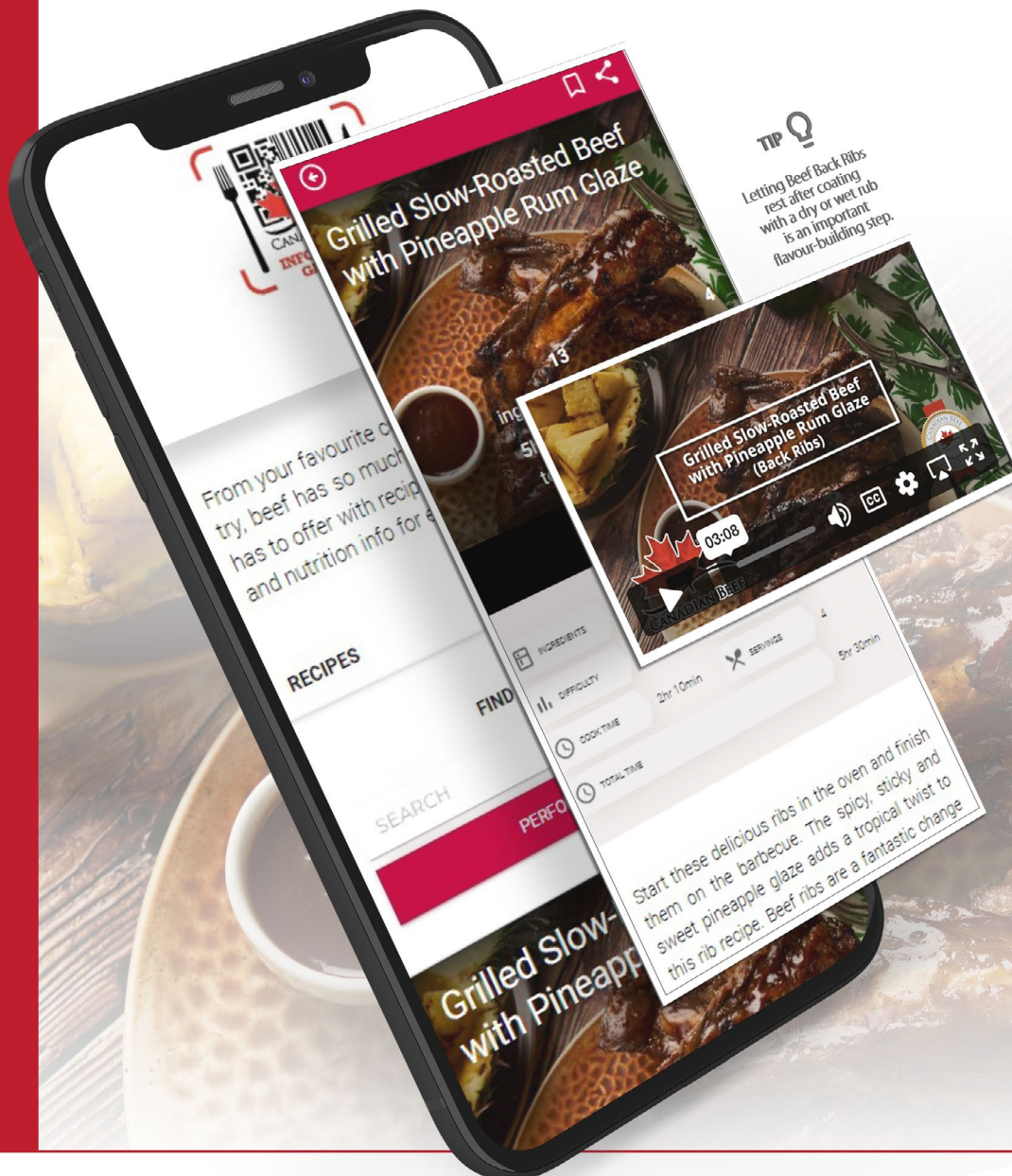




PREMIUM  
QUALITY  
GRAIN-FED  
CANADIAN BEEF

## INVESTMENT PLAN 2023 – 2024

Investing in a *Strong Future*  
for Canada's Beef  
Cattle Industry.



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## EXECUTIVE SUMMARY

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The annual investment plan provides levy funders, value chain partners and the Canadian Government with a road map of programs, services and resources planned for 2023–2024.

Canada Beef provides market development and promotion programs and services for the Canadian beef and veal industry. A division of the Canadian Beef Cattle Research, Market Development and Promotion Agency, Canada Beef is funded by cattle producer check-off, import levy and Federal and Provincial Government industry support.

Canada Beef is responsible for the delivery of domestic and international market development and promotion programs through offices in Canada, Mexico, Japan, China, Taiwan and South Korea. Canada Beef also serves Latin America, Southeast Asia, MENA and emerging markets of interest including the EU and UK.

The investment plan and market analysis is prepared each financial year to guide the delivery of Canada's National Beef Strategy and long-term investment priorities and outcomes that strategically align across the industry's value chain. The following investment and work plans outline the programs, services, resources, key performance indicators and budgets that will guide Canada Beef activities in 2023–2024.

Successful delivery of this plan is a stepping-stone towards achieving the outcomes defined in Canada's National Beef Strategy 2020–2024.

### CANADA'S NATIONAL BEEF STRATEGY

The National Beef Strategy demonstrates leadership and provides clarity as various stakeholders come together to work towards a common goal. It facilitates collaboration and coordination between the national organizations to leverage available resources effectively on behalf of producers. The National Beef Strategy was developed with the aim of achieving the industry goals aligned with the industry's vision and mission under four pillars.

The pillars identify focus areas and objectives that contribute to the overarching goals. For some focus areas, there are specific national organizations responsible for them; others will have multiple industry stakeholders working together to collectively achieve the outcomes identified. The goals are measurable benchmarks for which the industry is held accountable.


The Beef Demand pillar goal is to enhance beef demand and as a result, support the comprehensive carcass cut-out values above \$270/cwt over the life of the plan (2020–2024). Historically, for every \$1/cwt increase in the cut-out value, live fed cattle prices increased \$0.59/cwt. This will be achieved by focusing on domestic and global marketing, market access, the Canadian Beef Advantage, consumer confidence, public trust, and sustainability.

The Competitiveness pillar goal is to encourage a competitive regulatory, policy, and market environment. Emphasis is on reducing the labour shortage by 50% and reducing cost disadvantages with main competitors. This will be achieved by focusing on youth involvement, easing regulatory burden, and providing access to competitively priced inputs.

The Productivity pillar goal is to improve production efficiencies through the supply chain. This will be achieved by focusing on genetic selection, information flow, research capacity, research and development, and technology adoption. Measurements will include reducing pregnancy open rates, and calf death losses as monitored through regional cow-calf surveys; and improving feed efficiency and hay yields.

The Connectivity pillar goal is to enhance industry synergies and connect positively with government and partner industries by actively addressing industry issues, challenges, and opportunities with a unified industry voice. Connectivity is the responsibility of every organization in the industry.

Table# 1: Canada's National Beef Strategy 2020 – 2024 pillars and goals

|  | PILLARS                   | GOALS  |
|---|---------------------------|--|
|   | <b>1. BEEF DEMAND</b>     | Support the comprehensive cut-out above \$270/cwt<br>a. METRIC 1: To support the retail beef demand above 115 (Index 2000=100)<br>b. METRIC 2: To support the wholesale beef demand above 105 (Index 2000=100)<br>c. METRIC 3: To support the international beef demand above 100 (Index 2000=100)   |
|   | <b>2. COMPETITIVENESS</b> | Encourage a competitive regulatory, policy, and market environment<br>a. METRIC 1: To reduce the labour shortage by 50%<br>b. METRIC 2: To reduce cost disadvantages compared to main competitors by 2%  |
|   | <b>3. PRODUCTIVITY</b>    | Improve production efficiencies throughout the supply chain<br>a. METRIC 1: To reduce average open rates by two percentage points in each region<br>b. METRIC 2: To reduce average calf death losses to 5% in each region<br>c. METRIC 3: To improve feed efficiency by 5%<br>d. METRIC 4: To improve national average hay yields by 2-10% |
|   | <b>4. CONNECTIVITY</b>    | Enhance industry synergies and connect positively with government and partner industries   |

It is under the Demand and Connectivity Pillars of the National Beef Strategy where Canada Beef operates and brings value to producers. See [www.beefstrategy.com](http://www.beefstrategy.com) for more information.





## PILLAR 1: Beef Demand

The Beef Demand pillar goal is to enhance beef demand and as a result, support the comprehensive carcass cut-out values above \$270/cwt over the life of the plan. This will be a challenge as increased protein supplies become available in North America and around the world, pressuring prices. The industry remains focused on getting the right product to the right customer every time through product development and identifying markets for under-valued or underutilized cuts.

While many core Canada Beef activities continue, others will be enhanced and further developed based on market needs, emerging trends, and opportunity gaps. This includes, for example, redefining the Canadian Beef Centre of Excellence as a full-service video production studio to develop and produce video content for all markets. In addition, Canada's Food Guide released in January 2019 spurred a renewed focus on consumer confidence in the health and nutrition of beef, and the need to address concerns about beef production, sustainability, animal care and the environment.



## FOCUS AREA A: Domestic And Global Marketing

In the domestic market, beef faces growing competition from traditional proteins (i.e., pork and poultry) and non-traditional proteins (i.e., plant-based protein and cell-cultured meat alternatives). Additionally, the consumer demographic is changing as baby boomers retire and millennials represent a larger portion of the spending dollars. This shift in demographics provides new opportunities and challenges for the marketing and promotion of beef.

Beef cattle can be processed into over 300 products. The Canadian consumer has a preference and culinary culture for a select few of those beef products. Other beef products command a higher value in foreign markets where those items are a staple or delicacy.

### APPROACH

Evolve the Canadian Beef Centre of Excellence's ability and focus into the virtual and digital marketing space to reach a larger target market of potential clients and consumers across Canada and internationally. Continue to refine and evolve the Canadian beef brand with focus on the technical and emotional attributes that define the brand position. Continue to grow the number of domestic and international customers committed to Canadian beef supply.

Using market segmentation tools, Canada Beef will identify high growth and high value client and consumer groups by demographics, behaviour, ethnicity, geography, and other attributes. An overarching blend of emotional and technical attributes that are meaningful and relevant to each consumer or client group will be created and developed into marketing and promotional campaigns for specific segments resulting in increased awareness, improved perception, heightened product desire and ultimately increased demand.

### OUTCOMES & OBJECTIVES

#### 1. *Establish the Canadian Beef Advantage (CBA) as the most recognized and loyalty-based premium beef program in the world.*

- a. Ongoing development and communication of a differentiated brand position for Canadian beef leveraging the attributes of the CBA through technical resources, training platforms, advertising and trade media, and competitive benchmarking.
- b. Enhance existing communication and distribution platforms ensuring impactful communication of CBA messaging to targeted trade clients, including web platforms, trade advertising, and digital assets.
- c. Collaborate with brand license holders to leverage brand marketing initiatives.
- d. Positively impact key consumer influencers in domestic and export markets with positive messages about Canadian beef through brand partners, trade events, and marketing partnerships.

## 2. *Get the right product to the right customer every time.*

- a. Deliver through new product development and the Centre of Excellence enhancing carcass utilization and value.
- b. Procure market intelligence and direct resources to markets and market segments that represent opportunities for incremental value and return on marketing investments.
- c. Engage targeted customers in priority markets/segments through retail, foodservice, and influential industry events; support trade partner programs; and trade missions with domestic and international clients.
- d. Align with supply chain partners in target markets through the development of national programs, value-added beef products, and partnerships with packers and exporters, trade commissioners and other commodities.
- e. Collaborate with industry and distribution channel partners to implement targeted promotional brand initiatives in priority markets.



### **FOCUS AREA B:** The Canadian Beef Advantage

The Canadian Beef Advantage provides proof points on both functional and emotional attributes that are communicated through all Canadian beef brands. These proof points are validated by national benchmarking studies that are updated every five years to monitor the progress of industry and identify areas that could be improved throughout the supply chain. Continuous improvement in these areas support client and consumer experience and confidence towards our goal to establish Canadian beef brands among the most recognized loyalty-based beef brands in the world.

#### **Approach**

Canada's National Beef Quality Audit at Retail and Processing documents changes in carcass and beef quality over time, identifies opportunities for further improvement along the value chain and educates stakeholders on industry efforts to meet customer demands. The National Beef Sustainability Assessment outlines economic, environmental, and social performance. Research and development efforts focus on opportunities to improve consumer satisfaction of Canadian beef through pre- and post-harvest interventions.

#### **OUTCOMES & OBJECTIVES**

##### **1. *Monitor the Canadian Beef Advantage to assess the effectiveness of efforts to improve the product attributes with the greatest impact on carcass value and beef demand.***

- a. Beef Quality Audit demonstrates a reduction in carcass defects below 2016 levels and maintained or improved consumer satisfaction for tenderness, juiciness and flavour of inside round, cross-rib, top sirloin and strip loin steaks.
- b. Complete a retail meat case audit to benchmark attributes related to value and merchandising of Canadian beef including carcass utilization, grade, specification, composition, sustainability attributes, production methods, packaging, production claims, origin, counter space allocation, protein market share, and other important attributes.
- c. Monitor the sustainability (social, economic, and environmental) performance of the Canadian beef industry, from farm to fork, through the National Beef Sustainability Assessment.
- d. Leverage research available from the Canadian Roundtable for Sustainable Beef (CRSB), its membership, and the Canadian Centre for Food Integrity on consumer attitudes toward beef and sustainability.

**2. Development of a National Total Quality Management System to enhance decision making in support of customer satisfaction with Canadian beef and the profitability of the industry.**

- a. Validate objective in-plant measures of tenderness that can be used at line speed.
- b. Develop and implement processes that facilitate the automated collection, recording, evaluation, and communication of desirable (i.e., high lean yield/high marbling, healthy livers) and undesirable (i.e., low lean yield/low marbling, abscessed livers) characteristics to streamline the Beef Quality Audit and provide real-time feedback to industry.
- c. Increase information exchange between sectors along the supply chain to better inform production decisions that ultimately improve carcass value and consumer satisfaction.

**3. Research and development to improve consumer satisfaction with Canadian beef.**

- a. Demonstrate the cost-effectiveness and value of genetic markers for tenderness in commercial cattle.
- b. Identify potential interactions between tenderness genotype and animal management (i.e., implants, backgrounding, grassing, finishing, etc.) and develop appropriate breeding and management recommendations.
- c. Develop packaging and other technologies to improve shelf life and appearance.
- d. Improved algorithms for predicting lean meat yield and / or retail product percentage.
- e. Implement genomic and grading technologies that allow for market segmentation according to carcass quality and/or yield.
- f. Research technologies to enhance the ability to sort cattle/carcasses at line speed in packing plants, and product by quality.



**FOCUS AREA C: Consumer Confidence**

Consumer confidence in the health and nutritional benefits of beef and Canada's science-based food safety systems are continually being challenged. Consumers have more choice than ever on where they spend their food dollars. In general, when people feel good about and have confidence in Canadian beef, they will buy our products more often. Consumer confidence based on experience and value is essential to maintain current customers and attract new ones.

**Approach**

Consumer confidence starts with understanding that Canadian beef is a safe, high quality, nutritionally dense food produced in a sustainable manner. It is essential that the core aspects of the nutritional benefits of Canadian beef along with Canada's food safety systems are communicated regularly to consumers, both domestic and international. Investment in food safety and beef quality research continues.

*See Focus Area D: Public Trust for details around communicating about production practices.*

**OUTCOMES & OBJECTIVES**

**1. Enhance consumer confidence in Canadian beef across all markets through a focus on enabling industry advocates, leadership in stakeholder engagement, and partnerships with influencers.**

- a. Increase the number of strategic partnerships and networking with food, media, and nutrition influencers on the nutritional and environmental benefits of beef consumption.

**2. Improve the effectiveness and reach of consumer communication.**

- a. Provide global social media support for all Canada Beef led and partnered activities.
- b. Produce a seasonal kit for provincial/national cattle associations and partner organizations to use for seasonal promotions, key consumer events and include coaching on the development of promotional assets.
- c. Conduct targeted promotional brand initiatives in priority markets through brand license partners, resource development, and brand mark promotion.
- d. Lead the development of industry consumer campaigns focused on delivering the Canadian beef story, executed in collaboration with national and provincial stakeholders.
- e. Conduct consumer research to understand purchase drivers/motivators, collaborate on research undertakings to maximize information use and leverage existing research efforts.

**3. Promote the health and nutritional benefits of beef to consumers.**

- a. Support communication of beef's premium quality by the development of culinary and nutrition-related messaging and resources for inclusion in marketing campaigns.
- b. Produce nutrition communications promoting beef's nutrients to key demographics.
- c. Communicate beef's premium quality and safety by engaging targeted health professionals via trade events/conferences/seminars.
- d. Provide nutrition communications to key health professionals including doctors and dietitians focused on heart health and diabetes and early childhood nutrition.
- e. Participate and align with key industry networks (such as the International Meat Secretariat and Nutrient-Rich Alliance) to connect and collaborate on key health and nutrition issues that impact beef.

**4. Support consumer food safety education initiatives that demonstrate the effectiveness of Canada's science-based food safety system.**

- a. Enhance consumer education regarding the consumers' role and responsibility in ensuring food safety in the home, including at-home food handling and storage practices to ensure food safety.

**5. Research and extension to drive the reduction of food safety incidences and improve food safety along the beef supply chain.**

- a. Develop and implement cost-effective technologies targeting multiple pathogens in cattle and beef production and processing facilities, including heat- and acid-resistant E. coli and biofilm-forming bacteria.
- b. Develop objective, cost-effective approaches for verifying the effectiveness of packing plant equipment cleaning processes and adopt these approaches for 85% of processed cattle.
- c. Increased surveillance to detect, characterize and quantify the relative human health risk of (re) emerging pathogens.
- d. Effective probiotic intervention to eliminate pathogens for beef developed.

**FOCUS AREA D: Public Trust**

The public's trust in the beef industry is determined by overall societal perceptions, not just the attitudes and opinions of consumers. These perceptions can influence consumer preferences, government regulations and policies that impact the producer's ability to operate. Acceptance of sustainable technologies and production practices are being questioned and have the potential to limit the future competitiveness of the industry – through both regulatory changes and public perceptions. Specific to the beef industry there is increased attention being paid to the environmental impact, implications on public health from antimicrobial use in livestock, and perceived nutritional concerns with the consumption of red meat.

## Approach

The Canadian beef industry is placing significant emphasis on engaging producers and industry partners to communicate directly with consumers and the public to build trust and confidence in the Canadian beef industry. The Public and Stakeholder Engagement program is developing resources and providing training to a wide range of users who can then broadly spread a consistent message fostering transparency and trust.

The beef industry has a great story to tell as cattle convert cellulose from land that is too rocky, steep, or unsuitable for cultivation into high-quality protein, adding critical micro-nutrients to the food supply that supports public health. The beef industry utilizes one-third of the agricultural land in Canada but provides 68% of the potential wildlife habitat. Given that Canadian grasslands are an endangered ecosystem with less than 20% remaining intact, the relationship between beef production, biodiversity and grassland conservation should not be overlooked.

## OUTCOMES & OBJECTIVES

### **1. *Enhance the public image of the Canadian beef industry emphasizing the many positive benefits our industry contributes along with the continual improvement in environmental sustainability, animal health and welfare, and food safety practices.***

- a. Increase participation in the Beef Advocacy Canada (BAC) program to ensure industry leaders are informed and prepared to communicate consistent key messaging (see Youth Participation and Succession under the Competitiveness Pillar for more details on BAC enhancement).
- b. Produce and launch consumer-directed print/downloadable resources featuring factual insights around Canada's beef production systems and standards that convey transparency and confidence to global consumers.
- c. Align with key partners to develop broad-based Canadian beef industry promotional videos.
- d. Participate in strategic partnerships and networking opportunities to positively influence attitudes regarding beef's role in a healthy and sustainable diet.
- e. Encourage public figures to promote the image of Canadian beef producers and beef production systems and seek other publicity opportunities that promote the Canadian beef industry in a positive and proactive manner.
- f. Support the Public Trust Steering Committee to work together across all sectors in enhancing public trust for all of agriculture.
- g. Continue to align with select organizations that have a favourable image with the public on animal welfare and sustainability.
- h. Provide content to those developing education materials, for all age groups (elementary through post-secondary), on agriculture in Canada.

