Scheme, 1967](#)
 - Current as of 2023 December 12
 - Does not address pullets
 - Addresses quota, licences, levies, sales verification, and the constitution and powers of the egg marketing board over eggs
- [Animal Care Codes of Practice Regulation, BC Reg 34/2019](#)
 - Current as of 2023 December 05
 - Enshrines in provincial legislation the NFACC *Code of Practice for the Care and Handling of Pullets and Laying Hens* (2017)

DESCRIPTION

In British Columbia, there is no legislation which directly addresses pullets other than that which enshrines the NFACC code of practice.

Pricing is not regulated and quota for pullets is not in place. Interviews with stakeholders describe this as optimal, since buyer-seller negotiation and competition between sellers ensures flock quality.

EFC and the egg board together complete inspections against the two national programs.

ALBERTA

REGULATIONS

- [Standards and Administration Regulation, Alta Reg 267/200](#)
 - Current as of 2023 December 06
 - Pertains to manure storage and other operational aspects
- [Alberta egg Producers Plan Regulation, Alta Reg 258/1997](#)
 - Current as of 2023 December 06
 - Stipulates the constitution and authority of the marketing board
 - Pullets designated as regulated agricultural products under the plan
- [Egg Farmers of Alberta Plan Regulation, Alta Reg 26/2022](#)
 - Permits required in order to raise pullets
 - Permits required to raise more pullets than existing permit allows
 - Producers must keep record of pullet mortality; date, age, and number of pullets purchased and the name of the seller; and the date, number, and location of pullets sold or disposed of
 - Hatchery people must declare information related to the production, sale, and delivery of pullets
- [Hatching Eggs Regulation, Alta Reg 280/1997](#)
 - Licensing of pullet growers, conditions and restrictions thereon
 - Stipulations regarding breeder pullets

DESCRIPTION

In Alberta, pullets are a regulated agricultural product and permits are required to grow pullets.

Pricing is not regulated and quota for pullets is not in place. Interviews with stakeholders describe this as optimal, since buyer-seller negotiation and competition between sellers ensures flock quality.

EFC and the egg board together complete inspections against the two national programs. Independent pullet producers are inspected for SC-SC and NFACC compliance due to downward pressure from egg producers; this is also believed to be the case for pullet growers in other jurisdictions.

SASKATCHEWAN

REGULATIONS

- [The Animal Protection Regulations, 2018, RRS c A-21.2 Reg 1](#)
 - Current as of 2023 December 11
 - Prescribes the NFACC *Code of Practice for the Care and Handling of Pullets and Laying Hens* (2017)

DESCRIPTION

There is no pullet regulation in Saskatchewan, other than that which enshrines the NFACC code of practice.

MANITOBA

REGULATIONS

- [Manitoba Egg and Pullet Producers Marketing Plan Regulation, Man Reg 70/2005](#)
 - Current as of 2023 May 18
 - Stipulates the constitution and authority of the marketing board
- [Egg and Pullet Producer Registration Order, Man Reg 290/2014](#)
 - Current as of 2023 May 18
 - Requires pullet producers to be registered and that they pay fees to the board
 - Requires allotment of quota to raise pullets
- [Egg and Pullet Information Order, Man Reg 170/89](#)
 - Current as of 2023 May 18
 - Requires producers to provide information regarding pullet growing and marketing
- [Pullet Production Quota Order, Man Reg 127/98](#)
 - Current as of 2023 May 18
 - Regulates the allocation of pullet quota
 - Stipulates that non-integrated growers may not raise or keep more than 299 laying hens
 - Prescribes the NFACC *Code of Practice for the Care and Handling of Pullets and Laying Hens* (2017)
- [Pullet Penalty Levies Regulation, Man Reg 231/89](#)
 - Current as of 2023 May 18
 - Defines penalty levies for certain pullet growing infractions
- [Pullet Administration Fee Regulation, Man Reg 220/2004](#)
 - Current as of 2023 May 18
 - Defines fees to be paid by pullet growers to the marketing board

- [Egg and Pullet Penalty Levies Regulation re Quality Assurance Program Compliance, Man Reg 123/2012](#)
 - Current as of 2023 May 18
 - Defines penalty levies to be paid by pullet growers under certain circumstances related to quality risks, such as raising pullets in facilities which are not certified as compliant with the board quality assurance program
- [Pullet and Egg Quotas, Man Reg 164/72](#)
 - Current as of 2023 May 18
 - Defines requirements related to growing pullets under quota

DESCRIPTION

Manitoba appears to have the highest number of regulations regarding pullets and pullet growing. Pullets are regulated agricultural products under supply management, however, non-integrated producers may grow pullets so long as the number of pullets is not in excess of a certain number. Independent and integrated growers are subject to the same requirements regarding quality assurance and animal care.

