Northern Ontario Research, Development, Ideas and Knowledge

NORDIK INSTITUTE

Buy Local Lamb and Chevon:

Market Research Project

Broderick Causley and David Thompson

2011

NORDIK Institute

Algoma University's Community-Based Research Institute

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1.0 Introduction

In late 2010 the Algoma Sheep and Lamb Producers Association asked NORDIK Institute to investigate the local lamb and chevon (goat meat) market. This prompted NORDIK and Colleen Alloi to organize an open forum to discuss past strategies, emerging ethnic markets, and the need to analyze the local market with local farmers (NORDIK Institute, 2010). From this meeting, it was evident that goat and lamb producers desired market analysis for lamb and goat products in Algoma District. NORDIK understands that the market for lamb and chevon is diverse and that demand is growing. This demand can be attributed to Sault Ste. Marie's growing ethnic community or a desire for the healthy attributes of lamb and chevon. For lamb and meat goat producers to supply this demand, they require reliable information on consumer preferences.

The marketing study was derived from a research process that identified best practices through a literature review, identified consumer preferences, analyzed demographic data, and developed recommendations for the future. Consumer preferences were identified through two specific surveys. These methods engaged a variety of stakeholders that include butcher shops, farmers, restaurants, consumers, and community organizations. Quantitative data was developed through survey development, and was taken from Statistics Canada and other studies. A short literature review assisted the research process in developing survey questions and data sets. The literature review explored concepts such as marketing cooperatives, value chain development and ethnic preferences to lamb and chevon. The study developed recommendations for the Algoma Sheep & Lamb Producers Association. The recommendations outline how the group

can realize opportunities and mitigate threats as producers continue to serve this market.

1.1 NORDIK Institute

NORDIK Institute is a community-based research institute associated with the Community Economic and Social Development (CESD) program of Algoma University. Its mandate is to conduct regional and indigenous development and research. Our holistic approach is based on collaborative, community-university research partnerships wherein communities identify their research needs and questions, and are supported in their inquiry by university-trained researchers supervised by doctoral level faculty. NORDIK's association with the university allows us to provide high-quality research throughout the North.

1.2 Algoma Sheep and Lamb Producers Association

The Algoma Sheep and Lamb Producers Association (ASLP) is a small but committed group of producers who raise, process, and market sheep and lamb locally. The group works together to co-ordinate lambing to build a year-round farm gate market for lamb. They have a lot of experience working together through various initiatives that has garnered attention from the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA). In 2009, the ASLP won the Premier's Award for Agri-food Innovation Excellence for creating a lamb cookbook that sold 300 copies (Ontario Ministry of Agriculture, 2009). With their profits, the group purchased a large shared freezer and a shrink wrapper to sell individual cuts of lamb to consumers. Their values of working together in co-operation have prompted them to ask NORDIK to investigate the market for lamb and goat.

1.2 NORDIK research approach

As a research group based in Northern Ontario with a team of researchers drawn primarily from the North, NORDIK is uniquely situated to provide high-quality research that reflects the complexity of Northern communities. NORDIK has significant experience in conducting a wide scope of marketing studies and business development projects. NORDIK's engagement in regional development brings uncommon insight and experience to our research product, making our work both innovative and practical. Researchers and faculty with a variety of skills and knowledge of the North are available for this project.

2.0 Research Methodology

The marketing study will be done in three phases:

- Literature review
- Data collection
- Report on findings with recommendations

NORDIK used a multi-method approach to conducting this study. Both quantitative and qualitative data were collected from both local farmers and consumers. Two surveys collected data from consumers and producers to determine market demand and current supply. Selected interviews with participants were identified through the survey process. Interviews were done with selected members of the Oversight Committee. There were research limitations in securing interviews with butchers and meat managers of retail outlets. The data collection was augmented by a literature review of marketing cooperatives, value chains and consumer preferences for lamb and

chevon, including ethnic markets. The literature informed the data analysis and study recommendations.

NORDIK's commitment to building research capacity in the community and ensuring a high-quality product requires that the study have an Oversight Committee composed of relevant stakeholders – in this case, the ideal composition for such a Committee would include representatives of the ASLP. The Committee met throughout the study to provide feedback on data collection tools, and draft reports and analysis.

The research questions were as follows:

- What are consumer preferences for lamb and goat that are raised in Algoma District?
- How are current farmers in Algoma District marketing lamb and goat?
- How can farmers in Algoma District improve their procedures for marketing lamb and goat?

2.1 NORDIK team members

The market analysis will be conducted by a team of researchers led by David Thompson, BA (Hons), and Broderick Causley under the supervision of Dr. Gayle Broad, Research Director of NORDIK.

David Thompson, BA (Hons), is a graduate of the Community Economic and Social Development (CESD) program at Algoma University and has been employed by NORDIK for the past three years as a Research Assistant and Communications Coordinator. His previous research experience includes the development of business plans for both non-profit and for-profit businesses; the coordination of the Algoma Food Network; and a study on the socio-economic impact

of organized labour on the economy of Sault Ste. Marie. David will provide day-to-day management and guidance to the project, and will assist Broderick in developing the literature review, drafting the data collection tools, implementing the data collection including interviews, and in drafting the final report.

Broderick Causley is a student at Algoma University who is currently majoring in Mathematics. He has been hired through the Canada Summer Jobs program as a Business Development Assistant. Broderick brings a business background from his experience at the Bank of Montreal and has a passion for tutoring other students. Broderick will be responsible for conducting the literature review, drafting the data collection tools, implementing data collection including surveys, and for drafting the final report.

2.2 Research limitations

At the beginning of the research process, the Oversight Committee intended that the research would isolate diverse cultures within Sault Ste. Marie who frequently eat lamb and chevon. However, surveying these groups was a difficult task for a few reasons:

- The research process began at the same time a multicultural event "Passport to Unity" was held. This event would have been an ideal location to collect surveys, but tables had to be secured months in advance and surveys were not developed.
- The research assistant who collected the surveys was not of the same cultural background. This may have affected the levels of trust between the surveyor and those surveyed.

- Numerous contacts were made with community organizations who work with ethnic populations, but there was a lack of a physical presence during events.

Making a closer connection with a restaurant or an ethnic community group that eats chevon on a regular basis would have boosted participation. One group who participated in the research process is an Italian social club, Club Calabrese.

Another limitation was the feedback from butchers and grocery stores. There were a few attempts to interview butchers and Pino's, but there was a resistance from butchers and store owners who did not have time or did not want to participate in the research. A few butchers were able to be interviewed, but the number who agreed was not enough to ensure validity. Focus was put elsewhere to gather consumer insights through surveys instead of conducting interviews with store owners and butchers.

3.0 Contextual Analysis

3.1 Marketing cooperatives

"*A co-operative is a business owned and controlled by the people who use its services. They finance and operate the business for their mutual benefit. Working together, they are able to achieve personal economic goals that would otherwise remain beyond their reach.*" (Siebert, Ruth, & Zollinger, 1999)

A co-operative is a type of business structure which is owned and democratically controlled by its members – the people who use and benefit from the services provided by the business. Agricultural co-operatives provide producers with the opportunity to own and control businesses related to their farming operations, enabling them to address common problems or develop market opportunities (Ministry of Agriculture BC, 2008). Only the producers of agricultural commodities are eligible to own and be members of agricultural marketing co-operatives (Siebert, Ruth, & Zollinger, 1999). In this context, the reasoning for forming an agricultural marketing co-operative would be to address the demand for local lamb and goat products.

Marketing co-operatives give local producers the power to control their economic growth through group action (Ministry of Agriculture BC, 2008). Each producer involved is part of the co-operative's membership, and pools their products with all other members in the co-operative. Any co-operative is available to all persons able to use their services and also willing to accept membership responsibilities (International Co-operative Alliance, 2007), as it is more productive to form partnerships than to enter in to direct competition.

In a co-operative marketing pool, producers of a commodity jointly pool their production to be marketed. Ownership of a product is transferred to the co-operative's management to determine the best time to sell and where to sell (Ministry of Agriculture BC, 2008). Belonging to a co-operative reduces risk by spreading it over a group of members instead of concentrating it in the highest production of just one producer. A co-operative member can lose no more than the amount of money that he or she has invested in the business. No one participating in the marketing pool receives the highest price offered in a given year, but each one is protected from selling at the bottom of the market.

Marketing co-operatives are democratically controlled by their members involved. Control is normally expressed through the election of a board of directors, where each member is given only one vote regardless of the amount of capital invested (Ministry of Agriculture BC, 2008). Directors are elected to provide direction to the business by establishing the overall goals and policies. The issue of control of the co-operative is important, because this is how the owners assure that their business is meeting their individual goals.

3.2 Value chain development

To realize greater returns in the marketplace, farmers have to go beyond a traditional supply-chain approach to food production. Value chains are long-term networks of partnering business enterprises working together to maximize value for partners and the end customer of a product or service (Stevenson & Pirog, 2008). According to Stevenson & Pirog (2008), the key characteristics of effective value chains include:

- Where economies of scale are coupled with complex products that differentiate and add value
- Combining cooperation with competition to achieve collaborative advantages and adapt quickly to changes in the market
- An emphasis on high levels of performance and high levels of trust
- An emphasis on shared vision, shared information (transparency), and shared decision making among the partners
- A commitment to the welfare of all participants within the value chain, including fair profit margins, fair wages, and business agreements of appropriate extended duration

Economies of scale and differentiated products: A value chain for lamb and goat products would include a marketing co-operative with farmers at the centre; upstream partners like feed suppliers and veterinarians, and downstream partners like meat packing, food marketers, and the final consumer of the product (see Appendix 1 for an example value chain). Consumers are increasingly concerned with the freshness and nutritional content of their food, and prefer to purchase food that has been grown locally or regionally on family-scaled farms. Customer demand for differentiated food products is shifting to unique attributes that is based on functionality, food safety (antibiotic and/or hormone-free meat), environmental impact (organic or integrated pest management grown), geographic location (regionally based products), or other value-giving characteristics (Stevenson & Pirog, 2008). For local lamb and goat producers, having differentiated products can increase product desirability, but can pose difficulty in having a uniform product with multiple producers.

Cooperation and competition: The business model of value chains features close cooperation between partners within the chain (from feed to retail store for the final product) and competition between chains doing business in product sectors. Value chains are powerful at reducing the costs of product development, production, and procurement transactions as well as increasing the speed to market and overall product quality (Peterson, 2002, p. 1331). The challenge to cooperation and competition is ensuring that a sufficient volume of product can satisfy a growing demand. To meet excess demands, stakeholders in the value chain may establish contracts with multiple producers, horizontally. To participate in this arrangement, producers may need to be guaranteed an above-market price in exchange for specified production standards.

High levels of performance and trust: For a value chain to be effective, reliable production, processing, and distribution of high-quality lamb and chevon product is crucial. Standards for quality assurance can create significant value through the application of complex skills that generate competitive advantage. For example, a finishing diet that adds value to quality would need to be implemented across the producer group or co-operative. Levels of trust may not necessarily be based on personal relationships, but on organizational procedures (Dyer, 2000, p. 180). It is the trust in the fairness, stability, and predictability of the procedures and agreements among partners for an effective value chain.

Shared vision, information, and decision making: For a successful value chain to function, it is critical that partners share a common vision as to product quality, partner relationships, and the treatment of

customers. Also, a transparent flow of information enables partners in the value chain to share forecasts, manage inventory, schedule work and optimize delivery (Handfield & Nichols, 2002, p. 298). Use of information technology and the Internet can assist the process of tracking product from farm to plate. For an effective value chain to work, producers must go beyond being providers to that of partners. For partners to make decisions, effective governance is needed that includes legislative (setting standards for the supply chain), judicial (monitoring performance in the supply chain), and executive (coordinating procedures and flows in the supply chain) mechanisms (Kaplinsky & Morris, 2001). Power and authority issues within a value chain are important; more powerful partners may include retailers or processors in the value chain.

