

2022/23 BUSINESS PLAN

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



APRIL 1, 2022 - MARCH 31, 2023



TABLE OF CONTENTS

1	Vision, Mission and Purpose
2	Regulatory Framework and Governance
3	Service Provider Profiles
5	Market Outlook
7	Executive Summary and Budgets
8	Agency Administration
10	Administration Budget
11	Marketing
14	Marketing Budget
15	Research
17	Research Budget
18	Public and Stakeholder Engagement
20	Public and Stakeholder Engagement Budget
21	Provincial Investment
26	Operating Budget
28	Appendix
	Appendix I- Marketing Business Plan
	Appendix II- Research Business Plan
	Appendix III- Public and Stakeholder Engagement Business Plan
	Appendix IV- Provincial Investment Business Plans

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.

VISION

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

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.

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, plus the 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, allowed 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 have been subject to the levy of \$1 per head or carcass equivalent.

GOVERNANCE

The Agency is governed by 16 Agency Members from across Canada. There are 10 member seats allocated to beef cattle producers nominated by their provincial cattle associations. The remaining six are: four from processors, traders, brokers and exporters nominated

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.



2021/22 CANADIAN BEEF CHECK-OFF AGENCY MEMBERS



TERRY WIEBE
BRITISH COLUMBIA



JEFF SMITH
ALBERTA



SHEILA HILLMER
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



MIKE KENNEDY
CANADIAN MEAT COUNCIL



RUSS MALLARD
CANADIAN MEAT COUNCIL



ANDRE FORGET
CANADIAN MEAT COUNCIL



JOHN CURTIS
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's 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, information, training and opportunities, and to 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 acts 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 re-invested directly 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

In 2022, prices may rise higher as the global cattle supply tightens while strong international demand increases the carcass value. Canadian beef production increased in 2021 and is expected to move slightly lower in 2022.

Labour disruptions, volatile foodservice demand, and inflationary support from government transfers globally were the primary drivers of stronger beef prices in 2021.

2021 MARKET HIGHLIGHTS

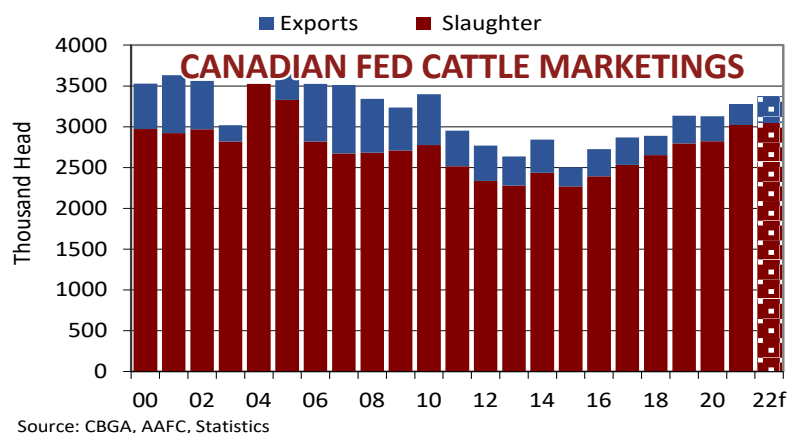
On July 1, 2021, beef cow inventories were down 1.7% at 3.55 million head from July 2020 and total cattle inventories were steady (+0.2%) at 12.23 million head. Beef replacement heifers were up 3.8% at 654,700 head.

Fed cattle marketings are projected to be up 4.7% in 2021 to 3.27 million head, with slaughter projected to be up 7.0% to 3.02 million head and exports projected to be down 17.1% to 254,700 head. Increased

feeder imports (up 54% year to date November) have supported domestic fed cattle slaughter. Dry conditions brought in from a La Nina weather pattern affecting much of North America pushed calves and feeders into feedlots. Western Canadian cattle on feed numbers in the third and fourth quarters of 2021 were up 13% from the third and fourth quarters of 2020 and up 25% from the five-year average. These numbers will be supportive toward steady beef production in the first half of 2022.

Non-fed marketings are projected to be up 7.2% in 2021 to 770,000 head. Domestic non-fed slaughter is projected to be up 11.9% to 556,700 head in 2021 following a 15% decline in non-fed domestic slaughter in 2020. Non-fed exports are projected to be down 3.4% to 213,600 head in 2021 with cow exports to the US still historically strong as packers continue prioritizing fed cattle in Canada. Overall Canadian cattle marketings (fed and non-fed) are projected to be up 5.1% from 2020 in 2021.