ONTARIO

REGULATIONS

- [Egg Farmers of Ontario Egg Quota Policy](#)
 - Defines rules for egg producers related to quota; regarding pullets, lays out requirements related to inspections before placement and obtaining pullet orders
 - Requires quota holders to meet all requirements based on the NFACC *Code of Practice for the Care and Handling of Pullets and Laying Hens* (2017)
 - Requires egg quota holders to use pullets certified under the On-Farm Food Safety (OFFS) Program and Animal Care Program
- [Egg Farmers of Ontario Policies, Programs & Procedures \(2011\)](#)
 - Defines independent pullet growers as those who have pullet quota but not egg quota
- [Egg Farmers of Ontario General Regulations \(December 2021\)](#)
 - Identifies “pullet dealers” as those who market or act as brokers for the marketing of pullets, including hatcheries that market pullets
 - Stipulates that pullets are grown on a quota basis other than noted exceptions
 - Defines requirements of pullet growers, including information sharing regarding production management aspects such as mortality
 - Defines requirements for pullet brokers/dealers and for hatcheries marketing pullets
- [Eggs - Marketing, RRO 1990, Reg 407](#)
 - Defines the authority of the provincial egg marketing board
 - Does not mention pullets

- [Levies or Charges - Hatching Eggs and Chicks \(over Quota\), RRO 1990, Reg 86](#)
 - Defines levies to be paid on production in excess of quota, including for pullets
- [Eggs - Plan, RRO 1990, Reg 409](#)
 - Defines the requirement to have representation of pullet growers on the provincial marketing board

DESCRIPTION

Ontario regulates the production of pullets under supply management, which affects both egg producers and independent pullet growers. Some growers who grow under a certain number of pullets per calendar year are not under supply management. Producers are required to ensure pullets are grown or sourced in compliance with the OFFS and Animal Care Program.

QUEBEC

REGULATIONS

- [Règlement sur les quotas des producteurs d'œufs de consommation du Québec](#)
 - Defines operational requirements related to housing and the provision of information
- [Plan conjoint des producteurs d'œufs de consommation et de poulettes du Québec](#)
 - Defines the function of a committee for the production and marketing of pullets, including pricing and recommendations to the federation on concerns of pullet producers
- [Règlement sur les conditions de production et de conservation à la ferme et sur la qualité des œufs de consommation](#)
 - Defines when quality assurance testing should be completed for pullets
- [Règlement sur les conditions de production des poulettes](#)
 - Defines conditions for the production of pullets, including providing information regarding testing and mortality, and sanitation, and other production management aspects
- Règlements sur la mise en marché des poulettes (no link provided and no version available)

DESCRIPTION

Quebec provides a pricing trend for the current and upcoming year to capture the price per chick. According to the FPCC (2014),⁵ Quebec has legislation which allows for quota, but quota is not currently in place in the province according to input from stakeholders.

NEW BRUNSWICK

REGULATIONS

None

⁵ https://publications.gc.ca/collections/collection_2014/cpac-fpcc/A99-1-8-2014-eng.pdf

DESCRIPTION

No regulations exist for pullets in New Brunswick.

NOVA SCOTIA

REGULATIONS

- [Nova Scotia Egg Producers' Egg Regulations, NS Reg 55/2020](#)
 - Requires that pullet producers adhere to the NFACC *Code of Practice for the Care and Handling of Pullets and Laying Hens* (2017)
 - Identifies non-commercial pullet quota holders
 - Requires permits to order pullets
- [Egg Farmers of Nova Scotia Marketing Plan, NS Reg 239/1982](#)
 - Defines the regulations related to producing pullets under quota
 - Stipulates that one board member must be a pullet producer
- [Egg Producers' Marketing Plan, NS Reg 239/82](#)
 - Defines the authority of the marketing board over pullet production
- [Egg Producers' Pullet Regulations, NS Reg 145/86](#)
 - Defines pullet quota requirements and levies
- Poultry Insurance Plan, NS Reg 339/2007
 - Provides for insurance against the loss of pullets and other poultry due to disease

DESCRIPTION

Nova Scotia has established supply management for pullets and has also legislated insurance for pullet producers against losses due to disease.