3.3 Consumer lamb and chevon preferences

In Ontario as a whole, the demand for meat from goats and lamb has increased. Worldwide, goat meat comprises 63% of all read meat that is consumed. There has been a moderate increase in ethnic groups in the Algoma District from regions where goat meat (chevon) includes a substantial portion of the diet (Statistics Canada, 2007). Chevon is serving the appetites of a growing Mideast, African and South Asian population in the region. Chevon is a healthy alternative to other meats, which can be a factor in many health-conscious residents (United States Department of Agriculture, 2008). Also, consumers may consume Jamaican curried goat or Mediterranean lamb dishes such as Gyros or Moussaka as a way of exploring alternative choices.

It is found that chevon and lamb is often served during festivals or holiday celebrations. Consumption is determined by both tradition and culture backgrounds, and religious background (Correa, 2008).

Table 1.1: Ethnic holidays and size of lamb or kid preferred for feast

Holiday	Date	Kid size	Lamb size
Easter (Western)	2012: April 8th 2013: March 31th 2014: April 20th	20 to 50 lbs	30-45 lbs., milk fed and fat
Easter (Eastern and Greek)	2012: April 15th 2013: May 5th 2014: April 20th	20 to 50 lbs	40-55 lbs., milk fed and fat
Caribbean holidays	August	60 lbs bucks	
Start of Ramadan (Muslim)	2012: July 21th 2013: July 10th 2014: June 29th	45 to 120 lbs, less than 12 months	60-80 lbs.
Eid al Fitr	2012: Aug 18th 2013: Aug 9th 2014: July 29th	45 to 120 lbs, 60 lbs optimum	60-80 lbs.
Eid al Adha	2012: Oct 25th 2013: Oct 14th 2014: Oct 3rd	Yearlings, blemish free	60-80 lbs. and old crop lambs

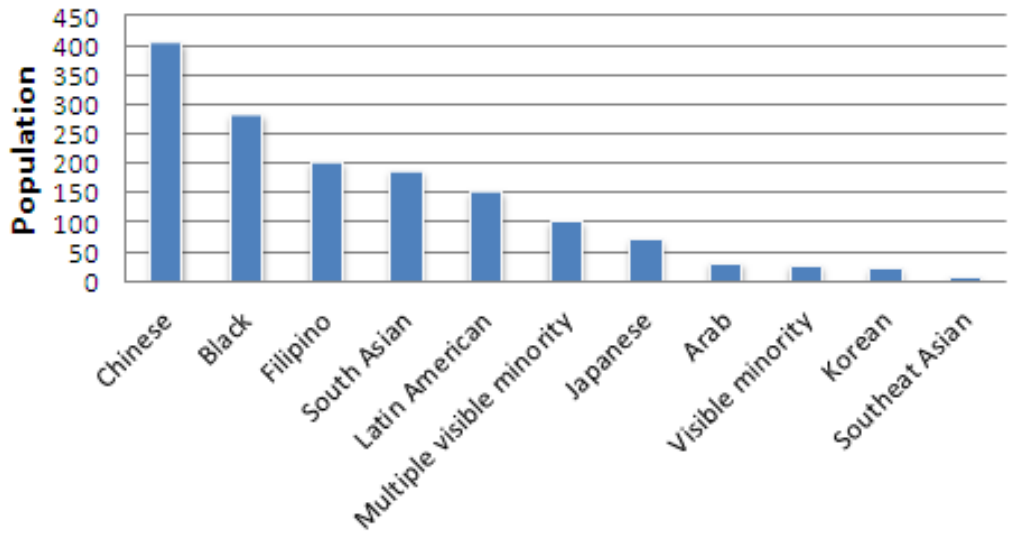
Source: Sheep Goat Marketing, 2007

It was found that chevon and lamb were in demand during Christmas and Easter for Christian holidays. The primary Jewish holiday where lamb and chevon are consumed is Passover. The beginning and end to Ramadan contains multiple Islamic holidays where chevon is a popular choice (Agricultural Marketing Resource Center, 2010). Prior research indicates that milk-fed kids are highly desirable for both the Christian and Jewish holidays. Live weight was preferred to range 30-40 lbs. During the holidays surrounding Ramadan, it was found that

preference was given to live weights in excess of 50 lbs, with an approximate age of 12 months (Sheep Goat Marketing, 2007).

With an increasingly diverse population that is adapted to eating chevon and lamb, the marketing future of Algoma District's lamb and chevon products appears favorable. More detailed Statistics Canada data on the 2011 Census will be beneficial to examine how the ethnic population has changed since 2006 (Chart 2).

Chart 1.1: Visible minorities, Algoma District, 2006



Source: Statistics Canada, 2007

4.0 Producers' survey results (22 responses)

4.1 Producers' survey overview

For sheep, the reported population from 18 farms was 630 ewes, two rams, and 64 lambs. The reported sheep breeds consisted of Arcott Outaous (97), Suffolk (69), Rideau & Rideau/Arcott Cross (100), Chevret (45), and Dorset (36). For goat, the reported population from five farms was 18 bucks, 162 does, and 3 wethers. The reported goat breeds consisted of Boer (25), Lamandra (10), Kiko (88), and Boer/Nubian (20).

According to the 2006 Agricultural Census, there were 1125 ewes and rams and 215 does and bucks. The surveyed farms represent a strong sample of the entire sheep and goat population in the Algoma District. In 2006, there were 16 total goat farms in the Algoma District and 30 total sheep farms. If the survey was done in 2006, 31% of goat farms (5/16) and 60% of sheep farms (18/30) in Algoma would be represented.

Table 2.1: Goat and sheep population surveyed

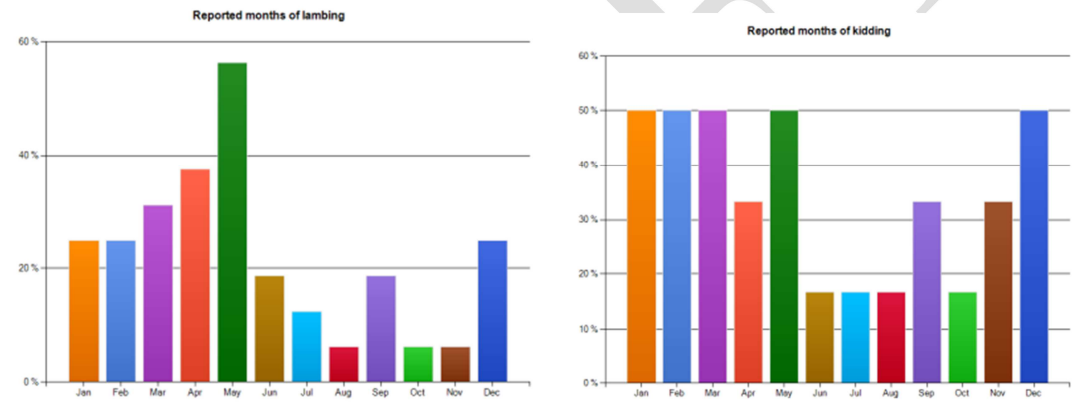
Algoma	Ewes & Rams	Does & Bucks
Surveyed	632	183
Total population in Algoma (2006)	1125	215
Surveyed percentage of total population	56%	85%

Overall, the number of respondents was an adequate picture of lamb and goat producers in the Algoma District. Roughly 61% of all lamb and goat livestock in the region was accounted for using Census 2006 data. Out of the 40 surveys issued, 25 were returned, equating to a 63% response rate. There were a few local producers that were omitted in the study, as their livestock was for personal use or was not marketable.

4.2 Production scheduling and projections

The majority of the respondent's ideal time for lambing sheep and kidding goat takes place between December and May. Only 33% of lamb producers are willing to lamb year round, while all goat producers surveyed were willing to kid year round. An average of those who are willing to lamb and kid year-round is 43%. The following graphs show the preferred months of breeding livestock: 1) only lambs, 2) only kids.

Chart 2.1, 2.2: Reported months of lambing and kidding



It is evident that goat producers are much more flexible in breeding, as they all responded with a willingness to kid year round. The number of producers who are flexible to lamb or kid year around is 53%. This can be attributed to a higher survivability for goats (kids) during the winter season, or a lower difficulty level in raising goats overall. Only one third of lamb producers are willing to lamb year round. Even with this level of participation, there are many lamb producers who are able to have a consistent volume of production throughout the year.

4.3 Lamb and goat population growth

The following table (below) lists a projected future population of lambs, kids, and culled ewes and does from 2011 to 2013. The figures were derived from the following questions to producers:

- Estimate the number of marketable kids and lambs you plan on owning in 2011-13 and estimate the average age (in months) and average live weight at the time of sale.
- Estimate the number of older ewes and older does you plan on culling or selling in 2011-13 and estimate the average age (in months) and average live weight at time of sale.

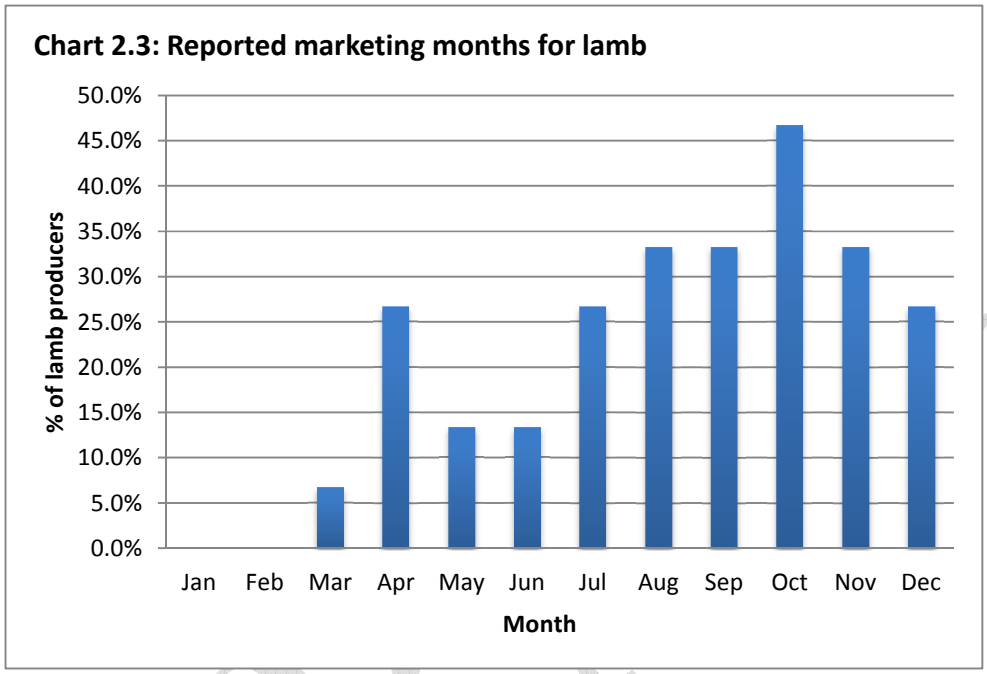
Table 2.2: Projections of marketable kids and lambs

Projections (response total & average): Number of marketable kids and lambs.								
	2011 Avg	2011 Total	2012 Avg	2012 Total	2013 Avg	2013 Total	Avg live weight	Avg age (months)
Kids (goat) 4 responses	35	105	50	200	83	250	60 lb	9
Lambs 15 responses	35	532	44	579	45	589	84 lb	5

There is an increasing confidence in projecting the number of kids and lambs being marketed. These figures are attributed to new lamb and goat farms that are increasing production. For example, Alex & Helen McRae are young farmers who are projecting to expand their goat herd at a rate of 50% from 2011-13 (Lamb and goat producers survey, 2011). However, there is one producer who is ceasing production of lambs after 2011.

