

List of *Threats* to Forage Industry from Stakeholder Forum (November 20-21, 2008):

- State of livestock industry and impediments to their profitability (ex. COOL, BSE)
- Recent increase in grain/oilseed prices – competes for land use
- Declining hay yields
- Reduced investment in research and development of forages
- Urban sprawl (competing land use)
- Misinformation at consumer level, policy maker level, lobbyist level
- Wheat as king mindset in Saskatchewan
- Lack of policy, incentives and resources for producers and producer groups
- Resource extraction (mining, oil and gas, etc..)
- Changes to annual cropping systems (crop residues cause problems when seeding subsequent forage crop)
- Diversity of industry, fragmentation, segmentation of sectors, lack of a common voice
- Biofuel policy-subsidizes annual crop production
- Regulation burdens
- Negative attitudes and aversion to change
- Lack of understanding of true cost of production figures
- Prices not always reflective of costs
- Declining cow numbers and herd numbers
- Time
- Lack of market and production data
- Transportation costs
- Lack of processing and manufacturing facilities
- Lack of consistent message from government (provincial and federal – change every four years, or less!)
- Market access (domestic and international)
- Low population density in Saskatchewan and prairies in general
- Competition with other industries for labour and supplies
- Problems defining and valuing ecological goods and services
- No forage levy – lack of industry investment
- Lack of partnerships with other industries
- Trade restrictions (interprovincial and international)
- Loss of sensitivity to rural issues, lack of connection to the farm/land from general population
- Lack of irrigation infrastructure
- Restricted perception/definition of forages
- Lack of understanding of risk management tools
- Inefficient handling and storage of forages
- Lack of innovation in forage harvesting equipment and methods

List of *Opportunities* to Forage Industry from Stakeholder Forum (November 20-21, 2008):

- Wide spread shortages of hay
- Nutraceuticals
- Public concern over the environment and the perceived/reality of “green” forages
- Ecotourism, recreation, parks, hunting
- Feeding livestock (grazing, backgrounding with forages, grass finished beef), free range poultry and hogs, bison
- Mitigation of climate issues
 - Carbon sequestration
 - Nutrient cycling
 - Water filtration
 - Drought management
 - Erosion reduction
 - Greenhouse gas reductions
- Nitrogen fixation
- Phosphorus recovery
- Reclamation, remediation uses
- Immigrant food culture
- Organic production – forages and livestock
- Broad number of ecological goods and services (possibility for economic compensation to producers)
- Renewable manufacturing (fibre, textiles)
- Renewable/cleaner energy (biofuel, ethanol, heating for homes)
- Biodiversity – untapped genetic diversity
- Habitat provision for wildlife, birds, pollinators
- Improvement of water quality and protection of source water
- Improved air quality (reduced erosion, oxygen production, carbon dioxide use)
- Spinoff for many other industries including manufacturing and processing
- Link to local food production
- Ceremonial or cultural uses and importance
- Lifestyle benefits
- Craft supplies (ie. Dried plant material)
- Carbon credits and offsetting
- Promoting health benefits of livestock and food products that use forages as a feed source
- Crop livestock interface (grazing of crop residues, legumes in crop rotations, feeding of crop byproducts)
- Export markets
- Xeriscaping and landscaping
- Improved use of current grazing resources through improved management
- World population growth has increased demand for food

- Use of annuals for forage
- Development of perennial cereal/oilseed varieties