PRINCE EDWARD ISLAND

REGULATIONS

None

DESCRIPTION

No regulations exist for pullets in Prince Edward Island.

NEWFOUNDLAND AND LABRADOR

REGULATIONS

- [Egg Regulations, NLR 33/00](#)
 - Defines the requirement to have a permit for the purchase of pullets and the levy to be charged if pullets are purchased without a permit
- [Animal Protection Standards Regulations, NLR 36/12](#)
 - Requires pullets to be produced in compliance with the NFACC *Code of Practice for the Care and Handling of Pullets and Laying Hens* (2017)
- [Egg Scheme, 2000, NLR 32/00](#)
 - Defines regulations related to quota for egg producers

DESCRIPTION

Newfoundland and Labrador requires permitting and licensing for the production and purchase of pullets.

ANNEXE 5: JANVIER 2024: RECOMMANDATION STRATÉGIQUE



PULLET GROWERS OF CANADA STRATEGIC PLANNING WORKING SESSION



www.groupeageco.ca

08 December 2023

G R O U P E
AGÉCO

Agenda

60 min

08 December 2023

- 1 Recap on our objectives and process
- 5-10 minutes
- 2 Interviews: What we heard from members
- 5 minutes
- 3 Interviews: What we heard from non-members
- 10 min
- 4 Recommendations
- 10 min
- 5 Discussion
- 25 min
- 6 Next steps
- 5 min

PROJECT OVERVIEW

Objectives

- Consult stakeholders to explore if and how there is a strategic and impactful role for the PGC
 - Are stakeholders satisfied with the *status quo*?
 - Past and present relationship with PGC
 - Test and invite operational scenarios for PGC

Process

- Interviews conducted with members (3) and non-members (13) of PGC
 - All regions of Canada were represented
 - EFC, FPCC, CEIRA were represented
- Feedback analyzed and discussed internally
- Recommendation prepared based on stakeholder input

3

INTERVIEWS: WHAT WE HEARD FROM MEMBERS

- There is a need for pullet growers to have a collective voice
- Program implementation and compliance differ on a regional basis
- There is a desire for greater standardization of pullet growing
- PGC should be empowered as a representative authority, but held accountable to its mandate



4

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

Production management and representation

- Broad support for EFC's current oversight and support (despite having no specific mandate over pullets)
- Improving relationship
- Pullets receiving more attention
- EFC does not adequately address pricing or **pullet quality**

5

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

Past relationship with PGC

- Membership was due to:
 - The enthusiasm of certain individual provincial board members;
 - The prospect of supply management for pullets;
 - And "peer influence"

Present relationship with PGC

- Members withdrew due to:
 - No supply management;
 - The loss of Manitoba as a member;
 - The departure of certain individuals from provincial boards;
 - Duplication of effort or the perception of no need;
 - And cost-saving.
- COG an important contribution, but otherwise no clear understanding of PGC's mandate

6

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

What if PGC were dissolved?

- General agreement that a voice for pullet growers is needed;
- General agreement that pullet quality = layer and egg quality;
- However, there is broad consensus that there would be little to no impact if PGC were dissolved.

7

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

PGC absorbed as a committee of EFC

- The most positively received scenario among participants;
- Represents the broad majority: pullet growers are also egg producers;
- Administrative efficiency for growers in dealing with only one organization;
- And EFC already has the capacity to do this.

Conditions

- EFC would need to be convinced of the need and benefit;
- PGC would need to be willing;
- A clear mandate would be required;
- And based on production-type rather than region.

8

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

PGC as a “program manager” for SC-SC and animal care

- No desire for this among participants;
- EFC and egg boards already doing a good job;
- Biosecurity risk of having too many people on farms;
- And administratively and financially undesirable to have two organizations doing this.

9

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

PGC as a voice for independent growers only

- Acknowledgement exists that independent growers lack representation, however, there are insufficient numbers for this to be effective or impactful;
- And it would create a “two-tiered” system, which is perceived as undesirable.

10

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

PGC as an association rather than an agency

- Easier to achieve than agency-status
- All growers' voices could be represented without duplicating the administrative activities of EFC
- Opportunity to conduct stakeholder engagement and research to support pullet industry

Conditions

- EFC does not accept the idea of a pullet committee
- An appetite among growers for representation
- A clear purpose
- Financially accessible

11

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

PGC develops a "quality standard"

- EFC does not address pullet quality;
- Higher quality flocks give growers greater negotiating power on price;
- And represents a mandate of "research and support."

Conditions

- The question of whether it should and how it would be prescribed and enforced;
- Collectively and objectively developed;
- And an appetite for such a standard exists.