Lambs: The number of marketable lambs increases from 532 (2011) to 589 (2013), averaging 5 months and 84 lbs at the time of

sale, with a large majority being marketed during the second half of the year. In October, approximately 45% of surveyed producers have lamb ready for market. The marketing patterns of lamb appear to favor holidays such as Easter, Ramadan, Thanksgiving, and Christmas.



Meat goats: The number of marketable kids ranges from 105 (2011) to 250 (2013), averaging 9 months and having 60 lbs most common at the time of sale. The marketing patterns of goat appear to favor holidays such as Easter, Ramadan, Thanksgiving and Christmas. However, the summer months are generally common also.

4.4 Culling sheep and meat goats

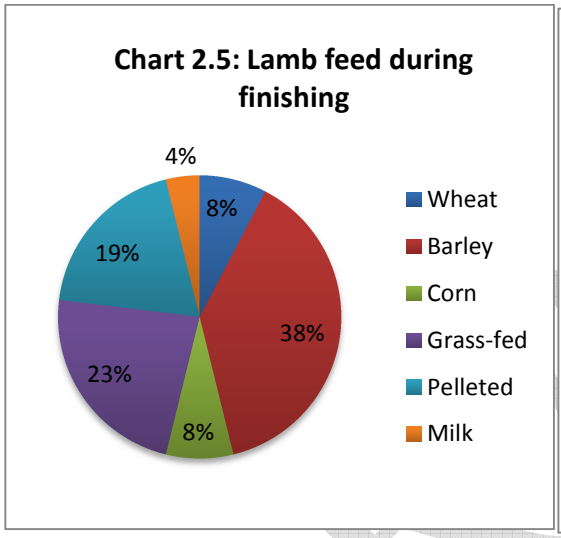
The preference for culling live stock is during the latter half of the year. For ewes (sheep), 50% of surveyed producers cull in October. For does (meat goats), culling is more consistent across the latter half of the year, especially in June, October and December.

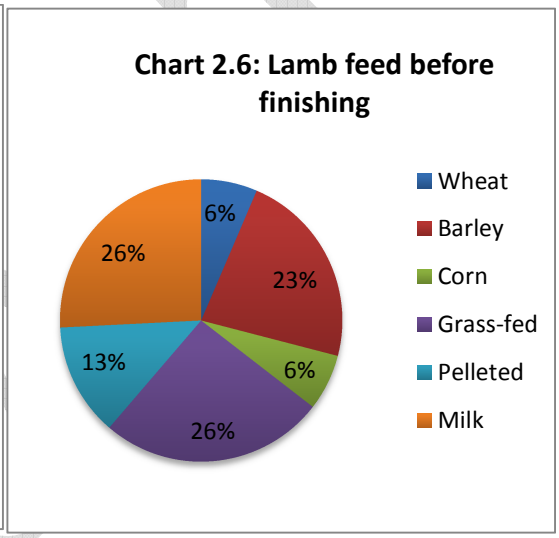
Table 2.3: Projections for number of culled meat goats and lambs

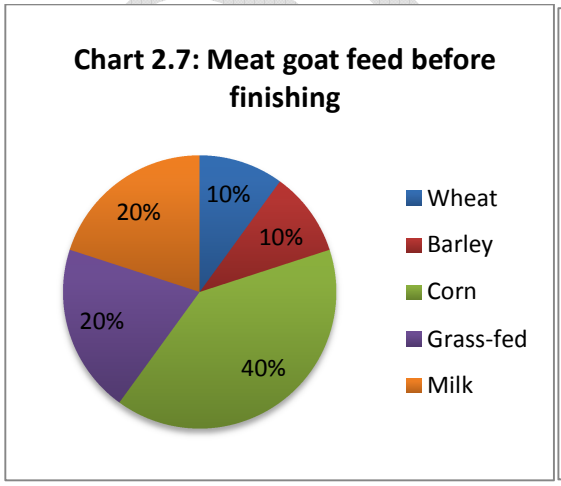
	2011 Avg	2011 Total	2012 Avg	2012 Total	2013 Avg	2013 Total	Avg live weight	Avg age (months)
Culled ewes 12 responses	3	35	5	54	5	52	149 lb	82
Culled rams 6 responses	.5	3	.57	4	.5	3	178 lb	44
Culled does 3 responses	10	31	8	15	9	17	140 lb	78

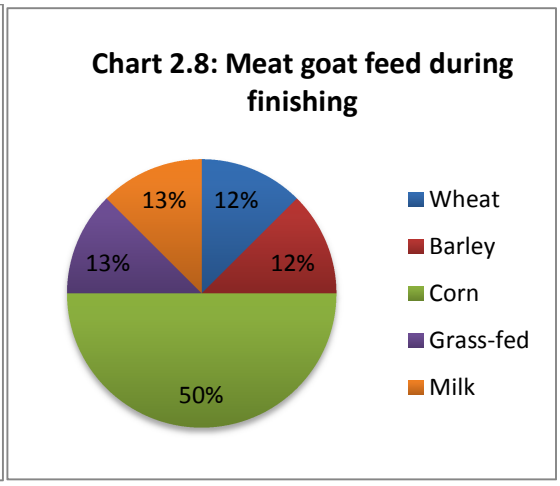
4.5 Feed inputs

Fifteen producers indicated that they use barley, grass and pellets to finish lamb. Ten respondents indicated they use barley when finishing lamb and six respondents indicated their lambs are grass-fed. A greater interest in using barley may be attributed to a lower cost of gains when compared to another high protein crop like corn (Lardy, 1999). The following tables show what local lamb producers (15 respondents) use for feed:









The major feed used in goat diets was corn, which was used by four producers in both regular feed and during finishing.

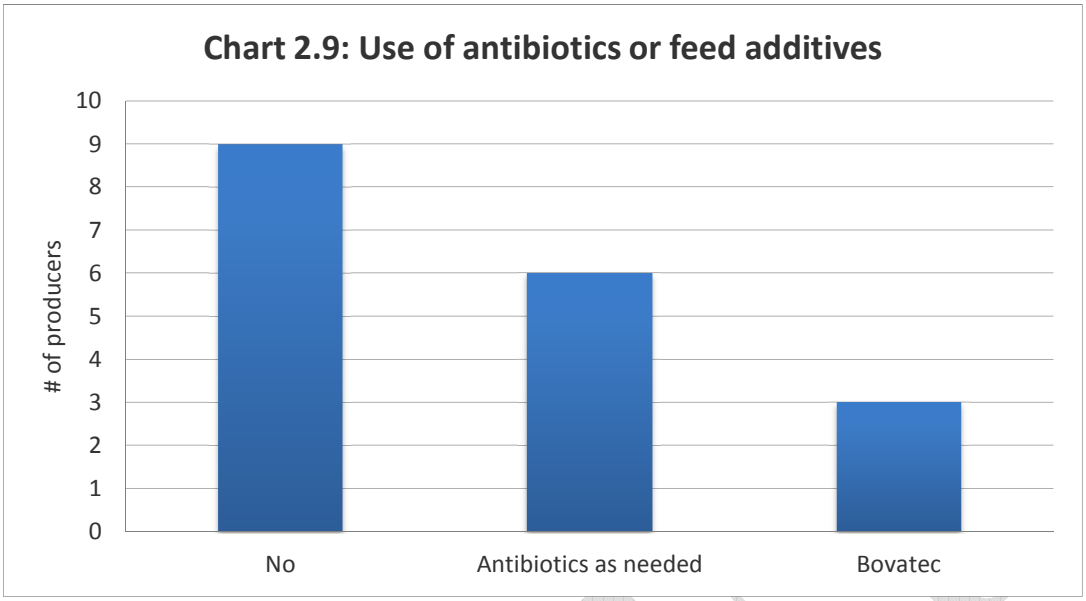
4.6 Adding value to feed

It should be noted that there is no official definition for "grass-fed", unlike organic livestock production. However, grass-fed products are increasing in popularity due to research studies that demonstrate higher amounts of conjugated lineolic acid (CLA), vitamin E, omega-3 fatty acids, beta-carotene, and vitamin A than meat from grain-fed animals (Schoenian, 2009). Direct marketing of grass-fed products to a niche market of consumers does have benefits from being a differentiated product that can demand a premium price. However, even with these added benefits, grain-fed lamb has been preferred in taste panel tests among American consumers (Schoenian, 2009). Producers may be significantly challenged by the transition to supplying grass-fed products.

Sourcing local feed is beneficial when differentiating products and in keeping down production costs. The preferred feed for lambs *before* finishing (milk, barley, grass-fed) is 74% local content, whereas the preferred feed for lambs *during* finishing (barley, grass-fed, pelleted) is 77% local content. Meat goats consume mainly milk, corn and grass feed *before* finishing and mainly corn and grass feed *during* finishing – both having local content averaging at 50%. Some additional feed diet items were apples and a combination of peas and barley; fewer than 5% reported these items.

4.7 Use of antibiotics

Forty-seven per cent of producers reported no antibiotics used on lamb and goats combined. 52% of producers used antibiotics as needed, such as Penicillin, when the lamb or goats contract illness such as Pneumonia. Three producers (16%) use *Bovatec*, which is used as an antibiotic and/or as a growth enhancing feed additive.

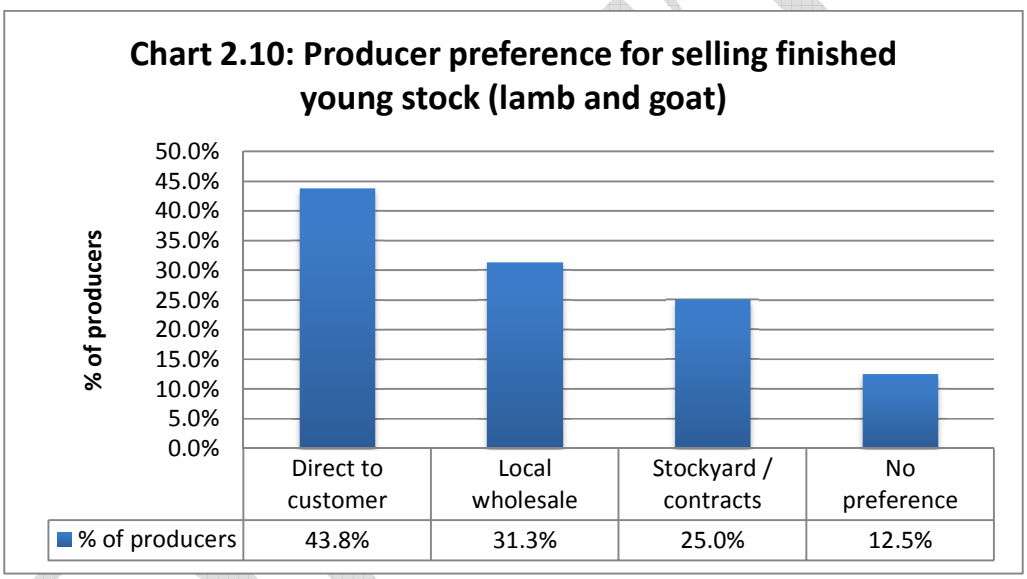


4.8 Marketing preferences

Out of sixteen respondents, fourteen (87.5%) are interested in participating in a marketing co-operative for selling lamb and goat meat into the local or regional market. The same fourteen producers would agree to a set price for selling lamb & chevon through a marketing co-op. Out of the 12.5% who were not, they had reported other marketing preferences. One respondent stated "I am a member of Penokean Hills Farms who are currently developing a local branded lamb product under our brand" (Producers survey). The percentage of selling through a market based co-operative represents 83% of the lamb producers and 83% of the goat producers. Some producers stated that their participation in marketing co-operatives will also depend on price. One producer stated, "We feel it is very hard to sell goat here for the price we feel is fair – based on the cost of feed and hydro…we need to get a better setup for the summer and want a herd that is a higher % of meat breed". For goat producers interested in a marketing co-op, local content of the goat's feed dropped essentially to 0%, both before and during finishing. For those

interested in the marketing co-op, anti-biotic use remained consistent.

