

Acknowledgements

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Foreword

Farm Foundation is a catalyst focused on economic and policy issues facing agriculture, the food system and rural communities. Unlike many nonprofits and nongovernmental organizations, we do not advocate, lobby or press a point of view. We create opportunities for industry, community, government and academic leaders to meet, learn and converse in an agenda-free environment. Our 70-year history of objectivity gives us the ability to engage diverse viewpoints and encourage dialogue among individuals and groups with different agendas.

In March 2004, Farm Foundation proposed a comprehensive, objective analysis of the future of animal agriculture in North America. Discussions with industry, government and academic leaders led to an industry roundtable in December 2004 and the initial project Steering Committee meeting in March 2005. These early discussions delineated four objectives for this effort:

1. Provide industry, government and community leaders with useful information targeted to the issues the animal agriculture industry will face in the near future;
2. Identify gaps in our knowledge and develop an agenda for research and education to fill those gaps;
3. Communicate key findings to the media and opinion leaders to increase public awareness and understanding of these issues; and
4. Engage private- and public-sector decision makers to address these challenges with innovative business strategies and public policies.

This report examines the opportunities and challenges facing North America's livestock sector, the driving forces behind these opportunities and challenges, and their potential consequences over the long term. This report proposes key policy alternatives and business strategies for change and analyzes their potential impacts on key stakeholders. It identifies the gaps in our knowledge and sets forth a research and policy agenda for the future. The objective is to give all stakeholders a clear understanding of the current state of the industry, a glimpse into the future, ideas

for change and their potential consequences, and an inventory of issues that need further research, industry actions or government policy.

This is a North American report examining the animal agriculture industry in all three NAFTA countries. It identifies issues that are common to all three countries and areas where there are different concerns and approaches. The report explores the integration of the industry across borders since the implementation of NAFTA and the factors that continue to enhance or impede trade. However, it does not recommend specific solutions to border issues.

The focus is on major animal segments of the North American food system—beef, pork, dairy and poultry. There are references to sheep and goats in the report, but, due to the relative size of these sectors, they are not the subject of significant analysis. The emphasis is on domesticated animals in the food system, not companion animals or minor species raised for recreation or public display.

This report results from a partnership between Farm Foundation, government agencies, industry groups, other nonprofit organizations and foundations, and the academic community. A diverse Steering Committee provided guidance and direction. Seven working groups headed by academic experts and composed of industry, government, nonprofit and academic leaders did the bulk of the analysis and writing. More than 150 individuals from Canada, Mexico and the United States actively participated in the development of this report.

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- American Farm Bureau Federation
- Canadian Cattlemen's Association
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- United Soybean Board

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