### **2. *Increase public recognition of the beef industry's direct and indirect contributions to the Canadian economy and society.***

- a. Maintain broad stakeholder support of beef cattle production practices.
- b. Achieve an alternative pathway to Front of Package labelling regulations that target saturated fats.
- c. Communicate that beef is an important part of a healthy, balanced diet and that Canada's Food Guide supports protein consumption from a variety of sources.
- d. Speak about the beef industry's contribution to sustainability in partnership with Canada Beef, CRSB and other stakeholders utilizing appropriate publications, video vignettes, social media, and other forums to reach end-users, consumers, and the public.
- e. Increase public understanding of beef industry animal production practices and how they are held up by the Code of Practice for the Care and Handling of Beef Cattle.
- f. Communicate the role of responsible antimicrobial stewardship in maintaining the effectiveness of human health products.



**3. Maintain the Canadian beef industry's social license to operate through communicating production practices and identifying opportunities for continuous improvement in areas of public concern.**

- a. Actively participate through the International Meat Secretariat in international initiatives.
- b. Keep the Code of Practice for the Care and Handling of Beef Cattle current with consideration for advances in science, production practices, availability of new technologies, and public expectations.
- c. Actively participate in international forums (ISO, OIE) on animal care and handling to ensure Canadian beef production practices are appropriately represented and understood as new international standards are developed.

**4. Implement the Stakeholder Engagement Strategy.**

- a. Proactive cross-organizational plan that facilitates the management of issues related to industry reputation through strategic response to issues.
  - i. Informal issues and reputation management through media/issues monitoring, sharing of information, discussing, and coordinating strategies and determining the most appropriate course of action for communication and information procurement including the identification of responsible organizations.
  - ii. Formal regular strategy discussions between national organizations on issues management to clearly define industry priorities and organizational strategies.
- b. Ensure the continuous monitoring of polling data and issues while developing appropriate resources and messages to enable industry to speak consistently.
- c. Make information easily understood and readily accessible to assist producers in being industry advocates.
- d. Solidify relationships with key public influencers to support and promote the healthfulness of beef in the diet.



**FOCUS AREA E: Sustainability**

Substantial progress has been made on the sustainability front over the last five years with the establishment of the Canadian Roundtable for Sustainable Beef (CRSB), as well as work by the Global Roundtable for Sustainable Beef (GRSB) in providing a common definition and principles that are being used by multiple countries. Issues such as animal welfare, antimicrobial resistance, and environmental impact continue to be raised by consumers, retailers and foodservice.

**Approach**

Consumer concerns about animal care and the environmental impact of beef will continue to be addressed through scientific studies and communications. This is an area of non-competitive cooperation with international partners through the GRSB, the International Beef Alliance, and the International Meat Secretariat. Aligning communications on the biodiversity and carbon sequestration benefits of beef production ensures consistent messaging among partner organizations. The work of the CRSB is built around three pillars. First, the National Beef Sustainability Assessment monitors progress over time. Second, the Certified Sustainable Beef Framework provides a consumer-facing logo and supply chain driven by market signals to incentivize producers. Third, sustainability projects communicate the efforts undertaken across Canada throughout the supply chain. All of this is aimed at encouraging continuous improvement.

## OUTCOMES & OBJECTIVES

### **1. *Support the activities of the Global and Canadian Roundtables for Sustainable Beef.***

- a. Recognize the CRSB as the go-to forum for beef sustainability information and conversations in Canada.
- b. Participate in the GRSB.
- c. Support multi-stakeholder processes and engagement to build public trust in the beef industry and enhance transparency.
- d. Continue to build strategic partnerships through the roundtables that advance beef sustainability efforts, particularly with non-industry stakeholders.

### **2. *Advance the sustainability of the Canadian beef industry.***

- a. Measure and track the sustainability performance (including production practices) of the Canadian beef industry through the National Beef Sustainability Assessment and identify opportunities for improvement in areas of public concern.
- b. Advocate for the continued and/or enhanced collection of important agriculture and environmental data to assist in establishing sustainability benchmarks and measure how agriculture is changing and improving over time.
- c. Develop ways to recognize and support projects, programs and initiatives that advance the goals in the National Beef Sustainability Strategy and CRSB research priorities.
- d. Increase industry adoption of Beneficial Management Practices supporting environmental sustainability and resource conservation through the support of existing technology transfer programs and advocating for the continued support of and participation in important stewardship programs.

### **3. *Implement and increase uptake of the Certified Sustainable Beef Framework.***

- a. Support the maintenance and regular review of the Certified Sustainable Beef Framework.
- b. Promote the Certified Sustainable Beef Framework to supply chains seeking assured sustainability claims and other related methods of production claims or attributes.
- c. Support adoption of Verified Beef Production Plus (VBP+), and other certification bodies, by producers to effectively demonstrate responsible on-farm production practices related to environmental sustainability, animal care, on-farm food safety, and biosecurity to the marketplace through the Certified Sustainable Beef Framework and broader producer-focused VBP+ training activities.

### **4. *Science-based information to support the development of effective public communication and policy regarding environmental goods and services provided by the beef industry.***

- a. Develop cost-effective methods of reducing greenhouse gas (GHG) emissions in forage-based diets.
- b. Quantify factors impacting the rate and extent of carbon sequestration in tame and native pastures across Canada as well as the impacts of pasture management on soil health, plant, animal, bird and insect biodiversity, water use, water cycles, and watersheds.
- c. Identify cost-effective cleaning technologies to reduce water use in beef packing and processing facilities.
- d. Quantify Nitrogen (N) and Phosphorus (P) excretion rates in grazing animals, and N impacts on GHG emissions and P runoff and leaching impacts on water quality / eutrophication and develop feedlot manure management best practices to reduce the risk.



## **PILLAR 4:** Connectivity

The Connectivity pillar objective is to enhance industry synergies; to connect positively with government and partner industries by actively addressing industry issues, challenges and opportunities with a unified industry voice.

Successful organizations and industries have made long-standing connections with governments, influencers, knowledge leaders, and are highly attuned to public opinion and changing trends. The strategy continues to build on these relationships and market awareness. Being connected and prepared to communicate in a meaningful way when events occur can directly influence how these events impact our industry. There are various organizations across the country, provincially and nationally, that share a common goal of enhancing the viability of the Canadian beef industry – when all parts connect, synergies are achieved.



## **FOCUS AREA A:** Industry Communication

Effective communication is foundational to all policy, marketing, and research activities within the Canadian beef industry. Communication is integral to engaging producers, processors, retailers, industry partners, government, the public, consumers, and global trading partners.

Communication needs to be transparent and consistent, with a common voice across all industry organizations. This is especially imperative in times of industry crisis. It is also critical to maintaining and enhancing consumer confidence. Consistent industry communication increases the public's understanding of the contribution the beef industry makes to the economy and environmental sustainability. Two-way communication of customers' demands throughout the supply chain from end-users to primary producers is also important to clearly understand market trends and align production accordingly. It is also important to continue to build on and strengthen the relationships and connections developed through the Canadian Beef Industry Conference (CBIC).

Encourage information sharing across industry organizations to avoid duplication of efforts and build strategic relationships to facilitate responsiveness of the industry to a wide range of demands.

### **OUTCOMES & OBJECTIVES**

#### **1. *Timely concise, and effective delivery of industry communications.***

- a. Ensure coordination of communication between national organizations.
- b. Ensure the timely transfer of information to provincial associations and other industry organizations to ensure they are prepared to handle media inquiries.
- c. Maintenance of an Industry Crisis Communication plan that is updated on an ongoing basis including direct engagement of key industry organizations, CFIA and AAFC to ensure appropriate linkages are made and processes are understood.

#### **2. *Enhance industry's ability to speak with consistent messaging.***

- a. Provide ongoing development of approved key messages for industry to utilize.
- b. Encourage provincial associations and their members to engage stakeholders using approved messaging and providing resources for local adaptation.



## FOCUS AREA B: Engage Industry Partners

All stakeholders share a common goal to enhance the productivity, profitability, and competitiveness of the various sectors within our industry. This goal can be achieved with the participation of all sectors including cow-calf producers, feeders, packers, retailers, and foodservice working together to develop new strategies and build a solid plan to which we can all align.

### OUTCOMES & OBJECTIVES

1. ***The Canadian Beef Advisors will oversee the delivery and reporting on the National Beef Strategy for the beef and cattle industry.***
2. ***Maintain and enhance the Canadian Beef Industry Conference as an annual event with multiple industry organizations conducting meetings and bringing industry together.***
  - a. Bring together a large audience of producers to engage in multiple meetings and place continued focus on the National Beef Strategy, with annual performance reporting and priority discussions.
  - b. Facilitate formal and informal collaborations between industry leaders, staff, and stakeholders to encourage ongoing discussions and exchanges of information regarding issues and opportunities of priority.
3. ***Expand cross-organizational learning and stakeholder engagement opportunities through the expansion of programs such as webinars, lunch and learns, Beef Advocacy Canada, and other opportunities.***
4. ***Build strategic partnerships with external stakeholders to support and promote beef production and consumption.***



## FOCUS AREA C: Engage Government and Global Partners

In addition to strengthening the level of communication and engagement within and between industry stakeholders, there is significant value and opportunity in investment (on an ongoing basis) in building long-term relationships with government, regulatory agencies, the public and consumers, partner industries, and other stakeholders. Building long-term relationships is necessary to establish trust, transparency and to build credibility that enables industry to effectively address issues that arise related to marketing, competitiveness, and productivity.

There are also synergies and opportunities for the Canadian beef industry to leverage common messaging, problem-solving and information from like-minded domestic and international partners in areas such as research, domestic and trade policy, and marketing.

### OUTCOMES & OBJECTIVES

1. ***Engage government and regulatory agencies to build and maintain long-term relationships.***
  - a. Continued investment in long-term relationships with government bureaucrats and elected officials to establish trust, transparency, and build credibility to encourage open dialogue and communication channels that are available in times of normalcy and crisis.
  - b. Encourage industry to speak with one voice when engaging with government to ensure clarity of priority and direction.
  - c. Active participation in government/forums such as the national Beef Value Chain Roundtable, Beef Cattle Trade Advisory Group, and others to ensure continued progress is made on files of priority to the industry.
  - d. Actively partner with Federal and Provincial Governments in ministerial trade missions and market development activities with trade commissioners, embassies and consulates in markets of interest to the Canadian beef industry.

**2. Participate in consumer discussions and forums to obtain feedback and provide information regarding the Canadian beef industry.**

- Producer participation in retail/end-user marketing initiatives.
- Participation in end-user consumer forums.
- Conduct proactive communications to educate consumers and the public about the Canadian beef industry and work to create an ongoing relationship where they turn to industry for their information.

**3. Invest in developing long-term relationships with a broad range of stakeholders, including domestic and international organizations, encouraging collaboration on priorities of mutual interest (i.e. trade agreements, animal health and care, government policy and programming, research and marketing) and open discussion when differences arise.**

Table# 2: Alignment of Canada Beef programs, services, and resources with Canada's National Beef Strategy Pillars 2020 – 2024

| Canada Beef Programs, Services, Resources | Pillar 1 Beef Demand | Pillar 2 Competitiveness | Pillar 3 Productivity | Pillar 4 Connectivity |
|---|----------------------|--------------------------|-----------------------|-----------------------|
| Trade Shows (domestic/international)      | ●                    | ●                        | ●                     | ●                     |
| Distribution Channel Sales Promotions     | ●                    | ●                        | ●                     | ●                     |
| Demand Building Programs                  | ●                    | ●                        | ●                     | ●                     |
| Export Market Development                 | ●                    | ●                        | ●                     | ●                     |
| Domestic Partner Program                  | ●                    | ●                        | ●                     | ●                     |
| Distributor Education Programs            | ●                    | ●                        | ●                     | ●                     |
| Incoming/Outgoing Missions                | ●                    | ●                        |                       | ●                     |
| Consumer Websites                         | ●                    |                          |                       | ●                     |
| Trade Websites                            | ●                    | ●                        | ●                     | ●                     |
| Social Media                              | ●                    |                          |                       | ●                     |
| Think Beef (generic promotion)            | ●                    |                          |                       | ●                     |
| Consumer Marketing (print)                | ●                    |                          |                       | ●                     |
| Consumer Marketing (media)                | ●                    |                          |                       | ●                     |
| Trade Publications                        | ●                    | ●                        | ●                     | ●                     |
| Technical Marketing Resources             | ●                    | ●                        | ●                     |                       |
| Health Professional Engagement            |                      |                          |                       | ●                     |
| Carcass Utilization/Value Optimization    | ●                    |                          | ●                     | ●                     |
| Eating Quality                            | ●                    | ●                        |                       | ●                     |
| Grading System Differentiation            | ●                    | ●                        | ●                     |                       |
| Market Intelligence                       |                      | ●                        |                       |                       |
| Canada Beef Performs (e-newsletter)       |                      |                          |                       | ●                     |
| Demand Building Events                    | ●                    | ●                        | ●                     | ●                     |
| Independent Retail Operator Engagement    | ●                    | ●                        | ●                     | ●                     |
| National Retail Operator Engagement       | ●                    | ●                        | ●                     | ●                     |
| Canadian Beef Centre of Excellence        | ●                    | ●                        | ●                     | ●                     |
| CBCE Video Production Services            | ●                    | ●                        | ●                     | ●                     |
| Canadian Beef Information Gateway         | ●                    | ●                        |                       | ●                     |

Note: in the National Strategy document, the Competitiveness and Productivity pillars deal primarily with animal production and not with downstream beef product processing and market development. Canada Beef recognizes there are opportunities to improve competitiveness and productivity in relation to beef processing and marketing.



## ORGANIZATIONAL OVERVIEW

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 brands for stakeholder and clients 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. These efforts increase awareness and demand for Canadian beef while ensuring the maximum value for producer dollars.

Canada Beef is the marketing division of the Canadian Beef Cattle Research, Market Development and Promotion Agency and began operations July 1, 2011, through the consolidation of the Beef Information Centre (formerly responsible for domestic beef market development including U.S.) and the Canada Beef Export Federation (formerly responsible for international beef market development).

Canada Beef is primarily funded by producer check-off levy and can further leverage check-off investment through federal and provincial government industry development funds and private client investments to maximize the impact of promotion and market development initiatives.

Canada Beef is well-positioned to deliver effective market development programs in Canada and key export markets through a head office in Calgary and field offices in Mississauga, Mexico, Japan, Taiwan, and China. Canada Beef employs 26 professional marketing and administration specialists who bring a broad range of skills and trade experience to the world table.

The team includes a cross section of specialists, including international and domestic marketing, communications, retail merchandising, product development, home economists, red-seal certified chefs, butchers and a registered health and nutrition specialist. Approximately one quarter of the Canada Beef team consists of foreign nationals strategically based in key export markets to serve industry needs.

Program planning, implementation, evaluation, measurement, and performance reporting is delivered by directors and managers in each market with the oversight and support from executive leadership and accounting staff in Canada.

The Canada Beef division is overseen by the Agency's Market Development and Promotion Committee comprised of representatives from provincial cattle producer associations and key trade sectors important to the Canadian beef industry.

Representation from provincial cattle producer associations provides direct engagement and participation from grassroots organizations representing stakeholder partners remitting check-off funds. This helps ensure understanding and buy-in support from stakeholders. The value chain is well represented through trade industry representatives to ensure Canada Beef is well-connected and relevant to partners that own and sell Canadian beef and veal. The active participation from all areas of the value chain at the highest level of the organization strengthens the value proposition that Canada Beef brings to the table and provides measurable ROI back to the industry.

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 National Beef Strategy is about positioning the Canadian beef industry for greater profitability, growth and continued production of high-quality beef and veal products. The strategy incorporates all sectors of the beef value chain and sets 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 safe and wholesome food.

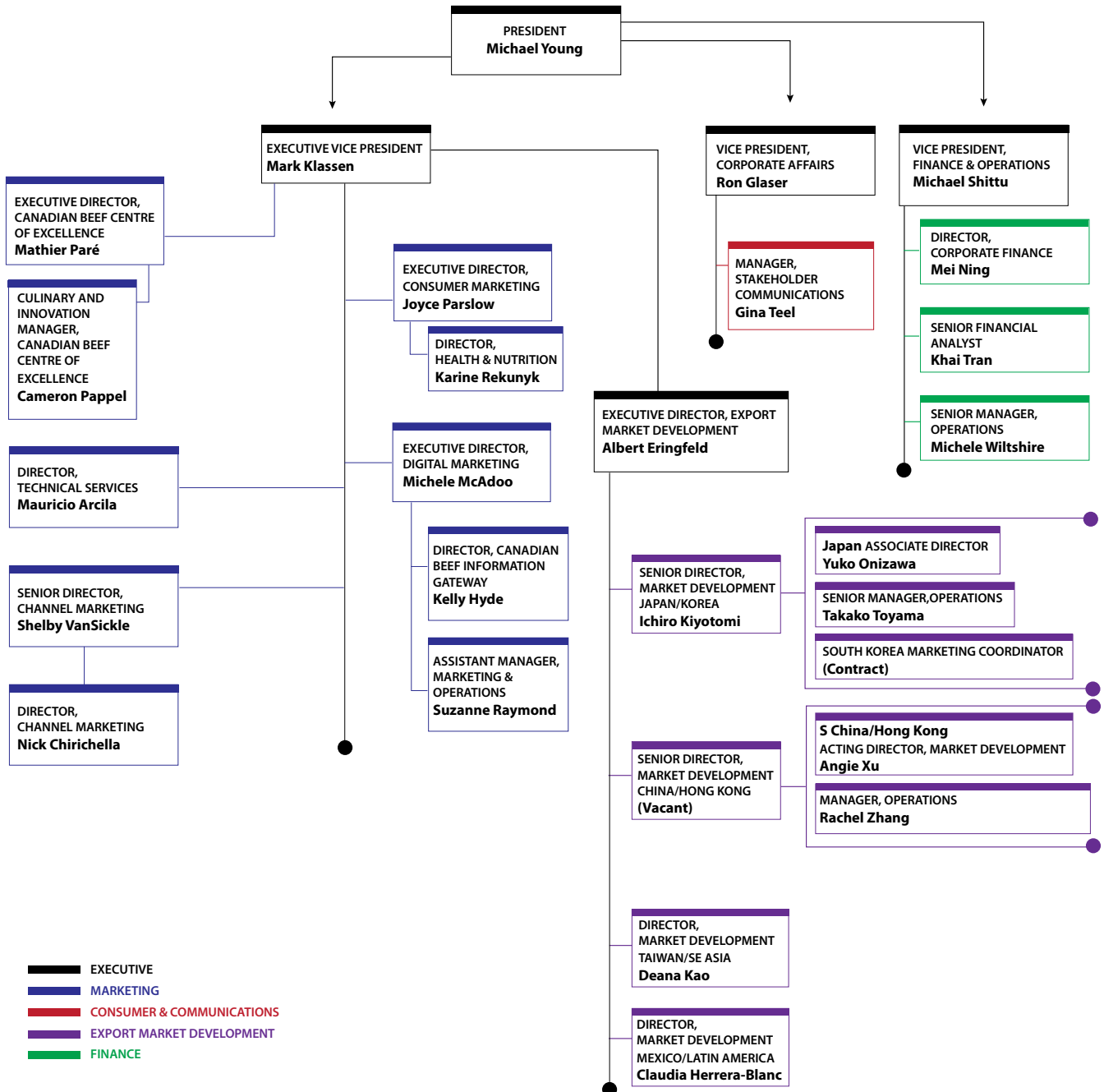
## Canada Beef Promotion and Marketing Committee 2023-2024

Table #3 Promotion and Marketing Committee 2023-2024

| Name                        | Industry Association                            | Representation                    |
|-----------------------------|---|-----------------------------------|
| Russ Mallard (Chair)        | Canadian Meat Council                           | Packers, processors               |
| Steve Christie (Vice Chair) | Retail/Foodservice                              | Channel distribution              |
| Jack Chaffe (Finance Chair) | Beef Farmers of Ontario                         | Primary producers                 |
| Jeff Cline                  | Canadian Meat Council                           | Packers, processors               |
| John Curtis                 | Canadian Meat Council                           | Processors, traders and brokers   |
| Andre Forget                | Canadian Meat Council                           | Processors, traders and brokers   |
| Coral Manastersky           | Canadian Association of Importers and Exporters | Further processors and importers  |
| Chad Ross                   | Saskatchewan Cattlemen's Association            | Primary producers                 |
| Jennifer Haley              | Veal Farmers of Ontario                         | Primary producers                 |
| Cameron Blake               | Member at large                                 | Channel Marketing                 |
| Cam Daniels                 | Member at large                                 | Packers, processors               |
| Mike Guest                  | Member at large                                 | Primary producer, regional packer |
| Clay Holmes                 | Member at large                                 | Packers, processors               |



# **CANADA BEEF** April 2023



## Mission

**A dynamic, profitable, and competitive  
Canadian beef and veal industry.**

## Vision

**Canadian high-quality beef and veal products recognized  
as the most outstanding by Canadian and  
world customers.**

## Mandate

**Invest in a strong future for  
Canada's beef and veal industry.**



*Connect, Innovate and Inspire.*

## MARKET ANALYSIS AND STRATEGY

### THE OPERATING ENVIRONMENT

The Canadian beef industry operates in a variety of dynamic and changing marketing conditions offering both challenges and opportunities.

