



2021/22 BUSINESS PLAN

Canadian Beef Cattle Research, Market Development and Promotion Agency
operating as the Canadian Beef Check-Off Agency



APRIL 1, 2021 - MARCH 31, 2022



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REPRESENTING THE AGENCY

WE ARE STRONGEST TOGETHER

The 16 Agency Members represent our stakeholders - grassroots producers, beef importers, packers and processors, and retail and foodservice organizations - and are your voice at the table.



Canadian beef producers and beef importers can be proud of their representation at the national table.

MISSION

To deliver measurable value to the Canadian beef industry through prudent and transparent management of the Canadian Beef Cattle Check-Off.

PURPOSE

The Canadian Beef Check-Off Agency (the Agency) manages and administers the Canadian Beef Cattle Check-Off, including Canada's Beef Import Levy. By working with core partners, the Agency ensures that check-off dollars are invested into research, market development and promotion programs that deliver measurable value to the Canadian beef industry.

VISION

A unified and sustainable national funding strategy for Canadian beef cattle research, market development and promotion.

The Agency is responsible for communicating the value of the check-off investment, as well as training and education of producers and funding partners, regulatory management, collection and administration of check-off dollars.

REGULATORY FRAMEWORK AND GOVERNANCE

Maintaining a structure focused on oversight of the check-off and import levy while ensuring compliance and transparency is a key to achieving success for our industry.

REGULATORY FRAMEWORK

The Farm Products Agencies Act, which was proclaimed in 1972 allows for the creation of the Farm Products Council of Canada (FPCC). The Act also provides the legal foundation for the creation of the Canadian Beef Cattle Research, Market Development and Promotion Agency (the Agency). The Agency was created with the directive to promote the research, marketing and promotion of Canadian cattle and beef products, both domestically and abroad. The Agency was proclaimed on January 17, 2002 and the registration published on January 30, 2002.

The Federal Levies Order was registered April 14, 2005. The import levy allows for equitable treatment between domestic beef producers and beef importers. The amendment to the Beef Cattle Research, Market Development and Promotion Levies Order to include an import levy was announced on July 30, 2013. Since January 1, 2014, all imports of beef cattle, beef and beef products into Canada were subject to the levy of \$1 per head or carcass equivalent.

GOVERNANCE

The Agency is governed by 16 Agency Members from across Canada. 10 member seats are allocated to beef cattle producers nominated by their provincial cattle associations. The remaining six are: four from packers/processors through the Canadian Meat Council (CMC),

one importer (I.E. Canada) and one retail/foodservice operator. These six directors are nominated from their respective associations, or by the delegates at the Annual General Meeting each year.



2020/21 CANADIAN BEEF CHECK-OFF AGENCY MEMBERS



TERRY WIEBE
BRITISH COLUMBIA



DOUG SAWYER
ALBERTA



JEFF SMITH
ALBERTA



CHAD ROSS
SASKATCHEWAN



MARY PAZIUK
MANITOBA



JACK CHAFFE
ONTARIO



KIRK JACKSON
QUEBEC



TREVOR WELCH
NEW BRUNSWICK



DAVID FRANCIS
PRINCE EDWARD ISLAND



**LARRY
WEATHERBY**
NOVA SCOTIA



**CORAL
MANASTERSKY**
I.E. CANADA



STEVE CHRISTIE
RETAIL/FOODSERVICE



JOHN CURTIS
CANADIAN MEAT COUNCIL



RUSS MALLARD
CANADIAN MEAT COUNCIL



ANDRE FORGET
CANADIAN MEAT COUNCIL



MIKE KENNEDY
CANADIAN MEAT COUNCIL

CANADIAN BEEF CHECK-OFF AGENCY SERVICE PROVIDERS

DELIVERING VALUE FOR OUR INDUSTRY

Three national service providers and seven provincial cattle associations invest check-off and import levy dollars to provide national benefits for our industry.



**MARKET
DEVELOPMENT &
PROMOTION**



RESEARCH



**PUBLIC AND
STAKEHOLDER
ENGAGEMENT**



**7 PROVINCIAL
CATTLE
ASSOCIATIONS**

MARKET DEVELOPMENT AND PROMOTION

Canada Beef is the promotion and market development services provider for the Canadian beef and veal industry in the domestic and export marketplace. Canada Beef works to enable and sustain end-user customer and consumer loyalty for Canadian beef and veal brands for stakeholder partners around the world. Canada Beef delivers its business strategy by leveraging Canadian beef and veal brands through consumer marketing and market development activities in Canada and key export markets around the world.

Canada Beef strategic priorities align with the National Beef Strategy developed by a broad industry coalition including all major national and provincial beef industry associations. The strategy positions the Canadian beef industry for greater profitability, growth and continued production of high-quality beef and veal products.

Canada Beef's strategy also aligns with the Federal Government's Agricultural Policy Framework that aims to increase and diversify exports to international markets and seize market opportunities through industry-led promotional activities that differentiate Canadian products and producers, and leverage Canada's reputation for high quality safe and wholesome food.

Canada Beef is primarily funded by producer check-off and Canada's beef import levy, and is able to further leverage check-off investment through government industry development funds and private client investments to maximize the impact of promotion and market development initiatives.

RESEARCH

The Beef Cattle Research Council (BCRC) is Canada's national industry-led funding agency for beef, cattle and forage research. The BCRC is funded through a portion of a producer-paid national check-off as well as government and industry funding, and is directed by a committee of beef producers from across the country.

The BCRC's mandate is to determine research and development priorities for the Canadian beef cattle industry and to administer Canadian Beef Cattle Check-Off funds allocated to research. The BCRC also leverages funding from Agriculture and Agri-Food Canada (AAFC) through The Sustainable Beef and Forage Science Cluster.

As the national beef cattle industry research agency, the BCRC plays an important role in identifying the industry's research and development priorities and subsequently driving investment in beef, cattle and forage research. As a leader in the development of the Canadian Beef Research and Technology Transfer Strategy, the BCRC facilitates and encourages collaboration and coordination among researchers and extension specialists, other funding agencies and industry in order to maximize the benefits obtained from all investments in beef research.

In addition to funding research and technology transfer in support of the Canadian beef industry, the BCRC supports the Verified Beef Production Plus (VBP+) program.

The BCRC operates as a division of the Canadian Cattlemen's Association (CCA) and was established by the CCA in 2001.

PUBLIC AND STAKEHOLDER ENGAGEMENT

The Public and Stakeholder Engagement Program (formerly Issues Management) is administered by the Canadian Cattlemen's Association (CCA) in partnership with Canada Beef and under the oversight of the Canadian Beef Advisors. The Public and Stakeholder Engagement team works with national and provincial beef organizations to address consumer questions and issues that could erode consumer and public confidence in the beef industry.

The Beef Advocacy Canada program is an additional platform under the Public and Stakeholder Engagement program to share resources and information, training and opportunities, and give producers across the country the tools to positively and consistently speak about beef production in Canada to the public.

Check-off funding is shared between the CCA at 75% and Canada Beef at 25% for the delivery of public trust programming and issues management. The work plan is designed with the intent to align and deliver on the National Beef Strategy five-year plan. Although the PSE program is administered through the CCA, it will act as a neutral collaboration between CCA, Canada Beef, and other provincial and national beef associations.