Total beef production (domestic, live slaughter exports, and offal) is projected to be up 5.2% to 1.62 million tonnes, primarily



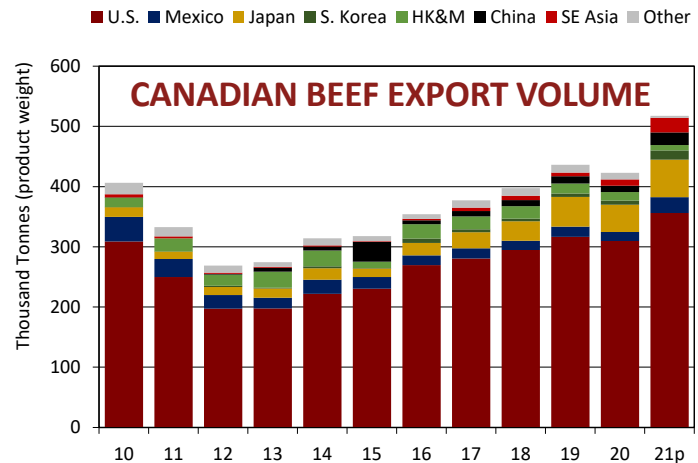
driven by domestic slaughter. Steer carcass weights are historically large, averaging 919 lbs in 2021, up 2 lbs from 2020. Domestic beef production is projected to be up 7.7% to 1.41 million tonnes and live slaughter exports are projected to be down 11.7% to 0.17 million tonnes.

With more cattle being slaughtered in Canada there is increased availability for beef exports. Year to date (November), Canadian beef exports were up 22% in volume and 39% in value with increases to all major markets: the United States (+15%), Japan (+38%), mainland China (+99%), South Korea (+130%), Mexico (74%) and Southeast Asia (excluding Taiwan) (+130%). Strong domestic and international demand supported beef prices with the US boxed beef composite price up 8% from 2020 in 2021.

2022 MARKET OUTLOOK

With La Nina expected to persist throughout the year, moisture conditions will be a primary driver of production in 2022. Higher fertilizer and feed grain prices, strong beef demand, inflation, and exchange rates will remain economic drivers of beef trade as well as affecting production costs and producer decision making.

Canadian cattle marketings in 2022 are forecast to be up 1.1% to 4.09 million head. Total beef production (domestic and live exports) is forecast to be down 0.6% at 1.61 million tonnes. Domestic production is forecast to be down 0.4% around 1.40 million tonnes with live slaughter exports down 2.7% to 172,000 tonnes. In 2022, fed cattle marketings are forecast to be up 2.8% at 3.37 million head with domestic slaughter up 0.9% to 3.05 million head and exports up 25.1% to 318,600 head. Non-fed marketings are forecast to be down 6.3% to 721,400 head with slaughter down 9.4% at 504,100 head and exports up 2.4% at 218,700 head.



Source: Statistics Canada, CFIA

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 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.

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.

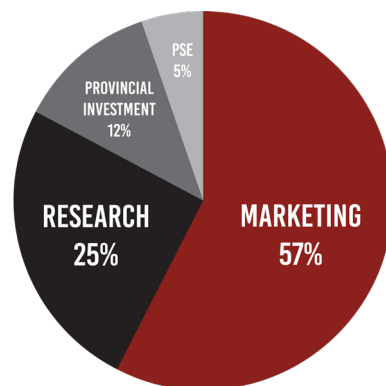
INTRODUCTION

Through the Canadian Beef Cattle Check-Off, Canadian beef and veal 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 products recognized as the most outstanding by Canadian and world customers.

In 2022/23, the Canadian Beef Cattle Check-Off and Canada’s Beef Import Levy is estimated to bring in approximately \$18,183,000 in gross revenue.

Moving into the 2022/23 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, after administration costs, 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 net beef import levy is allocated to the promotion of unbranded beef in Canada.



REVENUE ALLOCATION

CANADIAN BEEF CHECK-OFF AGENCY ADMINISTRATION

PROJECTED ALLOCATION: \$802,173

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 2022/23 fiscal year with goals to administer the Agency with separate and distinct governance, reduce check-off slippage, and reach out to more Canadian producers about the mechanics and value of the national check-off. The Agency Members approved a 2022/23 administration budget at \$917,000, with \$45,000 in additional revenue coming from the administration of Canada's pork import levy, and an additional \$70,000 to be invested from the Agency's surplus into measurable tactics and programs. The \$115,000 in additional revenue and the estimated \$802,173 from administration revenue balances the Agency's budget.

The Agency's programs 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.

Sound Governance and Administration

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. Five years into the new structure, the Agency will now undertake a structural review to ensure that the current setup of the Marketing Committee meets the needs that it was initially created to meet.

Structured Reporting and Compliance

The Agency's inspection program will continue to grow in 2022/23, 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. Additional inspectors have been added to the Agency, allowing a more widespread footprint from coast to coast. 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, remittance processes at the point of sale, and stronger communication through both partner organizations and directly to Canadian beef producers. Stakeholders can expect to see a new library of resources, and a renewed focus on targeted communications for various operation types in Canada's beef industry.