12

INTERVIEWS: WHAT WE HEARD FROM **NON-MEMBERS**

Overview

- Broad support for EFC;
- Pullets acknowledged as critical, but majority of pullet growers are also egg producers;
- No current reason compelling enough for provinces to consider membership with PGC;
- The scenario in which PGC is a committee of EFC is the most desirable;
- Pullet quality and uniformity guidelines, supportive research, and representation of pullet growers as an association are additional activities which may bring value;
- And there is no interest in having PGC complete inspections for the two industry programs.

13

REGULATORY SNAPSHOT

	BC	AB	SK	MB	ON	QC	NB	PEI	NS	NL
Regulation for pullets										
Quota		Permits								Permits
SC-SC inspections	EFC and Province	EFC and Province	EFC and Province	EFC and Province	EFC and Province	EFC and Province	EFC	EFC	EFC and Province	EFC and Province
Animal Care	NFACC Legislated		NFACC Legislated	NFACC Legislated					NFACC Legislated	NFACC Legislated
Pricing	buyer-seller	seller	buyer-seller	buyer-seller; legislation exists	buyer-seller	buyer-seller	buyer-seller	buyer-seller	buyer-seller; legislation exists	buyer-seller

- Most provinces have legislation regarding pullets, but comprehensiveness varies
- Quota exists for MB, ON, QC, and NS
- Pricing is largely determined between buyer and seller, but COG are supportive
- No material regulatory developments since FPCC submission

14

RECOMMENDATIONS FOR DISCUSSION

Recommendation

- Petition EFC to become a committee which undertakes research and engagement to ensure high-quality pullet growing

Consequences

- Pullets and pullet growers have stronger representation;
- And broad acceptance by stakeholders due to:
 - Administrative efficiency of having only one organization for the industry
 - No additional fee

15

RECOMMENDATIONS FOR DISCUSSION

Recommendation

- Dissolve PGC as an organization
- Collaborate with interested provincial producer groups to develop a regional association for pullet growers

Consequences

- No perceivable impact on pullet growers according to feedback received;
- Would need to ensure pullet-growing costs are integrated into EFC's costs of production;
- And provincial producer associations could take leadership in creating a provincial / regional association to represent pullet growers.

16

THANK YOU

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ANNEXE 6: FÉVRIER À MAI 2024 : SONDAGE AUPRÈS DES ÉLEVEURS



PLANIFICATION STRATÉGIQUE DES ÉLEVEURS DE POULETTES DU CANADA

MARS 2024

CONTEXTE

Les Éleveurs de poulettes du Canada (EPC) se sont retrouvés à la croisée des chemins en ce qui concerne leur mandat organisationnel et leur capacité à représenter les producteurs de poulettes à travers le Canada.

Dans le cadre de son processus de planification stratégique, l'EPC a mandaté deux sociétés canadiennes de conseil en agroalimentaire (Groupe AGÉCO et Serecon) pour mener des entretiens avec les membres de l'industrie dans le but de déterminer si et comment les besoins des producteurs de poulettes sont et pourraient être représentés de la manière la plus optimale.

Plusieurs scénarios ont été envisagés pour les EPC. Le scénario selon lequel les EPC deviendraient un comité des POC a été de loin le plus populaire, répondant au besoin d'une plus grande représentation des poulettes et des producteurs de poulettes sans l'administration supplémentaire d'une deuxième organisation.

Afin de faire avancer ce scénario, une consultation plus approfondie des parties prenantes est nécessaire pour identifier la demande globale correspondante, les forces, les faiblesses, les opportunités et les menaces.

En tant que producteurs de poulettes, votre voix et votre point de vue sont essentiels à ce processus. Nous vous invitons donc à répondre à ce bref sondage.

Il ne vous faudra pas plus de 5 minutes pour y répondre. Vos réponses seront utilisées pour informer les orientations stratégiques des EPC en ce qui concerne son avenir en tant qu'organisation.

Vos réponses resteront confidentielles.

SONDAGE

Le scénario proposé est que **les Éleveurs de poulettes du Canada se dissolvent en tant qu'association nationale et deviennent un comité des Producteurs d'œufs du Canada.**

1. Quelle est votre première réaction lorsque vous avez entendu parler de la proposition de dissolution des EPC et de son intégration dans les POC ?

☐ Très positive

☐ Plutôt positive

- ☐ Neutre
- ☐ Plutôt négative
- ☐ Négative

Facultatif : Avez-vous des préoccupations concernant la dissolution potentielle des Éleveurs de poulette du Canada pour en faire un comité relevant des Producteurs d'œufs du Canada ?