PROVINCIAL INVESTMENT

Under the Agency's regulatory framework and agreements, provincial cattle associations may opt to have a portion of the Canadian Beef Cattle Check-Off retained in their province. These funds must also be invested into marketing, research or public and stakeholder engagement efforts that provide benefits to beef producers and the Canadian beef industry as whole. Currently seven provincial associations allocate funds to this function.

CANFAX RESEARCH SERVICES

MARKET OUTLOOK

Economic recovery and the return of foodservice demand will be major drivers for protein markets in 2021.

Current 2021 forecasts are for economic growth in countries that are major destinations of Canadian beef.

2020 MARKET HIGHLIGHTS

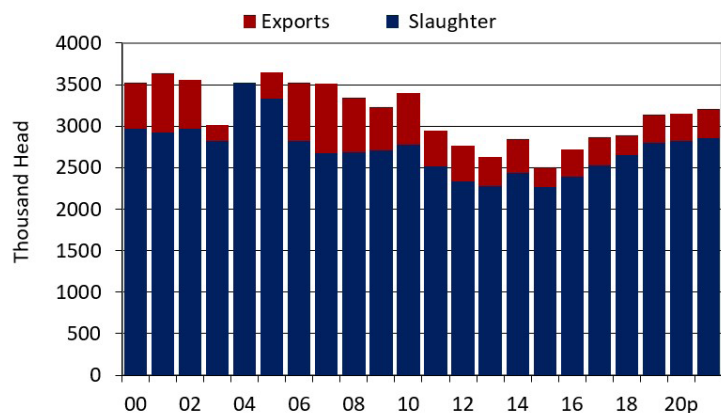
On July 1, 2020, beef cow inventories were down 1.4% at 3.62 million head and total cattle inventories were down 0.5% at 12.23 million head. Beef replacement heifers were down 0.8% at 630,800 head.

Fed cattle marketings are projected to be up 0.7% this year to 3.16 million head, with slaughter projected to be up 1.1% to 2.8 million head and exports projected to be down 2.9% to 329,900 head. Increased feeder imports (up 15% year to date September) have supported domestic fed cattle slaughter. Feedlot placements have adjusted

to make room with feedlots expected to get current close to year end. Cattle on feed inventories were down 2,000 from last year on November 1st. Most of the larger placements seen in June and July will show up in the fourth quarter 2020, not 2021, making it hard to get more current. Feeder basis levels will continue support for feeder imports.

Slaughter cows moved stateside as Canadian packers prioritized fed cattle. Domestic non-fed slaughter is projected to be down 17% to 488,000 head with exports up 17% to 211,900 head. Non-fed marketings are projected to be down 9% to 700,000 head. Overall slaughter cattle marketings (fed and non-fed) are projected to be down by 1.2% in 2020.

Larger carcass weights offset some of the decline in marketings with total beef production (domestic and live slaughter exports) projected to be down 0.8% to 1.55 million tonnes, assuming processing remains steady with last year throughout the



Source: CBGA, AAFC, Statistics Canada

CANADIAN FED CATTLE MARKETINGS

fourth quarter. Domestic beef production is projected to be down 1.5% to 1.3 million tonnes and live slaughter exports are projected to be up 3.6% 0.2 million tonnes.

Reduced federally inspected slaughter impacted beef export volumes, while larger provincial slaughter somewhat offset the decline supporting domestic supplies. Year to date (September), Canadian beef exports were down 7% with decreases to most of the major markets: the United States (-5%), Japan (11%), Mainland China (-40%) and Mexico (27%). Strong domestic and international demand supported beef prices with the US boxed beef composite price up 12% from a year ago (January-October). This combined with low to flat fed cattle prices supported packer margins (recognizing there were additional costs incurred due to COVID-19) and encouraged cattle slaughter.

2021 OUTLOOK

The shortage of pork in Mainland China due to the African Swine Fever (ASF) continues to support all meat prices at high levels within the country and shift global trade flows. Official Chinese reports indicate a strong recovery in the hog herd. Questions now are on how soon overproduction could pressure global prices lower. While economic recovery and the return of foodservice demand will be major drivers for protein markets in 2021. Market access and trade policies will continue to affect trade flows.

In 2021, fed cattle marketings are forecast to be up 1.5% at 3.2 million head with domestic slaughter up 1% at 2.85 million head and exports up 6% at 349,000 head. Non-fed marketings are forecast to be up 2.2% to 715,500 head with slaughter up 1.7% at 496,700 head and exports up 3.3% at 219,000 head. Overall, slaughter cattle marketings in 2021 are forecast to be up 1.6% at 3.92 million head. Total beef production (domestic and live exports) is forecast to be up 2% at 1.6 million tonnes. Domestic production is forecast to be up 1.6% around 1.3 million tonnes and live slaughter exports up 5.3% to 472 million 214,000 tonnes.



Source: Statistics Canada

CANADIAN TOTAL CATTLE & CALVES JULY 1

EXECUTIVE SUMMARY

ALIGNING OUR PLANS WITH INDUSTRY'S STRATEGY

The National Beef Strategy sees global opportunities ahead and meets industry challenges head on.

The Agency's business plan works to deliver on the goals and objectives of the Strategy to foster growth and profitability.



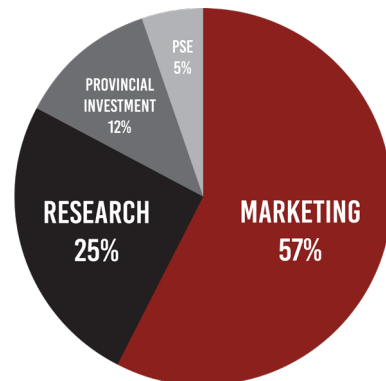
INTRODUCTION

Through the Canadian Beef Cattle Check-Off, Canadian beef cattle producers collectively invest in research, market development and promotion to achieve the industry's long-term vision of a dynamic and profitable Canadian industry with Canadian high quality beef products recognized as the most outstanding by Canadian and world customers.

In 2021/22, the Canadian Beef Cattle Check-Off and Canada's Beef Import Levy is estimated to bring in approximately \$18,083,000 in gross revenue.

Moving into the 2021/22 fiscal year, eight of nine provinces are collecting a \$2.50 national check-off, with Ontario and the Import Levy collecting \$1 per head or equivalent.

The Agency projects the total revenue, net administration, to be allocated as 57% to market development and promotion, 25% to research, 12% to provincial initiatives and 5% to public and stakeholder engagement (PSE). These allocations are set annually by each provincial cattle association one full year in advance and apply only to check-off dollars; the beef import levy is allocated to the promotion of unbranded beef in Canada.




REVENUE ALLOCATION

CANADIAN BEEF CHECK-OFF AGENCY ADMINISTRATION

PROJECTED ALLOCATION: \$876,150

Our four key objectives keep us focused on the unique needs of the provincial cattle associations and I.E. Canada, representing our nation's beef producers and beef importers.



Maintaining a strong, vibrant beef and veal industry is imperative. Our contribution is through our objectives.

The Agency moves into the 2021/22 fiscal year with goals to administer the Agency with separate and distinct governance, reduce check-off slippage, and reach more Canadian producers about the mechanics and value of the national check-off. The Agency Members approved a balanced 2021/22 administration budget at \$876,150. This will support the operations and Board, as well as the Agency's four strategic objectives:

1. Sound Governance and Administration
2. Structured Reporting and Compliance
3. Educated and Engaged Stakeholders
4. Strategic Communications and Collaboration

The ability to collaborate with our partners gives the Agency an advantage when it comes to communication: the ability to be flexible in channel and delivery, but consistent in message when targeting Canadian beef producers. By strategically amplifying the Agency's messages through traditional and innovative channels, we are able to grow our reach.