Engaged and Educated Stakeholders

This year also marks the 20th anniversary of the Agency and kicks off a five year lead up to the 25th anniversary celebration. The Agency will launch a new youth engagement strategy to help usher in a new generation of beef industry stakeholders, all while honoring and respecting the path that has led the Agency to its current role. This new engagement strategy will include outreach and communications, as well as an inward look to bring on a youth observer for a fresh perspective and linkage back to emerging industry leaders.

Strategic Communication and Collaboration

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.


2022/23 ADMINISTRATION BUDGET

	2021/22	2022/23
SOUND GOVERNANCE AND ADMINISTRATION	130,000	162,000
<ul style="list-style-type: none"> - 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 - review of the current Marketing Committee structure for gaps 		
STRUCTURED REPORTING AND COMPLIANCE	50,000	25,000
<ul style="list-style-type: none"> - standardizing remittance requirements for check-off remitters - growing inspection portfolio to include import levy - strengthen remitter compliance through inspections and education - reduce slippage on interprovincial marketings 		
ENGAGED AND EDUCATED STAKEHOLDERS	10,000	25,000
<ul style="list-style-type: none"> - 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	30,000
<ul style="list-style-type: none"> - 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	491,800
<ul style="list-style-type: none"> - reserve 	10,000	
BOARD OF DIRECTORS	219,500	183,200
<ul style="list-style-type: none"> - per diems - travel and meeting expenses - orientation and training 		
Total	876,150	917,000

CANADA BEEF MARKETING

PROJECTED ALLOCATION: \$9,960,835

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 is a market development and promotion service provider for the Canadian Beef Cattle Research, Market Development and Promotion Agency. Canada Beef is funded by cattle producers and is responsible for domestic and international beef and veal market development, promotion and support. The Canada Beef team includes 25 marketing, trade professional and administration staff based in Canada, Mexico, Japan, China, and Taiwan.

Canada Beef works to build a dynamic, profitable and competitive Canadian beef and veal industry where Canadian high-quality beef and veal products are recognized as the most outstanding by domestic and international customers. These efforts ultimately increase demand for Canadian beef and veal and the value producers receive for their cattle.

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 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 cattle producer check-off and import levy dollars and is able to further leverage the check-off investment through eligible government industry development funds and client partner investments to maximize the return on investment that cattle producers receive from their check-off contributions.

The Coronavirus pandemic has continued to disrupt 'business as usual' for supply partners, end-user clients and consumers worldwide. Canada Beef's commitment to address the market challenges of the pandemic will continue in the 2022/23 Investment

Plan. The plan is designed to be nimble and responsive, allowing Canada Beef to meet the needs of consumers and trade clients in both domestic and international markets.

The plan gives Canada Beef the flexibility to direct resources to areas of opportunity or risk as warranted by continually evolving market conditions. The goal for Canada Beef is to address the challenges of the pandemic and find or create the market opportunities that can come from change that will set it apart from its competitors and provide the maximum benefit for Canadian cattle producers and other stakeholders.

The \$14.2 million Plan is organized into 17 separate business units designed to increase the clarity and transparency of the plan for industry stakeholders. The Plan focuses on five key demand drivers important to the success of Canada Beef programs and services. Tactics, target audience and standardized KPI's have been incorporated to ensure effective, accurate and consistent ROI reporting back to stakeholder and funding partners.

1. Trade Marketing Development Programs and Services
2. Consumer Marketing Programs and Services
3. Market Intelligence Programs and Services
4. Stakeholder Communications Programs and Services
5. Industry Education Programs and Services

1. Generic Beef and Veal – Consumer Marketing

The Import Levy (collected on beef and veal imports at the equivalent rate of \$1 per head) continues to provide funding to promote the positive attributes of consuming beef and veal from all sources in Canada through consumer education, awareness, and trust through public influencers directly to consumers. 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 and veal over other proteins and positively influence health professionals.

2. Public and Stakeholder Engagement

Closely related to consumer marketing are efforts to build the beef industry's image and reputation with the public. Canada Beef continues to partner with the Canadian Cattlemen's Association and other beef industry groups to communicate with the public, consumers, key stakeholders and influencers, and meat trade to address concerns and build trust and confidence about how beef is raised and produced in Canada.

3. 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.

4. Channel Marketing

Programs focus on retail and foodservice channel promotion and market development initiatives that drive sales volume, market share and competitive position, retail, and foodservice demand building programs to increase product assortment, marketing programs that drive sales and awareness of the Canadian Beef Advantage in Canada.

5. 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. Defend, stabilize, and increase consumption of Canadian beef vs poultry, pork, and plant-based meat alternatives. Increase awareness, trust and confidence in the Canadian cattle and beef delivery systems with consumers through the Canadian Beef Advantage (CBA). Support and contribute to the development and launch of branded and generic Canadian Beef Information Gateway (Gateway) across all business units to achieve success.

6. Digital Marketing

Canada Beef will expand the awareness and reach of the Canadian beef value proposition through strategic content on digital platforms. Create, deliver, maintain, and measure cost-effective and impactful content for all Canada Beef digital platforms to support the communication of the Canadian Beef Advantage.