Both lamb and goat producers had varying preferences when marketing their products. There was a strong preference for selling locally as opposed to selling at the stockyard. 44% of lamb and goat producers combined preferred selling finished young stock direct to customer. Lamb producers prefer selling finished young stock direct to customer (50%), while goat producers prefer local wholesale (60%).



Half (50%) of sheep/goat producers combined preferred selling cull stock to stockyard/contracts, with all other options generally equally preferable. Sheep producers and goat producers also separately prefer selling cull stock to stockyard/contracts, respectfully at 50% and 67%.

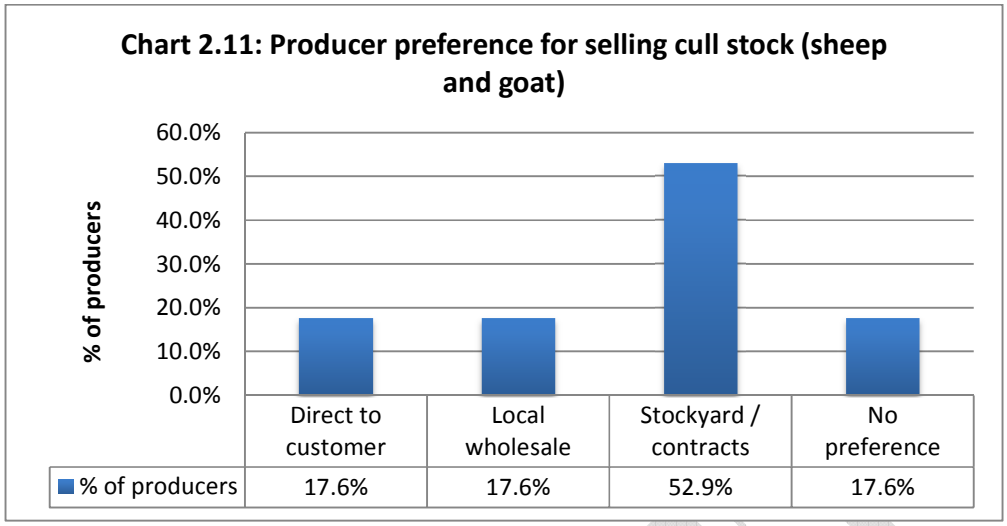
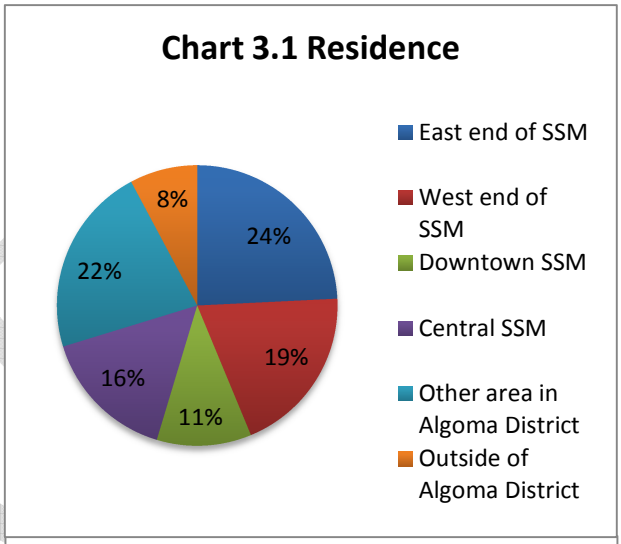


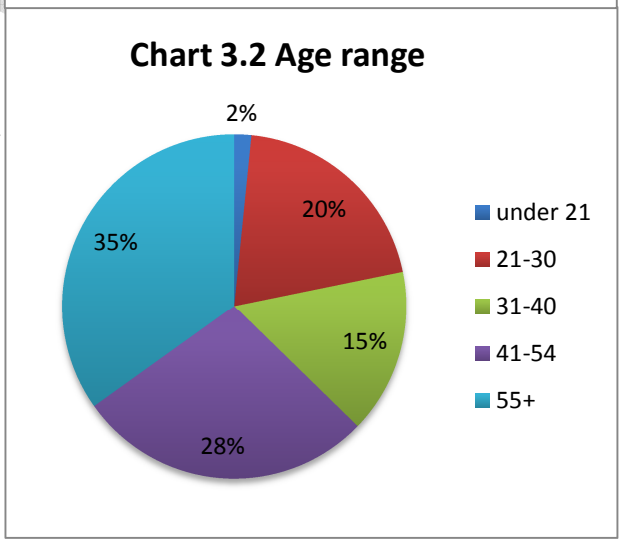
Chart 2.11: Producer preference for selling cull stock (sheep and goat)
% of producers
60.0%
50.0%
40.0%
30.0%
20.0%
10.0%
0.0%
Direct to customer
Local wholesale
Stockyard / contracts
No preference
% of producers
17.6%
17.6%
52.9%
17.6%

5.0 Consumers' Survey Results (141 responses; 48 online surveys, 93 live surveys)

5.1 Respondent profile

The following results were compiled from two different sources – online surveys generated from Survey Monkey (internet-based survey application), and live surveys generated in person at the *Green Expo,* the *Algoma Farmers' Market, the Laird Fair,* and *Bruni's Fine Foods*. The Green Expo accounted for 35% of the total surveys; the most successful event in generating surveys. Online surveys accounted for 34% of the total responses and were useful in reaching membership-based cultural groups like Club Calabrese, Steelworkers Local 2251, and New to the Sault (Sault Community Career Centre).





Overview: Over 35% of responders were aged 55 or over. Twenty-eight per cent were between 41-54 years of age, 16% were between 31-40 years of age, and also 20% were between 21-30 years of age. Fewer than 2% of all responders were under the age of 21. The majority (63%) of responders were over the age of 40. When asked where in Algoma District they reside, 24% answered 'East end of Sault Ste. Marie', 20% answered 'West end of Sault Ste. Marie', 16% answered 'Central Sault Ste. Marie', and 11% answered 'Downtown Sault Ste. Marie'. Eight

per cent of the respondents were outside of Algoma District; 22% were from another area in Algoma District. Of those who purchase lamb or chevon – 72% are within Sault Ste. Marie, and 20% are within other regions of Algoma District.

It was found that lamb is purchased more often than chevon. Fifty-three per cent of respondents reported purchasing lamb, while 15% have purchased both lamb and chevon. 31% of respondents purchase neither lamb nor chevon. The number of respondents who stated they don't purchase lamb and chevon (43 respondents) does not accurately affect those who eat lamb and chevon. Out of 141 respondents, 34 do not eat lamb and 116 do not eat chevon. This may be due to consuming lamb and goat at family events, but never making a purchase.

Chart 3.3 Do you purchase lamb or chevon (meat goat) products?
139 respondents

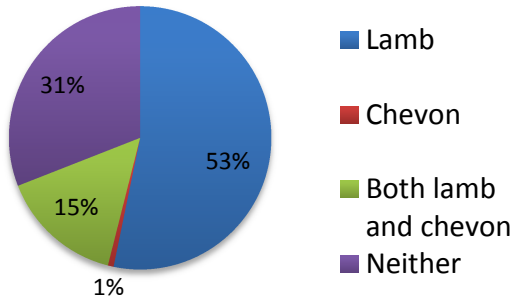
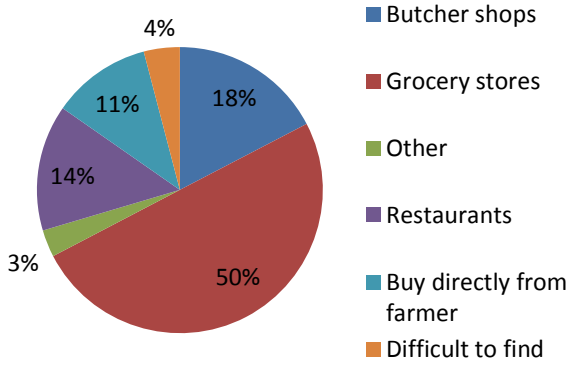


Chart 3.4 Consumer preference for product location (lamb and chevon)
99 respondents



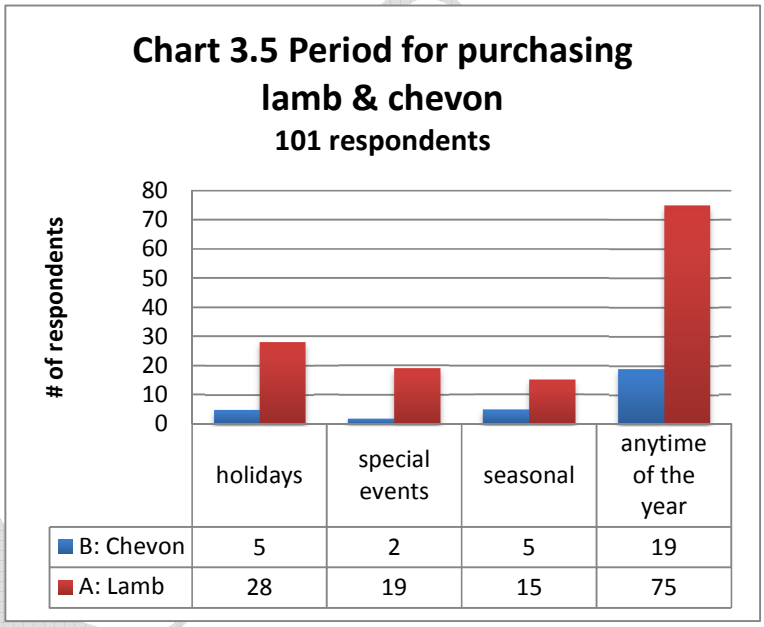
When asked where lamb and chevon was purchased, 50% of responders listed grocery stores (primarily Rome's Independent Grocer and Metro, however Food Basic's, Pino's, Costco and Walmart were listed). Eleven per cent of responders listed purchasing from local farms. Butchers were also then most common at 18% (primarily Scale Meats and Paesano Foods, with Prime Cuts listed as well). Fourteen per cent of all responders listed they purchased lamb or chevon at a restaurant (Arturo's,

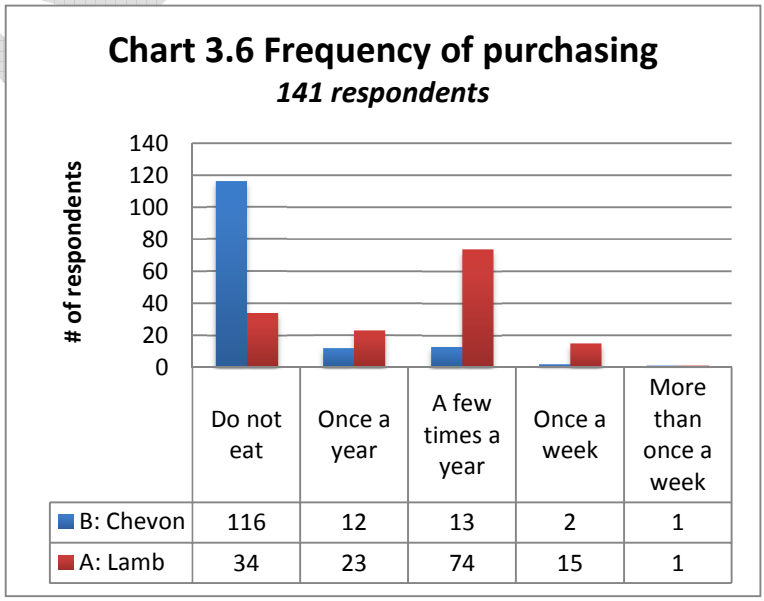
Thymely Manner, Red Top, and Indian food restaurants). Finally, 4% of responders stated difficulty in finding lamb or chevon and would purchase it wherever it could be found.