The current governance structure the Agency is managed under, provides clear direction for both the Agency and its Committees, and continues to move forward on a path of stronger governance and operational separation from the internal marketing division of the organization. The Marketing Committee is fully functional and evolving to tap into the expertise of its entire membership and continues to operate independently, but still under the general oversight of the Agency.

A business continuation plan will be a continued priority for the Agency this year, which will include an analysis of potential threats to revenue and exploring potential prevention or recovery systems to minimize impacts to the Agency's business. Plans for both long and short term revenue challenges will be developed and shelved for any future business impediments, whether likely or unlikely. The plan will allow the Agency to carry out business with service providers to ensure continued benefit to Canada's beef industry.

The Agency's inspection program will continue to grow in 2021/22, specially if COVID-19 restrictions are relaxed this year, allowing inspectors to become more visible during routine audits areas where slippage is a known issue across provincial borders. The Agency's appointed inspectors will work closely with provincial cattle associations to ensure aligned priorities and transparent audits.

In tandem with the inspection program, the Agency will strengthen the communication and education components around check-off and import levy collection and remittance processes. This should reduce barriers to collection and remittance that arise with complicated processes and regulatory framework. This will also increase data integrity, therefore strengthening the Agency's reporting and honing in on projections and budgeting.

The Agency will also begin researching innovative collection and reporting tools, which promise increased data integrity, reduced errors and real-time access to collection and remittance data for stakeholders across Canada. Long term benefits could include a reduction in collection and remittance reporting time, standardized collections and remittances, increased reporting accuracy, real time marketing and movement statistics, ensuring a level playing field for all stakeholders.

The Agency will ensure that Canadian beef producers have accessible information and resources to show the value of the Canadian Beef Cattle Check-Off. This will come in the form of an enhanced online presence, the development of print tools and resources available on multiple platforms, in-person presentations, and by providing simple forums for producers to communicate with those who are administering and investing their check-off dollars.

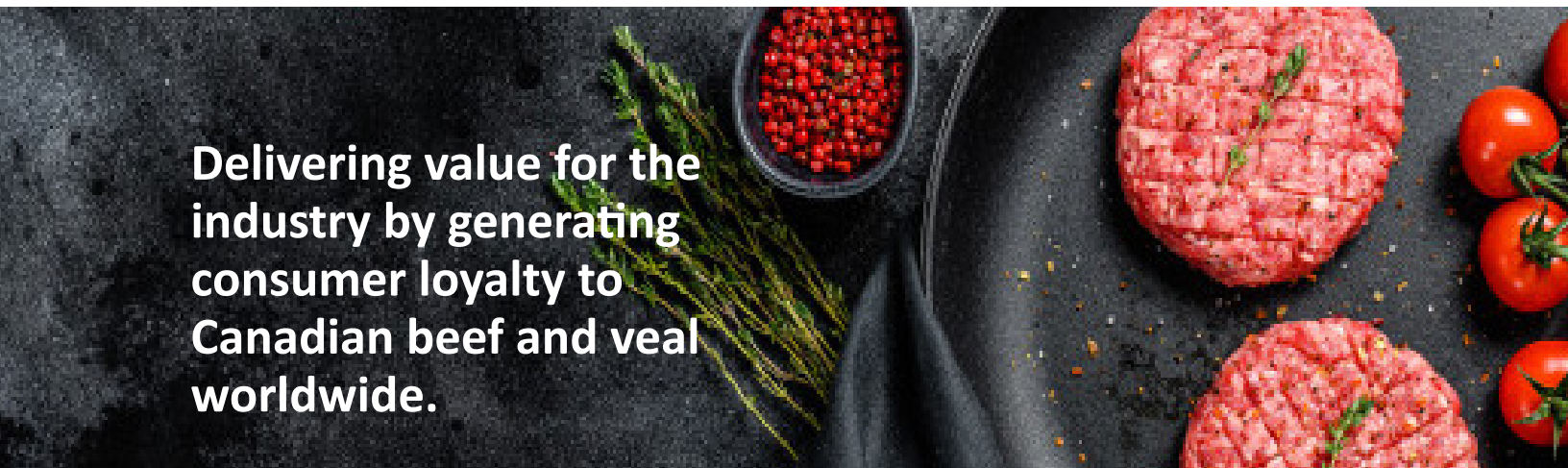
2021/22 ADMINISTRATION BUDGET

	2021/22	2020/21
SOUND GOVERNANCE AND ADMINISTRATION	130,000	113,500
- ensure federal regulatory requirements are met		
- cultivate a strategic and focused governance structure and culture		
- deliver accurate and valuable measurements and reportables		
- support the prudent administration of check-off and import levy management		
STRUCTURED REPORTING AND COMPLIANCE	50,000	42,500
- standardizing remittance requirements for check-off remitters		
- growing inspection portfolio to include import levy		
- strengthen remitter compliance through inspections and education		
- reduce slippage on cross-border marketings		
- research and testing of innovative collection and remittance systems		
ENGAGED AND EDUCATED STAKEHOLDERS	10,000	15,000
- support comprehensive learning on collection of levies at provincial level		
- create resource material for provincial cattle associations to support check-off collection		
- communicate value of national check-off programing		
- engage targeted industry stakeholders to champion value of check-off messages		
STRATEGIC COMMUNICATIONS AND COLLABORATION	30,000	10,000
- target Canadian beef producers to increase awareness of check-off basics		
- strengthen existing and foster new collaborations to amplify messages		
- increase check-off visibility and recognition to Canadian producers		
- utilize innovative channels and platforms to target producers		
OPERATIONS	426,650	398,000
- reserve	10,000	10,000
BOARD OF DIRECTORS	219,500	233,000
- per diems		
- travel and meeting expenses		
- orientation and training		
Total	876,150	822,000

CANADA BEEF MARKETING

PROJECTED ALLOCATION: \$9,885,299

As the marketing division of the Agency- Canada Beef is the stakeholder funded and run organization responsible for domestic and international beef and veal market development.



Delivering value for the industry by generating consumer loyalty to Canadian beef and veal worldwide.

Canada Beef works to build consumer and customer loyalty and strong relationships with trade customers and partners around the world. These efforts ultimately increase demand for Canadian beef and veal, and the value producers receive for their cattle. Canada Beef delivers its business strategy by leveraging the Canadian beef brand through consumer marketing and business development activities in Canada and key export markets around the world.

Canada Beef has built its strategic focus in parallel with the National Beef Strategy developed by a broad industry coalition including all the major national and provincial beef industry associations. The National Beef Strategy is about positioning the Canadian beef industry for greater profitability, growth and continued production of high-quality beef products. The National Strategy incorporates all sectors of the beef value chain and sets strategies and targets for increasing productivity, competitiveness, beef demand and industry/public connectivity.

Canada Beef's strategy also aligns with the Federal Government's Agricultural Policy Framework that aims to increase and diversify exports to international markets and seize market opportunities through industry-led promotional activities that differentiate Canadian products and producers, and leverage Canada's reputation for high quality and safe food. Canada Beef's Canadian beef brand positioning also aligns closely with the Federal Government's Brand Canada strategy.