7. Health and Nutrition

Establish Canada Beef as the industry authority about the nutrition and health benefits of beef. Educate consumers, stakeholders, and health professionals about beef's place in a healthy diet. Identify and develop communication and proof point resources that highlight beef's distinctive nutritional attributes, and the beneficial role beef can play in the diet.

8. Stakeholder Communications

Canada Beef will engage with industry, stakeholders, end-user customers, consumers and media via print, radio, virtual, and digital platforms. Create and deliver timely and cost-effective communication of the Canadian beef story and Canada Beef activities back to funding partners and stakeholders using a range of communications vehicles. Ensure organizational preparedness for issues and crisis management and provide internal and organizational support during active periods.

9. Canadian Beef Centre of Excellence

The Canadian Beef Centre of Excellence will provide education, learning tools and resource development to promote the Canadian Beef Advantage. The CBCE will develop and create resources to support all business units, stakeholder partners and trade-based clients in the domestic and export marketplace.

10. Export Market Development Partner Program

Provide funding support for Canadian beef representative companies to expand their Canadian beef business in the export marketplace through education, learning tools and resource development to promote the Canadian beef advantage. Develop and create resources to support all business units, stakeholder partners and trade-based clients in the domestic and export marketplace.

11. Emerging Markets

Canada Beef will support emerging export market development opportunities in EU, UK, MENA and other markets of interest to grow Canadian beef volume, value and market share. Develop, support, and implement a variety of trade and consumer marketing activities and sales promotions to increase the awareness of the Canadian Beef Advantage and drive sales growth in all segments and viable markets of opportunity.

12. Japan Market Development

Promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canada Beef volume, value, and market share in Japan. Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide return on investment (ROI) back to funding partners and stakeholders.

13. South Korea Market Development

Promote the Canada Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canada Beef volume, value, and market share in South Korea. Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.

14. China / Hong Kong Market Development

Promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canada Beef volume, value, and market share in China and Hong Kong. Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.

15. Taiwan / Southeast Asia Market Development

Promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canada Beef volume, value, and market share in Taiwan and Southeast Asia. Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.

16. Mexico/ Latin America Market Development

Promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canada Beef volume, value, and market share in Mexico and Latin America. Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.

17. Canada Beef Operations

Deliver financial accounting and administration services to ensure Canada Beef operations, programs and services are funded adequately, efficiently and in a timely manner. Provide sound financial policies and analytical systems for internal controls, accurate and timely financial information and ensure compliance with statutory and contractual obligations. Provide and maintain a fit-for-purpose, safe and functional office work environment for all Canada Beef offices.

2022/23 MARKETING BUDGET

Revenues		\$
1	Check Off - Marketing	8,870,000
2	Check Off - Public and Stakeholder Engagement	233,000
3	Import Levy - Beef	1,012,260
	Import Levy - Veal	32,740
4	Government of Canada - Canadian Agricultural Partnership (CAP)**	1,900,000
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
		\$ 12,454,000

Expenses		
	Board of Directors - Marketing Committee	65,000
	Marketing	14,162,640
		\$ 14,227,640

(Deficit) to be funded out of unrestricted accumulated reserves **\$ (1,773,640)**

		2022/23		
Marketing		Programs	Operating	Total
1a	Domestic - Generic Beef	860,000	226,400	1,086,400
1b	Domestic - Generic Veal	10,000		10,000
2	Public and Stakeholder Engagement	300,000	64,200	364,200
3	Global	820,000	1,108,300	1,928,300
4	Domestic - Channel Marketing	900,000	475,000	1,375,000
5	Domestic - Consumer Marketing	1,214,000	79,800	1,293,800
6a	Digital Marketing	465,000	189,900	654,900
6b	Digital Marketing - Generic Veal	22,740		22,740
7a	Health and Nutrition	285,000	55,650	340,650
7b	Health and Nutrition - Generic Beef	275,000		275,000
8	Communications	210,000	125,950	335,950
9	Canadian Beef Centre of Excellence	678,000	571,150	1,249,150
10	Export Market Development	450,000	162,400	612,400
11	Emerging Markets	260,000	-	260,000
12	Japan	825,000	499,800	1,324,800
13	South Korea	210,000	48,000	258,000
14	China	665,100	285,100	950,200
15	South East Asia (Including Taiwan)	265,000	107,600	372,600
16	Latin America (Including Mexico)	444,000	189,500	633,500
17	Calgary and Mississauga	-	815,050	815,050
		\$ 9,158,840	\$ 5,003,800	\$ 14,162,640