Table # 3: Global operating environment

#### CONSUMER TRENDS

1. Global Gross Domestic Product (GDP) is closely correlated with global beef consumption. A weakening GDP profile forecast for 2023 will likely impact beef consumption and pressure global beef prices in the short-run. In the long-run, the increasing global middle-class is expected to support global GDP and global beef consumption is expected to outpace production to support global beef prices.
2. Per capita red meat consumption is closely correlated with disposable income. Inflation, and measures to combat it, combined with weaker economies leading to higher unemployment and lower disposable incomes will likely spur a decline in red meat consumption in the short-term.
3. Foodservice sectors surged in 2022 and will likely regain more market share. Eroding wealth and labour shortages in the sector may delay or slow recovery.
4. Consumers are seeking out red meat choices with free-from, animal welfare and sustainability claims and credentials.
5. There is a growing demand for western style food in Asia. Consolidation from local markets to supermarkets and online platforms create opportunities to reach additional export markets.

#### COMPETITORS

1. **Domestically:** Chicken and pork remain the two major animal protein competitors. The relative retail price ratio for beef/pork in Canada was at normal levels in August 2022 while the beef/chicken ratio was historically low. Chicken production was slightly hampered by highly pathogenic avian influenza (HPAI) in fall 2022 across Canada; margins are hampered by feed grain prices that look bearish, impacted by Russia-UK war and weather.
2. **Internationally:** Global consumption of poultry is forecast to increase whereas global consumption of red meat in developed regions is expected to decline over the next 10 years.
3. **The United States, Australia, and Brazil** continue to be Canada's top competitors in all markets of interest. They are well-funded to innovate in performance and product quality and aggressive to grow market share. Mexico is growing domestic production and export markets.
4. **Exponential growth in global plant-based protein sales** have slipped in the wake of the pandemic (particularly in North America) and are anticipated to grow at steadier rates in the long-run.

#### MARKET ACCESS & TRADE

1. Input prices have been record large in 2022 and play a role in shifting competitive advantage.
2. Global freight costs have been declining from their record heights in 2021.
3. Canadian market access to China was suspended in 2022 due to an atypical BSE case. Canadian plant delistings have yet to be restored (as of October 2022) even if market access was reinstated.
4. In Canada-UK free trade talks, hormone-treated beef has emerged as a sticking point for the UK, resulting in zero Canadian beef exports to the UK from January through August 2022.
5. Canada's food quality, food safety and sustainable beef position provides an important competitive advantage.



# DRIVERS AFFECTING THE OPERATING ENVIRONMENT

## STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

Table# 4: SWOT analysis

### STRENGTHS

#### Funding:

Canada Beef is well-positioned to compete in all markets of interest and there is opportunity to support growth in the Canadian beef industry.

#### Safety and Integrity:

Continue to increase focus on country of origin and integrity systems that ensure meat safety and quality.

#### Sustainability:

Canada's reputation for high herd health, sustainability, nutrition, and environmental stewardship.

#### Eating Quality:

The Canadian beef grading system continues to deliver high-quality, nutritious beef to the world's table. Canada Prime, AAA, top tier AAA and AA grades support domestic and export consumer demand and provide higher cash returns throughout the distribution channels.

#### Yield Performance:

Exact specifications combined with increasingly high-yield grades deliver profitable results for end-user customers. The proportion of AAA and Prime grades (75% of A grades YTD Nov 2022) is becoming increasingly competitive with the US (82% YTD).

### WEAKNESSES

#### Supply:

Global demand for high-quality grain-fed beef may outpace supplies in the near-term following North American herd liquidation. This would keep prices high.

#### Global Demand:

Between 2023f and 2031f, world per capita beef consumption is forecast to decrease 0.02%, primarily in developed regions including Europe (-0.05%), Oceania (-0.07%) and North America (-0.03%).

#### Protein Competitors:

Canadian per capita beef consumption was down 7.2% in 2021, whereas consumption of pork (+1.1%) and poultry (+0.6%) increased from availability.

#### Inputs and outputs:

Cattle supply, labour availability and feed availability could impact live cattle trade, production, and beef prices in 2023.

#### Foodservice/Retail Shifts:

Foodservice in 2022 recovered foot traffic and supported value in the carcass. Macroeconomic headwinds forecast for 2023 could pressure the value of the carcass and slow the return of foodservice market share.

### OPPORTUNITIES

#### Protein Competitors:

Historically high domestic beef demand in the last three years combined with ample supply has solidified consumer beef buying habits.

#### Consumer Preference:

Consumers continue to seek food products based on quality certification, origin, price, traceability, environmental performance and antimicrobial use. Food safety, price, quality and animal welfare are key factors in choosing beef brands. Consumers showed remarkable preference for high-value beef middle meats, while at the same time, lower value cuts were increasingly sought out in 2022, supporting the whole carcass value and expanding tastes.

#### Global Population:

Global beef consumption will grow with global GDP in the long-run driven by a growing global middle-class.

#### Market Access:

Market access to China and the UK have been challenged in 2022. Nevertheless, Canadian beef exports have remained steady at record high levels as other countries take products previously exported to those markets.

#### Supply Chains:

Retail and foodservice channels in developing countries are becoming increasingly accessible.

#### Grading Advantage:

The U.S. grading system is known as the gold standard grain-fed beef quality selection system in the world. Harmonizing AAA as Canada Choice in the export marketplace would provide an advantage.

### THREATS

#### Competition:

Mexico has increased market share in the United States and is expanding production. Australian and South American beef production is ramping up and may regain access in key Asian markets with competitive pricing. North American per capita consumption of poultry and pork is expected to increase with beef declines in 2023.

#### Economic Instability:

Inflation and measures to combat inflation will impact the available disposable income of consumers and red meat consumption.

#### Market Access:

Canada has limited access to high value markets like China and the UK.

#### Increased Activism:

The actions of anti-meat groups invite negative impacts on producer well-being and new industry entrants.

#### Negative Media:

The release of numerous research opinions condemning the consumption or production of animal protein for food continue to surface in varying intensities.

## GLOBAL MARKETING HIGHLIGHTS AND OUTLOOK

Global beef prices have been declining since the second quarter of 2022. The decline follows a 17-month rise reported in the Food and Agriculture Organization's (FAO) beef price index. Between October 2020 and March 2022, the FAO global meat price index increased from 97.5 to 137.5 (2014-2016=100). The closest comparable beef price level prior to 2020 was in November 2019 when the FAO beef price index was at 114.0. While many factors were at play, the primary driver was a surge in global demand for high value middle-meats that spurred head-to-head competition for these products on the international stage. The shifting macro-economic performance of top beef importing countries will hold significant sway over the beef price trend in the year ahead. The FAO global beef price index was at the high end of the normal range at 112.2 in December 2022.

Supporting the rising global beef price was the wholesale value of beef. In the United States (U.S.), the world's top beef producing country, the wholesale composite cutout increased 9% year-over-year from 2020 to 2021, the fourth consecutive year of increasing value in the wholesale composite cutout. In 2022, the composite value has reversed trend, down 2.1%. The wholesale cutout was unseasonably volatile in 2020 and 2021, but steady in the first three quarters of 2022. Stability at wholesale helped to deflate the global beef price and alleviate some uncertainty and market risk.

The resurgence of production in top beef producing countries in 2022 helped steady the cutout. World beef production is projected to be up 1.7% in 2022p from 2021. The increase in production has resulted from expansion in some areas, and strong, drought induced liquidation in others. The result is a slightly tighter global beef cow herd and a 0.2% decline in global beef production forecast for 2023f. Key factors to watch will be whether input prices for production return from the stratosphere, and whether a three-year pattern of La Nina shifts to El Nino. While significant liquidation of the beef cow herd in Canada and the U.S. has all but set the marketing stage for 2023, feed availability and producer margins will influence whether more cattle come to market next year or are retained for expansion in 2024.

## CANADA 2022 SUPPLY HIGHLIGHTS

On July 1, 2022, total cattle inventories at 12.29 million head were down 2.8% from July 1, 2021. Beef cow inventories were down 1.7% to 3.71 million head, with the beef replacement heifer inventory down 7.4% to 622,100 head (Source: Statistics Canada).<sup>1</sup>

Feeder imports at 224,108 head from January through October 2022 were down 34% from the same period in 2021 but up 18% from the five-year average. Lower feeder imports result from a relative feed-cost disadvantage that persisted in favour of the U.S. for most of 2022. The Alberta 850 lb steer basis was between \$4/cwt and -\$30/cwt in 2022, up to \$1/cwt in October but sliding to -\$18/cwt in December 2022. Feeder imports surged into the fourth quarter and were likely to ease out. Feeder imports for 2022 are projected to be down 27% to 276,400 head. At these levels, Canada is projected to remain a net feeder importer for the fourth year in a row, at -97,500 head.

Fed cattle marketings are projected to be up 1% in 2022 to 3.28 million head; with domestic fed slaughter steady at 2.96 million head, and fed exports up 17% to 316,300 head. Non-fed marketings are projected to increase for the third year in a row after the 2020 low, up 3% from 2021 to 765,000 head in 2022. Domestic non-fed slaughter is projected to be up 3% to 547,100 head with non-fed exports up 2% to 218,400 head. Overall slaughter cattle marketings are projected to be up 2% in 2022, the highest since 2010.

Total beef production (domestic and live slaughter exports) in 2022 is projected to be up 2% to 3.6 billion pounds (1.63 million tonnes). The increase comes from strong domestic production, up 0.7% from 2021 to 3.07 billion pounds (1.39 million tonnes) in 2022p. At that level, beef production in 2022 would be the highest since 2005. Live slaughter exports are projected to be up 11% to 445 million pounds (201,800 tonnes). Strong performance on both sides of the border pressured the proportion of cattle processed in Canada to 87% in 2022 versus 88% in 2021.

<sup>1</sup> Statistics Canada's inventory estimates over the last five years were calibrated using the Census of Agriculture 2021 that resulted in a slight upward adjustment in cattle inventories over the last five years. As a result, inventories reported here this year are generally higher than reported in 2021, but the inventory trend over the last five years remains the same as previously reported, steady to lower.

## CANADA 2023 SUPPLY OUTLOOK

On July 1, 2022, the calf crop was 189,300 head smaller than July 1, 2021, and there were 283,710 head fewer beef feeders outside of feedlots than 2021. Cattle on feed inventories were down 46,000 head from last year on October 1st, the third month of lower placements following higher year-over-year placements from January through July 2022. Most of the larger placements from earlier this year will show up in the fourth quarter of 2022 but larger carcass weights may draw out some supplies. The lower placements in the last three months are the result of the smaller calf crop in Canada and the U.S. in 2022 as drought and high input cost have resulted in a smaller North American herd. This will limit the availability of beef supplies in 2023.

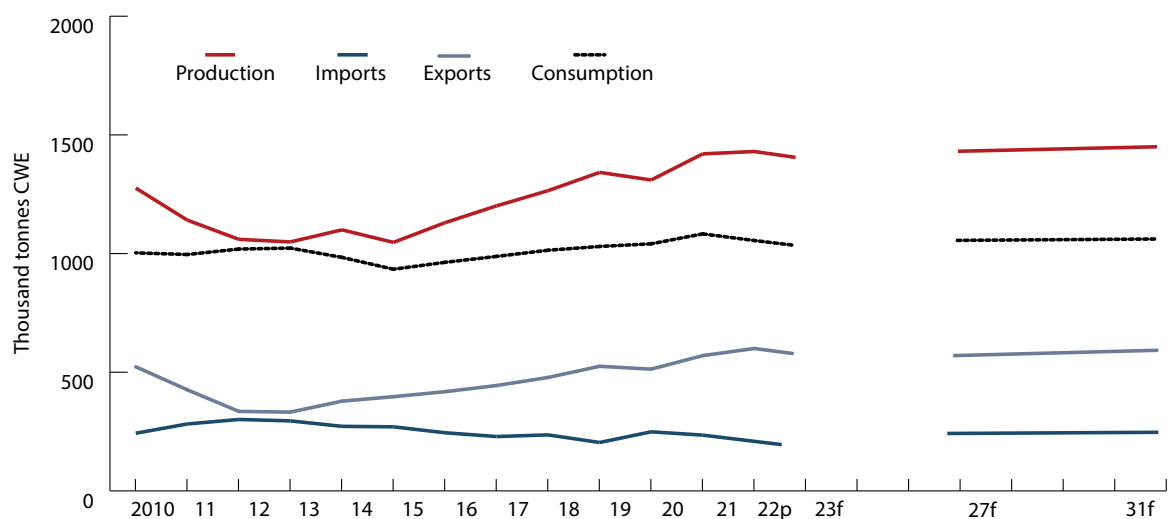
Lingering effects from drought will also pressure the Canadian herd in 2023. With a smaller beef cow herd and calf crop anticipated, beef production is projected to be down 1.9%. A slow down in global demand for beef on the heels of global recession may actually provide some relief for domestic beef prices in this lower supply environment.

In 2023, fed cattle marketings are forecast to be down 2.0% at 3.22 million head with domestic fed slaughter down 1.5% to 2.9 million head and exports down 6.7% at 295,200 head. Non-fed marketings are forecast to be down 0.9% to 748,500 with slaughter down 1.4% at 529,400 and exports steady at 219,100 head. Overall slaughter cattle marketings in 2023 are forecast to be down 1.8% to 3.9 million head, the smallest since 2020. Total beef production (domestic and live exports) is forecast to be down 1.9% to 3.52 billion pounds. Domestic production is forecast to be down 1.9% around 3.53 billion pounds (1.60 million tonnes). Live slaughter exports are forecast to be down 4.1% around 427 million pounds (193,500 tonnes).

Overall, cattle marketings in 2022 and 2023 are showing decline from 2021 which was the strongest year for marketings since 2010. Heifer retention was down in 2021 and 2022, but increased heifer retention and lower non-fed marketings would support expansion in 2023-24 if weather and demand remain on-side.

## CANADA BEEF SUPPLY AND DEMAND BALANCE 2011-2031F

### CANADA BEEF DISPOSITION



Source: USDA, FAS PSD, GIRA, FAO

## CANADA 2023 DEMAND FACTORS

Demand is a function of what consumers are willing to pay but also considers what they can pay. Bright spots in 2022 include higher projected retail beef demand (3.8% compared with 2021 and the highest since 1989), larger foodservice sales (+23% in 2022p over 2021), and a competitive labour sector (unemployment at 5.0% in December 2022) keeping consumption afloat. These demand factors may change as consumer's situations change in 2023. Domestic consumers have in recent years held a strong position, but expectations are for that position to deteriorate in 2023 as measures intended to stifle consumer spending intensify.

Inflation is pressuring what consumers can pay. All-item inflation was up 6.8% in November 2022 in Canada, but marked the third consecutive month of decline. Food inflation consistently outpaces base inflation. The cost of food in Canada was +10.3% year-over-year in November 2022 with British Columbia (9.0%) experiencing the least food inflation among the provinces and Prince Edward Island (+12.4%) and Manitoba (+12.3%) experiencing the most. Fresh or frozen retail beef prices in Canada were up 9.0% from January through November 2022 but up 1.1% in November 2022 compared with November 2021. Prices vary widely across markets reflecting what is available and what consumers are willing or even able to pay. Beef prices increased the least in British Columbia (-5.4% in year-over-year in November 2022) and the most in Prince Edward Island (+16.8%). Gasoline prices in Canada were up 13.7% year-over-year in November 2022, with the smallest increase in Alberta (+6.9%) and the largest increases in Manitoba (+23.5%) and British Columbia (+27.0). These pressures are forecast to persist into 2023 with headline inflation forecast to stay above the target rate of 2% in 2023.

The interest rate in Canada rose to 4.25% to combat inflation, and while historically low, rising interest rates impact the record large number of Canadians who purchased homes in the last two years. Increasing grocery bills and mortgage payments will reduce available disposable income. Demand for beef and competing proteins is expected to shift into value items in 2023. Relative price ratios at retail have thus far favoured beef in 2022, keeping it competitive in the meat case, but availability could be a challenge next year. As consumers exercise money saving strategies, retail is not likely to lose much share of the food dollar in 2023. While foodservice share of the total food dollar is anticipated to grow to 36.3% in 2022 from 32% in 2021, and grow to 37.2% in 2023, that growth could be pressured by the consumer's available disposable income.

## INTERNATIONAL OUTLOOK

Canada is not the only country anticipated to experience demand pressures from inflation and measures to mitigate it, nor the most severe case. Rising interest rates in the U.S. have devalued currency around the globe. The farther a currency falls relative to another, the harder it is for the country with the weaker currency to compete for goods. This issue may be exacerbated if the country with the weaker currency is also experiencing a slow down in growth. As Canadian monetary policy has moved to match U.S. monetary policy, this has kept Canadian currency relatively strong compared to our competitors. On the upside, the weaker Canadian dollar gives us a competitive edge over the U.S., when exporting beef. On the downside, other competitors like Australia and Brazil's currency have been devalued more than Canada's. Furthermore, many of our customers are experiencing a lower valued currency and a weaker economy for 2023.