Canada Beef is primarily funded by producer check-off dollars and is able to further leverage the check-off and import levy investment by accessing government industry development funds and private partner investments to maximize the impact of promotion and market development efforts and the benefits cattle producers receive from their check-off investment.

2021/22 Investment Plan

The Coronavirus pandemic has disrupted 'business as usual' for supply partners, end-user clients and consumers worldwide. Retail and foodservice operators are responding by experimenting and innovating to remain competitive. Foodservice clients big and small are trying new ways to take advantage of how consumers browse, shop and buy food. All vendors are re-imagining sales strategies, positioning and communication with clients, customers and consumers. This business environment is presenting opportunities for

Canada Beef to be a trusted trade partner that can bring marketing solutions to the table.

To deliver results in an ever-evolving marketplace, Canada Beef has built its 2021/22 Investment Plan to address six key strategic priorities:

- Increase beef and veal demand
- Promote Canadian beef in all channels
- Improve competitiveness (marketing grade qualities)
- Expand sku's and product offerings
- Promote sustainability, environmentally sound practices and social responsibility through end-user client partnerships
- Create and offer connectivity solutions in the marketplace to achieve goals and objectives

With this direction, the Investment Plan was developed to deliver measureable results and return on investment in priority markets with key customers. The \$13.9 million plan is organized into 14 separate business units designed to increase the clarity and transparency of the plan for industry stakeholders.

Domestic – Generic

The Import Levy (collected on beef imports at the equivalent rate of \$1 per head) continues to provide funding for positive, generic, non-branded beef messaging across Canada. With consumers' diminishing food skills, concerns over healthy diets and public trust issues, Canada Beef will develop targeted initiatives to positively influence consumer preference for beef over other proteins and positively influence health professionals.

Public and Stakeholder Engagement

Closely related to consumer marketing are efforts to build the beef industry's social license with the public. Canada Beef continues to partner with the CCA and other beef industry groups to address public and consumer concerns about beef production, while also building/reinforcing the Canadian beef brand.

Global Marketing

Development and production of science-based technical marketing resources to promote the Canadian beef advantage, differentiation against competitors, collect market intelligence, food safety and quality assurance systems, and benchmarking and proof points to improve Canadian beef's competitive position.

Domestic – Channel Marketing

Programs focus on retail and foodservice sale promotions, retail and foodservice demand building programs, marketing programs that drive sales and awareness of the Canadian Beef Advantage in Canada to build loyalty and commitment to Canadian beef among trade partners and consumers thus generating sustained demand and increased value for producers.

Domestic – Consumer Marketing

With consumers' diminishing food skills, concerns over healthy diets and public trust issues, Canada Beef will deliver targeted initiatives to positively influence consumer preference for Canadian beef over other proteins. Utilize various media to extend the reach and awareness of Canadian Beef messaging to support consumption, nutritional benefits, sustainability and convenience of Canadian beef in the consumer marketing space.

Communications

Canada Beef will connect with industry, stakeholders, end-user customers and consumers through media, digital platforms and print to create and deliver seamless, timely and cost effective communication of the Canadian Beef story, Canada Beef team activities back to funding partners, stakeholders and social media streams.

Export Market Development

Provide funding support for Canadian beef representative companies to expand their Canadian beef business in the export marketplace through a variety of essential marketing initiatives that supports industry needs to expand, explore and innovate to improve competitive position.

Japan Market Development

Create and deliver cost effective retail and foodservice sales promotions that will drive sales, increase brand awareness and expand product assortments for Japan with particular focus on carcass utilization, value optimization, expanded distribution, retail sector growth, promotion of the grades versus U.S./Australia.

Mexico/ Latin America Market Development

Create and deliver cost effective retail and foodservice sales promotions that will drive sales, increase brand awareness and expand product assortments for Mexico and Latin America with particular focus on recapturing the retail channel, and value and sales growth through sales promotions.

China / Hong Kong Market Development

Create and deliver cost effective retail and foodservice sales promotions that will drive sales, increase brand awareness and expand product assortments for China and Hong Kong with particular focus on developing business relationships with Chinese retail and foodservice operators best suited for Canadian supply partner execution capabilities.

Taiwan / Southeast Asia Market Development

Create and deliver cost effective retail and foodservice sales promotions that will drive sales, increase brand awareness and expand product assortments for Southeast Asia with particular focus on promote Canadian beef quality grades and developing new retail and foodservice clients.

South Korea Market Development

Create and deliver cost effective retail and foodservice sales promotions that will drive sales, increase brand awareness and expand product assortments for South Korea with particular focus on retail and foodservice channel promotions, export partner programs, and volume and value growth.

Emerging Market Development

Support emerging market development opportunities as needed in the export marketplace by supporting export market development program users, and volume and value building sales promotions in markets of interest to Canadian beef supply partners and end-user clients.

Canadian Beef Centre of Excellence

The Canadian Beef Centre of Excellence will provide education, training, E-learn digital platform, and development and distribution of virtual resources and video productions to support industry goals. The CBCE extension of programs and services will extend outside of the facility to support stakeholders, Canadian beef supply partners, end-user clients and international offices. The CBCE will become the premier Canadian Beef learning and merchandising solution centre in Canada.

2021/22 MARKETING BUDGET

Revenues			\$		
1	Check Off - Marketing				8,935,000
2	Check Off - Public and Stakeholder Engagement				225,000
3	Import Levy				950,000
4	Government of Canada - Canadian Agricultural Partnership (CAP)**				-
5	Alberta Agriculture and Industry				225,000
6	Export Market Development Administration Fee				25,000
7	Interest				50,000
8	Deferred Revenue Amortization (CBCE)				106,000
			\$ 10,516,000		
Expenses					
	Board of Directors - Marketing Committee				65,000
	Marketing				13,816,910
			\$ 13,881,910		
(Deficit) to be funded out of unrestricted accumulated reserves			\$ (3,365,910)		
Marketing			2021/22		
			Programs	Operating	Total
1	Domestic - Generic Beef		1,007,000	189,400	1,196,400
2	Public and Stakeholder Engagement		227,000	60,920	287,920
3	Global		1,060,000	1,169,200	2,229,200
4	Domestic - Channel Marketing		1,275,000	409,200	1,684,200
5	Domestic - Consumer Marketing		1,005,000	77,400	1,082,400
6	Communications		660,000	130,000	790,000
7	Export Market Development		550,000	154,400	704,400
8	Japan		700,000	504,000	1,204,000
9	Latin America (Including Mexico)		370,000	161,000	531,000
10	China		691,000	283,000	974,000
11	South East Asia (Including Taiwan)		175,000	132,000	307,000
12	South Korea		160,000	48,000	208,000
13	Emerging Markets		190,000	-	190,000
14	Canadian Beef Centre of Excellence		952,990	673,400	1,626,390
15	Calgary and Mississauga		-	802,000	802,000
			\$ 9,022,990	\$ 4,793,920	\$ 13,816,910

Notes:


Revenue

4 **CAP application in process

BEEF CATTLE RESEARCH COUNCIL RESEARCH

PROJECTED ALLOCATION: \$4,379,099

The BCRC's important role in identifying the industry's research priorities subsequently drives investment in beef cattle research.



Strategic investment in research will help our industry achieve the goals of the National Beef Strategy.