BEEF CATTLE RESEARCH COUNCIL

RESEARCH

PROJECTED ALLOCATION: \$4,372,828

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, 2022 to June 30, 2023 is projected at \$5.3 million plus unrealized gains on investments at \$373,002. Funding submitted directly by provincial cattle associations to the BCRC to support research activities in 2022/23 totals \$88,000. Expenses are projected at \$6.39 million for a 2022/23 net deficit of \$1.07 million, or \$694,560 when unrealized gains are included. The annual reserve at June 30, 2023 is projected at \$6.8 million, down from \$7.5 million projected for June 30, 2022. As 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 2022/23 programs are directed by the Canadian Beef Research and Technology Transfer Strategy (Research and Extension Strategy) released in 2021. This five-year Research and Extension Strategy was developed in partnership with the Canadian Beef Advisors (a collaborative group of national beef sector organizations including the BCRC) and ongoing engagement of researchers, funders and beef producers, to identify needs in research capacity, infrastructure, programming, funding and coordination. 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 renewed Research and Extension Strategy aligns with Canada's National Beef Strategy and the ten-year goals launched by the Canadian Beef Advisors.

The core research and technology transfer principles identified in the Research and Extension Strategy and supported by the 2022/23 BCRC programs are:

1. Increase producer profitability by increasing productivity or decreasing costs of production and risks.
2. Develop, enhance and encourage adoption of beneficial practices and innovations that maximize the environmental benefits industry provides and continue to reduce our environmental footprint, while supporting industry competitiveness.
3. Support continuous improvements in Canadian beef demand through advancements in the quality and safety of Canadian beef.

4. Generate science to inform decision makers, policy and best management practices and to support consumer confidence and public trust.
5. Develop, enhance and encourage adoption of leading-edge technologies that support industry competitiveness, automation and sustainability.
6. Ensure the maintenance and rejuvenation of critical research capacity and infrastructure that facilitate proactive inquiry and innovation to support industry advancement.

With the anticipation that the fourth Science Cluster program will be announced in 2022, the BCRC will select new projects to be funded and develop a Science Cluster IV application in 2022. The selected projects will support the core principles outlined above. Funding research and extension projects and initiatives outside of the Beef Science Cluster remains a core component of the BCRC's funding plan for 2022/23. The majority of funds will be made available to researchers through open calls for proposals aimed at achieving specific priority outcomes in identified program areas aligned with the Research & Extension Strategy.

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 2022/23. 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, the technology transfer network, surveillance research networks and cost of production network. The eastern content expansion plan will focus on creating and improving the visibility of BCRC content applicable to beef producers in Ontario, Québec and the Atlantic provinces. The veterinary collaboration project will support veterinary community engagement, resource development and building awareness and utilization of BCRC extension resources by veterinary teams and their beef clients. 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 2022/23. Moving into its third year of a five-year transition plan, the VBP+ program priorities for the coming year include: enhancement of the producer training platform; development of online auditor training tools; advancement of a remote audit delivery process; and technical reviews of the on-farm food safety HACCP plan and on-farm food safety producer recommendations.

2022/23 RESEARCH BUDGET

Net Assets, beginning of year (July 2021)	8,821,234
Excess (deficiency) of revenue over expenditure - June 2022	<u>(1,277,117)</u>

Net Assets, June 30, 2022	7,544,117
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Projected 2022 - 2023 Revenue

National Check Off	4,379,000
Industry - Cluster projects	86,000
Industry - non Cluster projects	2,000
VBP+ Stripe Transfer Payment	37,200
AAFC Cluster projects	496,568
AAFC VBP+ Industry	296,000
Interest	30,000

Total Revenue	5,326,768
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Projected 2022 - 2023 Expenses

BCRC Division Services	1,104,772
Projects - non Cluster	3,742,873
Verified Beef Production Plus	511,100
Cluster III Projects	739,586
VBP Market Alignment	296,000

Total Expenses	6,394,331
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Projected 2022-2023 Other Income

Unrealized Gains	373,002
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Excess (deficiency) of revenue over expenditure	(694,561)
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Projected Net Assets, June 30, 2023	6,849,557
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PUBLIC AND STAKEHOLDER ENGAGEMENT

PROJECTED ALLOCATION: \$934,802

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 2022-2023 budget. We anticipate that there will be \$930,000 overall allocated to the PSE program for the fiscal year April 2022 to March 2023, based on projected marketings. Of this, \$697,000 will be allocated to CCA to administer, and the remaining \$233,000 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. To ensure that synergies within the industry are enhanced, the engagement and participation of stakeholder groups is essential. This National Communication Managers group includes but is not limited to stakeholders such as: the 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 that help amplify and deliver messages.

Supporting issue response remains a key deliverable for the PSE program. Through our investment in both a media monitoring platform (Meltwater) and an animal rights surveillance service (AFIMAC), we continue to seek out new technologies and partnerships to best inform our responses. The Canadian Beef Expert Network was launched in 2021 with over 50 subject matter experts, ready to respond when issues arise. Both experts and industry stakeholders have access to new and updated factsheets and educational webinars. Media training was offered to top industry spokespersons, staff, and young producers to ensure industry messages are aligned, consistent and transparent. With the Beef Advocacy Canada platform completely revamped into an engaging, video-based experience, the PSE program is continuing to deliver tools, resources and training for successful industry representation that is essential to maintaining public trust.

