

# Ontario Game Meat Industry

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### Research Overview

Over past few months I have interviewed multiple chefs, butchers, farmers, and distributors from the south-eastern part of Ontario about the use of Ontario Game meats. They each give me their insight into the industry. I have taken what I learned from each person plus some secondary research methods to write a research paper focusing on the supply-chain of Ontario Game Meats. I will look at what game meat is, game farms, abattoirs, distribution methods, and restaurant/consumer trends. The information presented in this paper is accurate to the primary research that was conducted; however, there may be others whose situations differ from what is described.

### What is Game Meat?

Game meat is any meat that comes from an animal that is hunted for sport or food. However, game meats that are served in a restaurant are not the same because the animals are raised on a farm instead of being wild. There is a difference in taste between farm raised vs wild game due to the food the animals receive on the farm. However, only farmed animals are allowed to be served on menus due to health regulations. Game meat is any animal outside of the traditional three: chicken, beef and pork. Appendix A has a chart that covers the difference between game and traditional animals. The reasoning behind this is that these three meats dominate grocery store meat cases and are what customers are used to seeing on menus and cooking at home. While there are game animals that are becoming more popular, they are still game and should be classified as such.

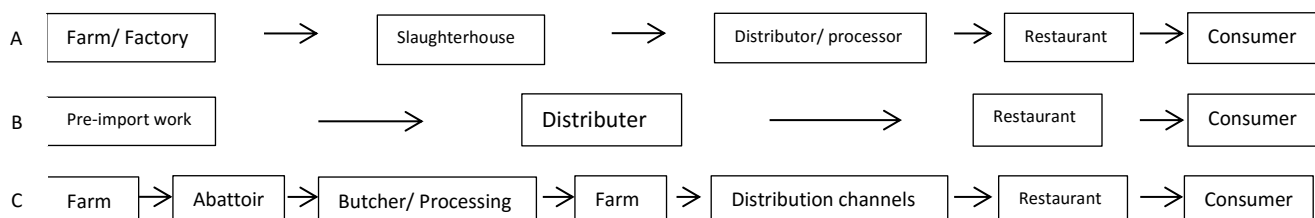
### Difference from Traditional

Game meat is different from the traditional three due to many reasons. One of the biggest differences is that the average person can cook the traditional three at home, while not many people can cook game. Game meats require different cooking methods and these skills are generally learned from someone who understands them. Game meat is harder for a consumer to purchase for home as local grocery stores only offer traditional three plus some common game (duck or lamb). One of the

biggest differences is how the supply chain operates and the increased responsibility that falls onto the farmer.

### Comparing Supply-Chains

Below are three flow charts that outline the three different supply chains that exist within the meat industry. The first one is the traditional chain where the animal is sold to the slaughterhouse who then sells the meat to a butcher. The main reason behind this is that traditional animals are usually grown on large scale production and it is easier for the farmer to sell the animal to the slaughterhouse then have to find a distributor/restaurant to take the product. The second chain looks at non-Ontario farmed game meat. This meat is brought in by larger distributors who do little or no work on the product before shipping to the restaurant or retail. Meat is imported in because it can be of better quality or price compared to local animals. The third chain looks at Ontario farmed game meat. This is the most complicated supply chain because the farmers are more involved in the selling and distribution process.



A. Is the traditional chain, B. Is the Non-Ontario Game chain, and C. Is Ontario Game Chain

### *On the farm*

#### Why Game?

There is difference between a farmer raising pork, beef or chicken and raising game meats. Getting into farming game is not a spontaneous decision as the game market is less stable compared to traditional. Understanding this, why do farmers choose game animals? One reason is the independence that is associated with these animals (Farm S. K., 2015). There are a limited number of game farmers in Ontario, leading to no set price, no one telling them how to raise the animals or how to care for them.

These farmers enjoy this independence as they directly control their success. As a game meat farmer you are able to set the price and if a customer does not want to pay it then you can feel comfortable turning away that business (Farm S. K., 2015).

Game farmers also slaughter around their schedule (to the extent possible when working with an abattoir) not a restaurants. Game farmers also slaughter around their schedule. When slaughtering large animals if freezers are full and there are not enough fresh orders to use the whole animal then the farmer will delay slaughter (Farm S. K., 2015). This shows the power that farmers have over their customers. These two aspects together lead to a stable business compared to traditional farmers who can have highs and lows from year to year.