The BCRC revenue for the period July 1, 2021 to June 30, 2022 is projected at \$5.52 million and expenses are projected at \$6.84 million, for a 2021/22 net deficit of \$1.32 million. The annual reserve at June 30, 2022 is projected at \$6.2 million, down from \$7.5 million projected for June 30, 2021. The impact of the COVID-19 pandemic resulted in approximately \$1.1 million of BCRC funding being deferred due to research planned to start-up in 2020 being postponed. These deferred funds remain committed to multi-year projects and programs. As these and subsequent multi-year projects are contracted, the BCRC reserve will continue to be drawn down annually to fall in line with the restricted reserve of \$2 million.

The BCRC 2021/22 programs are directed by the Canadian Beef Research and Technology Transfer Strategy (Research and Extension Strategy). This five-year Research and Extension Strategy was developed in partnership with the Beef Value Chain Roundtable and ongoing engagement of researchers, funders and beef producers, to identify needs in research capacity, infrastructure, programming, funding and coordination, and to ensure priority industry outcomes are being addressed. It aligns dollars and priorities to achieve a comprehensive outcome-based research and extension program supporting the Canadian beef industry's vision and guides industry and government research investments at both national and provincial levels across multiple funding agencies. The BCRC is in the process of renewing its five-year Research and Extension Strategy which will align with Canada's National Beef Strategy and ten-year goals recently launched by the Canadian Beef Advisors, a collaborative group of national beef sector organizations including the BCRC.

It is anticipated that the fourth Beef Science Cluster program will be announced in 2022 and the BCRC will begin planning for this in 2021/22. A call for proposals for Science Cluster IV projects will be launched in summer 2021 and will be based on priorities identified in the BCRC's renewed five-year Research and Extension Strategy currently under development. However, funding research and extension projects and initiatives outside of the Beef Science Cluster remain a core component of the BCRC's funding plan for 2021/22. As such, the 2021/22 annual call for proposals will be structured differently than in the past to accommodate the Science Cluster IV planning given the significant level of human resources required. The budget for the 2021/22 priority research call for proposals will be reduced and will focus on addressing a few clearly defined project priority areas, expressed

as problem statements. To support the timelines and planning for Cluster IV, the 2021 call for proposals will be expedited while ensuring the maintenance of our rigorous internal technical review and selection process.

The 2021 research program priority areas are currently being reviewed by BCRC and industry representatives, to decide which key areas will be focused on. The priority topics to be selected from include: the prevalence of food safety pathogens; effective sanitation in beef packing and processing facilities; feed digestibility and use of poor-quality feed in beef cattle diets; options to improve annual and perennial forage yields; and cover crop use and management in Canada.

The BCRC's Proof of Concept & Validation Trial program, intended to support short-term proof of concept-based research to help decide whether it is worth pursuing as a larger area of research, will continue in 2021/22. The BCRC will also continue with its Research Capacity program which addresses industry identified priorities and gaps in research capacity across Canada through the support of Research Chairs at different institutions.

The BCRC will continue to advance its technology transfer programs utilizing current outreach and extension strategies, as well as new initiatives including various networks – a technology transfer network, surveillance research networks and cost of production network. The surveillance networks, in the areas of cow-calf surveillance and antimicrobial use and resistance surveillance, will inform industry practice, policy and regulation, public trust discussions and future research and extension priorities. The cost of production network under a five-year plan is intended to support industry competitiveness by having Canadian beef cattle cost of production data in every province/eco-region to guide technology transfer and research priorities and support policy decisions. The BCRC remains committed to expanding the reach of its extension initiatives to drive the timely adoption of research and innovation.

The delivery of the Verified Beef Production Plus (VBP+) program, including the training and auditing components, will continue to be advanced in 2021/22. Moving into its second year of a five-year transition plan, the VBP+ program priorities for the coming year include: building the education and training components; continuing to work with the Canadian Food Inspection Agency to get VBP+ approved as an EU Certification body; as well as developing a web-based producer-facing portal, allowing producers to play a larger role in managing their training, audit, and renewal events.


2021/22 RESEARCH BUDGET

Net Assets, beginning of year (July 2020)	9,323,364
Excess (deficiency) of revenue over expenditure - June 2021	(1,807,792)
Net Assets, June 30, 2021	7,515,572
Projected 2021 - 2022 Revenue	
National Check Off	4,379,000
Industry - Cluster projects	86,000
Industry - non Cluster projects	101,625
VBP+ Stripe Transfer Payment	32,386
AAFC Cluster projects	642,275
AAFC VBP+ Industry	231,818
Interest	50,000
Total Revenue	5,523,104
Projected 2021 - 2022 Expenses	
BCRC Division Services	1,077,383
Projects - non Cluster	3,613,907
VBP+ Management	547,940
Cluster III Projects	1,371,827
Enhanced VBP+ Industry	231,818
Total Expenses	6,842,875
Excess (deficiency) of revenue over expenditure	(1,319,771)
Projected Net Assets, June 30, 2022	6,195,801

PUBLIC AND STAKEHOLDER ENGAGEMENT

PROJECTED ALLOCATION: \$901,930

Now in its second year of full funding, the Public and Stakeholder Engagement (PSE) program works to fulfill the public trust objectives of the National Beef Strategy under the beef demand and connectivity pillars.



Transparency and accountability are key in a time when the public has a growing desire to know more about where their food has come from.

Allocations of check-off funds are shared between the Canadian Cattlemen's Association (CCA) at 75% and Canada Beef at 25% for the delivery of national public trust programming and issues management. The work plan is designed with the intent to align and deliver on the National Beef Strategy five-year plan.

Projected revenue from the allocations, along with the 25% portion to Canada Beef, are summarized in the 2021/22 budget. We anticipate that there will be \$901,930 overall allocated to the PSE program for the fiscal year April 2021 to March 2022, based on projected marketings. Of this, \$675,000 will be allocated to CCA to administer, and the remaining \$225,000 to Canada Beef.

The PSE team works closely with the Canada Beef staff in strategic planning and delivery of public trust in beef and beef production. A critical element of the team is the stakeholder groups who participate in the National Communication Manager activities. The in-kind support from stakeholders such as but not limited to; Beef Cattle Research Council (BCRC), Canadian Roundtable for Sustainable Beef (CRSB), Canadian Meat Council (CMC), the National Cattle Feeders Association (NCFA) and the provincial cattle organizations help amplify and deliver messages.

It is becoming increasingly clear that negative perceptions about the environmental footprint of meat is largely being driven by global organizations that then influence national governments and institutions. While the importance of mitigating issues that originate in Canada remains the top priority for the team, we must also consider that much of the media coverage today is based on international reports highlighting other cattle production systems. Unfortunately, an audience that is largely removed from agriculture believes this to be true of Canadian production as well. This does provide an opportunity to showcase the world-class environmental excellence that is displayed by the Canadian beef industry but also demonstrates the need for more involvement on an international level. Stakeholder Engagement Manager, Amie Peck, has taken on the role of Communications Council Chair at the Global Roundtable for Sustainable Beef to allow for aligned strategy on issue mitigation with international organizations.

A major accomplishment of the previous fiscal year included the large-scale consumer research that was conducted, establishing a bench line for the PSE team to work from in both issue mitigation and proactive projects. This research confirms most Canadians

are supportive of the national beef industry but highlighted concerns about environmental impacts, especially by millennials. However, 70% of millennials want to know more about how cattle are raised, demonstrating huge opportunities for the industry to showcase positive production practices, family operated businesses and environmental benefits.