2. Selon vous, dans quelle mesure Les producteurs d'œufs du Canada (POC) comprennent-ils actuellement les défis et les besoins particuliers des producteurs de poulettes ?
- ☐ Compréhension incomplète
 - ☐ Assez incomplète
 - ☐ Plus ou moins complète
 - ☐ Compréhension complète
 - ☐ Je ne sais pas

Facultatif : Quels sont les défis et les besoins spécifiques qui pourraient ne pas être suffisamment compris ?

3. Pensez-vous que vos intérêts et vos besoins en tant que producteur de poulettes seraient représentés de manière adéquate au sein des POC par un comité des poulettes nouvellement créé ?
- ☐ Oui
 - ☐ Non
 - ☐ Incertain

Facultatif : Y a-t-il des domaines spécifiques dans lesquels vous pensez que les intérêts des producteurs de poulettes pourraient être compromis par ce changement ?

4. Sur la base de ce que vous savez aujourd'hui, seriez-vous favorable à la proposition de dissolution des EPC et à sa transformation en un comité au sein des POC ?
- ☐ Oui
 - ☐ Non
 - ☐ Incertain

• Facultatif : Pourquoi préféreriez-vous que les EPC reste une organisation indépendante ou qu'elle devienne un comité des POC ?

5. Pensez-vous que ce changement aura une incidence sur vos activités quotidiennes en tant que producteur de poulettes ?

☐ Oui
☐ Non
☐ Je ne sais pas

Facultatif : De quelle façon ?

6. Quelle importance accordez-vous au fait que les éleveurs de poulettes disposent d'une organisation dédiée qui représente leurs intérêts ?

☐ Pas important
☐ Assez important
☐ Très important
☐ Je ne sais pas

Facultatif : Pourquoi ?

7. Quels sont les avantages spécifiques que vous attendez de l'intégration des Éleveurs de poulettes du Canada au sein des Producteurs d'œufs du Canada ? Énumérez jusqu'à trois avantages, le cas échéant.

(_____) _____
 (_____) _____
 () _____

8. Quelles sont vos attentes concernant la représentation des producteurs de poulettes au sein du comité des Producteurs d'œufs du Canada ?

QUESTIONS DÉMOGRAPHIQUES

9. Dans quelle province/territoire êtes-vous situé ?

– AB
 – BC

- MB
- NB
- NL
- NS
- ON
- PEI
- QC
- SK
- Yukon
- Territoires du Nord-Ouest
- Nunavut

10. Veuillez indiquer le type de production de poulettes qui décrit le mieux votre exploitation :
- Producteur indépendant (poulettes uniquement)
 - Producteur intégré (poulettes et œufs)
 - Autre. Précisez :
11. Quelle est la capacité totale de votre (vos) bâtiment(s) d'élevage de poulettes ?
- 1 à 9 999
 - 10 000 à 24 999
 - 25 000 à 49 999
 - 50 000 ou plus
12. Depuis combien d'années élevez-vous des poulettes ?
- 0 à 9 ans
 - 10 à 19 ans
 - 20 à 29 ans
 - 30 ans ou plus
13. Outre Les Éleveurs de poulettes du Canada, les producteurs d'œufs du Canada et l'office des œufs de votre province, avez-vous d'autres affiliations qui répondent à vos besoins en tant que producteur de poulettes ?



PULLET GROWERS OF CANADA: STRATEGIC PLANNING

MARCH 2024

CONTEXT

Pullet Growers of Canada (PGC) has found itself at a crossroads regarding its organizational mandate and capacity to represent pullet growers across Canada.

As a part of its strategic planning process, PGC has mandated two Canadian agrifood consultancies (Groupe AGÉCO and Serecon) to conduct interviews with industry members with the objective of identifying whether and how the needs of pullet growers are and could be represented in the most optimal way.

Several scenarios for PGC were considered. The scenario of PGC becoming a committee of EFC was by far the most popular, responding to the need for greater representation of pullets and pullet growers without the additional administration of a second organization.

In order to advance this scenario, further stakeholder consultation is required to identify the corresponding overall demand, strengths, weaknesses, opportunities, and threats.

As pullet growers, your voice and perspective are critical to this process. We therefore invite you to complete this brief survey.

This survey should not take more than 5 minutes to complete. Your answers will be used to inform PGC's strategic orientations with respect to its future as an organization.

Your answers will remain confidential.