#### Challenges Associated with Game

There are challenges that face game farmers just like any other farmer. One of the toughest is the weather that exists in Ontario. The weather is variable throughout the year and from year to year. This can affect the size/weight of the animals during the winter. Bison is a great example of this, as during the winter they drop weight due to the grass being covered in snow. This forces the farmer to feed them wheat based products which do not keep them as big. Due to this they are not slaughtered during this time (Farm S. K., 2015).

Another challenge that exists is the start-up costs associated with game animals as they are more expensive than traditional with some require specialized pens. Elk is an example of this as they require taller fences as they can jump higher than other animals (Farm S. K., 2015). This means the farmer needs to have some financial backing during the start-up phases of a game farm.

However, the biggest issue is the farmer's relationship with the abattoir. Game slaughter requires a more specific abattoir because facilities need to be fully cleaned between animals (Ontario Ministry of Agriculture, 2015). This can lead to the farmer getting moved or delayed even if they have

been booked in for a specific time slot. This is an issue due to orders however there seems to be an understanding in the industry that this can happen but it is still the major issue that exists because non-Ontario game meats do not have the same issue.

### Animal Management

#### *Feed*

Game animals are raised very similar to other animals that are grown on local organic farms. This means animals are either hand feed or eat off the land. Farmers control what they feed their animals whether that is GMO grown feed or naturally grown feed. However, due to the expenses that are associated with the animals most farmers opt for natural feed (Farm B. H., 2015).

Every animal is different when it comes to feed, especially in portion size, and it is important that farmers understand the right amount for each animal. There was a farmer that was preparing one of their animals for breeding, however, during the weeks leading up to the amount of food was incorrect which led to a delay in breeding and ultimately a delay in production (Farm B. H., 2015).

When it comes to feeding a game animal it is similar to traditional as the farmer has to know the best food for the animal and ensure that portions are being controlled.

#### *Pens*

Depending on the size some, game animals are kept in open pens while having access to indoor coverage due to the harsh winters that exist in Ontario. This style would be for medium sized animals and birds while larger animals would be outside year round with no coverage due to their ability to acclimatize to Ontario weather (Farm S. K., 2015). Pens can be compared to those that exist on an organic/free range farm. Understanding which animals can be kept together and which have to be separate is a key part of any game farm. Properly understanding this can allow farms to diversify their selection without running out of space. A great example of this is Blue Haven Farm, who has a wide range of animals both traditional and game. They have facilities where chickens and Cornish game hens

live together (Farm B. H., 2015). Understanding which animals can live together a big part of being an Ontario game farmer.

There can be easier game animals to pen such as larger animals (bison) which are more free range, meaning they eat off the land and are given large areas to live. Understanding where animals come from is an important aspect to farming game in Ontario due to the climate that exists. At one farm they have wild African Pheasants (Guinea fowl) which have to be kept in a heated, indoor pen as they are not able to be in the cold climate. Game farmers are very passionate with their work and take the time to understand the climate that their animals come from and ensure that pens accurately represent to that climate (Farm B. H., 2015).

#### Transportation to Abattoir

As animals get prepped for transport they are separated from the other animals and held in a separate pen. When working with larger animals whose weight fluctuates throughout the year, it is important to weigh the animals so that you ensure that it is being slaughtered at the proper weight (cite, Bison). Once this process is complete the animal is held overnight and then is moved into a transport for shipping to the abattoir. The animal has to be alive upon arrival at the abattoir for health regulations and inspections (Farm B. H., 2015).

#### *Abattoir*

##### At Abattoir (warning graphic content)

To look about the abattoir let's break it down into three different categories: Large animals (Bison), medium animals (lamb and goat), and birds. These operations do not take place at the same time within an abattoir and there are abattoirs that specialize in one type of animal. Most of these abattoirs are provincially regulated which means that animals killed within them can only be shipped to locations within Ontario. This is the main section of the supply-chain where there are government regulations. Before getting into specific details there are general regulations that need to be understood.