For the 2021-2022 year, the PSE team looks to focus on two key areas of deliverables, with ten associated annual core activities and two long term program initiatives.

Two areas of focus:

1. Supporting issues response
2. Proactive media strategies, partnership investment and proactive content

Ten core activities are critical in the delivery of the program business plan:

1. Response intelligence
2. Consumer research
3. Media advisory group
4. Social media content
5. PSE communications
6. Video series with key partners
7. Training and industry consultations
8. Key contacts/partnerships
9. Beef advocacy Canada
10. Public outreach

Two long term program initiatives:

11. Long term strategy
12. Issues reserve

2021/22 PUBLIC & STAKEHOLDER ENAGEMENT BUDGET

	Q1	Q2	Q3	Q4	2021/22 TOTAL PSE Budget	CCA – SE Program	Canada Beef
Revenue							
Projected National Check-off Funds	175,000	250,000	310,000	165,000	900,000	675,000	225,000
Other Revenue-Carry Forward	93,519						
Other Revenue- Grants/sponsorships							
Total Revenue	268,519	250,000	310,000	165,000	900,000	675,000	225,000
Expenses							
Operations ¹	75,000	75,000	76,000	76,000	302,000	302,000	-
Communications	38,000	39,000	38,000	37,000	152,000	97,000	55,000
Partnerships	5000	5,000	25,000	10,000	45,000	40,000	5,000
Training	6000	5,000	5,000	5,000	21,000	16,000	5,000
Administration	5000	5000	5000	5000	20,000	20,000	-
Public Outreach/ Project Development	90,000	90,000	90,000	90,000	360,000	200,000	160,000
Expenses	219,000.00	219,000.00	239,000.00	223,000.00	900,000	675,000	225,000
Net Surplus (Deficit) ⁹	49,519.00	31,000.00	71,000.00	-58,000.00	93,519	93,519	
Issues Reserve Fund							

*Please note this budget reflects the CCA fiscal calendar year (June 2021 – July 2022).

Activity	CCA – PSE Program	Canada Beef
Operations and Administration	322,000	
1. Response Intelligence	18,000	
2. Consumer Research /Campaign Evaluation	20,000	
3. Media Advisory Group	15,000	
4. Social Media Content	40,000	
5. PSE Communications Plan	10,000	55,000
6. Key Partners Video Series	60,000	
7. Training and industry consultations	11,500	5,000
8. Seek out and invest in key partnerships/projects for building public trust	40,000	5,000
9. Further Develop Beef Advocacy Canada	20,000	
10. Public Outreach	118,500	160,000
11. Issues Response Reserve	0	
Total	\$675,000	\$225,000

PROVINCIAL CATTLE ASSOCIATIONS

PROVINCIAL INVESTMENT

PROJECTED ALLOCATION: \$2,040,522

Provincial allocation programs are currently delivered by seven provincial cattle associations and must promote the marketing and production of beef cattle, beef and beef products or conduct and promote research in the beef and veal industry.

The unique needs of the provincial cattle associations invite the opportunity to invest regionally with national benefits.



MANITOBA BEEF PRODUCERS: \$83,363

The Manitoba Beef Producers (MBP) will undertake four production related research activities that invest check-off dollars directly into producer-focused research, and one public trust promotion and awareness program to close the gap between the general public and beef production. These projects will come from the 6.5% of Manitoba's national check-off retained for provincial investment.

Environmental factors like changes in land use and climate change have led to the modifications in the geographic distribution of many plant and animal species, including pests like ticks, along with the pathogens they can carry. The two most common tick species in Manitoba are the American dog (wood) tick and the blacklegged (deer) tick. This project aims to grow knowledge of the relationship between different types of pastures, and the exposure of livestock and workers to two species of ticks. In the end, it will help the industry to evaluate the health risks and the economic risks associated with ticks on pastures. MBP will contribute \$15,000 per year for 3 years.

MBP will also contribute \$15,000 per year for two years to a research project to estimate the impact of grazing on water cycling and nutrient export in pasture landscapes in the Canadian Prairies. Understanding the relationships between climate, water cycling, nutrient sources and land management in grasslands will equip producers to better manage their landscapes, enable risk management analysis under periods of feed shortage, and provide the industry with science based information necessary to identify the merits of grassland and pasture systems in achieving whole-farm sustainability. The information could also later be used to develop effective public communication regarding environmental goods and services provided by the industry.

An MBP provincial investment program will explore predation in a pilot program to reduce livestock and economic loss from wildlife predation. The pilot project is targeted in areas of the province where livestock predation issues are most pressing and costly or are emerging. In addition, the pilot project includes as part of an ongoing communication strategy, to increase understanding of the management practices available to producers to manage the risk of predation. The proposed pilot

project is designed to improve prevention and mitigation strategies for livestock losses caused by predation, with the ultimate goal of reducing livestock losses due to predation (including livestock deaths, injuries to livestock and the associated economic and opportunity costs) as well as reducing Manitoba's exposure to future liability for payments under the Manitoba Wildlife Damage Program Compensation Program.

As part of a Manitoba strategy to engage the research community, some funding provided by the provincial investment portion of the national beef check-off will go towards supporting the Manitoba Beef and Forage Initiative (MBFI) programs with national beef industry value. Support will be focused towards public and producer facing programs like student training on agriculture and research related duties, student and producer workshops and tours, applied, demonstration and discovery research, media relations and communications through the website, publications and social media. MBP will contribute \$20,000 to MBFI programs.

The last set of projects that MBP plans to invest in 2021/22 are public trust programs aimed at driving stronger engagement with the public. The first is the development of a beef cattle story book, that demonstrates beef cattle's influence on grassland habitat. With similar messaging to the Guardians of the Grasslands mini-documentary, the story would present the message simply to engage young children. MBP is researching potential partners for the program, where funds would be invested in development, printing and distributing to classrooms across the province. In addition, funds will also be allocated to improving MBP's presence at the Farm and Food Discovery Centre south of Winnipeg to drive more engagement with attendees.

BEEF FARMERS OF ONTARIO: \$427,209

The Beef Farmers of Ontario (BFO) have allocated 49.8% of their net national check-off dollars back to their province for investment for four high level strategies; some with multiple activities.

Provincial investment funds will help fund BFO's \$40,000 annual membership in the Livestock Research and Innovation Corporation (LRIC), an organization that provides leadership to the Ontario livestock sectors in research and innovation. One of LRIC's deliverables to BFO in 2021 will be to work with BFO to update their research and investment strategy and priorities document that will help direct future funding. This priority setting process will involve the Beef Cattle Research Council (BCRC) to ensure national priorities are reviewed to prevent duplication and promote enhanced coordination with the Canadian Beef Research and Technology Transfer Strategy, as well as to support the specific research-focused goals contained in the National Beef Strategy. A major deliverable for 2021 will be to increase extension and dissemination of beef research results from all funders in the province, including BFO. Extension and dissemination activities for the beef sector provided by LRIC would not be possible in the absence of BFO membership in the organization. This will provide value to the Canadian beef industry as a whole. Information obtained by provincial research Centre's will be shared nationally with BCRC.