SURVEY QUESTIONS

1. Please indicate the type of pullet production which best describes your operation:
(drop-down menu)
 - Independent grower (pullets only)
 - Integrated producer (pullets and eggs)
 - *I am not a pullet grower -> survey ends here ("Thank you for participating. This survey is for pullet growers")*

The proposed scenario is that **Pullet Growers of Canada dissolves as a national association, becoming instead a committee of the Egg Farmers of Canada.**

2. What is your initial reaction to hearing about the proposal for PGC to dissolve and integrate with EFC?
- ☐ Very positive
 - ☐ Somewhat positive
 - ☐ Neutral
 - ☐ Somewhat negative
 - ☐ Negative

Optional: Do you have any concerns regarding the potential dissolution of Pullet Growers of Canada to become a committee under Egg Farmers of Canada?

3. How well do you think Egg Farmers of Canada (EFC) currently understands the unique challenges and needs of pullet growers?
- ☐ Incomplete understanding
 - ☐ Somewhat incomplete
 - ☐ Somewhat complete
 - ☐ Complete understanding
 - ☐ I don't know

Optional: What specific challenges and needs may not be sufficiently understood?

4. Do you feel that your interests and needs as a pullet grower would be adequately represented within EFC with a newly established pullet committee?
- ☐ Yes
 - ☐ No
 - ☐ Unsure

Optional: Are there any specific areas where you feel pullet growers' interests might be compromised by this change?

5. Based on what you know now, would you support the proposal for PGC to dissolve and become a committee within EFC?
- ☐ Yes
 - ☐ No
 - ☐ Undecided

Optional: Why would you prefer to maintain PGC as an independent organization, or support the transition into a committee of EFC?

6. Do you believe this change will impact your day-to-day operations as a pullet grower?

- ☐ Yes
- ☐ No
- ☐ I don't know

Optional: How so?

7. How important is it for you that pullet growers have a dedicated organization representing their interests?

- ☐ Not important
- ☐ Somewhat important
- ☐ Very important
- ☐ I don't know

Optional: Why so?

8. What specific benefits do you anticipate from the integration of Pullet Growers of Canada into Egg Farmers of Canada? List up to 3 benefits, if any.

- ☐ _____
- ☐ _____
- ☐ _____

9. What are your expectations regarding the representation of pullet growers and growing within the Egg Farmers of Canada as a committee? (open-ended)

DEMOGRAPHIC QUESTIONS

10. In which province/territory are you located?

(drop-down selection)

- AB
- BC
- MB
- NB
- NL
- NS

- ON
- PEI
- QC
- SK
- Yukon
- Northwest territories
- Nunavut

11. What is the total capacity of your pullet barn(s)?

(drop-down menu)

- 1 to 9,999
- 10,000 to 24,999
- 25,000 to 49,999
- 50,000 or more

12. For how many years have you been growing pullets?

(drop-down menu)

- 0 to 9 years
- 10 to 19 years
- 20 to 29 years
- 30 or more years

13. Other than Pullet Growers of Canada, Egg Farmers of Canada, and your provincial egg board, do you have any other affiliations which support your needs as a pullet grower?

14. If you would like to receive PGC's newsletter, please enter your email address:

ANNEXE 7: MARS À MAI 2024 : PROPOSITION DU GROUPE DE TRAVAIL CONJOINT



PULLET GROWERS OF CANADA
STRATEGIC PLANNING WORKING SESSION

March 26, 2024



www.groupeageco.ca



AGENDA

- | | | |
|---|---------------------------|------------|
| 1 | Context and Objectives | 10 minutes |
| 2 | The Proposed Option | 5 minutes |
| 3 | Discussion and Next Steps | 30 minutes |

CONTEXT AND OBJECTIVES

PGC IS AT A CROSSROADS

- The update of the strategic plan:
 - An opportunity to reflect on the need for a national organization representing pullet growers
- Work accomplished so far:
 - A Regulatory Scan
 - A Stakeholder Consultation
 - A Strategic Workshop
 - A Producer Survey

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CONTEXT AND OBJECTIVES

KEY LEARNINGS

- Pullet growing is a **critical node** in the egg supply chain
- There is no **broad authority** over pullets and pullet growers nationally
- **Industry consultation** revealed that:
 - There is a desire for greater pullet representation
 - There is a desire for that representation to come from EFC

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THE PROPOSED OPTION

Through a transition process, to dissolve PGC to establish a new pullet representation entity steered by EFC

- What's in it for the industry?
 - Ensure a consistent control over the entire egg supply
 - Having the same high production standards applied from 1 to 70+ weeks
 - Enhanced risk management
 - A vehicle for coordinated dialogue
 - Administrative efficiency

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WHAT'S NEXT?