### Regulations

Ontario abattoirs are governed by the MIA (Meat Inspection Act (Ontario)), while national abattoirs are inspected by the MIA (Meat Inspection Act (Canada)). Ontario abattoirs are only allowed to process meat that is for consumption in Ontario (Ontario Government). There are inspectors present in every abattoir as the meat must be stamped with an inspection legend and properly labelled in order to be sold (Ontario Government). Game regulations are extensive and are present throughout the whole process. Once the animal has been killed and the organs have been removed they are further inspected and tested for bacteria and other pathogens (Ontario Ministry of Agriculture, 2015). An abattoir could be responsible for the contamination of an animal if the temperature of the facility is not properly maintained. A large animal must have its carcass temperature reduced and maintained at 7C while a small game must have its temp at 4C throughout the meat (Ontario Government). It is imperative that these temperatures are monitored as any variations could contaminate the meat and make it unsafe for sale.

### Large Animals

The animal must be alive on arrival and able to move by itself into the holding pen at the abattoir. At this point the animal is inspected to ensure the animals are in accordance with food safety and animal welfare legislation (Ontario Government). If the animal does not pass the inspection it can be appointed to veterinarians for further tests and possible treatment before slaughter (Ontario Government). If the animal passes inspection it is then shot by the farmer with a bolt-gun which kills the animal instantly. After this the animal is strung up and its throat split so it can bleed out. This is the human way of killing the animal as it is dead before the bleeding processes. Once it is bled out the hind and organs are removed and the animal is put in the cooler. If a portion of the animal is being shipped fresh then that part is taken off and held in the cooler. Then the meat is wrapped in cheese cloth and loaded onto a truck for shipping. If there are no fresh orders then the animal gets shipped to the butcher where it is broken down into individual portions. Once the individual portions are prepared they



are then vacuum sealed and picked up by the farmer to be either be delivered or returned to the farm to be frozen (Farm S. K., 2015).

### Medium Animals

The animals arrive alive and if they are not processed right away are placed into a holding pen. Then the farmer has to fill out the associated paper work to ensure that they receive their animals back. This is an important step because these abattoirs can have multiple animals from multiple farms getting processed at the same time. At this point, the farmer will also indicate where the product is going following slaughter and who is making the delivery. Once it is time for the animal to be slaughtered, the inspector looks over the animal to ensure safety and welfare. Once the animal passes it is removed from their pen and put on a ramp which has a large swinging gate. This gate hits then on the head between the horns which knocks them out. Following this they are hung from their hind feed and their throat is slit so they bleed out. They then move down the line, where the animal is cut down the middle and hide/fleece is taken off the animal. If the animal has horns then the head is removed. Then the animal gets passed to the next station where the guts/ organs are removed and further inspected. Once the organs are approved, the animal gets moved onto the next station where is it washed and moved into the cooler. The animal is given the number from the form already filled out and then kept cool until they get shipped to either the butcher, where they are broken down and vacuum sealed, or fresh to a restaurant (Farm B. H., 2015).

### Birds

The animas must arrive alive and be inspected before they are processed. Birds must be removed from their crates and placed into pens for this process. The main thing that birds are inspected for is their hygiene, specifically whether or not the feathers can be skinned/ plucked (Ontario Ministry of Agriculture, 2015). A bird could fail this stage for something as little as too much dirt feathers. Once the bird passes inspection it is then hung on a line by their feet and their head is dragged through a trough of water with an elect current in it. This kills the bird instantly and then their throat is cut so they bleed

out. Then the bird goes into a big vat of boiling water that is timed for about 30 seconds. Then the bird is put into a big round tube with rubber nipples that spins taking the feathers out of it. Following this the bird placed into a cooler until the farmer returns (Farm B. H., 2015). Most game birds are sold whole to restaurants unless otherwise specified.

### *Distribution*

#### The Butcher Shop: Case Study

In order to understand the different distribution channels that exist within the game meat industry it is important to understand traditional distribution channels. For the purposes of this explanation I am going to use a company called The Butcher Shop. This is not a local butcher shop, this is a large meat distribution company located in Etobicoke, Ontario. They offer a wide range of products that range from raw retail cuts to dry-aged or smoked meats. As a company they purchase whole-sale cuts of meat from slaughterhouses and turn them into retail cuts which are then sold to restaurants. They work in an assembly line format processing through thousands of orders every day. Once the meat has been processed it is then organized onto a truck and shipped to its destination. It is normal for a delivery truck to make multiple stops along the way to maximize efficiency. This company works as a distribution center buying animals from the slaughterhouse and providing to the restaurant. Depending on your location and the size of order, there could be a delivery fee; however it is rare for this to occur (Shop, 2015). This is a traditional method for how restaurants are supplied with their meat products. However, Ontario game farms do not have enough supply to work with a large distributor like the Butcher Shop, leaving them to find their own methods of distribution.