5.2 Purchase frequency

Out of those who purchase lamb, anytime of the year is preferred at 77%. Lamb is also purchased seasonally (15%), on holidays (27%), and during special events (16%). Out of those who purchase chevon, 81% will purchase anytime of the year, 24% will purchase on holidays, 19% will purchase seasonally, and 10% will purchase during special events.

When asked how often lamb was consumed, 16% answered once a year, 52% answered a few times a year, and 10% answered once a week. When asked how often chevon was purchased,

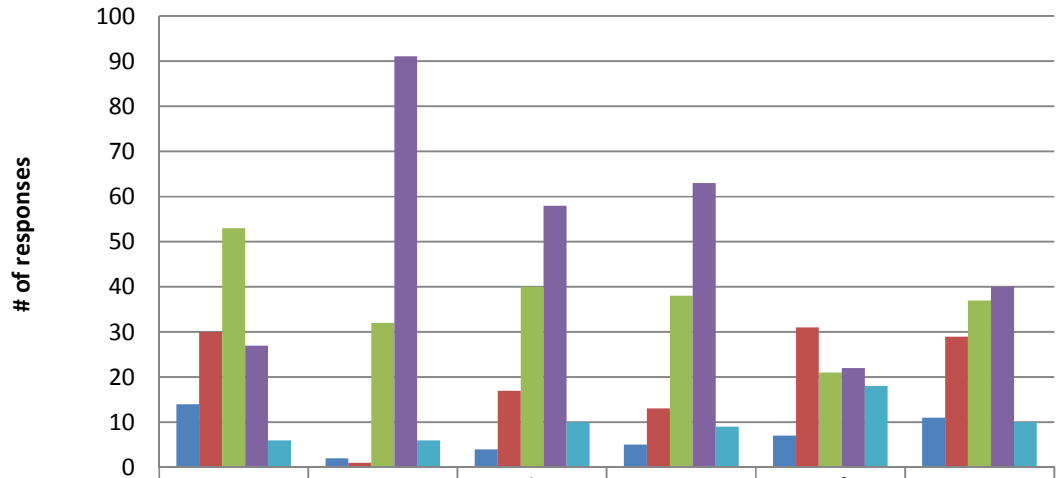




9% answered once a year, 9% answered a few times a year, and 1% answered once a week. For the preferred purchase period, both lamb and chevon are comparably similar. For consumption frequency, lamb is consumed much more often than chevon. For example, weekly consumption of lamb is tenfold over chevon.

5.3 Consumer preferences

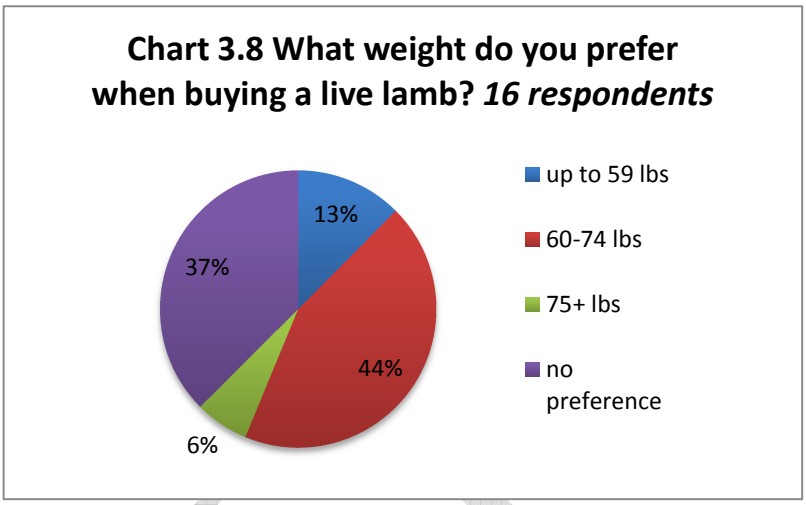
When purchasing lamb or chevon, price was listed as 62% important (21% of that VERY), quality was 93% important (69% of that VERY), anti-biotic free was 76% important (45% of that VERY), hormone free was 79% important (49% of that VERY), close-to-organic was 70% important (39% of that VERY), organic was 61% important (32% of that VERY), and a corn-free animal feed was neutral (31%).



	Price	Quality	Anti-biotic free	Hormone free	Corn-free feed diet	Organic
Not important	14	2	4	5	7	11
Neutral	30	1	17	13	31	29
Important	53	32	40	38	21	37
Very important	27	91	58	63	22	40
No preference	6	6	10	9	18	10

Generally, both anti-biotic free and hormone free were important, while having an organic product contained many neutral responses. A corn-free animal feed diet was found not to be of importance to the local consumer.

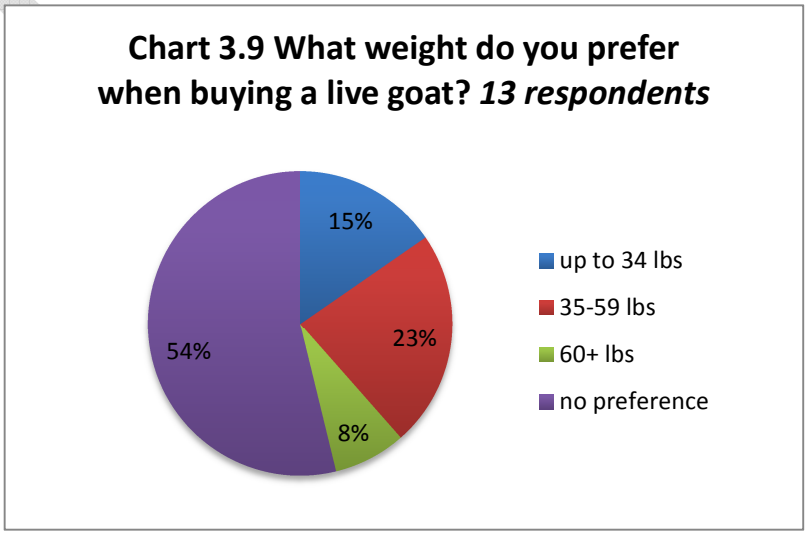
It is noted that 2% of responders listed a Halal diet (3 respondents) as being important, and 2% listed a Kosher diet (3 respondents) as being important. As stated in the Producers' Survey report, a higher ethnic participation was expected in this survey. Fewer than 2% of all respondents listed either diet as being important. It should be noted that these services are workable both through the practices of local producers and the local abattoir. Education should be given when possible to those requiring these diets on the local option of purchasing both lamb and goat products.



Three per cent of all lamb purchasers prefer purchasing only a live lamb, whereas 5% of all goat purchasers prefer purchasing only a live goat. Eighty-six per cent of all lamb purchasers prefer purchasing only processed lamb, whereas 82% of chevon purchasers would purchase only processed chevon. The remaining 11% of lamb purchasers and 14% of chevon purchasers will purchase either processed or live.

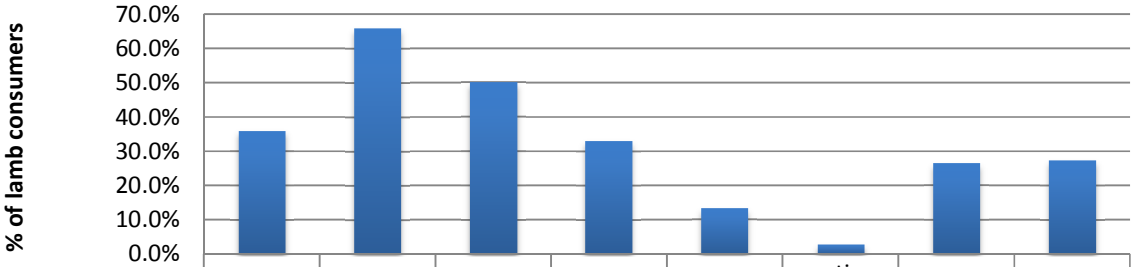
Over 90% of lamb and chevon purchasers will purchase processed, and this should be the target market. However, there is still a market for a live lamb or goat, which many producers reported willingness to sell live in that event.

Of those preferring a live lamb or goat, the weight was generally mixed between being neutral (31%) and important (38%). The preferred weight when purchasing a live *lamb* is between 60 and 74 pounds (44%), whereas 38% had no preference. The preferred weight when purchasing a live *goat* is 35-59 pounds (23%), however 54% had no preference.



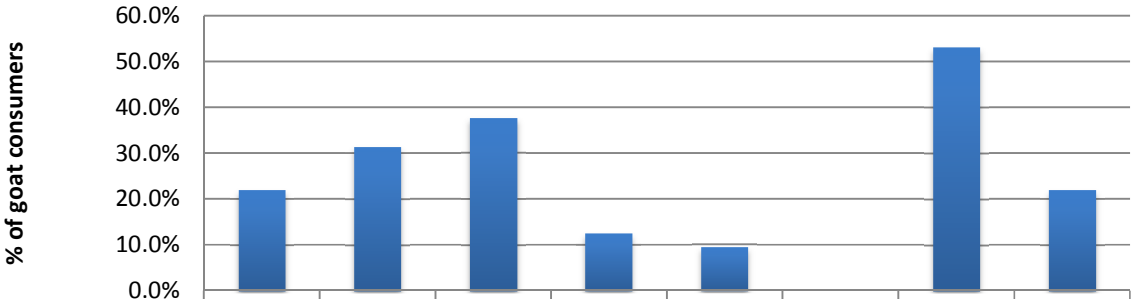
It was noticed that multiple consumers would like to "try" purchasing a live lamb or goat, which resulted in slightly skewed (inexperienced) numbers in weight preference. Much variation was present when discussing preferred cuts of processed lamb and chevon. For lamb, 66% preferred a leg, 50% preferred a loin, 36% preferred ribs, 33% preferred a shoulder, 27% preferred ground, and 26% preferred cubed. For chevon, 53% preferred cubed, 38% preferred a shoulder, 31% preferred a leg, 22% preferred ribs, and 22% preferred ground.

Chart 3.10 If purchasing processed lamb, what cut(s) do you prefer?
106 respondents



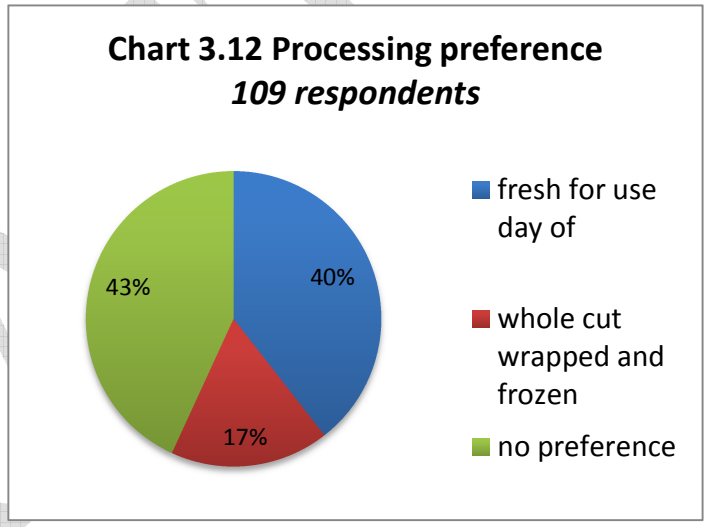
	ribs	leg	loin	shoulder	breast	entire carcass	cubed	ground
Cut preference	35.8%	66.0%	50.0%	33.0%	13.2%	2.8%	26.4%	27.4%

Chart 3.11 If purchasing processed chevon, what cut(s) do you prefer?
32 respondents



	ribs	leg	shoulder	breast	whole carcass	half carcass	cubed	ground
Cut preference	21.9%	31.3%	37.5%	12.5%	9.4%	0.0%	53.1%	21.9%

The main preferred cuts for lamb are both legs and ribs, while cubed chevon is strongly preferred. Many of those who completed the live surveys would consider trying new cuts if they were made available. Perhaps cubed chevon was selected so strongly because that is how it is commonly sold in restaurants or when cooking. With chevon being unfamiliar to many, recipe knowledge would be extremely beneficial to marketing, and could be incorporated into an online strategy.