### CURRENCY CHANGES RELATIVE TO THE U.S. DOLLAR IN 2022

| Country            | Percent change (week ending September 30, 2022) |
|--------------------|---|
| Mexican Peso       | -2%   |
| Brazilian Real     | -3%   |
| Canadian Dollar    | -7%   |
| Chinese Yuan       | -9%   |
| Australian Dollar  | -15%  |
| New Zealand Dollar | -21%  |
| Euro               | -21%  |
| South Korean Won   | -24%  |
| Japanese Yen       | -28%  |

### REAL GDP GROWTH PROJECTIONS FOR SELECT BEEF IMPORTING COUNTRIES AND MAJOR CANADIAN BEEF EXPORT DESTINATIONS 2022P-2023F

| Country        | Share of global beef & veal imports (2019-2021 est) | 2022p GDP | 2023f GDP |
|----------------|---|-----------|-----------|
| China          | 23%   | +3.2%     | +4.4%     |
| U.S.           | 13%   | +1.6%     | +1.0%     |
| Japan          | 8%  | +1.7%     | +1.6%     |
| Vietnam*       | 3%  | +7.5%     | +6.7%     |
| South Korea**  | 5%  | +2.8%     | +2.2%     |
| Russia         | 4%  | -3.4%     | -2.3%     |
| European Union | 3%  | +3.1%     | +0.5%     |
| United Kingdom | 3%  | +3.6%     | +0.3%     |
| Canada         | 2%  | +3.3%     | +1.5%     |
| Mexico         | 1%  | +2.1%     | +1.2%     |
| Brazil         | <1%   | +2.8%     | +1.0%     |
| World          |   | +3.2%     | +2.7%     |

Source: IMF, \*World Bank, \*\*OECD

From January through October 2022, Canadian beef exports were up 6% in volume and +5% in value. The international wholesale beef demand (a function of export values and volumes) is projected to be down 1.7% in 2022p even with near record high values (\$4.6 billion) and volumes (504,600 tonnes). Retail demand from Canada's top market, the U.S., is projected to be down 1.9% in 2022p. Market share of Canadian beef exports on a volume basis (January through October 2022) were steady at 70% for the U.S. and 5% for Mexico but increased from 11.5% to 13.7% for Japan, from 2.5% to 3.7% for South Korea, and from 3.5% to 4.0% in Southeast Asia. Market share to China and Hong Kong fell from 5.6% in 2021 to a projected 0.9% in 2022p with market access in China closed.



## JAPAN OUTLOOK

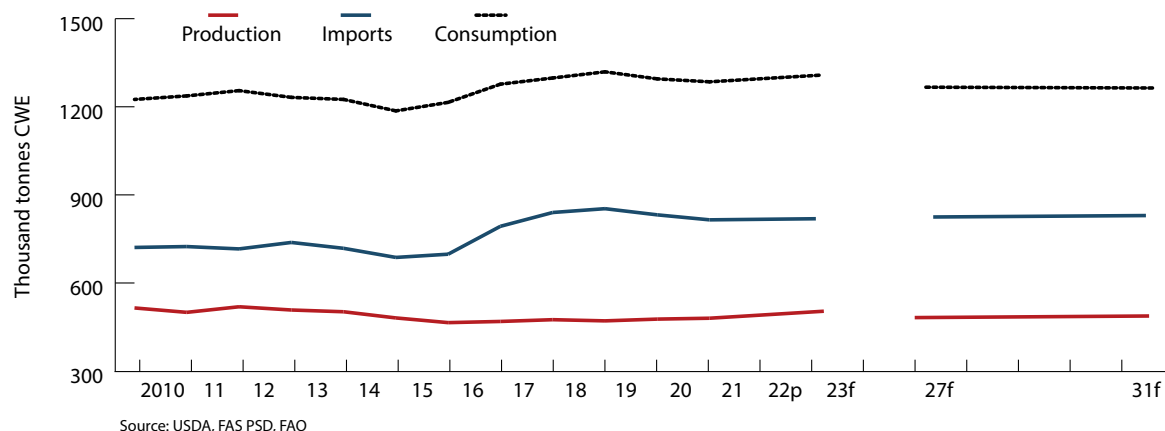
Japanese cattle inventories are forecast to increase by 5,000 head in 2023f to 3.995 million head after two years of larger calf crops. There was overproduction in the dairy sector that pushed Holstein cows to market; that is expected to ease in 2022 as slaughter of Wagyu and cross breeds are expected to increase 2%. The result is steady beef production forecast for 2023f. In the medium and long-run, beef production is forecast to decline from 2022p, down 4.0% by 2027f and down 5.5% by 2031f.

Japan is projected to be the second largest global importer of beef and veal products behind China in 2022p and 2023f. Sixty-five percent of beef consumption in Japan is imported. Japan is a major importer of chilled frozen meat. Under the U.S.-Japan Trade Agreement the U.S. has gained tariff treatment equal to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership countries, including Australia, Japan's second largest supplier. Japanese beef imports are projected to be down 0.9% in 2022p and up 0.6% in 2023f. In the long-run, imports are forecast to grow by 1.8% from 2022p levels by 2031f.

Consumption preferences have shifted in recent years to include thick, lean cuts of grain-fed beef in U.S. style eateries. Japan imports large volumes of tongue and skirt as well. Beef consumption in Japan is approximately 60% through foodservice and 40% through retail and other channels. Consumption was forecast to rebound in 2022p but demand impacted by Covid restrictions was slower than expected to recover. Only on August 1, 2022, did the Japanese government roll-back their foodservice and international travel restrictions. For 2023f, consumption is forecast to be up 1.7% from 2022p but kept below pre-Covid years by inflation at foodservice and retail. Western-style fast food restaurant sales in Japan have recovered fastest, with Japanese fast-food style restaurants picking up in sales, followed by table barbecue. In the medium and long-term, beef consumption is forecast to be steady.

## JAPAN BEEF SUPPLY AND DEMAND BALANCE 2011-2031F

### JAPAN BEEF DISPOSITION



### CHINA AND HONG KONG OUTLOOK

Brazil is the main supplier of beef to China, with a 38% market share from January through July 2022. The U.S. and Australia are the dominant suppliers of grain-fed beef to China with market share at 7% each. Imports of Canadian beef have been suspended since January 2022 following an atypical Bovine Spongiform Encephalitis (BSE) case finding in Alberta. A two-year ban on beef following an atypical BSE case in Ireland has yet to be resolved (October 2022), potentially indicating a timeline for recovering access to that market.

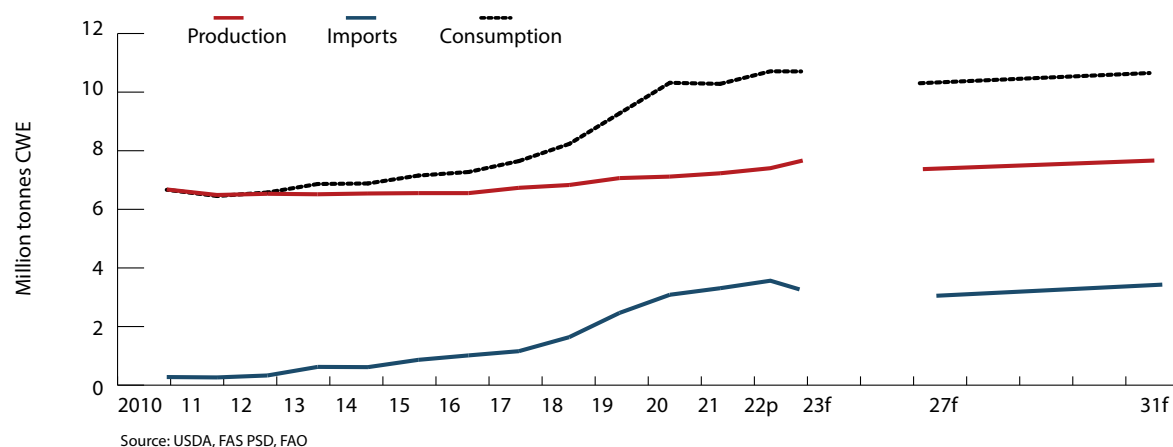
Chinese imports of beef are projected to be up 3.8% in 2022p. Imports of beef are forecast to be down 9.2% in 2023f on uncertain foodservice demand, global availability, and a weakening economy that could soften bids. Larger domestic production will support availability of homegrown beef, forecast to increase 5.3%. Imported grain-fed beef is popular for barbecue and high-end restaurants. Since imported beef is primarily used in foodservice sectors, it has been impacted by continued zero-Covid policies and a weaker economy expected in 2023. In the medium term, beef imports are expected to moderate, -0.4% from 2022p levels in 2027f. Long run forecasts are for higher beef imports, up 1.3% from 2022p levels by 2031f.

Chinese consumption is projected to be up 2.6% in 2022p and estimated to be steady (+0.8%) in 2023f. Consumption is forecast to grow modestly from 2022p levels, up 1% by 2027f, and up 3% by 2031f.

Hong Kong imports and consumption are projected to decline sharply for the second consecutive year in 2022p, down 52.8% and 52.3% respectively. A portion of those losses are forecast to return in 2023f, with imports forecast to be up 28.6% from 2022p in 2023f and consumption forecast to be up 27.9%.

### CHINA BEEF SUPPLY AND DEMAND BALANCE 2011-31F

#### CHINA BEEF DISPOSITION



## SOUTH KOREA OUTLOOK

Domestic Hanwoo beef still dominates beef sales at retail channels. High cattle prices in Korea incentivized producers to hold onto cattle and increase stocks, pressuring production down 4.7% in 2022p. Hanwoo beef cow numbers are at historic highs (since 2014) and consistent domestic beef demand combined with government support for small business will support increased production, projected to be up 0.5% in 2023f.

Consumption is expected to be up 4.8% in 2022p, and up another 2.5% into 2023f. Most retail beef sales (domestic and imports) occur through grocery, followed by online, then hypermarkets, then convenience channels. Online and convenience food sales in South Korea are expected to grow at a faster pace than other retail channels in the medium and long-term. Many imported beef products head into retail convenience where home meal replacements are becoming increasingly popular. Convenience stores and the home meal replacement sales are the drivers for beef imports.

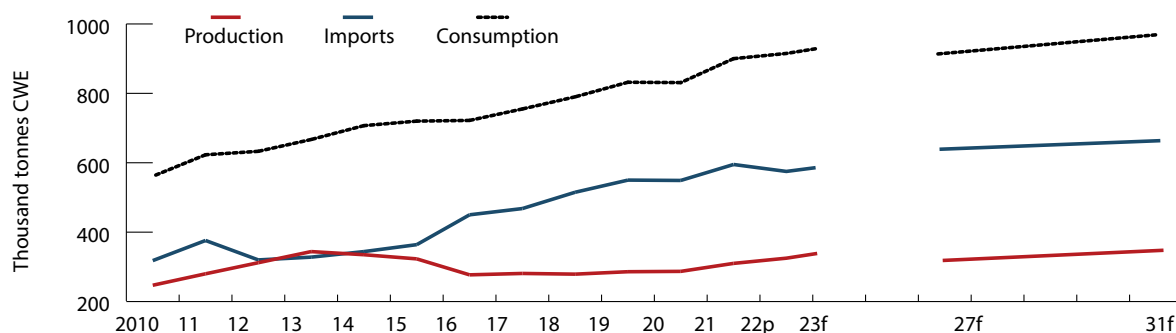
Historically, expenditures on dining out versus at-home have been about half, but that number declined to about 44% into 2021 due to Covid measures forcing closures, limited hours or capacity. Koreans have larger and larger incomes and preferences are becoming increasingly sophisticated as South Koreans are open to trying new tastes, which advances foodservice. Foodservice and retail sector employment has failed to recover to pre-Covid levels, however; higher food prices and staffing issues are slowing the recovery. Foodservice is working to earn back market share. The hotel sector is influential for introducing new products, but the recovery of inbound travellers and foodservice is slow. Most food service offered in South Korea is through full-service restaurants, followed by quick service, then special service.

With higher production and consumption projected, imports are projected to be up 3.7% in 2022p and up 1.6% in 2023f to meet increasing demand. Beef is among the top 10 growth products under consumer-oriented agricultural imports. South Korea imports primarily frozen beef, followed by fresh beef. The U.S. had 54% market share of frozen beef, with Australia at 37%. For fresh/chilled, the U.S. had 67% share with Australia's share at 33%.

In the medium and long-run, domestic beef production is forecast to grow 3.0% from 2022p to 2027f, and 4.4% from 2022p to 2031f. The increased production will support increasing beef consumption in South Korea, but domestic production is not large enough to produce volumes demanded for domestic consumption. By 2031f, consumption is expected to increase 4.4% from 2022p. Import growth is also forecast for the long-term, up 4.2% by 2031f.

## SOUTH KOREA BEEF SUPPLY AND DEMAND BALANCE 2011-31F

### SOUTH KOREA BEEF DISPOSITION



Source: USDA, FAS PSD, FAO

## MEXICO

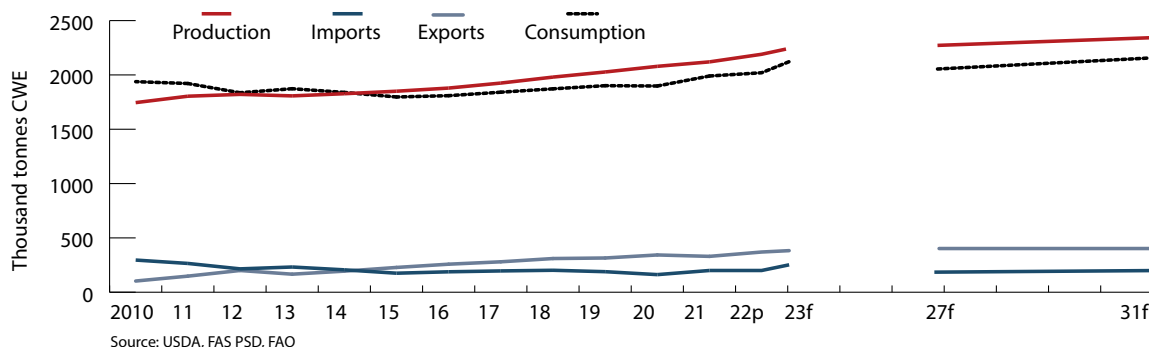
A shift in production practices into vertical integration and improved animal performance is being incentivized by nearby markets for grain-fed beef and attractive export prices. Production is projected to increase steadily in the near-term, up 2.2% in 2022p, then up 2.3% in 2023f and over the next 10 years, increasing by 5.1% between 2022p and 2031f. Mexico's live slaughter cattle exports to the U.S. have declined in recent years as a result of vertical integration that allows Mexico's beef producers to capture more value in their product. More cattle have been imported for slaughter from the U.S. as well due to U.S. labour shortages. Production will vary regionally by resource and infrastructure constraints in some regions. Beef exports are forecast to increase steadily after a projected spike in 2022p. Beef exports from January through August 2022 have been record large and are projected to be up 18.5% in 2022p. With beef exports forecast to be up 2.3% in 2023f from 2022p, setting new records next year and supported by growing production. The lion's share of beef exports go to the U.S., followed by Japan, Canada and South Korea.

Despite larger production, domestic consumption of beef is expected to decline 1.7% in 2022p from 2021, under the struggle of inflation, then forecast to rebound 4.2% in 2023f from 2022p levels. Domestic beef consumption in Mexico is forecast to grow in the future. Domestic tastes and preferences are moving toward grain-fed beef. Domestic beef demand has historically been driven by the foodservice sector and food consumed away-from-home is a continuing trend. In 2022, tourism and foodservice industries rebounded following the Covid-19 pandemic. Local butchers remain the primary retail channel in Mexico but increasing numbers of large supermarket chains are also facilitating international access. Domestic consumption is forecast to grow 4.4% between 2022p and 2031f.

Mexican beef imports are projected to be down 7.0% in 2022p from 2021, but will be large in 2023f (+25% from 2022p) as growth in export markets require supplement with imports in the domestic market under a relatively strong macro-economic forecast. Imports in the medium and long run are forecast to be 10% lower than current levels, among the lowest volumes in recent decades due to more availability in the domestic market.

### MEXICO BEEF SUPPLY AND DEMAND BALANCE 2011-2031F

#### MEXICO BEEF DISPOSITION

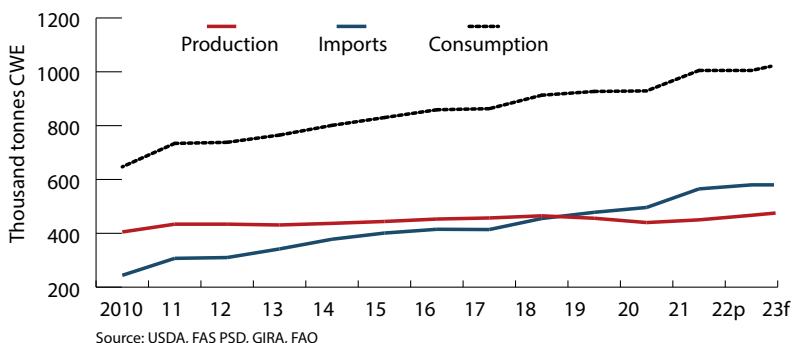


## SOUTHEAST ASIA

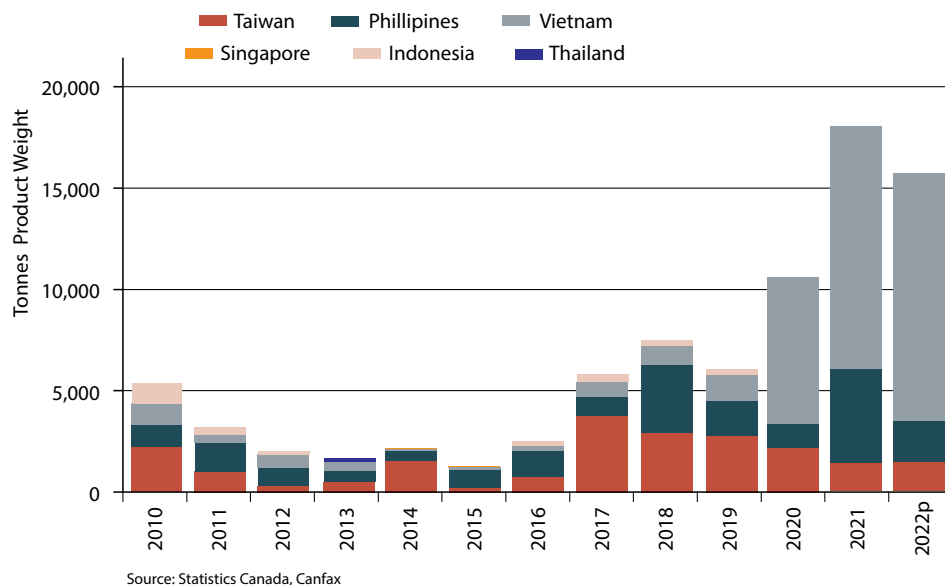
Taiwan, Vietnam, and the Philippines have historically been Canada's three primary beef export markets in Southeast Asia. Domestic beef production in Southeast Asia is projected to grow 1% in 2022p and is forecast to increase 3% in 2023f. Beef consumption is projected to increase by 5% in 2022p and forecast to increase 2% in 2023f. Higher beef imports will be needed to balance the sharp increase in consumption in 2022p as consumers switch from pork, which has supply limitations due to African Swine Fever (ASF). Southeast Asian beef imports are projected to be up 10% in 2022p and forecast to increase another 1% in 2023f.

### SOUTHEAST ASIA BEEF SUPPLY AND DEMAND BALANCE 2011-23F

#### SOUTHEAST ASIA BEEF DISPOSITION



#### CANADIAN BEEF EXPORT VOLUMES TO SE ASIA



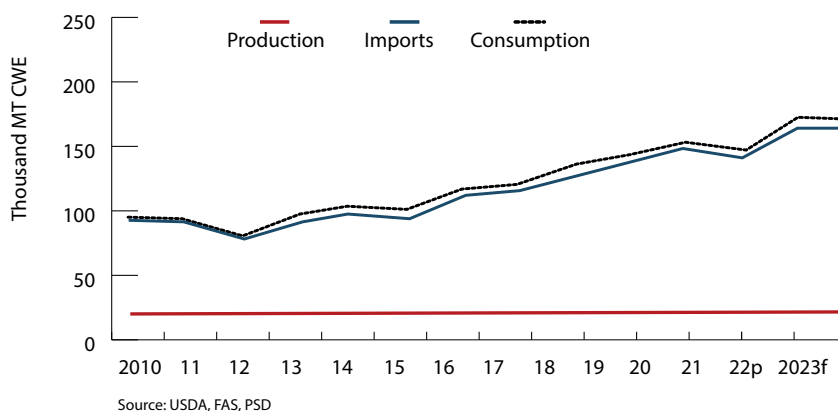
## TAIWAN

Opportunities exist to meet the growing demand for western style food in Taiwan. Channels in Taiwan are well-developed with a thriving online economy. Convenience stores have developed and promote e-commerce for fresh groceries, and prepared foods for pick-up. Modern grocery and supermarkets are on a growth trajectory as they are in other developing markets like South Korea and to some extent, Mexico. Quality and safety are important values in Taiwan's food market.