Alongside Canada Beef, the PSE program participated in a double page insertion to the National Post in May. The content highlighted beef as a nutritional staple for Canadians as well as the vital role cattle play in nature-based climate solutions. The two printings had

a distribution of over 1.2 million Canadians and included a successful digital advertising component. To promote the role of cattle in preserving Canada's endangered native grasslands, PSE also partnered with CRSB, DUC and NCC on two broadcast TV episodes as part of the program FoodScape with Canadian Better Living.

Overall, there was significant challenges seen by the Canadian beef industry in 2021 including drought, wildfire, feed shortages and continued impacts of COVID-19. In terms of public trust, both private interests, investors and animal activists have aligned their messaging on the environmental impacts of beef production to encourage a reduction of beef consumption and drive sales of plant-based alternatives. However, there was also extremely high demand for Canadian beef both domestically and internationally and uptake of positive beef industry communications through both internal and external industry partners. As our benchmark consumer research highlights, Canadians are interested in the benefits of raising beef cattle and perceptions positively increase as they learn more.

For the 2022-2023 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

2022/23 PUBLIC & STAKEHOLDER ENAGEMENT BUDGET

	Q1	Q2	Q3	Q4	2022/23 TOTAL PSE Budget	CCA – PSE Program	Canada Beef
Revenue							
Projected National Check-off Funds	185,000	260,000	310,000	175,000	930,000	697,000	233,000
Other Revenue-Carry Forward	93,519						
Other Revenue- Marketing check-off	55,000						55,000
Total Revenue	333,519	260,000	310,000	175,000	930,000	697,000	288,000
Expenses							
Operations ¹	74,000	74,000	75,000	75,000	298,000	298,000	-
Communications	45,000	45,000	45,000	45,000	180,000	120,000	110,000
Partnerships	5000	5,000	15,000	10,000	35,000	30,000	5,000
Training	10000	9,000	9,000	9,000	37,000	24,000	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	205,000	168,000
Expenses	229,000.00	228,000.00	239,000.00	234,000.00	930,000	697,000	288,000
Net Surplus (Deficit) ⁹	104,519.00	32,000.00	71,000.00	-59,000.00	148,519	93,519	-
Issues Reserve Fund					100,000	100,000	-

**Please note this budget reflects the CCA fiscal year (July 2022-June 2023)*

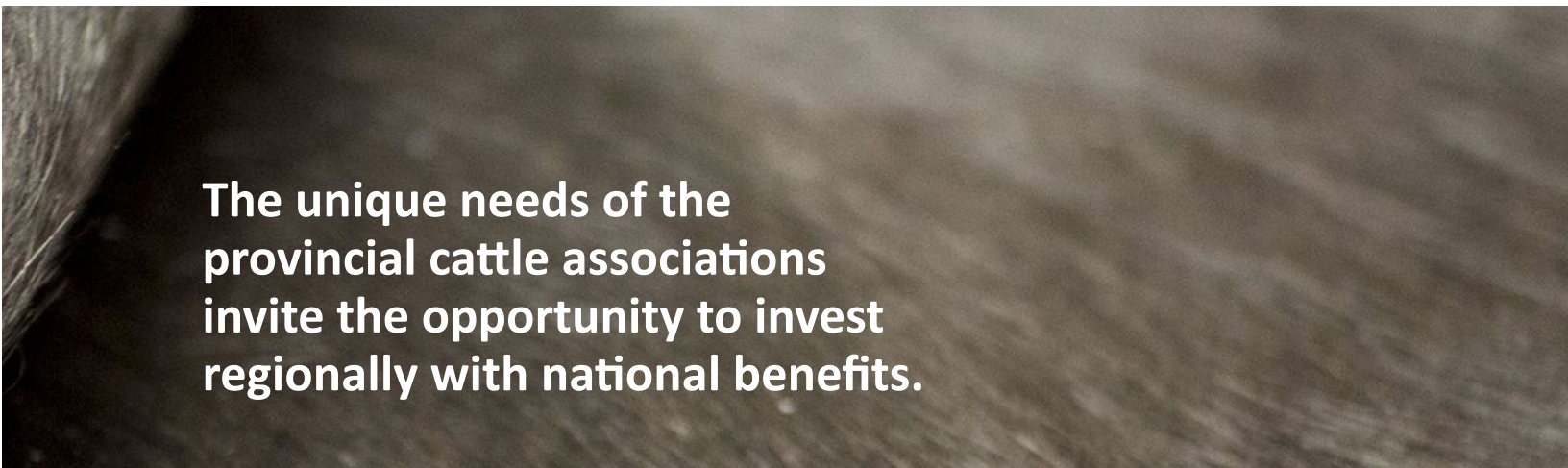
Activity	CCA – SE Program	Canada Beef
Other Revenue (Marketing check-off)	-	\$55,000
Operations and Administration	\$318,000	
1. Response Intelligence	\$10,500	
2. Consumer Research /Campaign Evaluation	\$32,500	
3. Media Advisory Group	\$12,000	
4. Social Media Content	\$30,000	\$25,000
5. PSE Communications Plan	\$41,000	\$85,000
6. Key Partners Video Series	\$45,000	
7. Training and industry consultations	\$20,000	\$5,000
8. Key partnerships for building public trust	\$30,000	\$5,000
9. Beef Advocacy Canada and PSE Websites	\$13,000	
10. Public Outreach	\$145,000	\$168,000
Total	\$697,000	\$288,000
11. PSE Issues Reserve (Mawer Investments)	\$100,000	