#### Farm to Restaurant

Game meat farmers are not only responsible with raising the animals but they also are responsible for the distribution of it. Farmers do not sell their animals to an abattoir, instead they pay for their animals to be slaughtered and then pay for them to be turned into retail cuts and/or vacuum sealed bags. Vacuum sealed bags have to be picked up by the farmer and transported back to the farm

where they are kept frozen until delivery. If a restaurant wants a fresh cut then the cut is prepped to be shipped to the restaurant (Farm B. H., 2015). When it comes to deliveries restaurants could pick up the order from the farm/abattoir or farmers would use a third party company called ERB (Farm S. K., 2015). ERB is company that is all about deliveries and they are used by farmers because the charge for the service goes to the restaurant. This information is fully-disclosed to restaurants but allows restaurants to receive fresh cuts from local farms. There are some farmers that will deliver to restaurants depending on the proximity to the farm and the working relationship. With farmers being responsible for their own deliveries, it adds extra work to their day that is surrounded around how and when orders are taken.

### Orders

Orders are not easy and require a lot of planning by the farmers. Everything is surrounded around the farmer. The farmer has to work with the abattoir to book a slaughter date. Following that the farmer reaches out to their customer and informs them of the slaughter date and ask if they would like to place an order. This is an important step because restaurants cannot just call up a farmer and ask for fresh meat delivered the next day. Instead, restaurants are forced to order and plan around the farmers schedule and when their animals are being slaughtered. However, if a restaurant needs frozen, retail cuts then they may be able to place a spontaneous order depending on what the farmer has in stock (Farm B. H., 2015). Orders are more complicated with Ontario game meats however it can create a strong working relationship between a restaurant and a farmer to create a better product for the consumer.

### Collaboration Between Farmers

With Ontario game farms being responsible for their own marketing and distribution there are farmers who unable to find the best sale. To help this situation, some farmers work together when filling orders to help service larger restaurants. This helps get Ontario game onto the table at local restaurants.

Another form of collaboration exists is with the Mennonite community. These people have their farms but do not interact with the outside world. Some local farmers work with this community to help get their product to restaurants and butchers. This is done by farmers purchasing animals from the Mennonites and taking them to the abattoir as one of their own. This allows farmers to increase product offerings to restaurants who might be looking for one specific cut of meat or looking for more portions of a specific animal (Farm B. H., 2015).

Another form of collaboration between farms is sharing animals for breeding. Some farms are too small to have multiple animals and instead have to work with other farms to breed their animals. The animals will be put together at one farm and then either shipped apart after pregnancy or kept together until after birth. This allows smaller farms to economically grow their farm (Farm B. H., 2015). Collaboration between Ontario farmers is an important piece to the success of the industry, however the practices of the farmers are important because farmers want to work with people who operate in similar nature to them.

## *Restaurant*

### Perception of Game Meat

Game meat is not new to the restaurant industry as a whole however; game is working its way into the Ontario restaurant market. When chefs design a menu it is about what the customer wants. Customers are becoming more adventurous and restaurants are offering outlets for them. Fine dining restaurants are leading the way when it comes to game meat dishes and that stems from the price consumers are willing to pay for dinner. Game meat is traditionally priced higher due to its limited availability and the added training associated with each different dish. Beyond guests willing to pay more for game there is also the perception that game meat is healthier than the traditional three.

This is a comment that multiple chefs said during research and after visiting game farms this comment was validated. The main reason is that game farms are smaller than traditional which allows

the farmer to raise the animals the way they want to without GMOs or chemicals. This stems from the farmer paying for slaughter so there is no specific size requirement. This means that game meats from Ontario are being raised naturally and in some cases organically, which provides a healthier product to the customers. This conclusion was drawn from research gathered. There is only outside research done on the health benefits between hunted game and traditional.

Restaurants like selling game meat to their customers because it allows them to differentiate between their competition and attract new customers. Game meats allow restaurants the opportunity to share their passion for new and exciting dishes with their customers.