BFO intends to invest \$100,000 in the development and undertaking of the BFO Research Investment Strategy. The overarching goal of the strategy is to increase the development, adaptation, assessment, and easy adoption of on-farm technologies that help beef producers respond to changing demands, and to quantify and investigate emerging issues of importance to the Ontario and broader Canadian beef industry through targeted investments in research and innovation projects. The BFO Research Committee will consider both opportunities and problems facing the industry as well as current industry research priorities. The goals of the Strategy complement the goals and priorities contained in the Canadian Beef Research and Technology Transfer Strategy developed by the BCRC, as well as research-focused goals contained in the National Beef Strategy. The industry wants to explore all avenues that will provide it with a secure future in Ontario, through the investigation of new regional production systems, better utilization of gene technologies, nutritional advances, forage breeding and management and market intelligence specific to Ontario's varied and diverse production regions and consumer market segments.

BFO has committed \$193,000 to their Consumer Engagement Program, a combination of activities and initiatives that engage directly with consumers to achieve four key goals:

- Maintain and gain support for Ontario's beef industry and create enthusiasm for buying Ontario beef
- Increase awareness of the attributes and benefits associated with beef
- Increase demand for Ontario beef
- Increase trust in beef production and consumption

The "Ontario Beef" identity is used in the Consumer Engagement Program to drive awareness and interest in the Ontario beef industry and products. The program will focus on priority areas, including online engagement, events, resource development, and school outreach.

Success in the Consumer Engagement Program is measured in a variety of ways, including online and event engagement numbers (i.e. audience reached but also level of engagement with audience and relevance of that audience), market share of beef in the Ontario marketplace against other protein competitors, and engagement/activity metrics of involvement in public discussion on beef and topics such as environmental impact, nutrition/health, and animal welfare. The overarching mission is to provide a positive and credible voice on all things beef and beef production related in the consumer/public space within the province of Ontario.

The proposed investment of \$193,000 represents approximately 64% of total budget for consumer engagement activities. The remaining 36% will be paid for using Ontario provincial check-off funds. The funds returned to Ontario will allow BFO to augment activities in this area that would otherwise not be possible.

LES PRODUCTEURS DE BOVINS DU QUEBEC: \$1,358,000

Les Producteurs de bovins du Québec (PBQ) collect levies based on various classes of cattle, and in turn, their plans to invest their provincial allocations into classes of cattle/beef as well. The association allocates 100% of net check-off back to their province.

PBQ continues to fund projects in the feeder calf sector to deliver value for feeder calf producers. Projects in the feeder calf focus on continually improving feeder calf health, ensuring consistent health and wellness protocols are conducted and recorded, and delivering strong marketing options for the feeder calf sector to remain competitive.

The main areas of focus for the fed cattle sector is continuing work in strategic planning for market development and research, implementing the VBP+ action plan, and work to enhance income security and farmer profitability. A strategy is also being developed to align the supply chain in Quebec, and provide a steady, predictable beef supply.

Market development and promotion activities for Québec milk-fed and grain-fed veal are again a top priority for PBQ. Working with the Canadian Veal Association (CVA) and the federal working group on veal will align focus on competitiveness and determine priority issues in the sector to focus on. Both grain-fed and milk-fed veal sectors in Quebec will continue to strategically implement the promotion plan developed for this coming year.

For cull cattle and bob calves, PBQ has a strong plan to drive initiatives to add value in these cattle classes. Research around utilizing dairy cattle to finish in Quebec feedlots continues to be undertaken, as well as the development of new markets and outlets for cull cattle in the province. As for bob calves, PBQ continues to implement a strategy to improve the health and welfare of bob calf production in the province, including a transition to the new transportation regulations implemented federally.

NEW BRUNSWICK CATTLE PRODUCERS: \$19,950

While the majority of investments made by the New Brunswick Cattle Producers (NBCP) in 2021/22 will focus on joint programs with the other Maritime provinces through the Maritime Beef Council, (MBC), NBCP will also fund provincial programs aimed at building a stronger, more profitable beef industry in the New Brunswick.

Grazing management, forage nutrient management and forage cost of production are important aspects of the beef industry that the NBCP plan to focus on this year. Both programs will include a mentorship component, connecting producers with resources and real industry experience in these areas. Goal setting and action planning will also be integral pieces to the programs, as will engaging agriculture and conservation communities to strengthen connections, infrastructure and support for more advanced systems.

The NBCP has recognized that the province represents a key animal movement corridor for livestock entering the United States from Canada and/or the entry of livestock to Canada from the United States. New Brunswick also manages ports of entry for the provinces of Quebec, Nova Scotia and Prince Edward Island, and any animals imported or exported from Newfoundland and Labrador are likely to travel through New Brunswick. The New Brunswick Cattle Producers Association has recognized the importance of developing and maintaining an Animal Health Emergency Management plan. NBCP will complete the plan and communicate the results of the plan development process to all New Brunswick cattle producers. It will also encourage strengthened communication, awareness of critical gaps and encourage a further action plan to minimize risk with foreign animal disease outbreaks.

Last year, COVID-19 reinforced the need for a comprehensive risk management (BRM) strategy to be maintained on the farm. While generally, New Brunswick farmers do not make effective use of currently available Business Risk Management Programs, both federal and/or provincial, New Brunswick beef producers are particularly disengaged from BRM programs. This project

will work to understand the current barriers for producers to engage in current BRM programs, and creation of an action plan to support strengthening producer engagement in comprehensive risk management.

Recent work through the Maritime Beef Council (MBC) and the Beef Cattle Research Council (BCRC) has brought the long-term goal of Maritime price insurance for producers into reach. The NBCP wishes to invest in a long-term producer engagement process around the use of the Eastern Livestock Price Insurance Program (ELPIP) as it moves into initial implementation phases. Increasing both awareness, and understanding of these programs is key to their success in the beef sector, so an action plan to support this will be developed to ensure an aligned implementation through the province and region.

Additional support will be provided to the Maritime Beef Council- Combined Maritime Initiatives below.

NOVA SCOTIA CATTLE PRODUCERS: \$23,750

A cornerstone of the Maritime Beef Industry Development and Expansion Strategy is to improve genetic evaluations and herd performance, and Nova Scotia is home to the only public genetic evaluation station in Atlantic Canada. Each year more than 100 bulls from across the region are tested for performance traits such as average daily gain (ADG) and Residual Feed Intake (RFI). This project is designed to encourage breeders to have bulls evaluated and improve awareness and purchase of bull selection based on genetic performance measures. As a whole, the beef industry will benefit through the growth of the Maritime beef sector, and increased producer productivity and knowledge. This ongoing project will receive \$8,000 in provincial investment dollars.

Over the past number years, the Nova Scotia Cattle Producers (NSCP) have partnered with the Maritime Beef Council, Perennia, local veterinarians as well as Dr. Claire Windeyer from the University of Calgary to deliver several calf health workshops, focusing on vaccination protocols. During this same period, there has been little increase in the proportion of, particularly vaccinated cattle marketed through Atlantic Stockyards Ltd. There has been a trend over the past six years for fewer cattle to be vaccinated at fall and early winter feeder sales. The objective of the On-Farm Cattle Precondition Pilot Project is to improve cattle herd health in the province by increasing the quantity and quality of vaccinated brood cows and pre-conditioned feeder calves. To reach this objective, the NSCP will work through a series of seven goals to improve awareness, training and education, build capacity, increase proportion of preconditioned cattle, introduce novel preconditioning services, conduct a break even analysis for service delivery and increase the proportion of positive titer feeder cattle at auction.