PROVINCIAL CATTLE ASSOCIATIONS

PROVINCIAL INVESTMENT

PROJECTED ALLOCATION: \$2,124,538

Provincial allocation programs are currently delivered by seven provincial cattle associations and must promote the research, market development and promotion of beef and veal in Canada.



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

MANITOBA BEEF PRODUCERS: \$79,146

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.

Generating science-based information regarding the role of cattle as a natural solution to climate change and sharing it with consumers is essential, as many are unaware of the implications of their food choices on food system environmental sustainability, as well as future food security. The goals of the MBP Systems Solution project is to demonstrate the value of livestock at a natural systems solution by: (1) supporting Manitoba's Protein Strategy and promoting a green economy as a consequence of their role in the circular bioeconomy by promoting crop-livestock integration at the regional level; (2) helping cow-calf producers adapt to climate change by identifying cost-effective alternative feedstuffs that will improve production efficiency, and provide more options when feed resources are in short supply; (3) identifying resource-sparing and emissions reductions (GHG and ammonia); (4) empowering producers by generating science-based data which will enable them to speak to the sustainability of their production systems, and; (5) enhancing public trust by providing science-based information regarding beef sustainability to aid in their decision-making regarding food choices.

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 2022/23 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: \$429,458

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

BFO will spend the bulk of their provincial investment into 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 is designed to target urban and suburban audiences, with more refined targeting of specific messages and resources as appropriate. A focus will be on collaborating with other consumer engagement and marketing efforts taking place to augment and broaden the message through BFO's channels, events and contacts. Activities are designed to connect into the industry's broader initiatives in the areas of beef demand and public trust.

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.

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. A major deliverable for 2022 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 are substantially enhanced with the membership of BFO, and that provides value to the Canadian beef industry as a whole. Information obtained by provincial research centres will be shared nationally with BCRC. LRIC in partnership with BFO has also committed to GRIP activities- Getting Research Into Practice (GRIP).

BFO will be investing \$30,000 into the Sustainable Beef and Forage Science Cluster through the Beef Cattle Research Council

(BCRC). The Cluster is a partnership between Agriculture and Agri-Food Canada (AAFC) and BCRC aiming to ensure proactive and strategic investments in research are allocated to programs that have the greatest potential to move the Canadian beef cattle sector forward. This Cluster builds on the success of the first (2009-2013) and second (2013-2018) Beef Science Clusters. Third Cluster projects will advance the science of past Clusters as well as address current and anticipated threats and opportunities for Canadian beef production. Investments are focused on a portfolio of research that contributes to the industry's ability to meet the growing global demand for high quality, safe beef through responsible and profitable production practices that support a sustainable future for the Canadian beef cattle industry.

LES PRODUCTEURS DE BOVINS DU QUEBEC: \$1,394,375

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.

The PBQ continued to focus on marketing and research strategies to maintain and develop Quebec's feeder calf sector. The implementation of a mandatory vaccination program to improve feeder calf quality was postponed as a result of COVID-19.

While the volume of fed cattle produced in Quebec continues to fall, the PBQ is committed to taking measures to reverse this trend. To this end, an action plan was adopted as part of the Quebec beef sector strategic planning process. Seizing on consumers' enthusiasm for local foods and differentiated products continues to be a priority, and project-specific financial supports for this type of initiative have also been allocated. Meanwhile, the PBQ continues with its project to assess the feasibility of finishing dairy cows in Quebec.

In the interests of maximizing revenue from dairy calf sales to meet demand, the potential for using beef semen in dairy herds was evaluated; the primary objective was to remedy the lack of information available to dairy producers. The PBQ developed a document for Quebec cull cattle and dairy calf producers and other stakeholders that deals with drug residues in carcasses which continues to be a focal point of communication. The document will streamline access to the key information needed to manage drug residues in meat, to encourage judicious use of drugs in beef and dairy production, and to ensure safe food production that meets with consumer satisfaction.

The PBQ continues with various projects to make the milk-fed and grain-fed veal sectors more competitive. A number of changes in publicity and promotion have been made in order to help reposition the product. A mobile app was developed to help with on-farm data collection and reduce the need for paper records and continues to be an important piece in the sector's strategy. Research projects on biosecurity initiatives in transportation and on-farm activities are also underway. Finally, a decision-making tool is in development to help independent milk-fed veal producers calculate their production costs.