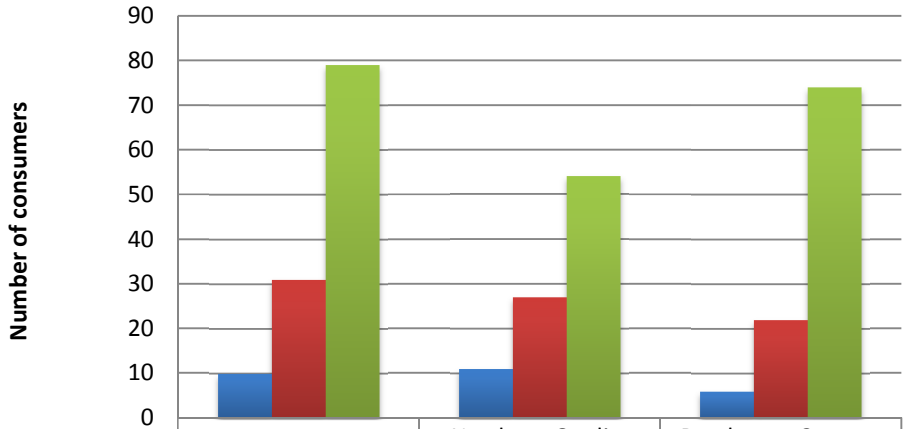


When purchasing processed lamb or chevon, 39% preferred fresh for use day of, whereas 17% preferred whole cut wrapped and frozen. 43% had no preference when purchasing processed lamb or chevon. A problem which arose during the initial survey production was the wording of this question. "Fresh vs. frozen" did not appeal to many of the initial responders when comparing the basic word choices. For this reason, "fresh for use day of" and "whole cut wrapped and frozen" were incorporated into the survey to clarify what fresh, and frozen, was. Mathematically speaking, this could adjust the responses up to 15%. However, almost half of all who responded had no preference. The verbal reasons frequently contained difficulty in finding lamb or chevon, and thus purchasing whenever possible.

A majority (61%) of those who answered would purchase locally raised lamb and goat directly from the farmer. Also, 41% of all who responded would purchase directly from Northern Quality Meats if it were available. Another 56% of all respondents would purchase directly from the butcher or grocery store.

Chart 3.13 Purchase location preference

130 respondents

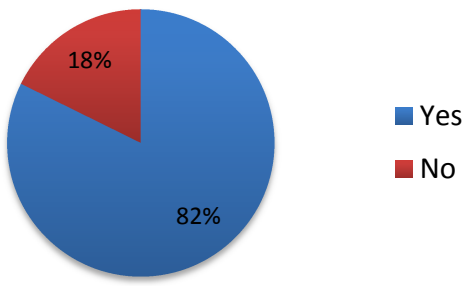


	The farmer	Northern Quality Meats	Butcher or Grocery Store
Would not purchase	10	11	6
Maybe - would purchase	31	27	22
Definitely - would purchase	79	54	74

Finally, an overwhelming majority of consumers are willing to pay a premium for locally raised lamb and goat products (where local was defined to be within the Algoma District).

Chart 3.14 Pay a premium for local

130 respondents



Many consumers discussed difficulty in purchasing directly from the farmer, where delivery

may be a needed option, as well as hours may need to be flexible. Overall, there are many who would like to see local lamb and chevon on the shelves of local grocery stores and butchers, even if it means paying a premium. Roughly the same percentage of those who were not willing to pay a premium to guarantee local, felt that price was very important in the prior preferences.

6.0 Situational Analysis

6.1 Porter's 5 forces model

Power of suppliers: The rising cost of inputs (fertilizers, feed, and fuel) is a threat for local farmers. There is room for choosing local feed sources that can reduce cost; farms can co-operatively source feed together to reduce costs.

Power of customers: The consumer is willing to pay a premium for locally produced meat. However, a butcher or intermediary may not be willing to pay a premium price for whole animals. If an intermediary is a major pressure, other alternatives to sourcing lamb and goat will be necessary (direct marketing or frozen processed cuts at retail).

Threat of new entrants: Wholesale competitors like Sysco can affect future profitability of this venture (Sysco is now sourcing regional products). Without value-added attributes, there is a higher threat of new entrants. New entrants can also be farmers who are entering the market outside the co-operative, which can adversely affect profitability. A marketing co-op that unifies multiple farmers through a strong vision, can build a stronger barrier against new entrants.

Threat of substitute products: A buyer may substitute lamb or goat with beef or chicken. The willingness to substitute may affect certain market segments more than others. The decision to switch may be due the price a customer is willing to pay. Depending on the location of the product, it will be easier or more difficult to switch to a substitute. In a butcher shop, a customer has a wide array of selections in front of them. At a farmers' market, the selection may be increasingly limited. A marketing co-op that serves multiple products (beef, pork, lamb) at one location is better positioned to avoid product substitution.

Competitive rivalry within an industry: Local lamb and goat farmers have a competitive advantage over major competitors that mainly import from abroad. However, the major competitors have an advantage of having a stable supply that can service major retailers while offering a lower price.

6.2 PEST analysis

Political	**Economic**
- Municipal support for agriculture, including support for developing farmers markets. - Provincial support through funding that includes the Ontario Market Investment Fund and Broader Public Sector Investment Fund. - Federal support through Community Futures Program, which has small grants for community initiatives (East Algoma Community Futures Development Corp. Discretionary Fund)	- Agricultural community in Algoma is in flux; diversification and value-added products are becoming more important in growing the sector. - Potential for more producer co-operatives - Cash and specialty crops and specialty livestock are increasing - Algoma ranks third in farm receipts - Growth in the market for lamb and goat products due to the arrival of new immigrants
Social	**Technological**
- Succession is a concern among farmers in Algoma; the next generation does not want to continue farming lifestyle. - Over 52% of farmers have off the farm jobs (less time for volunteer efforts) (Harry Cummings and Associates Inc., 2009) - First Nations, Amish, and Mennonite communities are increasing - Cultural factors in sourcing lamb and goat for religious festivals	- New goat research (Centre of Excellence for Goat Research and Innovation) centre in Peterborough underway to study animal health, breeding, and nutrition - New technologies make it possible for enhanced traceability of product from farm to plate. - Social media and internet drives interactions with younger demographic

6.3 SWOT analysis

Strengths	**Weaknesses**
- Local abattoir allows religious practice slaughtering - Diverse range of farmers (young, hobbyists, and experienced) - Some restaurants and butchers have working relationships with lamb and goat farmers - Experienced lamb farmers with knowledge to share - Willingness to work together for a common goal (marketing co-op or collective) - Farmers are already working together through referrals and direct marketing; at farmers markets; and through intermediary businesses (Penokean Hills Farms) - Available kids year round	- Goat use is marginal; a lot of local people who haven't tasted - Distance from bigger markets (Toronto) - Negotiating a consistent price can be a challenge - Breeding stock not locally available - Limited availability of marketable lambs available in the spring - Transportation and delivery costs are high - Abundance of predators - Not a lot of time for marketing - Need for more training - Unknown size of the market - Abattoir prices are high - Limited availability of medical supplies in Sault area
Opportunities	**Threats**
- Growth of ethnic markets (Muslim, Caribbean, African and Indian) and a strong Italian population in SSM - Marketing through Buy Algoma. Buy Fresh. And Northern Ontario Agri-Food Education and Marketing (NOAFEM) - Training opportunities on nutrition and disease management - Niche market for value added meats: health benefits of grass-fed; antibiotic and hormone free. - Sudbury market (Eat Local Sudbury Co-op is looking for suppliers) - New Indian restaurants and caterers in the area (Rasoi, Husky, Bruce Mines) - Greater desire for processed cuts, rather than whole carcasses	- Rising feed costs - Rising energy costs for inputs and transportation of final product - Not enough demand for a marketing co-op to be feasible. - Sault market may not be big enough for the effort - Not having a consistent product throughout the year - Goat and lamb are not requirements, but are nice for special occasions - Competition from within and not farms working together - Competition from importers (New Zealand and Australia) and from Southern Ontario. - Loosing connection with consumer if another entity is developed

6.4 Critical issues

- Choose value-giving characteristics and develop common protocols and vision
- Create awareness that lamb and goat is available among multiple market segments
- Develop knowledge of lamb and goat producers for healthy animals, safe practices and business development
- Involve butchers, restaurants and retailers in the process of market research and development (pricing, sourcing and branding)
- Become economically viable. To break-even and provide extra income for the marketing co-operative, a pricing structure would need to be developed.

7.0 Market strategy

7.1 Segmentation

1) The locavore

- Empty nesters or married couples with university-aged children
- Live in urban or suburban neighborhoods
- High income
- Higher rate of university degrees
- Price is less of a critical factor in purchase decision
- Exhibit cultured sensibilities in the market
- Interested in Buying Local or the 100 Mile Diet
- East end Sault Ste. Marie

2) The emerging locavore

- Interest in eating new ethnic foods
- Interest in health benefits
- Price sensitive
- New homeowners or renters
- Interest in fitness, organized team sports
- Low-Mid income

3) **Ethnic market:**
   - Diverse: young families, professionals, international students
   - Connected to New to the Sault, multicultural associations, and student groups at Algoma University
   - Price sensitive
   - Some restaurant owners

7.2 Targeting

1) **Near empty nests:** Nearly empty nests are generally married couples over 45 years old whose children either still live at home or have gone off to school. This segment has a higher rate of obtaining university degrees and has higher incomes. This segment is represented between ages 40 and 55.

Consumption habits: This market segment is an avid visitor to specialty butcher shops, especially in the east end, downtown, and west end of Sault Ste. Marie (Scale Meats, Prime Cuts, City Meat Market and Paesano's). Since this segment frequents grocery stores, it would be advantageous to develop a relationship with Pino's or Rome's. This market segment is also a visitor to farmers' markets (Algoma & Johnson Township) and health food stores (Country Way & Tamarack). Other businesses and practitioners that could be made through this segment include naturopathic doctors, caterers and restaurants. The segment has cultural sensitivities for ethnic foods including Indian food restaurants (Husky House Northern Restaurant, Rasoi catering) and restaurants such as: Panna Bar & Grill, Embers Grill & Smokehouse, Solo Trattoria, and Gliss Resto-bar. Examples of restaurants that serve lamb into this segment include Arturo's Ristorante, A Thymely Manner, Fresco, Red Top Inn, and View Restaurant & Bar (Delta Hotel).[1] Some consumers in this group are price-sensitive with a fondness for buying clubs, loyalty programs or warehouse clubs.