Agriculture imports are an important part of meeting domestic demand at retail and foodservice as beef production in Taiwan is negligible. In 2020 and 2021, foodservice demand was pressured under Covid measures, and beef imports declined 3.7% as a result. Beef imports in 2022 have surged ahead, projected to be up 14.8% in 2022p from 2021. For 2023f, beef imports are projected to moderate, up a further 1.0%. The increase in imports in 2022 supports the 14.2% increase in consumption projected for 2022p, followed by another 1% increase in consumption forecast for 2023f. The U.S. is a top supplier to Taiwan through a bilateral relationship. This is a competitive market where pricing and volumes will play a role for access next year.

### TAIWAN BEEF SUPPLY AND DEMAND BALANCE 2011-23F

#### TAIWAN BEEF DISPOSITION



### EUROPEAN UNION (EU27)

The European Union (EU27) is liquidating under conditions of drought, high fed cattle prices, and high feed and energy prices that are pulling cattle forward at lower carcass weights. High slaughter numbers but lower slaughter weights have pressured domestic production in 2022. Domestic production is projected to be down 0.7% in 2022p, with further declines (-1.8%) forecast for 2023f. The limited availability of young animals within the herd this year is expected to stifle availability for next year. Whether the herd consolidates or expands following this period will really be determined by the direction of agricultural policy being set for the region starting in 2023 and the resolution of severe drought. Forecasting in this volatile environment is risky, but the general production trend today is expected to slope downward based on the current herd structure and tone of agricultural policy. By 2027f, production is forecast to be down 3.9% from 2022p levels and by 2031f, production is forecast to be 6.5% lower than 2022p levels.

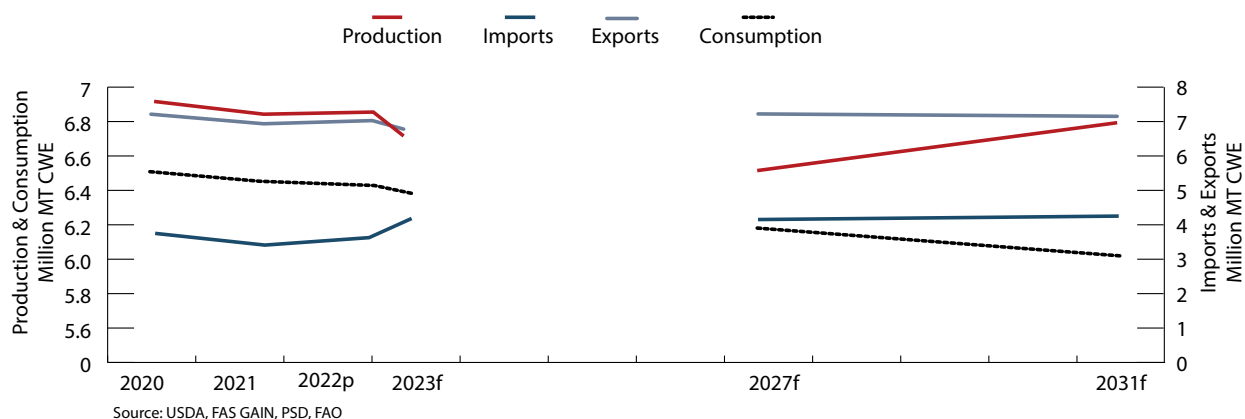
Beef consumption is expected to decline steadily over the next two years; to be down 0.1% in 2022p from 2021 with another 0.8% decline in 2023f. The near-term declines are a function of beef availability in the domestic market and the purchasing power of the domestic consumer, who face major economic headwinds in currency, food, energy prices and shelter. In the medium and long-term consumption is forecast to decline by 3.1% in 2027f from 2022p levels, and decline 5.6% by 2031f from 2022p levels.

Exports were strong in 2022 and projected to be up 3.9% in 2022p from 2021 on account of surplus in production relative to consumption and a return of nearby tourism and foodservice demand. The surplus that currently exists between production and domestic consumption is expected to narrow in the long-term as production declines faster than consumption which is forecast to move slightly and steadily lower. As a result, exports are forecast to decline 7.1% in 2023f from 2022p levels and decline 3.7% between 2022p and 2031f.

Imports are projected to support consumption that will decline at a slightly slower rate than production. Imports are projected to be up 6% in 2022p from 2021 under a rebounding foodservice sector and a normalization of trade after rolling lockdowns. Imports are then forecast to grow 8.1% in 2023f primarily from low price countries like Brazil and with more modest increases in demand for high-quality grain-fed beef. Imports in 2022p have failed to recover to levels preceding the Covid pandemic, but are forecast to increase 12.9% from 2022p levels by 2027f, and up 14.5% from 2022p levels by 2031f, as production declines at a faster rate than consumption.

### EUROPEAN UNION BEEF AND VEAL SUPPLY AND DEMAND BALANCE 2020-31F

#### EU-27 BEEF DISPOSITION





## UNITED KINGDOM

The United Kingdom (UK) is projected to be a soft market in 2022p and 2023f with growth potential in the medium and long-run as, like the European Union, an overall trend towards imports supporting consumption ramps up.

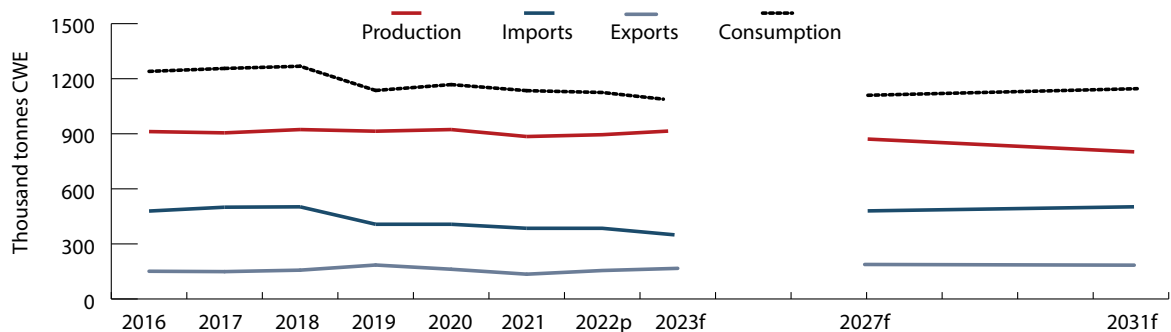
Beef production in the UK is projected to increase 1.1% in 2022p from 2021 levels. A similar 1.1% increase in production is forecast to occur in 2023f. In the medium and long-term, production is forecast to decline modestly, down 2.5% between 2022p and 2031f.

The consumption trend is projected to be opposite to the production trend which is unusual but quite in line with the long-term (12-year) FAO trend forecast. This presents an opportunity if the outcome of trade negotiations between the UK and Canada are positive. Consumption is forecast steady to lower in the near term before returning steady to higher in the medium and long-term. Consumption is projected to decrease 0.7% in 2022p from 2021 levels, and to decline another 1.2% in 2023f. Consumption is forecast to increase 0.3% between 2022p and 2027f and increase 1.1% between 2022p and 2031f for an overall slight increase from current levels.

Imports in 2022p surged 5.6% from 2021 levels on the return of foodservice demand. Thus, 2023 could be a challenging year economically for the UK, and as a result, imports (which are typically higher value foodservice products) are forecast to be down a further 4.8% in 2023f. In the near-term, increasing production alongside pressured consumption will support exports. Exports are projected to be up 2.2% between 2022p and 2023f with slight growth (1.6%) by 2031f.

## UNITED KINGDOM BEEF SUPPLY AND DEMAND BALANCE 2016-31F

### UNITED KINGDOM BEEF DISPOSITION



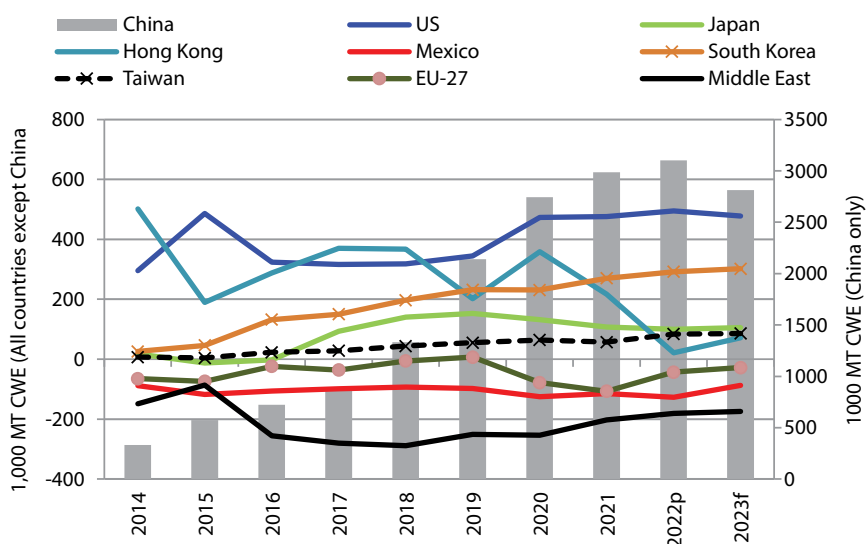
Source: USDA FAS, PSD, FAO

## GLOBAL BEEF CONSUMPTION OUTLOOK

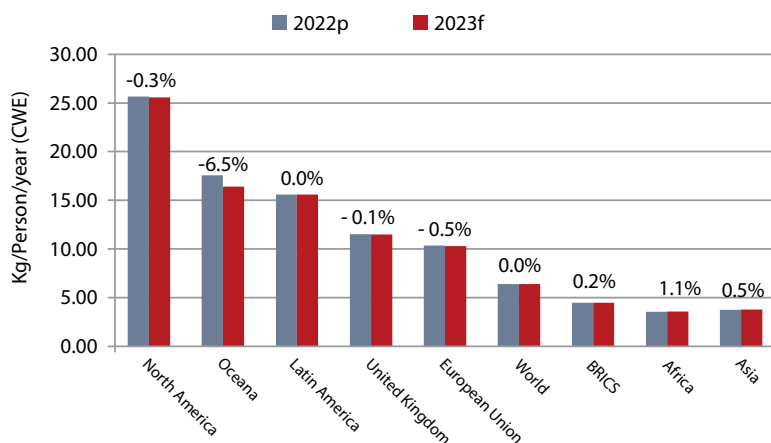
With production challenges rising and falling in 2020 and 2021, trade flows shifted by necessity. Many countries turned to beef imports to meet surging demand and sidestep disruptors like labour availability and animal disease. In 2021, foodservice recovery created bidding wars on the world stage leading to record high wholesale and retail prices for high-value cuts on the beef carcass. These bidding wars among top performing countries priced others out of those markets and they turned to less expensive beef primals and grinds to meet demand while maintaining margins in 2022. Surging imports from China and Southeast Asia have moderated, but the protein gap left by African Swine Fever (ASF) has yet to be filled, and these regions have developed a taste for beef.

Per capita beef consumption continues to grow in Asia with the rising middle-class and the development of supply chains. Beef is a key ingredient in many Asian food service offerings which are being increasingly frequented by the middle-class. Consumption in North America is anticipated to decline due to limited supplies of grain-fed beef in 2023.

## GROWTH IN BEEF IMPORTS SINCE 2014



## PER CAPITA BEEF CONSUMPTION



Source: OECD, Agricultural Outlook 2017, FAO

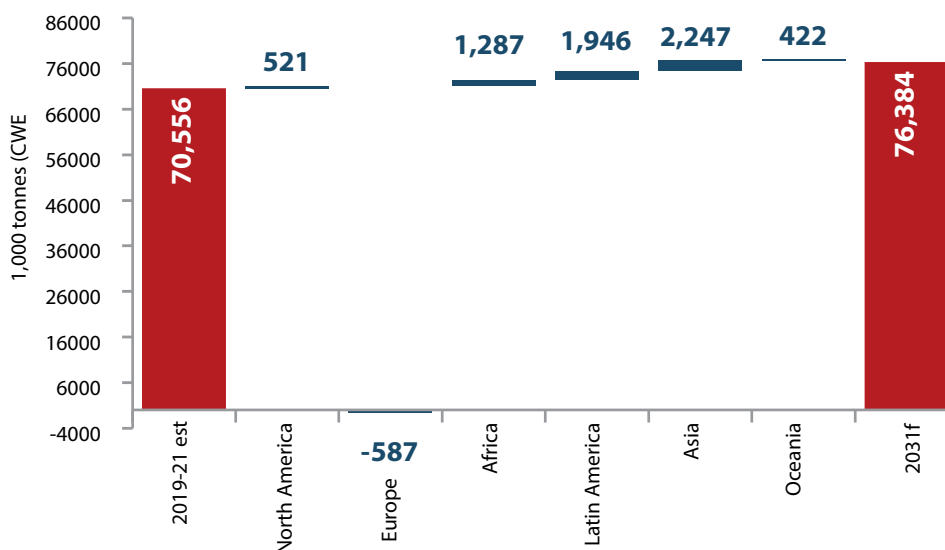
### COMPETITOR ANALYSIS

Global beef cow numbers in 2022p and 2023f are expected to be steady to slightly lower at 202.2 million head. Brazil is expected to have the largest beef cow inventory in 2023f (55.2 million head) making up 27% of the total global beef cow herd. Beef cow inventories have been steadily growing in Brazil since their 2016 low. Brazil is the world's largest beef exporter by far with exports projected to grow to 2.95 million tonnes in 2022p and 2.98 million tonnes in 2023f.

Beef cow inventories in Australia are projected to expand significantly, up 6.0% in 2022p and a further 8.5% in 2023f. Australia is in an expansion phase following a multi-year drought that brought beef cow inventories to a multi-decade low in 2021. Australia experienced labour shortages and production challenges in 2022 that hampered their production and exports. These challenges affected the price of Australian beef and competitiveness into international markets. With Australian policy looking once again to encourage migrant workers, expect a resurgence of Australian beef into key markets in Asia and lean manufacturing trim into North America.

The U.S. has the largest grain-fed beef herd in the world at 91.9 million cattle projected for 2022p. The beef cow herd has declined nearly 5% since 2019 however, following multi-year drought in key U.S. cattle producing regions. The beef cow herd is forecast to decline a significant 3.5% into 2023f with severe drought continuing to ravage pastures and forage availability. The liquidation of the cattle herd has supported U.S. beef exports up 5.8% from January through August 2022 from the same period in 2021. With limited availability forecast for 2023f, production and exports are projected to ease.

### BEEF PRODUCTION CHANGE BY REGION 2019-21est - 2031f



Source: OECD FAO

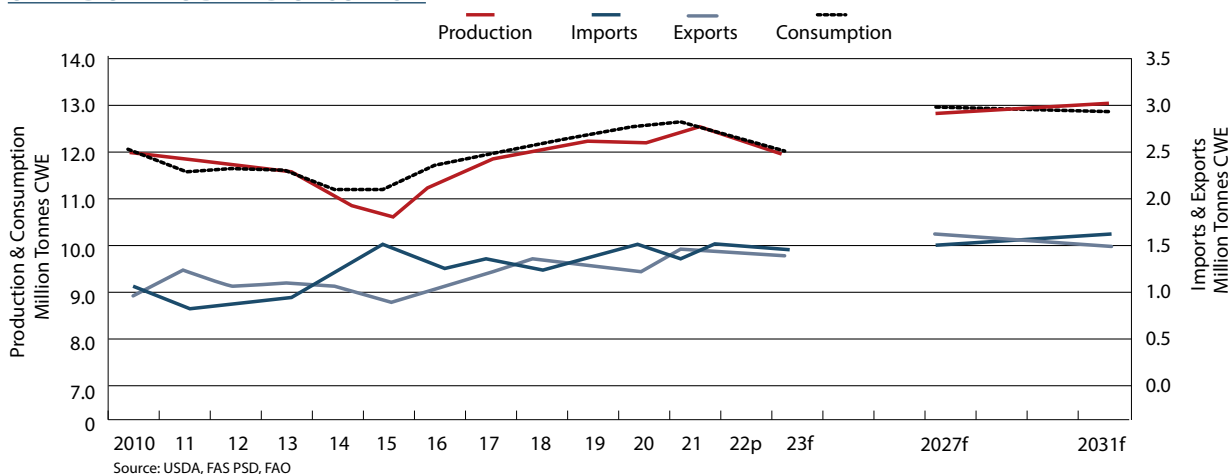
## UNITED STATES

U.S. beef exports are forecast to ease in 2023f, down 14% from 2022p after two years of record high volumes. Drought in the U.S. will dry up the cattle supply with little expectation that expansion will be possible for at least three years. Production in 2022p is projected to be steady (+0.7%) with 2021 and record large at 12.8 million tonnes produced as a result. The forecast calls for production to decline significantly (-6.3%) in 2023f from 2022p. Anecdotal expectations based on historical events put production closer to down 5% in 2022p at 12.2 million tonnes, with the hope of some support in the first quarter of 2023 from cattle fed longer. Between 2022p and 2027f, production is forecast to increase 0.7% if weather conditions allow, with a 2.1% increase from 2022p levels forecast by 2031f. In-between these forecasts, however, the bottom of the cattle cycle is expected to be experienced with lows in 2023/24 potentially revisiting the 11% change from 2016 to 2021.

Production, consumption, imports, and exports were projected to be stronger in 2022 than the previous year due to the combined effects of surging competition for beef, disease in competing meats, and weather events. Beef consumption in the U.S. is projected to be down 4.1% in 2023f due to reduced availability. In the medium and long-term however, steady growth in consumption from 2022p levels is expected, up 0.3% by 2027f, and up 1.5% by 2031f. With herd expansion possible in 2025 and supported by a likely shift to El Nino that will restore pasture conditions, exports will resume, forecast to be up 5% between 2022p and 2027f and up 4% between 2022p and 2031f.

## U.S. BEEF SUPPLY AND DEMAND BALANCE 2011-31F

### UNITED STATES BEEF DISPOSITION



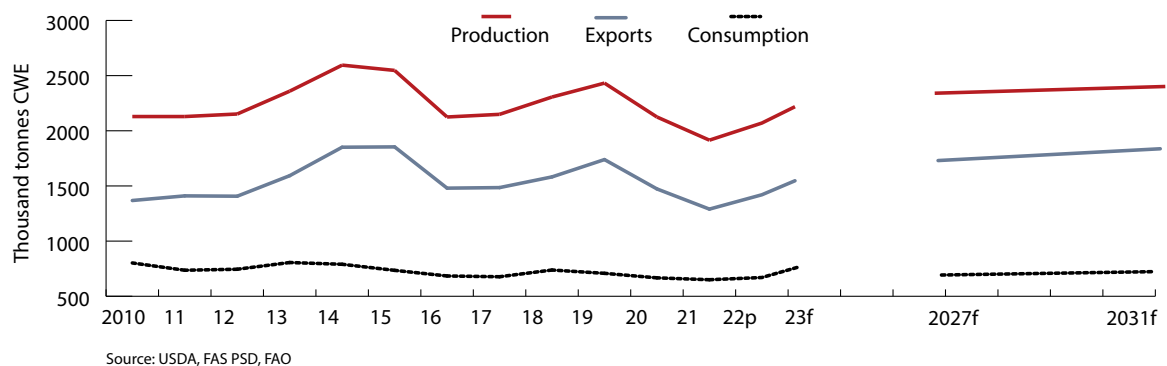
## AUSTRALIA

Production in Australia was on the upswing in 2022. Production in 2022p is projected to be up 3.3% from 2021, and up another 13.3% in 2023f. Higher production will support domestic consumption in 2022p, up 7.4% and up again by 7.5% in 2023f, aided by the gradual reopening of the tourism sector and the easing of restrictions for migrant workers. In the medium and long-term, consumption is forecast to decline 5.0% between 2022p and 2027f, but ease to a 3.3% decline by 2031f from 2022p levels.