NEW BRUNSWICK CATTLE PRODUCERS: \$38,200

While the majority of investments made by the New Brunswick Cattle Producers (NBCP) in 2022/23 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.

The NBCP are investing in the improvement of beef herd in New Brunswick through genetic advancement. The enhanced genetic potential of the beef herd reduces feed input costs, reduces greenhouse gas emissions and maximizes carcass yield and profitability enhancing the competitiveness of beef in the protein marketplace. The project will include a comprehensive communications and outreach plan, developed and deployed in partnership with the Maritime Beef Council, for the New Brunswick beef sector.

The association will also work with livestock and industry stakeholders in New Brunswick to develop an emergency management action plan, and train stakeholders for deployment as needed. Preparing for effective industry management in the advent of a foreign animal disease outbreak will ensure that the provincial beef sector can contribute effectively to the management or crisis management, limiting negative impacts for the Canadian beef sector in its entirety.

The NBCP are planning to explore options for deploying a forage yield monitoring network to collect annual forage yield data across various regions of the province to support a forage yield index that can inform the development of a forage insurance program in the future. Currently, New Brunswick is the only province without a forage yield insurance program, putting producers at a significant disadvantage to growers in other provinces who have the opportunity to cover weather related forage production losses.

The goal to enhance pasture management systems and extend the grazing season will be the end result of the NBCP's investment

into pasture management planning. By promoting the advance pasture management systems deployed by provincial and national agriculture groups, NBCP plans to support increased profitability in the cow-calf and stocker sector.

NBCP will support the promotion and training for the advance cattle price insurance risk management program in the province. The support and adoption of this program will support industry growth over the long term, and comprehensive communications plans will be delivered across the province and the Maritime region.

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

NOVA SCOTIA CATTLE PRODUCERS: \$53,480

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.

Forage and soil management and improvement are an important piece of beef production across Canada, and the NSCP are investing into strategies to focus on these areas. NSCP will work closely with researchers and extension specialists to collect and analyze data related to the project goals. The NSCP aims to establish 10 sentinel farms across the provinces and will include extension activities related to the importance of ongoing soil and forage analysis. In tandem with the monitoring program, the NSCP will invest to support farm practices that improve fertility management to enhance pasture and forage productivity for cattle growth and performance. To measure success, NSCP will track soil and forage testing information as well as lime purchase information to gain a better understanding of soil fertility and productivity in Nova Scotia.

NSCP will work with a registered dietician to engage working professionals, teachers, and consumers to conduct small focused information sessions and demonstrations. The goal of this project is to engage beef producers and consumers in the benefits of including beef in a healthy diet. In the second part of the project, the dietician will hold workshops and demonstrations at producer meetings to demonstrate healthy eating plans for farmers during busy farming periods. The primary goal will be to hold five consumer engagement sessions and five sessions with producers, and to develop resources to share with other provincial cattle associations.

NSCP will be investing into an On-Farm Cattle Precondition Pilot Project to improve cattle herd health in the province by increasing the quantity and quality of vaccinated brood cows and pre-conditioned feeder calves. The project will be broken into several initiatives, including communication and education, on-farm training, introducing novel preconditioning services, developing an on-farm cattle processing team, and conducting a break-even analysis for service delivery. NSCP aims to increase the proportion of positive titer feeder cattle marketed at auction, and increase the proportion of pre-conditioned feeder cattle marketed as well, to an ultimate goal of 1,000 head across six designated zones in the province.

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

PRINCE EDWARD ISLAND CATTLE PRODUCERS: \$20,055

The Prince Edward Island Cattle Producers (PEICP) will invest in 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 will be again taking part in the Meat N' Badaydas month long celebration in April. Meat N' Badaydas celebrates the warmth of gathering around the dinner table, providing comfort in times of need, and carrying on beloved family traditions. Along with the Meat N' Badaydas campaign, the PEICP will take part in Beef 'n' Brews, celebrating delicious beef dishes prepared by chefs from across PEI. Both campaigns will have a strong social media presence to promote where beef comes from, the benefits of beef, and getting people thinking about bringing the beef to their home barbecue.

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 of 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 \$42,900 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.

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.

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 returning, as well as 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.

VEAL FARMERS OF ONTARIO: \$109,825

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 flatten 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 organizations 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. 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, 2023

REVENUE

Canadian Beef Cattle Check-Off	17,083,000
Beef Import Levy	1,100,000
Pork PRA Import Levy Administration	45,000
	18,228,000

EXPENSES

Board of Directors	183,200
Agency Administration	733,800
Provincial Investment	2,124,538
Research	4,372,828
Public and Stakeholder Engagement	922,626
Marketing	9,960,835
	18,297,828

Surplus/(Deficit)	(69,828)
Revenue from Surplus	70,000
	173



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