Media and events: This market segments media habits include print (Sault Star, Toronto Star, The Sentinel, Sault This Week), broadcast (Q104 radio, Mix 100, CBC, CTV), magazines (Our Homes Magazine) and direct (brochures, flyers). Cross promotional forms of

[1] Additional restaurants and their contact information are included on Appendix 5 Contact List

media include the Buy Algoma. Buy Fresh. brochure; Northern Ontario Agri-Food Education and Marketing Boreal Harvest Art & Farm Tour brochure and participation in festivals. Festivals and events that would reach this target segment include Ontario Winter Carnival Bon Soo (Feb), Hilton Beach Summer Festival (Aug), SSM Chamber of Commerce's Spring Expo 2012 (Oct), Rotaryfest (July), Sault Area Hospital Foundation's Chilifest (Sept), and the Green Expo (July). Festivals and events that would reach this target segment include Algoma Fall Festival (Oct), SSM Chamber of Commerce's Northern Ontario Business Awards (Oct), New to the Sault's Passport to Unity (May) and Shadows of the Mind Film Festival (Feb).

Organizations in this segment that support smaller events include the following: Sault Ste. Marie Horticultural Society (Harvest Supper, Seedy Saturday), Club Calabrese Sault Ste. Marie, Slow Food Sault Ste. Marie, Algoma Farmers' Market and the Johnson Township Farmers' Market. [2]

Interests: This segment has high rates for going to casinos, the movies, Greyhound games and festivals. This market segment may belong or volunteer with various social clubs (Slow Food, Club Calabrese, Moose Lodge), non-profits (Clean North, SSM & Area Arts Council, Ermatinger Clergue), hobby-based groups (gardening, art guilds), sports teams (curling, hockey, bowling, or baseball leagues), or other physical activity clubs (jogging, aerobics, golf, swimming, Tai Chi, Yoga, x-country skiing). These types of groups host annual events for fundraising, which in some cases include dinners. Those in this segment take pride in healthy lifestyles. Professionals in this segment are also politically active, work on community projects, serve as volunteers and give to philanthropic causes. They go to the theatre, symphony and art gallery. At home they listen to read a lot and listen to music on the radio. This group exercises their social conscience with their time and money.

2) **The emerging locavore:** This segment is comprised of young families or singles that are between the ages of 25-35.

[2] Organizations and their contact information are attached as Appendix 5 Contact List

Consumption habits: This market segment mainly shops at grocery stores or bulk food stores and are not frequent visitors to butcher shops. This is mainly due to the fact that this segment has less buying power when shopping for food. Increasingly this segment is a visitor to farmers' markets and is drawn to the idea of Community Shared Agriculture. This segment has taken a strong interest in trying new things, including ethnic foods; especially Indian, Middle Eastern and Caribbean. Some restaurants that source these foods include Shawarma Shack, Frank's Food Co., Eleven Bistro & Bake Shoppe and other Indian restaurants that were noted above.

Media and events: This market segments media habits are mostly online through such mediums like Facebook, Twitter, blogs and news sites. To reach the segment through social media, this segment will join Facebook fan pages (such as www.facebook.com/buyalgoma) to get information. This segment also follows Twitter accounts to get real-time information and news. This segment also visits blogs and news sites to get news; in Sault Ste. Marie, these sites include Local 2 and SooToday. Other media habits include magazines (The Fresh Magazine, Snap!) and TV & radio broadcast. This segment is also drawn to events like Shadows of the Mind, Rotaryfest, Bon Soo, Passport to Unity, and Buskerfest.

Interests: This segment is a frequent visitor to the local theatre, bars (LopLops), nightclubs and concerts. This segment will also seek out cross-cultural activities like dance performances, art openings, music festivals and community theatre productions. This segment likes to remain physically active through sports or aerobics.

3) Ethnic market (Indian, Middle Eastern, African, Caribbean and Latin American)

The ethnic market is remains to be unknown in its preferences since there is a high degree of variation. There is a lack of up to date data on Stats Canada from 2006 census to fully understand this segment. There are few organizations in Sault Ste. Marie with access to this segment through immigration and settlement services.

New to the Sault: New to the Sault is a one-stop service centre dedicated to assisting newcomers and immigrants to Sault Ste. Marie

with their settlement and integration needs through a variety of services and programs. New to the Sault works closely with its partners in the community to offer newcomers a support network and assist with locating community information and resources to allow newcomers to smoothly integrate into the community. Every year New to the Sault hosts Passport to Unity (May 4-6, 2012), an annual multicultural festival, aimed at bringing the community together to celebrate and discover diverse cultures and traditions that exist within the city.

Similar organizations that branch between diverse cultures include the Algoma Latin Association, Algoma Multicultural Centre, the Local Immigration Partnership and the African Canadian Association of Northern Ontario. New to the Sault has offered tours around Sault Ste. Marie for different events and attractions.

International students: At Algoma University and Sault College, there is a growing rate of international students from all over the world. The Algoma Multicultural Students Association (AMSA) is run by and for international students at Algoma University. In the past this student group has supported World Religion Day (January), Diwali Dinner (November) and has held various fundraisers with diverse foods.

8.0 Implementation

8.1 Summary

1) **Broaden relationships with northern Ontario lamb and goat farmers**
2) **Encourage lambing and kidding in the winter months**
3) **Educate and train new and young farmers through OMAFRA and OSMA programs**
4) **Develop lines of grass-fed lamb and chevon products or antibiotic and hormone free lamb and cheveon products**
5) **Develop closer direct market relationships from farm to consumer**
6) **Supply restaurants and caterers that can promote local lamb and goat farms**
7) **Monitor and increase supply of lamb and goat to local butchers**

8.2 Recommendations

1) **Broaden relationships with Northern lamb and goat farmers**

   Growing the market for lamb and goat products in Northern Ontario will inevitably lead to increased competition between regions who can supply the market. Other producers in Manitoulin, Sudbury and North Bay/Temiskaming should be engaged in this dialogue. Just like local lamb and goat producers, these other producers face similar challenges. For example, most of these producers use regional provincially inspected abattoirs in Northern Ontario. These producers may also have knowledge on raising lamb and goats in the harsh Northern climates. It would be beneficial to do an environmental scan using similar survey methods that were used for this research project. It would be useful to share best practices in marketing, breeding and nutrition amongst Northern producers.

2) Encourage lambing and kidding in winter months

In order to meet a consistent supply throughout the year, there is a greater need to lamb year round. Lambing year round will ensure that there are marketable lambs available in the spring (Easter) months for holiday feasts. The inability to lamb in summer months could be due to different factors such as survivability in the winter. To overcome this challenge, farms may need to improve their ability to keep lambs warm throughout the year through heated barns. Each individual farmer would need to develop a business plan to determine how many marketable lambs they would need to sell in order to maintain and construct a heated barn. This cost/benefit analysis on heated barns would need to be done in order to justify the capital expenditure. There are already four farmers who have the capacity to have marketable kids in the spring. A co-operative can facilitate the varied scheduling of marketable lambs and kids throughout the year.

3) Educate and train new and young farmers through OMAFRA and OSMA programs

Greater confidence in selling lambs and goats is growing in the Algoma District. This growth can be attributed to the growth of Mennonite producers in the Algoma District. The growth can also be attributed to an increasing number of young farmers starting farm operations. With an increase in numbers sold, more training on direct marketing, nutrition and feeding will be required.

4) Develop line of antibiotic and hormone additive free lamb and goat products

Antibiotic use was a concern among one producer who did not want to be involved in a co-operative that sold animals that were injected with antibiotics. However, a few surveys state that antibiotics are rarely used if at all; most are used in situations with sick animals.

The majority of consumers have requested an antibiotic free product. Lamb purchasers felt that antibiotic free is important (30%) or very important (48%); while goat purchasers felt antibiotic free meat is important (30%) or very important (50%). These preferences can be due to food safety concerns, animal treatment concerns, or information through the media. Guaranteeing antibiotic free meat can draw significant value to the average consumer. Of the producers surveyed, nine producers do not use antibiotics so making a transition away from antibiotic use may not be a difficult task.

Penokean Hills Farms is an example of a group of producers who've marketed local beef that is free of antibiotics and growth hormones. They have started to market lamb as part of their selection of products. It would be advantageous for lamb and goat producers to partner with Penokean Hills Farms since their product name has been marketed throughout Algoma District since 2007.

5) **Develop closer direct market relationships from farm to consumer**
    a. Pilot test a Community Shared Agriculture program for small ruminants and other meats (beef, pork) through Northern Quality Meats.
    b. Pilot test lamb and goat products at Algoma Farmers' Market
    c. Develop farm tours with New to the Sault, Algoma University, Algoma Food Network, and farmers' markets
    d. Support events that bring farmers and consumers together; such as, sponsoring meals where product can be served with marketing materials
    e. Market through direct marketing initiatives such as Buy Algoma. Buy Fresh. or Ontario Farmers' Markets
    f. Develop branded marketing materials for small ruminants including brochures and stickers for promoting local lamb and goat.
6) **Increase supply of lamb and goat to restaurants and caterers that promote local farms**
7) **Increase supply of lamb and goat to local butchers**

9.0 Control and feedback

Customers should be given the opportunity to give feedback on the lamb and goat products they consume. Customers can provide this feedback to the butchers or restaurants who can relay the information back to the farmer. Feedback mechanisms for direct marketing between farmers and consumers can be developed through tracked email campaigns (e.g. www.MailChimp.com) and social media interactions (Facebook and Twitter). Coupon books or direct mail campaigns can also be used in coordination with restaurants and butchers to promote products and track interactions with different segments of customers. Once used, coupons can include spaces to include email addresses or postal codes to track the location of customers. Another consideration is installing a traceability system at the abattoir, Northern Quality Meats to track inventory and sales. The

Traceability Foundations Initiative[3] is an initiative from the Ontario Ministry of Agriculture, Food and Rural Affairs to enable farmers and processors to follow products through the various stages of the agri-food value chain.

[3] http://www.omafra.gov.on.ca/english/food/foodsafety/grants/index.htm

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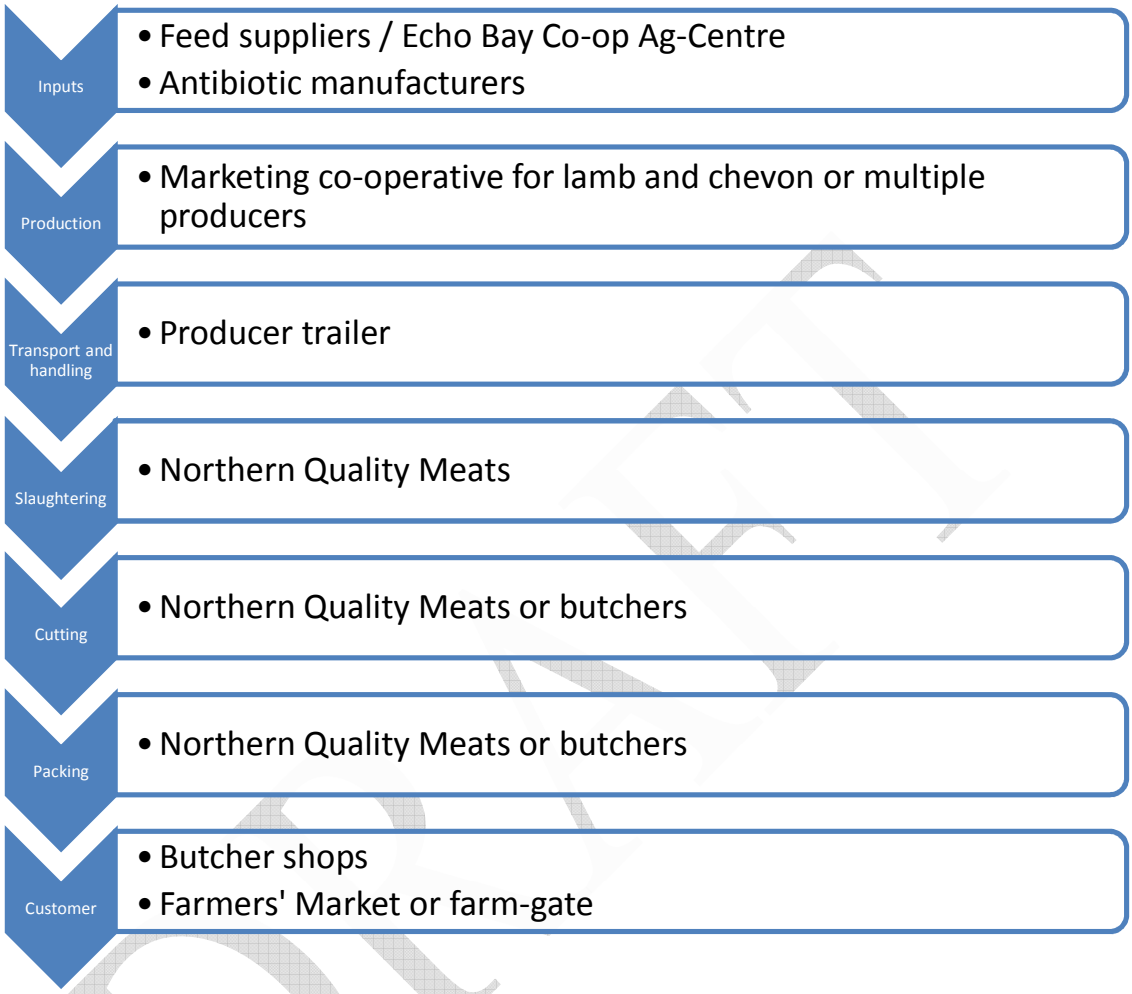
Appendix 1 – Current value chain



Appendix 2: Sheep and Goat Breeds

Sheep Breeds

1. Terminal or Sire Breeds: These breeds are generally characterized by rapid growth, muscularity, and good carcass traits. Reproductive performance may be somewhat lower than in the maternal breeds.