#### How chefs Learned to use Game Meat

Most European trained chefs have worked with game meats throughout their careers, while locally trained are less exposed to game. For more game meats like duck or lamb, chefs get exposure on traditional menus because these are common dishes that are on upper level restaurant's menus. For more adventurous game meats, like caribou, chefs first experienced them on tasting menus. The main reason for this is that the product costs more and preparing enough for a dining room can lead to high menu prices or high food waste expenses. Whether a chef was European trained or locally trained, they are always doing research and looking for something new they can use on their menu that would set them apart from their competition.

There are also chefs who work with game meats because they were raised in a hunting family. These chefs have been exposed to wild game for a majority of their lives so they have learned different cooking methods from their family. These chefs understand the value of the product as one chef told me the moment you kill your first animal you learn to use every last bit (Horne, 2015). These kinds of chefs can teach from different angles because they have experience first-hand the difference between wild and farmed game.

### Education

Above I talked about how chefs learned to use game but the cooks on the line or the butchers working in these restaurants need to learn about different game meats in order to successfully do their job.

First, let's look at the butchers. Butchers within restaurants receive wholesale cuts (like a side of venison), they then break it down into the portions that they want to serve. Talking with a butcher at one of these restaurants, he said "Once you learn how to break down the traditional three, then learning game cuts are not as difficult" (Donovan, 2015). The only difficult aspect with learning these cuts is that there are longer stretches between lessons due to game being delivered less often

Now let's look at the cooks. Any cook working in a fine dining restaurant can cook the traditional three in multiple ways, but not all of them can cook game meats. One chef said "He loves the look in his cook's eyes when a side of venison is brought through the kitchen" (Horne, 2015). The main reason for this is that it is something new that cooks get to learn. Due to this it is important for a cook to have a good chef to teach them all about game meats.

### Purchasing Ontario vs Non-Ontario Products

Unless a restaurant is strictly local based products then they are going to search for the best products from around the world (Donovan, 2015). One example of this is that New Zealand lamb is globally acclaimed as the best lamb in the world and thus restaurants are going to use this product over others. However, Ontario products do play a major role in the industry as they are the main source for fresh meat. Restaurants that have on-sight butchers are more likely to buy locally because they are able to get fresh whole cuts. While chefs continue to search for the best product it is also up to the farmers to ensure that they are informing chefs about their process and why they should buy from them.

For local one location restaurants using Ontario based game is easier because you can create a relationship with the farmer. However, if you are a larger chain that has multiple restaurants it is not as easy to offer Ontario game because farmers would not have enough to supply year round. The main reason for this is regulations that these farmers occur, whether that is quota or when they can slaughter the animal. This can lead to products not be readily available to a restaurant because at any point in time the abattoir could tell farmer they have been bumped from their given day and thus this would affect the restaurant and the receiving of their product. However, chefs some chefs still prefer to get game from local farmers because they can go see how the animals are raised and create an effective working relationship.

### Fish

While this report looks at Ontario game meat, any game report would not be complete without fish. Most people would not classify fish as game, however, it is the last wild protein that appears on menus. However, there are very limited wild fish in Ontario as it is not attached a major ocean leading to a majority of Ontario fish to be farmed. Now, that is not to say that there is no wild fish in Ontario just it is not as common as BC or Maritime fish (Ocean, 2015). Due to this, I am not following fish through the supply-chain method instead am including a small section to mention it

### *Consumer*

#### Consumer Enjoyment

Game meats are a newer product to the Ontario restaurant market. However, one chef he told me “This is a part of our history that we lost” (Bangerter, 2015). This looks at the idea of eating of the land and using local products that are all around us. While the traditional three are found all around us, meats like bison or venison are more indigenous to Ontario. As a society, we are starting to get back to our roots when it comes to our food choices and this stems from an increase in consumer enjoyment and curiosity. Every chef plans their menu around what guests are going to want. The reason for this is because if you did it any other way then you would not be in the restaurant business. Consumers are

enjoying game meats as alternative dishes for dinners. One chef went as far as to say “If you have Caribou vs Lamb on the menu, 9 out 10 people would choose Caribou” (Horne, 2015). This shows that consumers want something different, something they cannot cook at home. Game meats are increasing in popularity and consumers are the driving force behind this.

#### Who is Buying Game?

Looking at downtown Toronto and an analysis of menus from different restaurants: high-end and fine dining restaurants are leading the charge for game meat options. This stems from the higher costs associated with the items and the increased trust associated with each. Trust looks at the consumer having a perception that certain restaurants are more trustworthy for cooking game.