Beef exports are projected to be 0.7% larger in 2022p than 2021 and grow larger in the medium and long-term. Exports are forecast to increase 16.2% in 2023f, and be up 34.6% between 2022p and 2027f and up 38.6% between 2022p and 2031f. In 2022, Australia is only in year two of an expansion phase with a peak likely occurring before 2027 with production and exports falling to forecast levels.

### AUSTRALIA BEEF SUPPLY AND DEMAND BALANCE 2011-31F

#### AUSTRALIA BEEF DISPOSITION

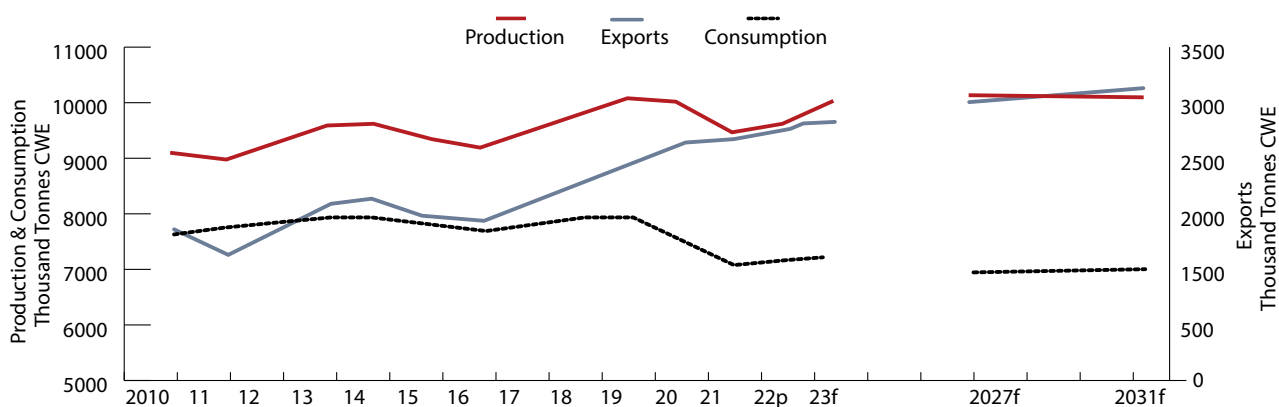


## BRAZIL

Brazilian beef production is forecast to increase 6.2% in 2022p from 2021, and up another 1% in 2023f before moderating over the medium and long-term. Production growth is expected at 2% between 2022p and 2027f and 2.8% between 2022p and 2031f. China and countries like the U.S., the UK, and Canada have stepped up importation of Brazilian beef products due to availability and low prices relative to other markets for beef. Exports have surged in 2022, projected to be up 27.2% in 2022p from 2021 but are expected to moderate, up 0.8% between 2022p and 2023f. Exports are forecast to be up 5.5% in 2027f from 2022p levels and up 9.6% by 2031f. Consumption in Brazil is projected to be steady in the near, medium and long-term, so exports will grow to address additional production and fluctuate on global availability and demand for beef supplies.

### BRAZIL BEEF SUPPLY AND DEMAND BALANCE 2011-31F

#### BRAZIL BEEF DISPOSITION



Source: USDA, FAS PSD, FAO

## CANADA BEEF DEMAND DRIVERS

### TACTICS, TARGETS AND KEY PERFORMANCE INDICATORS

Investment plans have been created to focus on five key demand drivers important to the success of the Canada Beef Investment Plan. Tactics, target audience and standardized KPI's have been incorporated to ensure effective, accurate and consistent ROI reporting back to NCO and funding partners.

Table # 7: Demand drivers, tactics, targets and KPI's

| Description   | Investment Tactics  | Target Audience  | Key Performance Indicators   |
|---|---|--|--|
| <b>1. Trade Marketing Development Programs and Services</b> | Trade Shows<br>Print/digital Resources<br>Websites<br>Advertising<br>Video and Animations Partner Programs<br>Event Marketing<br>Demand Building Trade Missions<br>CBA Resources  | <ul style="list-style-type: none"> <li>• Professional end-user clients</li> <li>• Primary or further processors</li> <li>• Purveyors</li> <li>• Distributors</li> <li>• Exporters</li> <li>• Importers</li> <li>• Retail</li> <li>• Foodservices</li> </ul>                  | <b>Domestic:</b><br>Volume disappearance of beef in Canada vs pork and poultry.<br><b>Export:</b><br>Volume, value, and market share of Canadian beef vs competing suppliers.<br><b>All Markets/Segments:</b><br>Satisfaction Index.                               |
| <b>2. Consumer Marketing Programs and Services</b>          | Retail/Foodservice Sales<br>Promotions<br>Print/digital Resources<br>Recipe Development<br>Photography<br>Nutritional Analysis<br>Websites<br>Social Media<br>Gateway Solutions<br>RoundUp App<br>Advertising<br>Video and Animations<br>Partner Programs<br>Event Marketing<br>Culinary Research<br>Online Education | <ul style="list-style-type: none"> <li>• Consumers</li> <li>• Retail and Foodservice operators</li> <li>• Primary or further processors</li> <li>• Consumer organizations and associations</li> </ul>  | <b>Domestic:</b><br>1. Volume disappearance of beef in Canada vs pork and poultry.<br>2. Retail demand index.<br><b>Export:</b><br>Volume, value, and market share of Canadian beef vs competing suppliers.<br><b>All Markets/Segments:</b><br>Satisfaction Index. |
| <b>3. Market Intelligence Programs and Services</b>         | Development/Reporting<br>Internal and Commissioned Research<br>Contract Market Intelligence<br>Beef Quality and Yield<br>Benchmarking   | Strategic planning<br><ul style="list-style-type: none"> <li>• Professional end-user clients</li> <li>• Primary and further processor clients</li> <li>• Purveyor distribution clients</li> <li>• Retail/foodservice</li> <li>• Cattle/beef industry stakeholders</li> </ul> | <b>Domestic:</b><br>Volume disappearance of beef in Canada vs pork and poultry.<br><b>Export:</b><br>Volume, value, and market share of Canadian beef vs competing suppliers.<br><b>All Markets/Segments:</b><br>Satisfaction Index.                               |
| <b>4. Stakeholder Communications Programs and Services</b>  | ROI Analysis and Reporting<br>Activity Reporting<br>Satisfaction Survey Index<br>Annual Reports<br>Social Media   | NCO<br><ul style="list-style-type: none"> <li>• Cattle, beef, allied associations</li> <li>• Federal/Provincial Governments</li> </ul>   | <b>All Markets/Segments:</b><br>Satisfaction Index.  |
| <b>5. Industry Education Programs and Services</b>          | CBA Support Resources<br>Distributor Education<br>Online Learning<br>Health and Nutrition<br>Engagement   | Education professionals<br><ul style="list-style-type: none"> <li>• Cattle, beef, allied associations</li> <li>• Health/nutrition</li> </ul>   | <b>All Markets/Segments:</b><br>Satisfaction Index.  |



## Canada Beef -

### **Adapting to the “New Normal” in a Changing Marketplace**

“The new normal” is a term used to describe the period that follows a significant transitional phase, and it aptly describes the emerging marketplace for Canadian beef in fiscal 2023-2024. Two years of the COVID-19 pandemic have given rise to many short term and potentially long lasting changes to the domestic and international marketplace.

Early on in the period, consumers rediscovered their kitchens as foodservice establishments dealt with dining room closures and transitioned to focus on take-out and delivery services. Labour and supply chain disruptions played havoc with product availability and pricing at both retail and foodservice.

Later, the marketplace adapted and economies began to move to a post-pandemic phase - a transition that coincided with the highest inflationary period in decades and held the looming threat of a global economic recession.

It is within this context that the 2023-2024 Canada Beef investment plan was developed.

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, and find or create the market opportunities that can come from change. These efforts will set Canadian beef apart from its competitors and provide the maximum benefit for Canada's cattle producers and other stakeholders.

The \$14.7 million plan is organized into 18 separate business units designed to increase the clarity and transparency of the 2023-2024 strategy for industry stakeholders. Tactics, target audience and standardized Key Performance Indicators (KPIs) are incorporated in the plan to ensure effective, accurate and consistent return on investment (ROI) reporting back to stakeholder and funding partners.

The 2023/24 Investment Plan focuses on five key priorities important to the success of Canada Beef programs and services.

#### **1. Full Execution and Deployment of the Canadian Beef Information Gateway (Gateway) Platforms Across all Channels and Sectors**

The Gateway optimizes the intersection of food and technology by using quick response (QR) codes to drive the purchase and enjoyment of beef. The project uses scannable codes to improve customer experience through the selection, purchase, preparation and enjoyment of consuming Canadian beef. Each cut has a digital profile accessible via smart phone or tablet. Each profile features essential information including recommended cooking methods, food safety and storage information, written recipes, recipe videos, nutritional information and shopping lists. The information presented and the visual appearance of the Gateway program can be customized for retail partners. The program was launched in Canada last fiscal and will be made available in global markets this fiscal. Canada Beef will expand Gateway platforms to be adaptable to all sectors including retail, foodservice, packers and producers/stakeholder audiences. The organization will invest heavily in promotion and marketing of the Gateway in fiscal 2023-2024 to bring more partners and clients to the table. The IT architecture was designed to continue to expand and evolve in order to bring the closest alignment possible with partners and clients.

#### **2. Value Cut Options for Retail and Foodservice**

The impact of food inflation, particularly for the meat category, is biting into consumers' purchasing power and is challenging beef's place on food service menus and retail meat counter shelves. As customers and consumers consider less expensive options, Canada Beef will create and promote processing and merchandising solutions that will help bring lower-cost beef choices to a variety of menu and retail applications. The strategy will help to defend the place of high value middle meats on menus and encourage the uptake of lesser known value cuts supported by consumer marketing and education to enhance awareness of proper preparation and cooking methods.

### **3. Continue to Refine and Develop the Canadian Beef Advantage for Trade Audiences While Introducing it to the Consumer Audience**

The Canadian Beef Advantage (CBA) is the combination of technical and emotional product attributes that taken together differentiates Canadian beef from its domestic and international competitors. These attributes include areas such as beef quality, food safety, grading, genetics, sustainability, cattle identification, animal health, etc. These messages have long been at the centre of trade extension and communications, and will now be translated into consumer-friendly language and incorporated into consumer marketing and communications.

### **4. Maximize and Optimize the Expansion of the Canadian Beef Centre of Excellence**

The Canadian Beef Centre of Excellence (CBCE) was retrofitted to become a multimedia production studio in order to meet the growing demand for digital media to support trade and consumer marketing programs. Renovations and audio/visual upgrades to the Centre will ensure the facility continues to play a key role in communicating the Canadian Beef Advantage across digital platforms to consumers, culinary and butchery students, and meat professionals worldwide. The CBCE will offer cost-shared and cost-covered partner programs that will support both generic and branded program development.

### **5. Pandemic Recovery and Growth Strategy**

The pandemic had significant and wide-ranging impacts on the retail sector - and in particular on the food service sector, which is still in recovery. A pandemic recovery strategy is being developed guided by market research completed late in the previous fiscal year. Research identified nine key issues that the strategy will address:

- protect beef's place on the menu;
- communicate the beef margin story;
- assist operators on enhancing yield;
- emphasize emerging cuts;
- support beef's position on the menu with additional size options;
- develop high demand products;
- collaborate with processors to develop products;
- monitor competitive protein activity;
- steak as take away options – product and packaging;
- Canadian beef as local product; and
- communicate opportunities to automate beef related food service processes.

Finally, in 2023, Canada Beef will celebrate the 50th anniversary of beef marketing activities in Canada and abroad. Canada Beef began operations on July 1, 2011 with the consolidation of the Beef Information Centre (formerly responsible for domestic beef market development) and the Canada Beef Export Federation (formerly responsible for international beef market development). While Canada Beef has operated for just over a decade, its predecessor organizations had operated as the domestic and international marketing organizations for the Canadian beef industry since 1973 (Beef Information Centre in 1973 and Canada Beef Export Federation in 1989). The Canada Beef Market Development and Promotion Committee and the staff are proud to carry on the strong legacy of leadership in beef marketing and innovation that will continue to serve producers by ensuring a bright and resilient future for the Canadian beef industry.



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# GENERIC BEEF AND VEAL – CONSUMER MARKETING

## WORK PLAN # 1 2023 – 2024

|  |   |   |
|--|---|---|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Consumer Marketing    |   |
| <b>Total Budget:</b>                     | \$424,990                                 | Source:<br>\$403,264: Import Levy<br>\$21,726: Veal Import Levy |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F |   |

### Strategic Priorities:

Promote the positive attributes and benefits of consuming beef and veal to Canadian consumers.

### Objectives:

Build trust and confidence for the consumption of beef and veal products through consumer education.

| Tactics  | Budget    | Deliverables  | Key Performance Indicators  |
|--|-----------|---|---|
| <b>1. National Consumer Demand Building Campaign</b><br>– the affirmation campaign to enhance the positive perception of beef.   | \$225,000 | <b>Q1-Q2:</b><br>Refresh campaign strategy and creative.<br><b>Q4:</b><br>Multi-media advertising + consumer engagement concentrated in final quarter.<br><b>Target:</b><br>Media placement targeting beef eaters ages 25-50 years with creative/messaging that celebrates beef's unique benefits and appeal (The One & Only Beef). | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Retail demand index. |
| <b>2. Partnered Collaborative Consumer Campaigns</b><br>Partnered nutrition focused consumer campaigns and resource fulfillment. | \$152,000 | <b>Q1-Q4:</b><br>Partnered collaborative consumer campaigns via health organization channels based on Canada Beef's Nutrition portfolio insights.<br><b>Target:</b><br>4 earned media placements.<br>Participation in outreach programs via 4 health/wellness education organization channels.                                      | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Retail demand index. |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|----------|---|--|
| 3. <b>Thinkbeef.ca</b><br>Generic beef promotion | \$26,264 | <p><b>Q1-Q4:</b><br/>Maintenance, revisions, and platform operation.<br/>Campaign tracking/measurement.<br/>Resource distribution.</p> <p><b>Target:</b><br/>2 updates to structure as needed.<br/>Quarterly seasonal updates.<br/>Annual measurement report.<br/>Operation and Updates of the Resource/Order Centre.</p> | <p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p> <p>3. Retail demand index.</p> |
| 4. <b>ThinkVeal.ca</b><br>Generic veal promotion | \$21,726 | <p><b>Q1-Q4:</b><br/>Consumer promotion/asset development to leverage ThinkVeal.ca.</p> <p><b>Target:</b><br/>1 update to structure as needed.<br/>2 seasonal updates.<br/>Quarterly promotion/media outreach of ThinkVeal.ca consumer assets.</p>  | <p>1. Annual veal disappearance in Canada vs beef, pork, and poultry.</p> <p>2. Satisfaction index survey.</p>                         |



## PUBLIC AND STAKEHOLDER ENGAGEMENT

### WORK PLAN # 2 2023 – 2024

|  |   |   |
|--|---|---|
| <b>Team Lead and Budget Holder:</b>      | Vice President, Corporate Affairs   |   |
| <b>Total Budget:</b>                     | \$270,000   | Source:<br>\$212,000: PSE Check-Off<br>\$58,000: Beef Check-Off |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F<br>Pillar 2: Connectivity – Focus Area: A,B,C |   |

#### Strategic Priorities:

Awareness, information, debunking negative mainstream and social media.

#### Objectives:

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.

| Tactics   | Budget   | Deliverables  | Key Performance Indicators   |
|---|----------|---|--|
| <b>1. Canadian Beef Sustainability Campaign</b><br>Canada Beef will develop and execute a consumer-focused public relations and social media campaign leveraging positive messages derived from the updated beef life cycle analysis research being completed by CRSB. This research provides the benchmark for measuring the environmental footprint of the Canadian beef industry. Canada Beef will seek and pursue opportunities to further leverage this investment in partnership with PSE-CCA and CRSB. | \$75,000 | <b>Q3:</b><br>Completion and release of updated study expected in Q3.<br>Evaluation of study and development of key takeaways and messages.<br><b>Q4:</b><br>High impact, science-based messaging directly to consumers via paid media and social media extension.<br><b>Target:</b><br>5 million consumer impressions. | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey. |
| <b>2. Direct to Consumer Messaging</b><br>Consumer-focused public relations and social media campaigns featuring positive beef industry messaging delivered directly to consumer audiences.   | \$50,000 | <b>Q2-Q4:</b><br>Three direct-to-consumer public relations campaigns focused on trust and confidence issues reaching 3 million consumer impressions.<br><b>Target:</b><br>Impactful story telling content relevant to issues of concern.  | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey. |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators  |
|--|----------|---|---|
| <b>3. Consumer Messaging through Trade Partners</b><br>Consumer-focused public relations and social media campaign featuring positive beef industry messaging delivered to a consumer audience in partnership with a trade client. | \$80,000 | <b>Q2-Q4:</b><br>One consumer messaging campaign delivered through/ with trade partners reaching 1.5 million impressions.<br><br><b>Target:</b><br>Impactful story telling content relevant to issues of concern.   | 1. Annual beef disappearance in Canada vs pork and poultry.<br><br>2. Satisfaction index survey.    |
| <b>4. Consumer Messaging through Stakeholder Partners</b><br>Consumer-focused public relations and social media campaign featuring positive beef industry messaging delivered to a consumer audience with a stakeholder partner.   | \$20,000 | <b>Q2-Q4:</b><br>One consumer messaging campaign delivered through/ with stakeholder partners reaching 1 million consumer impressions.<br><br><b>Target:</b><br>Impactful story telling content relevant to issues of concern.  | 1. Annual beef disappearance in Canada vs pork and poultry.<br><br>2. Satisfaction index survey.    |
| <b>5. Key Influencer Outreach</b><br>Consumer-focused public relations and social media campaigns featuring positive beef industry messaging delivered to key influencer audiences.  | \$20,000 | <b>Q2-Q4:</b><br>Two initiatives designed to ensure key influencers (trade, food writers, dietitians, home economists, media, NGOs) maintain confidence and support for beef and veal production.<br><br><b>Target:</b><br>Impactful story telling content relevant to issues of concern. | 1. Annual beef disappearance in Canada vs pork and poultry.<br><br>2. Satisfaction index survey.    |
| <b>6. Resource and Content Development:</b><br>Design and production of PSE content and resources  | \$15,000 | <b>Q2-Q4:</b><br>Design and translation of content. Productions of factsheets, backgrounders, photography, research, and resources.<br><br><b>Target:</b><br>Impactful story telling content relevant to issues of concern.   | 1. Annual beef disappearance in 2. Canada vs pork and poultry.<br><br>2. Satisfaction Index survey. |
| <b>7. Industry Membership and Participation:</b><br>Membership and participation costs to align with key allied organizations on PSE issues.   | \$5,000  | <b>Q2:</b><br>Alignment and cooperation between organizations such as CRSB, CCFI, etc.  | 1. Satisfaction index survey.   |
| <b>8. Media and Spokesperson Training:</b><br>Media training for key staff and industry spokespersons to improve performance and outcomes during media engagements.  | \$5,000  | <b>Q3-Q4:</b><br>Five individuals attending training session.   | 1. Satisfaction index survey.   |





# GLOBAL MARKETING

## WORK PLAN # 3 2023 – 2024

|  |   |  |
|--|---|--|
| <b>Team Lead and Budget Holder:</b>      | Executive Vice President                  |  |
| <b>Total Budget:</b>                     | \$1,110,000                               | Source:<br>\$1,110,000: Beef Check-Off<br>SCAP Leveraged |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F |  |

### Strategic Priorities:

Development and production of online and print marketing resources, Canadian Beef Information Gateway, and market intelligence to support sales of Canadian beef in global markets.