KEY MILESTONES AND TENTATIVE TIMELINES

- To complete the **producer survey** – Q2-2024
- Get **provincial buy-in** on the proposed option – Q2-2024
- To establish a **Joint Working Committee** – Q2-2024
- To draft and submit a **detailed transition plan** – 2025

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DISCUSSION

- Does the proposed option seem viable to you?
- What would most contribute to the success of this undertaking?
- Are there specific challenges to account for?

ANNEXE 8: MAI 2024 : RÉSULTATS DU SONDAGE



PULLET GROWERS OF CANADA STRATEGIC PLANNING

15 May 2024



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G R O U P E
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ON JOINING A JOINT WORKING COMMITTEE TO FACILITATE AN EFC PULLET COMMITTEE

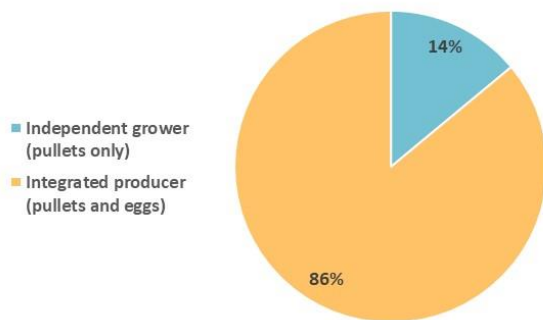
PROVINCIAL BOARD DECISIONS

	Vote	Change Needed?	Recommendation for PGC	Recommendation for EFC	Comments
BC	✗	NO	-	-	EFC already includes input from pullet growers on critical areas
AB	✓	-	-	-	-
SK	✗	NO	PGC to dissolve	-	EFC already includes input from pullet growers on critical areas
MB	✗	NO	PGC to continue representing growers	-	EFC already includes input from pullet growers on critical areas
ON	✓	-	-	-	Agrees to support a joint working group
QC	✓	-	-	-	-
NB	✗	YES	-	EFC to facilitate pullet committee	EFC in collab. w/ provinces; membership withdrawn and letter to EFC submitted in support of committee
PEI	?	-	-	-	-
NS	✗	-	-	-	EFC's responsibility to facilitate pullet representation w/ provinces
NL	✗	-	-	EFC to facilitate pullet committee	EFC's responsibility to facilitate pullet representation w/ provinces

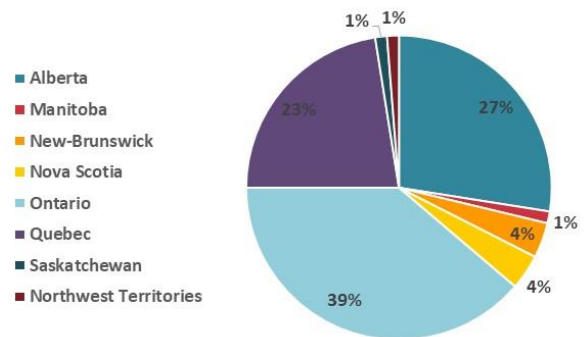
YES = 3 NO = 6 WAITING = 1

PRODUCER SURVEY RESULTS

Production type



Provincial representation

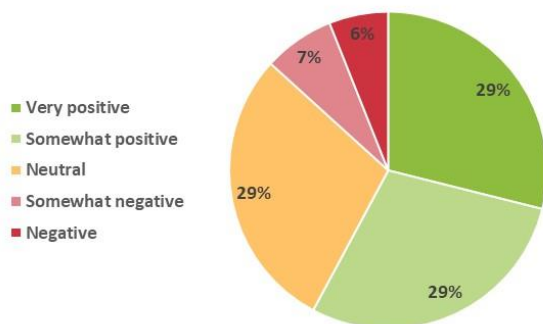


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PRODUCER SURVEY RESULTS

What is your initial reaction to hearing about the proposal for PGC to dissolve and integrate with EFC?