The main people who are buying game meats are foodies. These people are going out and looking for different foods and are adventurous when it comes to trying something new (Macdonell, 2015). The other people buying game might just be looking for something different once and a while. These people will buy the traditional three when they are out and only occasionally try something different.

There is one restaurant that is doing something different to attract new customers and to educate them on game and that is Farmhouse Tavern and their hunt camp. During a time when the restaurant is closed, customers make reservations to come in for a multi-course dinner and have the dishes explained to them. This experience helps customers understand different aspects of their meal and understand different game meats. When this experience was released to the public, people went right after it (Macdonell, 2015). This shows that people want something different and are willing to pay more and spend more time out to get it.

#### Current trends

In the restaurant industry there are the traditional three meats but recently certain game animals are becoming more traditional. Lamb and duck are at the front of this trend as they are



extremely common on any fine dining menu and could even find some on non-chain middle restaurants. This forces chefs to go out and find something different to keep their foodie guests interested. When people go out for dinner at a high end restaurant they are looking for something that they could not make at home.

### *Further Research*

#### Research Challenges

Throughout my research, there were many challenges to overcome to produce these findings. The main problem that occurred was the amount of research available. The Ontario game meat industry is something that has very limited research conducted on it. This led to a lot of primary research. This made it very difficult to get started because the industry was still unknown and an understanding of the industry was required before a direction for research could be decided. Doing primary research meant a lot of time doing interviews with people all over southeastern Ontario. Doing these interviews started to become a challenge with the winter weather and balancing schedules. This led to scheduling issues surrounding interviews as everyone involved worked on different schedules and were in various locations.

When putting the pieces together, there was a challenge of not being able to check the results. While this is common with research into new areas, it was not something that was anticipated. This led to frustration as the results were becoming clear but there was no other research to compare to. This led to questioning the results and ultimately delayed the report because there were worries that the information gathered was wrong. This was a challenging part of the research and required faith that the results were right, was it possible to push through this phase and write the report.

These were the two biggest challenges that needed to be overcome during the research.

#### Continuing Research

If there was an opportunity to continue research on game meats in Ontario, the first area to look at would be the consumer/restaurant specifically the trust associated with game. This had a very

interesting conclusion that was discovered during research and one that could affect the restaurant industry as a whole not just Ontario game.

Another area to continue research is the farm. The findings presented only scrapped the surface during research and there is more that could be learned about this part of the industry. Having the opportunity to gain a greater understanding of this industry through additional locations throughout Ontario could affect how restaurants and farmers work together.

## *Conclusion*

### Summary of Ontario Game

Game meat within Ontario restaurants are increasing, which is related to the increase in Ontario game farming. The supply-chain associated with Ontario game is more complicated than other meat but it allows a farmer and a restaurant to develop a professional relationship. This relationship stems from the increased involvement for both parties.

The farmer has to fully understand how to raise and feed different animals, including some that are not be indigenes to the Ontario climate. The farmer also has increased costs associated with having to pay for the slaughter/butchering instead of selling the animal to the slaughterhouse. There are different regulations that exist at these abattoirs due to the possibility of the animal being wild instead of farmed. The farmer also has to market their product to restaurants to ensure that orders are placed before the slaughter date. The farmer also, is responsible for either organizing delivery to the restaurant or working with the restaurant for pick it up.

Once game has reached the restaurant it is the responsibility of the chef and cooks to know how to work with the different cuts. From here the chef has to design a menu that attracts customers to their restaurant. This stems from the customers wanting to experience new and different products from restaurants.

Within the game industry there are certain animals that are starting to become more traditional and some customers consider these traditional not game meats. These meats have become staples on any fine dining menu and are what customers expect as options.










#### Final Thoughts

The Ontario game meat industry is still in its infancy stage and will continue to grow over the coming years. The industry is going in this direction because chefs and farmers are able to develop an in depth relationship that is centered around the quality and consistency of the final product. There are always going to be challenges associated with the Ontario game industry, like any farming industry. The understanding that chefs have about the Ontario game industry is a strong showing of the future, however, at the end of the day the consumer is and always will be the driving factor.

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# Appendix A

Traditional	Game Animals
  	     

This table does a quick comparison between traditional animals and game animals. The game meat column is not limited to only those animals while there are no additional traditional animals.