### Objectives:

Develop marketing resources, programs, and intelligence to be utilized by Canada Beef staff, stakeholders and clients.

| Tactics   | Budget  | Deliverables   | Key Performance Indicators  |
|---|---|--|---|
| <b>1. Global Market Intelligence Resources (GMIR) Services:</b><br>Production of Canada Beef market intelligence resources for distribution to Canadian industry and government stakeholders. Includes purchase of statistical and market intelligence information and support services.            | \$418,000<br>1. GIRA: \$10,000<br>2. Global AgriTrends: \$12,000<br>3. Other Market Intelligence Subscriptions: \$4,000<br>4. Canfax: \$90,000<br>5. NielsenIQ retail data = \$217,000<br>6. Technomic foodservice data = \$45,000<br>7. Consulting experts, graphic design and data entry support services including contract Market Analyst= \$40,000 | <b>Q1-Q4:</b><br>1. Monthly Global Market Intelligence Report.<br>2. Quarterly Domestic Market Intelligence Report.<br>3. Monthly Canada Beef Trade Report.<br>4. Weekly Trade Headlines.<br>5. Monthly and Quarterly Retail Market Intelligence Report.<br>6. Quarterly Food Service Market Intelligence Report.<br>7. Cattlemen's Magazine Updates.<br>8. Monthly Statistical Reporting. | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>2. Global Canadian Beef Information Gateway Platform Architecture:</b><br>Coding and design of software to support Gateway platforms for foodservice, retail, packer, producer, and supplier brands. Development includes national as well as industry partner editions for the domestic market. | \$302,000<br>1. Coding = \$252,000<br>2. Design and contract support services as well as subscriptions and licenses = \$50,000  | <b>Q1-Q4:</b><br>1. Retail Gateway.<br>2. Foodservice Gateway.<br>3. Packer (wholesale) Gateway.<br>4. Producer brands.<br>5. Partner brands.  | 1. Satisfaction index survey.   |

| Tactics   | Budget  | Deliverables   | Key Performance Indicators  |
|---|---|--|---|
| <b>3. International Meat Secretariat Membership:</b> (Shared tactic with CCA)<br>Canada Beef will participate in relevant areas of IMS activities including the Human Nutrition and Health Committee and the Marketing Committee.   | \$5,000   | <b>Q1-Q4:</b><br>Membership.                         | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Volume/value, market share of Canadian beef in the export marketplace.                                  |
| <b>4. Canadian Beef Advantage Global Marketing Resources:</b><br>Development of content for global marketing resources for meat professionals including seminars, web, print, video digital and point-of-sale that provide information on the Canadian Beef Advantage to buyers of Canadian Beef. | \$100,000   | <b>Q1 – Q4:</b><br>CBA Marketing Resources.          | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>5. Canada Beef Stakeholder Satisfaction Survey:</b><br>Conduct satisfaction survey in Canada and foreign markets. Analyze results and prepare summary reports for promotion committee, NCO, funding partners and stakeholders.   | \$10,000  |  | 2. Satisfaction index survey.   |
| <b>6. Canadian Beef Research:</b><br>Commissioned research on key issues and opportunities for the Canadian beef industry including attitudinal survey research, laboratory testing and quality benchmarking in global markets.   | \$225,000<br>1. Survey Research \$75,000<br>2. Product research including laboratory testing and quality benchmarking = \$150,000 | <b>Q1-Q4:</b><br>Completed research studies.         | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>7. Technical &amp; Regulatory Services:</b><br>Industry engagement, analysis, and resource development in support of key regulatory and technical issues in collaboration with industry stakeholders as required.  | \$50,000  | <b>Q1 - Q4:</b><br>As needed Services and Resources. | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Volume/value, market share of Canadian beef in the export marketplace. |



# CHANNEL MARKETING

## WORK PLAN #4 2023 – 2024

|  |   |                           |
|--|---|---------------------------|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Channel Marketing     |                           |
| <b>Total Budget:</b>                     | \$475,000                                 | Source:<br>Beef Check-Off |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F |                           |

### Strategic Priorities:

Increase volume, value and market share growth. Improve carcass utilization and value optimization. Canada Beef brand growth, distribution, education, and promotion of the Canadian Beef Advantage (CBA).

### Objectives:

Develop, implement, and support retail and foodservice channel sales promotions and market development initiatives that drive sales, market share and competitive position for Canadian beef in the marketplace. Create and implement retail and foodservice demand building programs to increase product assortment and marketing programs that increase the awareness of the CBA in Canada.

| Tactics  | Budget    | Deliverables  | Key Performance Indicators   |
|--|-----------|---|--|
| <b>1. Retail and Foodservice Promotions:</b><br>Canada Beef team will work with new and existing end-user clients to promote traditional and new innovative cuts, brand awareness, sales volume and value growth through national and regional retail and food service promotions. | \$35,000  | <b>Q1 - Q4:</b><br><b>Retail promotions:</b><br>- 2 national events.<br>- 2 regional events.<br><b>Foodservice promotions:</b><br>- 2 national events.<br>- 2 regional events.<br><b>Target:</b><br>+10% YOY sales promotion activity.<br>+10% YOY increase of Canada Beef logo usage in – market through new and existing client partners. | 1. Sales increase over base.<br>2. Number of new, existing and value cuts featured.<br>3. Brand recognition and promotion. |
| <b>2. Trade Shows:</b><br>Trade Show participation provides a high-impact venue for Canada Beef, supply partners and end-user clients to connect.  | \$100,000 | <b>Q1 - Q4:</b><br>1. Restaurant Canada Show.<br>2. Grocery Innovation Canada.<br><b>Foodservice:</b><br>3. GSF – TBD<br>4. Sysco – TBD   | 1. Number of client visits to booth.<br>2. Satisfaction Index survey.<br>3. Number of new contacts made.                   |
| <b>3. Trade Advertising:</b><br>Targeting business-to-business messaging to promote Canada Beef programs and services, Canadian beef grading and cooking methods. The budget includes the cost of placement, creative and e-blast.   | \$90,000  | <b>Q1 - Q4:</b><br><b>Insertions:</b><br>1. Canadian Grocer x 12.<br>2. Grocery Business x 2.<br>3. Menu Magazine x 2.<br>4. Meat & Poultry Ontario x 4.<br>5. Western Grocer x 2.<br><b>Target:</b><br>+10% YOY industry reach and awareness of target messages.   | 1. Reach and frequency of key messaging to target market.  |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|----------|---|--|
| <b>4. Marketing Materials:</b><br>Adaptation, updating, development and production of technical marketing materials to increase awareness of CBA, grading system and POP materials. Adaptation of existing materials to be available from trade-based website <a href="http://cdnbeefperforms.ca">cdnbeefperforms.ca</a> | \$65,000 | <b>Q1- Q4:</b><br>1. Retail Resources.<br>2. Foodservice Resources.<br>3. Vocational Resources.<br><b>Target:</b><br>+10% YOY sector utilization.   | 1. Production and distribution of resources vs base.<br>2. Satisfaction Index survey.          |
| <b>5. Partner Programs:</b><br>The Canada Beef team will collaborate with end-user clients to promote branded and co-branded Canada Beef programs through cost-share funded partner programs. Partner programs are initiated and implemented by the end-user client.   | \$30,000 | <b>Q1- Q4:</b><br>1. Retail Partner programs.<br>2. Foodservice partner programs.<br>3. Packer/purveyor partner programs.<br><b>Target:</b><br>+10% YOY utilization of partner programs vs previous year.   | 1. Number and value of partner programs implemented.<br>2. Satisfaction Index survey.          |
| <b>6. Demand Building Programs:</b><br>Canada Beef team will work with end-user clients to promote value cuts, themes and seasonal opportunities, brand awareness, sales volume, and value growth through national and regional demand-building programs.  | \$20,000 | <b>Q1- Q4:</b><br>1. Demand building retail promotions:<br>2. Steak Poster for Foodservice and Retail.<br>3. Demand Building Presentation – 2 events.<br><b>Target:</b><br>+10% YOY utilization of demand building resources to promote value-cuts. | 1. Number of events and cross sector participation conducted.<br>2. Satisfaction Index survey. |

| Tactics  | Budget   | Deliverables   | Key Performance Indicators  |
|--|----------|--|---|
| <b>7. Independent Retail Operators Program:</b><br>POP materials and promotional resources development and distribution to support independent retailers' operations. Development and introduction of the Independent Foodservice operators Programs (IFSOP)         | \$40,000 | <b>Q1- Q4:</b><br>1. Two distribution events for IROP.<br>2. One distribution event for independent foodservice operator.<br><b>Target:</b><br>+10% YOY utilization of IROP resources vs previous year.  | 1. Volume and reach of resources distributed.<br>2. Satisfaction Index survey.  |
| <b>8. Sponsorship and Events:</b><br>Collaboration and sponsorship through national/regional organizations and conference events that reach target markets, audience, and sector-specific segments. Provisions include virtual or in-person participation as needed. | \$70,000 | <b>Q1- Q4:</b><br>1. Two retail events.<br>2. Two foodservice events.<br><b>Target:</b><br>+10% YOY reach to qualified clients with key messaging.   | 1. Number of events conducted.<br>2. Satisfaction Index survey.<br>3. Participation and attendance.   |
| <b>9. Beef Information Gateway:</b><br>Create and produce POP resources and support materials to promote the Gateway.  | \$25,000 | <b>Q1- Q4:</b><br>1. Canvass existing users to renew/restock merchandising material.<br>2. Develop new signage for smaller independent retailers to promote the program.<br><b>Target:</b><br>Increase the number of Gateway programs in Canada 25% YOY. | 1. Number of tier 1 national client Gateway programs in market.<br>2. Number of tier 2 regional client Gateway programs in market.<br>3. Satisfaction Index survey. |



# CONSUMER MARKETING - DOMESTIC

## WORK PLAN #5 2023 – 2024

|  |   |                           |
|--|---|---------------------------|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Consumer Marketing    |                           |
| <b>Total Budget:</b>                     | \$1,545,000                               | Source:<br>Beef Check-Off |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F |                           |

### Strategic Priorities:

Maintain, increase, and expand Canadian beef disappearance/consumption in Canada. Expand and improve consumer access to preparation methods, recipes, nutritional information to improve customer experience and the enjoyment of consuming Canadian beef in multiple ways. Educate consumers about the Canadian beef grading system to fully understand Canadian beef quality.

### Objectives:

Create and launch impactful messaging, recipe content, and promotional activities to leverage the Canadian Beef Information Gateway (Gateway) across Canada.

| Tactics  | Budget    | Deliverables  | Key Performance Indicators   |
|--|-----------|---|--|
| <b>1. National Canadian Beef Advertising/ Demand Building Campaign:</b><br>Focus primarily on promotion of the Gateway.                                | \$500,000 | <b>Q1:</b><br>Refresh campaign strategy and creative, asset development.<br><br><b>Q2-Q4:</b><br>Multi-media advertising.<br>PR initiatives.<br>Influencer outreach.<br>Consumer activations.<br><br><b>Targets:</b><br>Consumer advertising and promotions to drive awareness and interaction with the non-partnered Gateway.                                  | 1. Annual beef disappearance in Canada vs pork and poultry.<br><br>2. Satisfaction index survey.<br><br>3. Retail demand index.<br><br>4. Improved consumer awareness/ interaction measures pre and post campaign.   |
| <b>2. National Canadian Beef Advertising/ Demand Building Campaign:</b><br>Focus primarily on CBA messaging/content and beef quality (grading system). | \$120,000 | <b>Q1-Q4:</b><br>Incorporate multi-media advertising and PR initiatives, feature 1 topic of the CBA per quarter: food safety, animal welfare, grading and quality, sustainability.<br><br><b>Target:</b><br>Measure consumer understandings of the 4 CBA factors promoted and consumer attitude ratings for Canadian Beef pre and post each quarterly campaign. | 1. Improved consumer understanding of 4 factors of the CBA based on benchmarking.<br><br>2. Enhanced positive attitude ratings for Canadian Beef.<br><br>3. Annual beef disappearance in Canada vs pork and poultry.<br><br>4. Satisfaction index survey.<br><br>5. Retail demand index. |

| Tactics   | Budget    | Deliverables   | Key Performance Indicators  |
|---|-----------|--|---|
| <b>3. National CPG brand (s) partner programs:</b><br>That align with Canadian Beef utilization or consumption. Partner programs will focus on the Gateway and/or "Made with Canadian Beef" claims. | \$180,000 | <b>Q1- Q2:</b><br>Creation of CPG partner program guidelines and application form.<br><b>Q3- Q4:</b><br>Promotion, outreach, and execution in market.<br><b>Target:</b><br>Development of brand-partner specific Gateway version(s).<br>Collaborative marketing campaign efforts to promote/distribute access to the co-branded Gateway versions.  | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Retail demand index.   |
| <b>4. National consumer activation campaign to support and promote Canadian beef at the foodservices sector.</b>  | \$120,000 | <b>Q2- Q3:</b><br>Recruitment/Partnering.<br><b>Q4:</b><br>Promotion, outreach, and execution in market.<br><b>Target:</b><br>1 consumer engagement activation per 6 provincial regions to support ground beef demand via grass-roots restaurant and provincial organization participation.  | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Increased Canadian Beef ground beef sales via food service operations during campaign promotion. |
| <b>5. Make it Beef Club:</b><br>Canada Beef consumer outreach database and engagement program.  | \$73,000  | <b>Q1-Q4:</b><br>Content development and outreach.<br>Member recruitment and activation.<br>Advisory Panel polling + incentive, databased management.<br><b>Target:</b><br>Increase membership by 10%.<br>Gain and maintain an open rate average of 22%.<br>Execute 1 advisory panel activation quarterly.<br>Implement Club Member incentive programming (e.g. Surprise and delight marketing). | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Retail demand index.   |



| Tactics   | Budget    | Deliverables   | Key Performance Indicators  |
|---|-----------|--|---|
| 6. <b>Canadian Beef Information Gateway recipe collection content development.</b>  | \$30,000  | <p><b>Q1-Q4:</b><br/>Original recipe development to round out gaps in Gateway Recipe Collections (includes editing, nutrient analysis).</p> <p><b>Target:</b><br/>Deliver 45 original finalized recipes for use in the Gateway.</p>  | <p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p> <p>3. Retail demand index.</p>  |
| 7. <b>French Translations</b><br>(75% Gateway, 25% other Canadian Beef content)   | \$37,000  | <p><b>Q1-Q4:</b><br/>Translation of English to French Canadian consumer marketing assets.</p> <p><b>Target:</b><br/>75% Gateway, 25% other Canadian Beef content.</p>  | <p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p> <p>3. Retail demand index.</p>  |
| 8. <b>Provincial Marketing Alliance (PMA):</b><br>Collaboration and cost share funding for eligible consumer advertising campaigns implemented by provincial cattle associations. | \$240,000 | <p><b>Q1-Q2:</b><br/>Promotion and outreach to provincial organizations.</p> <p><b>Q1-Q4:</b><br/>Execution in market.</p> <p><b>Target:</b><br/>Development and circulation of the PMA Eligibility and Operating Procedures Document Q1.<br/>Initiatives with ABP, SCA, BFO, BCCA, MBP and Atlantic in proportion to CO investment contributions.</p> | <p>1. Annual beef disappearance in Canada vs pork and poultry per regional effort</p> <p>2. Satisfaction index survey.</p> <p>3. Retail demand index per regional effort.</p> |
| 9. <b>Canadian Beef Information Gateway:</b><br>Promotion and Advertising   | \$245,000 | <p><b>Q1-Q4:</b><br/>Multimedia advertising/promotion.<br/>Incentivized consumer engagement.<br/>Consumer engagement activations including provincial partner events.</p> <p><b>Target:</b><br/>Quarterly seasonal campaigns to promote the non-partnered Gateway.</p>   | <p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p> <p>3. Retail demand index.</p>  |



# DIGITAL MARKETING

## WORK PLAN #6 2023 – 2024

|  |   |  |
|--|---|--|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Digital Marketing     |  |
| <b>Total Budget:</b>                     | \$665,000                                 | Source:<br>\$655,000: Beef Check-Off<br>\$10,000: Veal Import Levy |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F |  |

### Strategic Priorities:

Expand the awareness and reach of the Canadian beef value proposition through strategic content on digital platforms.

### Objectives:

Create, deliver, maintain, and measure cost-effective and impactful content for all Canada Beef digital platforms to support the communication of the CBA.

| Tactics  | Budget    | Deliverables  | Key Performance Indicators   |
|--|-----------|---|--|
| <b>1. Canada Beef websites – support of domestic and international websites:</b> <ol style="list-style-type: none"> <li>Content, maintenance, monitoring and measurement of consumer facing domestic websites and social media platforms.</li> <li>Establish canadabeef.ca website as the consumer destination for topics related to Canadian beef (educational resources, culinary inspiration, and nutritional information).</li> <li>Establish cdnbeefperforms.ca website as a key trade resource source for topics related to CBA, grading, demand building programs, educational resources, and export information.</li> <li>Collaborate with Global teams to identify and develop strategically aligned content for retailers and consumers to communicate CBA, beef quality and branding on websites and social media.</li> <li>Maintain Thinkveal.ca website that operates as a consumer-focused resource centre to support generic veal promotion.</li> </ol> | \$190,000 | <b>Q1-Q4:</b> <ol style="list-style-type: none"> <li>Create and execute monthly content calendar. Support and enhance social and consumer marketing programs through seasonal content builds and website tools.</li> <li>Create artwork and fact-based resources to communicate the Canadian Beef Advantage (CBA) pillars on both consumer and trade websites.</li> <li>Develop content plan and toolkit of artwork and resources for global teams to use to communicate the CBA, grading and quality.</li> <li>Work with health &amp; wellness team to build a robust canadabeef.ca nutrition section.</li> </ol> <b>Target:</b> <ol style="list-style-type: none"> <li>Quarterly Google Analytics reports (70% 28-day active users, 20 average page views).</li> <li>Web users - reach 15% more YOY.</li> </ol> | <ol style="list-style-type: none"> <li>Annual beef disappearance in Canada vs pork and poultry.</li> <li>Satisfaction index survey.</li> <li>Retail demand index.</li> <li>Website analytics.</li> </ol> |

| Tactics  | Budget    | Deliverables   | Key Performance Indicators  |
|--|-----------|--|---|
| <b>2. Social Media:</b><br>1. Maintain a leadership position to promote Canadian beef initiatives through social media.<br>2. Support consumer marketing messaging from provincial and national cattle organizations.<br>3. Educate and inform Canadian beef producers about Canada Beef marketing and market development initiatives.<br>4. Create new audiences through implementing a micro-influencer strategy to grow social followers and advocates of beef. | \$110,000 | <b>Q1-Q4:</b><br>1. Create and execute monthly content calendar focused on building awareness of Canadian beef, education (Beef quality, grading, CDN beef TV) and inspiration.<br>2. Quarterly review and identify content needs/gaps and build new and proactive creative.<br>3. Develop and produce creative to promote the Canadian beef advantage.<br><b>Target:</b><br>1. 20 million impressions,<br>2. 300,000 engagements,<br>3. 150,000 clicks,<br>4. Audience size – grow base by 10% YOY.   | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Retail demand index.<br>4. Social media analytics.   |
| <b>3. Video Streaming:</b><br>Establish Canada Beef as a video destination channel for culinary excellence, butchery skills, nutrition, and educational resources.   | \$120,000 | <b>Q1-Q4:</b><br>1. Execute consumer targeted video campaigns to build channel subscribers and increase video views (talking nutrition, seasonal culinary builds, CBA, Beef Quality, CBCE TV content).<br>2. Create calendar and execute CBCE TV and video cooking content to targeted audiences. Cross promote through social channels and websites to maintain current subscribers and earn new subscribers.<br>3. Create strategies and build calendars to promote video platforms – YouTube and Vimeo.<br><b>Target:</b><br>1. 100,000 video views.<br>2. 300,000 video impressions.<br>3. 10 to 15 new videos added to playlists. | 1. Annual beef disappearance in Canada vs pork and poultry.<br>2. Satisfaction index survey.<br>3. Retail demand index.<br>4. Video platform analytics. |