Additional support will be provided to the Maritime Beef Council- Combined Maritime Initiatives below.

PRINCE EDWARD ISLAND CATTLE PRODUCERS: \$19,000

The Prince Edward Island Cattle Producers (PEICP) will invest in two provincial strategies with the national check-off funds allocated back to their province, with the goal of showing national benefit through these activities.

The PEICP is working to promote the Island Beef brand and local Island Beef producers, through a partnership with Atlantic Beef Products and the Restaurant Association of PEI. Two campaigns will be developed, focusing on Island Beef farmers in the area. The first is planned for May 2021, pending COVID-19 restrictions, focusing on incorporating local breweries, wineries and cideries, pairing those local products with Island Beef. The campaign will have a strong social media presence, highlighting producers, beef benefits and bringing beef to barbecues across the region. The second campaign will run in the fall, focusing on local Fall Flavours events, again, pending COVID-19 restrictions. These events have been running in PEI for many years, and this year the PEICP looks to partner again with the Restaurants Association of PEI to kick off a beef focused event featuring local beef producers cooking along side chefs, and answering questions on Island Beef.

To ensure a strong and robust check-off system in Canada, regulatory compliance is paramount on all levels. In PEI, the PEICP will invest in regulatory compliance strategies to ensure the requirements in the Cattle Marketing Board Order and Canadian Beef Check-Off Agency's Collection and Service Agreements are being met and check-off is being collected consistently and fairly. In turn, this will enable PEICP to continue to invest in innovative, strategic programming to support the beef industry.

Additional support will be provided to the Maritime Beef Council- Combined Maritime Initiatives below.

MARITIME BEEF COUNCIL - COMBINED MARITIME INITIATIVES

The Maritime Beef Council (MBC), which includes the New Brunswick Cattle Producers (NBCP) the Nova Scotia Cattle Producers (NSCP) and the Prince Edward Island Cattle Producers (PEICP) have submitted a joint, co-operative plan within the three Maritime provinces. Funding for these joint programs totals \$32,350 in Canadian Beef Cattle Check-Off dollars.

To increase professionalism in the beef industry, the MBC will invest into both the Atlantic Beef School, and the Maritime Beef Conference. The Atlantic Beef School aims to increase efficiency in production practices and business management decisions while connecting with other beef producers. Six to eight modules will be delivered in the coming year, and have been adapted to be delivered virtually. The Maritime Beef Conference is planning for a face to face conference event in 2021, after being entirely virtual in 2020. The objective of this year's conference is "Healthy Cattle, Healthy Grass, Healthy Cattle" and will train and educate beef producers about current and future trends in their industry and future farm preparation.

One of the current limitations affecting the expansion of the Maritime beef herd is the lack of risk management tools available to beef producers. As the agricultural industry continues to evolve, the complexity and risks are increasing. Currently beef producers in Maritime Canada still operate without a program that manages price risk in a bankable, timely fashion. While AgriInvest and AgriStability are available, MBC will be working to develop an Eastern Livestock Price Insurance Program for Maritime cattle producers.

The MBC also plans to conduct a project aiming to maximize utilization of pasture and forage. The first element in this project would be held in conjunction with the Atlantic Forage Field Day at the Nappan Research Farm in Nova Scotia. The second element would include industry contribution to the Eastern Canadian Forage UPick tool, pending acceptance of the funding application.

Value chain alignment is another focus of the MBC, and through a suite of projects, the associations plan to drive higher engagement across the industry. The Verified Beef Production Plus program will be ramped up in the Maritimes this year, as well will feedlot and cow/calf production clubs. Both the VBP+ and production clubs focus on knowledge transfer, education and strengthening profitable and recognized processes on farm. There will also be investment into value chain alignment in the dairy industry, where the gap in bob calf marketing continues. Resources will be shared with producers to assist getting bob calves to a marketable weight.

MBC is developing a consumer strategy in collaboration with Canada Beef to increase the demand for high quality Canadian beef in the region. Funding for this project in 2021/22 would kick start a strategic plan for a consumer engagement project, aligning with processors, food service and culinary institutes in Atlantic Canada. MBC will work to finalize all plans, resources, roll-out and detailed outcomes this year for a final approval by MBC, funding partners and key stakeholders.

VEAL FARMERS OF ONTARIO: \$109,250

The Veal Farmers of Ontario (VFO) began remitting levies to the Agency in spring of 2020, and elected to allocate 100% of these funds to provincial investment, targeted at an Ontario Veal Appeal consumer marketing campaign. VFO is in its second year of remitting directly to the Canadian Beef Check-Off Agency, and is working to provide valuable input to Canada's beef and veal industry through their contribution to the Agency's Marketing Committee.

The overall goal for VFO is to drive demand for veal. With an increased demand for finished Ontario veal cattle, producers should expect a more stabilized demand, with a goal to flattening the impact of seasonality- and markets for quality male dairy calves in all areas of the supply chain. VFO will identify strategic opportunities and initiatives that will leverage budget and resources to extend consumer reach. The program will be guided by four objectives, including: (i) increasing consumption through existing consumers, (ii) partnering with likeminded organization to extend reach, (iii) increasing understanding of consumer needs, and (iv) improving and protecting the integrity of veal and veal labeling to ensure consistency.

Investments will be made in different tactics like social media, recipe development, brand ambassadors, and partnerships with retail and foodservice. VFO will continue to grow the search for Ontario's Best Veal Sandwich contest, and drive consumer demand through targeted efforts.

A key focus for driving consumer demand for VFO will be targeted efforts that include encouraging current veal consumers to increase consumption. This ensures limited resources are targeted to those having the most market impact.

CANADIAN BEEF CATTLE CHECK-OFF AGENCY

OPERATING BUDGET

FOR THE YEAR ENDED MARCH 31, 2022

REVENUE

Canadian Beef Cattle Check-Off	17,083,000
Import Levy	1,000,000
	18,083,000

EXPENSES

Board of Directors	219,500
Agency Administration	656,650
Provincial Investment	2,040,522
Research	4,379,099
Public and Stakeholder Engagement	901,930
Marketing	9,885,299
	18,083,000

Surplus/(Deficit)	0
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VISION

Deliver measurable value to the Canadian beef industry through prudent and transparent management of the Canadian Beef Cattle Check-Off.

MISSION

A unified and sustainable national funding strategy for Canadian beef cattle research, market development and promotion.

It is important that we manage producer and industry dollars transparently and prudently. Our board of grassroots producers and industry representatives are committed to deliver the best possible return for our industry, enabling growth, profitability and sustainability.

As a Canadian beef producer or industry stakeholder, your voice matters. Whether it is electing your representative, voting at our annual meeting, attending a provincial cattle organization meeting or connecting with us on social media, we take each interaction to heart every day.

Whether you write letters or tweets, we want to hear from you. We have an open door policy and pride ourselves on transparency, so stop in, ask questions and provide feedback! Sign up for our monthly newsletter The Gatepost on our website.



www.cdnbeefcheckoff.ca

info@cdnbeefcheckoff.ca

[@cdnbeefcheckoff](https://twitter.com/cdnbeefcheckoff)



146, 6715 8th St NE Calgary, AB
(403) 451-0917