Terminal sire animals are used for the purpose of producing a market lamb. The focus here is on the frame of the animal and weight of gain. The female offspring from terminal sires are not usually kept on as replacement ewes as the qualities sought for replacement breeding animals are not those expressed by terminal sires.

If you are in the early stages of building your flock you may wish to build up your maternal qualities to grow the foundation of your flock and then focus on terminal sires for producing market animals.

You also have the option of splitting the flock and using different rams for the two purposes. You would place a ram of the maternal breeds with your best maternal ewes and keep the best replacements from this group. For the second group you would select a terminal sire breed for a ram and then market all the resulting offspring from this group.

Some examples of terminal breeds are: Texel, Suffolk, and Charollais

2. Maternal Breeds: These breeds tend to have higher fertility, increased number of multiple births, higher milk production, increased longevity, and mothering ability. However, they tend not to be as large or well muscled as the terminal breeds.

It is a good idea to keep in mind the breeds that show a tendency to have strong maternal traits since **one or more of the maternal breeds will often make up the breeding animals in a flock.**

The maternal breeds will express characteristics such as strong bond to lambs, will keep track of their lambs and keep them close by, lamb easy, attend to newborn lamb immediately, good milkers (not heavy milkers necessarily), raise lambs with vigor.

Some examples of maternal breeds are: Dorset, Outaouais-Arcott, and Romanov

3. Dairy Breeds: These breeds have been specifically selected for high milk production. The milk from ewes is mainly used to produce cheeses, such as feta, ricotta, and Camembert. Examples of dairy breeds are: East Friesian and British Milk Sheep.

4. Wool Breeds: Different breeds have different types of wool. Although the production of various items requires the use of different types of wool, some breeds have become known as 'wool breeds' in light of the fact that their wool may be highly valued in specialty markets. Examples of these breeds are: Icelandic, Merino, and Shetland.

Source: informedfarmers.com

Sheep Breed Matrix

Breed	Primary Use	Breed Type	Physical Traits	Wool Type	Hardiness	Mature Size	Growth Rate	Prolifacy	Breeding Season*
Arcott	Meat Wool	Terminal sire	White faced	Medium	High	Medium	High	Medium	Long
Rideau-Arcott	Meat Wool Milk	Maternal	White/ mottle-faced	Medium	Moderate	Medium	Moderate	High	Long
Outaous -Arcott	Meat	Maternal	White/ mottle-faced	Medium		Medium		High	Long
Chevret	Meat Wool	Maternal	Polled and bare faced	Medium	Moderate-high (able to maintain body condition on grass alone)	Small	Low	Moderate	Short
Suffolk	Meat	Terminal Sire	Head/legs black; fleece white with some dark fibres	Medium	Low	Large	High	Moderate	Short-Moderate
Dorset	Meat and wool	Maternal	Horned or polled; all-white (very white fleece)	Medium	Moderate	Medium	Moderate	Moderate	Long

* Breeding Season: Long= 6-8 months; Moderate=4-6 months; Short=<4 months

Goat Breed Matrix

Breed	Primary Use	Physical Description	Fertility	Growth Rate
Boer	Meat – typically raised on pastures.	White bodies with red heads Horned Lop ears	Good	High
Boer/Nubian	Meat Milk	White bodies with brown heads Long pendulous ears	Good	High
Kiko	Meat—does not require feed supplementation to reach mature weight (very hardy breed requiring little producer input)	Large framed Generally white coated Horned	Good	High

Appendix 3: Consumer Survey

Q1) Do you purchase lamb or chevon (meat goat) products?

☐ just lamb ☐ just chevon ☐ both lamb and chevon ☐ neither

Q2) Where do you purchase lamb or chevon? You can name a restaurant, a butcher, a grocery store…etc

_____
_____
_____

Q3) What is your age range?

☐ under 21 ☐ 21-30 ☐ 31-40 ☐ 41-54 ☐ 55+

Q4) Where do you reside?

☐ East end of Sault Ste. Marie ☐ Downtown Sault Ste. Marie
☐ West end of Sault Ste. Marie ☐ Central Sault Ste. Marie
☐ Other area within Algoma District ☐ Outside of Algoma District

Q5) When do you purchase lamb or chevon? You can select more than one answer.

	Lamb	**Chevon**
holidays	☐	☐
special events	☐	☐
seasonal	☐	☐
anytime of the year	☐	☐

*If you selected special events, please specify: _____
_____
_____

Q6) What best estimates how often you eat lamb or chevon?

	Lamb	**Chevon**
do not eat lamb and/or chevon	☐	☐
once a year	☐	☐
a few times a year	☐	☐
once a week	☐	☐
more than once a week	☐	☐

Q7) How important are the following when purchasing lamb or chevon?

	Not important	**Neutral**	**Important**	**Very important**	**No preference**
price	☐	☐	☐	☐	☐
quality	☐	☐	☐	☐	☐
anti-biotic free	☐	☐	☐	☐	☐
hormone free	☐	☐	☐	☐	☐
close-to-organic	☐	☐	☐	☐	☐
organic	☐	☐	☐	☐	☐
corn-free animal feed	☐	☐	☐	☐	☐

Q9) Do you prefer purchasing a live lamb or goat, or do you prefer processed? You may select both answers.

- ☐ a live lamb or goat → if you selected this, answer BOX 1 (below)
- ☐ processed lamb or goat → if you selected this, answer BOX 2 (on the next page)

BOX 1 (*complete this only if you prefer purchasing a live lamb or goat*)

B1A) When buying a live lamb or goat, how important is the weight?

	Not important	Neutral	Important	Very important	No preference
The weight is:	☐	☐	☐	☐	☐

B1B) What weight do you prefer when buying a live **lamb**?

☐ up to 59 lbs ☐ 60-74 lbs ☐ 75+ lbs ☐ no preference

B1C) What weight do you prefer when buying a live **goat**?

☐ up to 34 lbs ☐ 35-59 lbs ☐ 60+ lbs ☐ no preference

B1D) Are there any other conditions that are important when buying a live lamb or goat?

Please list them here:

_____
_____
_____
_____

BOX 2 (*complete this only if you prefer purchasing processed lamb or goat*)

☐ loin ☐ cubed
☐ shoulder ☐ ground

B2B) If purchasing processed **chevon**, what cut(s) do you prefer?

☐ ribs ☐ whole carcass
☐ leg ☐ half carcass
☐ shoulder ☐ cubed
☐ foreshank/breast ☐ ground

B2C) When purchasing processed lamb or chevon do you prefer fresh for use day of, or whole cut wrapped and frozen?

☐ fresh for use day of
☐ whole cut wrapped and frozen
☐ no preference

B2D) Are there any other conditions that are important when buying processed lamb or chevon?

Please list them here:

_____
_____
_____
_____

Q10) Would you purchase locally raised lamb or goat directly from:

	Definitely - would purchase	**Maybe - would purchase**	**Would not purchase**
the farmer?	☐	☐	☐
Northern Quality Meats?	☐	☐	☐
the butcher/grocery store?	☐	☐	☐

Q11) Would you be willing to pay a premium to guarantee locally raised lamb or goat?

☐ Yes ☐ No

_____*end of survey*

Q2) Please estimate the number of marketable **lambs or kids** you plan on owning in 2011-2013.

2.A) **LAMBS**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would be ready for market.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

2.B) **MEAT GOATS (CHEVON)**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would ready for market.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Q3) Please select the months when you plan on lambing/kidding.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Would you be flexible to lamb/kid year round? **Yes** / **No**

Q4) Please estimate the number of older **Ewes/Does** & **Rams/Bucks** you plan on **cull/selling** in 2011-2013.

4.A.1) **OLDER EWES**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would be culled.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

4.A.2) **OLDER DOES**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would be culled.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

4.B.1) **OLDER RAMS**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would be culled.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

4.B.2) **OLDER BUCKS**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would be culled.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Q5) Please estimate unbred yearling **Ewes/Does** you plan on **cull/selling** in 2011-2013.

5.A.1) **UNBRED YEARLING EWES**

2011: ____ **2012**: ____ **2013**: ____

A) Please estimate the *average age* (_____) and *average live weight* (_____) at time of sale.

B) Please circle the month(s) when they would be culled.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

B) Please circle the month(s) when they would be culled.

Jan	Feb	Mar	Apr	May	Jun
Jul	Aug	Sep	Oct	Nov	Dec

Q6) A) Please select the **lamb's** feed *before* and *during* finishing.

Before finishing	**During finishing**
Wheat___ Barley___ Corn___	Wheat___ Barley___ Corn___
Grass-fed __ Pelleted___ Milk___	Grass-fed __ Pelleted___ Milk___
→*How much ____% is **local** content?*	→*How much ____% is **local** content?*

B) Please select the **meat goat's** (**chevon**) feed b*efore* and *during* finishing.

Before finishing	**During finishing**
Wheat___ Barley___ Corn___	Wheat___ Barley___ Corn___
Grass-fed __ Pelleted___ Milk___	Grass-fed __ Pelleted___ Milk___
→*How much ____% is **local** content?*	→*How much ____% is **local** content?*

Q7) Do you currently use any hormones and/or anti-biotics? Please explain.

_____

_____

_____

Q8) Are the sheep/goats *confined*? Confined___ Pasture___ Both___

Q9) Do your sheep/goats live in close proximity to other farm animals? **Yes** / **No**
If *yes*, please list the animals. _____
_____

Q10.A) Please circle where you prefer selling **finished young stock**:
[Direct to customer] | *[Local wholesale]* | *[Stockyard/contracts]* | *[No preference]*

Q10.B) Please circle where you prefer selling **cull stock**:
[Direct to customer] | *[Local wholesale]* | *[Stockyard/contracts]* | *[No preference]*

Q11) Would you be flexible on a set price for selling lamb & goat meat? **Yes** / **No**

Q12) Would you be interested in participating in a market-based co-operative for selling lamb and goat meat into the local or regional market? **Yes** / **No**

——————— ***end of survey*** ———————

Please list any other comments below. *(Also, feel free to expand on any question.)*

_____

_____

_____

_____

_____

_____

_____