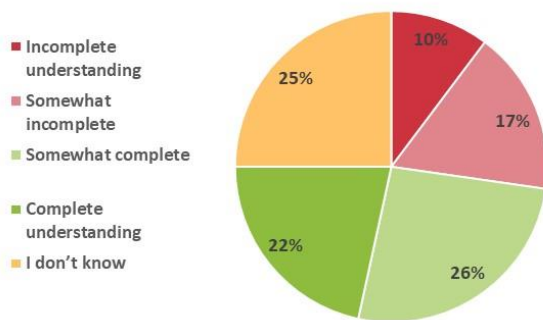
- Almost 60% feel positive about the dissolution of PGC and integrate with EFC (as a pullet committee)
- Indicates a desire for further integration, reflecting feedback heard during consultations

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PRODUCER SURVEY RESULTS

How well do you think Egg Farmers of Canada (EFC) currently understands the unique challenges and needs of pullet growers?



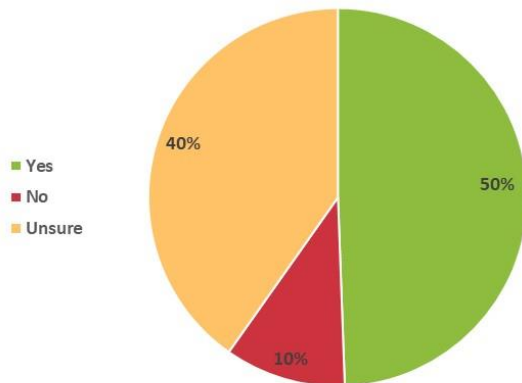
- Almost 50% of participants believe EFC has at least some understanding of pullet growers' needs.
- Fewer than 30% believed EFC did not understand.
- "Somewhat incomplete" and "Somewhat complete" may be combined, indicating that almost half (43%) believe there is some measure of improvement to be made in EFC's understanding on this matter.

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PRODUCER SURVEY RESULTS

Do you feel that your interests and needs as a pullet grower would be adequately represented within EFC with a newly established pullet committee?



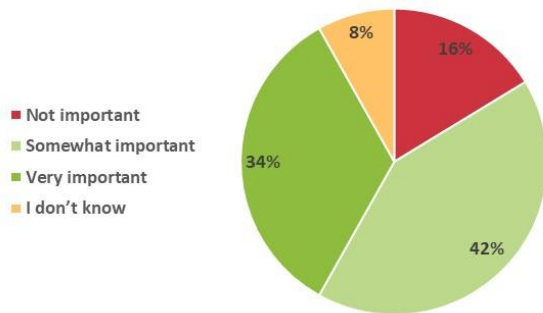
- Half of respondents believe the proposition of a committee is a good idea.
- However, a significant proportion are unsure, indicating that more information is needed to inform a decision.

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PRODUCER SURVEY RESULTS

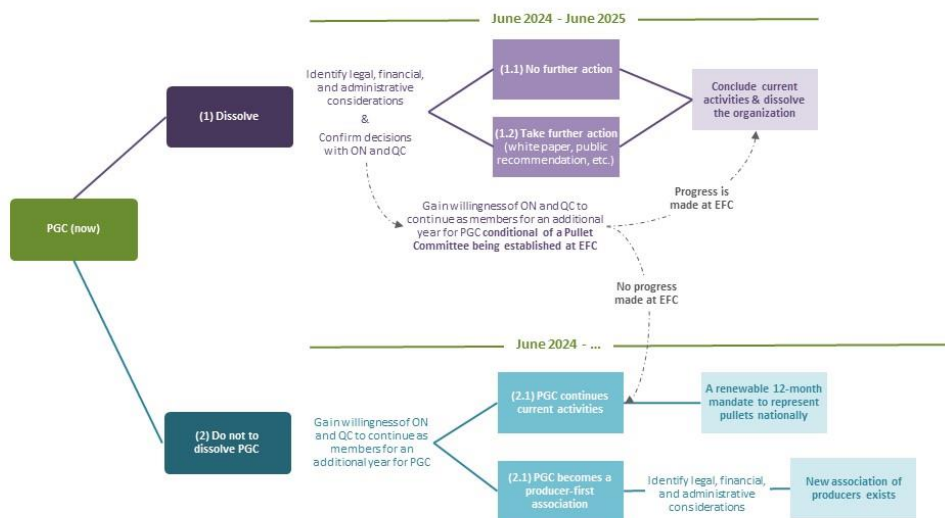
How important is it for you that pullet growers have a dedicated organization representing their interests?



- More than 70% of participants believe it is important to have an organization representing their interests.
- However, we cannot assume this means PGC, since

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To proceed according to the timelines of the ON and QC provincial board meetings, and according to key administrative dates, either the end of current calendar year (DEC 2024, 6 months) or the end of PGC's fiscal year (JUN 2025, 12 months)

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NEXT STEPS