| Tactics  | Budget    | Deliverables   | Key Performance Indicators  |
|--|-----------|--|---|
| <b>4. Digital support of Canadian Beef Information Gateway Programs:</b> <ol style="list-style-type: none"> <li>1. CDN Beef Gateway Generic - Execute seamless alignment and promotion of Generic - Canadian Beef Information program through digital and social media platforms.</li> <li>2. CDN Beef Partner Gateway - Create and execute social and digital joint promotions with retail partners to communicate to program.</li> </ol> | \$125,000 | <b>Q1-Q4:</b> <ol style="list-style-type: none"> <li>1. Execute program awareness through targeted digital ads and social posts driving users to either Canadian Beef branded or partner Gateway programs.</li> <li>2. Website – building Canadian Beef branded Gateway content and customizing Gateway content for retail partners in the domestic market.</li> <li>3 Highlight key consumer marketing initiatives through digital promotions to support Gateway content (recipes, videos, world cuisine influencers).</li> </ol> <b>Target:</b> <ol style="list-style-type: none"> <li>1. 1 million impressions 200,000 engagement.</li> <li>2. 50,000 clicks.</li> <li>3. Quarterly reports – track this year to establish benchmarks.</li> </ol> | <ol style="list-style-type: none"> <li>1. Annual beef disappearance in Canada vs pork and poultry.</li> <li>2. Satisfaction index survey.</li> <li>3. Retail demand index.</li> <li>4. Digital analytics</li> </ol>                             |
| <b>5. E-Commerce Strategy:</b> <ol style="list-style-type: none"> <li>1. Establish Canadian Beef Information Gateway as a key online shopping resource for retailers and consumers.</li> <li>2. Execute strategy and support key resources to highlight Canadian Beef Information Gateway content across various e-commerce on-line programs.</li> </ol>   | \$100,000 | <b>Q1-Q4:</b> <ol style="list-style-type: none"> <li>1. B to B - Support retailers' online shopping programs to improve satisfaction and product lineup of CDN Beef. Promote resource toolkit. Develop training resources for retailer staff.</li> <li>2. B to B to C - Create content to build consumer confidence on how to order and purchase beef through retailer online shopping platforms.</li> </ol> <b>Target:</b><br>Develop and launch an ecommerce platform for a national retailer.   | <ol style="list-style-type: none"> <li>1. Annual beef disappearance in Canada vs pork and poultry.</li> <li>2. Satisfaction index survey.</li> <li>3. Retail demand index.</li> </ol>   |
| <b>6. Canadian Beef Marketing Library:</b><br>Maintain and support library management system to store key assets and share with partners and provincial and national cattle organizations.   | \$20,000  | <b>Q1-Q4:</b> <ol style="list-style-type: none"> <li>1. System updates and management of library services.</li> <li>2. Creation and uploading of new assets and system updates.</li> </ol> <b>Target:</b> <ol style="list-style-type: none"> <li>1. Top resources downloaded.</li> <li>2. # of new resources added to system.</li> <li>3. # of users of system user sessions.</li> </ol>   | <ol style="list-style-type: none"> <li>1. Annual beef disappearance in Canada vs pork and poultry.</li> <li>2. Satisfaction index survey.</li> <li>3. Retail demand index.</li> <li>4. Marketing library usage and system analytics.</li> </ol> |



## HEALTH AND NUTRITION

### WORK PLAN #7 2023 – 2024

|  |  |  |
|--|--|--|
| <b>Team Lead and Budget Holder:</b>      | Director, Health and Nutrition               |  |
| <b>Total Budget:</b>                     | \$560,000                                    | Source:<br>\$270,000: Beef Check-Off<br>\$290,000: Import Levy |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand –<br>Focus Area: D,E,F |  |

#### Strategic Priorities:

To be the industry voice and authority on the nutrition and health attributes of beef.

#### Objectives:

Identify and develop evidence-based proof points and messaging that highlight beef's competitive nutritional attributes and the unique beneficial role beef plays in the diet. Through strategic partnerships, reach health professionals, consumers and stakeholders to disseminate these facts about beef's place in a healthy diet.

| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|----------|---|--|
| <b>1. Nutrition Research and Regulatory Intelligence:</b><br>Foundational investments required to guide and shape messaging and priorities in all health and nutrition communications. | \$90,000 | <b>Q1-Q4:</b><br>1. Nutrition analysis and determination of allowable claims for cuts and recipes.<br>2. Nutrition research monitoring.<br>3. Development of Just the Facts research summaries.<br><b>Q3:</b><br>1. Beef knowledge and attitudes insights research.<br><b>Q1-Q4:</b><br>1. Participation in external expert networking groups and collaborations.<br>2. Establishing connections with Academia and Health Canada.<br>3. Engagement with Expert Nutrition Advisory Committee.<br>4. Monitoring & communicating of emerging issues relevant to beef nutrition.<br><b>Target:</b><br>Website and Gateway potassium claims updated by Q4.<br>4 research summaries developed.<br>Participation in minimum of three external networking groups.<br>Bi-annual meetings with Expert Advisory Committee. | 1. Satisfaction index survey.<br>2. Benchmarking Survey – health and nutrition questions.<br>3. Annual beef disappearance in Canada vs pork and poultry. |

| Tactics   | Budget    | Deliverables  | Key Performance Indicators   |
|---|-----------|---|--|
| <b>2. Nutrition Messaging and Content Development:</b><br>Translation of relevant beef nutrition science into key messages for use in a cross-section of program areas and campaigns. | \$30,000  | <b>Q1-Q4:</b><br>1. Development of nutrition content for health professionals.<br>2. Working with cross-functional teams to develop and provide audience-specific nutrition content for outreach projects as needed by Consumer Marketing, Channel, Digital, CBCE, etc.<br><b>Target:</b><br>Nutrition messaging developed for at least 4 new tactics.<br>23 Reasons campaign launched by Q1.   | 1. Satisfaction index survey.<br>2. Benchmarking Survey – health and nutrition questions.<br>3. Annual beef disappearance in Canada vs pork and poultry. |
| <b>3. Beef Information Gateway (Gateway):</b><br>Support health and nutrition modules of Gateway and dissemination of these to health professional community.                         | \$40,000  | <b>Q1-Q4:</b><br>1. Maintain ESHA license and associated data held within system.<br>2. Lead and support implementation of Health and Wellness Module in Gateway database.<br><b>Q2-Q4:</b><br>1. Develop and disseminate Gateway promotional resources for health professionals.<br><b>Target:</b><br>Diet and allergen tagging complete for recipes up to and including Phase 5.<br>Reach 25K health professionals with Gateway promotional messaging.  | 1. Satisfaction index survey.<br>2. Benchmarking Survey – health and nutrition questions.<br>3. Annual beef disappearance in Canada vs pork and poultry. |
| <b>4. Direct to Health Professional Communications:</b><br>Communicate beef's competitive advantages through relevant trade channels.   | \$100,000 | <b>Q1-Q4:</b><br>1. Education for health professionals about beef's nutritional competitive advantages through sponsorships and conferences.<br>2. Placement of beef nutrition messaging in high impact trade publications targeted to health professionals.<br><b>Target:</b><br>+10% YOY increase in reach.   | 1. Satisfaction index survey.<br>2. Benchmarking Survey – health and nutrition questions.<br>3. Annual beef disappearance in Canada vs pork and poultry. |
| <b>5. Educational Outreach:</b><br>Through partner programs – 3rd party voice: Working through partners, disseminate beef resources and messages.                                     | \$300,000 | <b>Q1-Q4:</b><br>1. Ambassador (3rd party voice) media outreach to health professionals through print and digital.<br>2. Distribution of beef health resources to consumers through Health Partners: e.g. Ashfield, Multiview, Canadian Blood Services, Osteoporosis, etc.<br>3. "Talking Nutrition": Expert voices on key beef health and wellness topics in video, print or digital campaigns.<br><b>Target:</b><br>Product distribution pick up by HP's.<br>Reach 2 million consumers via ambassador outreach. | 1. Satisfaction index survey.<br>2. Benchmarking Survey – health and nutrition questions.<br>3. Annual beef disappearance in Canada vs pork and poultry. |



# STAKEHOLDER COMMUNICATIONS

## WORK PLAN #8 2023 – 2024

|  |   |                        |
|--|---|------------------------|
| <b>Team Lead and Budget Holder:</b>      | Manager, Stakeholder Communications       |                        |
| <b>Total Budget:</b>                     | \$285,000                                 | Source: Beef Check-Off |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F |                        |

### Strategic Priorities:

Engage industry, stakeholders, end-user customers, consumers and media via print, radio, virtual, and digital platforms.

### Objectives:

Create and deliver timely and cost-effective communication of the Canada Beef story and team 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.

| Tactics  | Budget   | Deliverables  | Key Performance Indicators    |
|--|----------|---|-------------------------------|
| <b>1. Annual Reporting</b><br><b>a. Canada Beef Investment Plan document (Internal)</b><br>1. Produce Canada Beef annual investment plan for next fiscal year.<br>2. English printed plan and digital PDF versions for internal distribution only.<br>3. Work plan tactics information used to develop content for Canada Beef annual report.<br><b>b. Canada Beef Annual Report</b><br>1. Develop design and produce Canada Beef's annual report for distribution in August 2023.<br>2. English digital flipbook and PDF versions.<br>3. French version digital PDF.<br>4. English print version. | \$25,000 | <b>Q3-Q4</b><br>1. Content for front half of report to be edited and formatted, include final/approved work plans, finalize and print report.<br><b>Target:</b><br>100% distribution to internal group.<br><b>Q1-Q3</b><br>1. Compile information from each of the hubs and develop layout of report:<br>2. English flipbook and PDF completed/distributed in Aug 2023.<br>3. French PDF posted to website in Aug 2023.<br>4. Completed English print version distributed by Sept 2023.<br>5. Postage mail distribution of printed report to national and provincial cattle organizations by Sept 2023.<br>5) promotion of annual report in CBP<br><b>Target:</b><br>+10% YOY increase in stakeholder readership. | 1. Satisfaction index survey. |

| Tactics   | Budget   | Deliverables  | Key Performance Indicators   |
|---|----------|---|--|
| <b>2. Canada Beef Performs Monthly E-newsletter:</b><br>1. Develop and produce 12 monthly e-publications in English and French<br>2. Distributed digitally to all subscribers.<br>3. Expand readership through active engagement and promotion of the publication through French speaking stakeholders. | \$65,000 | <b>Q1-Q4</b><br>1. Work with all Canada Beef budget holders to assemble relevant and timely information, activities, and images each month.<br>2. Develop and execute annual media plan to increase readership and promote the publication in English and French speaking Canada.<br><b>Q1-Q2</b><br>3. Create 2 print ads and digital ads to support CBP to be placed in national and regional cattle industry and association publications.<br><b>Target:</b><br>+10% YOY increase in stakeholder readership. | 1. Satisfaction index survey.<br>2. Web analytics.<br>3. Subscription gains. |
| <b>3. Stakeholder Outreach:</b><br>Content will be created to support a variety of tools for provincial newsletters, websites, annual reports, news releases, advertorials, resource creation, photos, infographics, visuals, etc.  | \$15,000 | <b>Q1-Q4</b><br>1. Create and deliver Canada Beef updates, articles, reports, columns for provincial and national publications.<br>2. Create, manage, and deploy media releases as required.<br>3. Create resources for stakeholders, deploy for use in their publications.<br>4. Marketing and promotion materials for events.<br><b>Target:</b><br>+10% increase YOY reach and awareness.   | 1. Satisfaction index survey.  |
| <b>4. Media Monitoring Contract Service</b><br>Contract service to provide timely monitoring of media messaging to identify trends and opportunities.   | \$30,000 | <b>Q1-Q4</b><br>Contract Service.   | 1. Satisfaction index survey.  |
| <b>5. Canadian Beef Industry Conference (CBIC)</b><br>Participation and planning support to deliver a successful CBIC.  | \$30,000 | <b>Q1-Q2</b><br>1. Participate in planning and CBIC program development.<br>2. Develop two industry sessions to support trade and consumer trends.<br><b>Q2</b><br>3. Work with Canada Beef team to staff booth.<br><b>Target:</b><br>+10% YOY participation increase.  | 1. Satisfaction index survey.  |



| Tactics  | Budget   | Deliverables   | Key Performance Indicators    |
|--|----------|--|-------------------------------|
| <p><b>6. Stakeholder Resources:</b></p> <p><b>a. Tool building</b></p> <p>Update and support Canadian beef cattle and beef fact sheets, information, media kits.</p> <p><b>b. Tool extension</b></p> <p>Develop concepts focusing on current communication challenges, emerging issues, and actionable solutions important to Canadian cattle and beef sectors and stakeholder clients.</p>  | \$25,000 | <p><b>Q1-Q4</b></p> <p>1. Update Canada Beef resource materials for provincial and national publications.</p> <p>2. Create, manage, and deploy media releases as required.</p> <p>3. Create infographic resources for stakeholders, deploy for use in their publications.</p> <p>4. Present information sessions at industry events or on online.</p> <p><b>Target:</b><br/>+10% YOY increase in uptake/distribution of comms tools.</p> | 1. Satisfaction index survey. |
| <p><b>7. Issues and Crisis Preparedness:</b></p> <p>Canada Beef will test its organizational preparedness plan for effectiveness in all areas of the plan.</p>   | \$15,000 | <p><b>Q1-Q2</b></p> <p>1. Crisis simulation – test the plan and staff for readiness.</p> <p><b>Target:</b><br/>100% participation.</p>   | 1. Satisfaction index survey. |
| <p><b>8. Communications Support:</b></p> <p>Canada Beef will contract the services of editors, writers, designers, translators, to support various tactics and commitments as required.</p>  | \$10,000 | <p><b>Q1-Q4</b></p> <p>Contract services as required.</p>  | 1. Satisfaction index survey. |
| <p><b>9. Canada Beef 50th Anniversary Event:</b></p> <p>Canada Beef will plan an event to acknowledge the 50th anniversary of the organization in 2023. This event is envisioned as a lunch or dinner gathering held in conjunction with CBIC 2023. The budget includes anniversary swag and the creation of a special anniversary logo for the year/event.</p>  | \$40,000 | <p><b>TBD calendar 2023</b></p> <p>Contract services as required.</p> <p><b>TBD:</b><br/>\$20,000 comms plan.<br/>\$20,000 food/ beverage/ venue meal/event.</p>   | 1. Satisfaction index survey. |
| <p><b>10. Producer Association Meeting:</b></p> <p>Participation and Support</p> <p>Canada Beef will participate in various Producer Association meetings to maintain positive relationships and increase awareness and support of Canada Beef activities and value they bring to the cattle industry. Activities may include participation costs for staff attendance, costs for hosting information booths/displays, and event/speaker/ meal sponsorships. These activities can be supplemental to and in support of Provincial Marketing Alliance activities.</p> | \$30,000 | <p><b>Q1-Q4</b></p> <p>Participate in 3 to 6 Producer Association meetings to maintain funder and stakeholder support and awareness of Canada Beef activities and value.</p>   | 1. Satisfaction index survey. |



# CANADIAN BEEF INFORMATION GATEWAY

## WORK PLAN #9 2023 – 2024

|  |   |                        |
|--|---|------------------------|
| <b>Team Lead and Budget Holder:</b>      | Director, Canadian Beef Information Gateway |                        |
| <b>Total Budget:</b>                     | \$381,000                                   | Source: Beef Check-Off |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F   |                        |

### Strategic Priorities:

Develop, support, promote and implement Canadian Beef Information Gateway (Gateway) projects across all sectors in Canada to increase Canadian beef consumption and carcass utilization through positive consumer and client experiences.

### Objectives:

Work collaboratively with Canada Beef content development team, stakeholders, and clients to create and launch Gateway projects across all sectors to expand reach, education, and knowledge about Canadian beef in the marketplace.

| Tactics  | Budget   | Deliverables  | Key Performance Indicators  |
|--|----------|---|---|
| <b>1. Canadian Beef Information Gateway Survey:</b><br>Develop survey to measure partner satisfaction and understand program effectiveness and gaps for improvement. | \$1,000  | <b>Q1-Q4</b><br>Execute survey and develop priorities, address gaps, and determine next steps for improvement.<br><br><b>Target:</b><br>75% respondent participation and 80% approval rating.   | 1. Number of respondents based on sector representation.<br><br>2. Utilization and adaptation of input submitted.<br><br>3. Satisfaction index survey.                          |
| <b>2. Canadian Beef Information Gateway Content:</b><br>Build content to support the Canadian Beef Information Gateway with clients and partners.                    | \$50,000 | <b>Q1-Q4</b><br>Develop Canadian Beef Information Gateway content and promotional resources.<br><br><b>Target:</b><br>20% increase in content and client/consumer utilization.  | 1. Client and partner utilization of content.<br><br>2. Quantity and value of content.<br><br>3. Satisfaction index survey.<br><br>4. Utilization of regional Gateway projects. |
| <b>3. Producer-Branded Canadian Beef Information Gateway:</b><br>Collaborate with the producer associations to promote key content to their target audience.         | \$50,000 | <b>Q1-Q4</b><br>Reach out and promote the value of the Gateway to producer associations. Collaborate with stakeholders to adapt their content to enhance regional Gateway projects.<br><br><b>Target:</b><br>Create and launch 3 producer Gateway projects. | 1. Client and partner utilization of content.<br><br>2. Quantity and value of content.<br><br>3. Satisfaction index survey.<br><br>4. Utilization of the Gateway.               |

| Tactics  | Budget    | Deliverables  | Key Performance Indicators   |
|--|-----------|---|--|
| <b>4. Canadian Beef Information Gateway POP Resources:</b><br>- Develop and maintain branded Gateways for larger tier 1 and 2 retail operators.<br>- Develop custom digital advertising and in-store promotional resources for participating clients to optimize customer utilization to meet the expectations of Canada Beef and the client organization. | \$200,000 | <b>Q1-Q4</b><br>Develop, produce, and launch Gateway content and promotional resources to meet the needs of clients and support the utilization of their Gateway.<br><br><b>Target:</b><br>15% YOY increase in custom or generic recourses for each Gateway client partner. | 1. Client and consumer utilization of content.<br>2. Quantity and value of content.<br>3. Satisfaction index survey.<br>4. Utilization of the Gateway.<br>5. Client advertising. |
| <b>5. Canadian Beef Information Gateway for Foodservice:</b><br>Develop and launch a strategy for the Foodservice Gateway that will serve the needs of the foodservice distributor, operator, and consumer.  | \$80,000  | <b>Q1-Q4</b><br>Develop, produce, and launch Gateway content and promotional resources to meet the needs of foodservice clients.<br><br><b>Target:</b><br>Develop and launch a Gateway platform for foodservice distributors and operators by segment.                      | 1. Client and consumer utilization of content.<br>2. Quantity and value of content.<br>3. Satisfaction index survey.<br>4. Utilization of the Gateway.<br>5. Client advertising. |



# CANADIAN BEEF CENTRE OF EXCELLENCE

## WORK PLAN #10 2023 – 2024

|  |  |  |
|--|--|--|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Canadian Beef Centre of Excellence |  |
| <b>Total Budget:</b>                     | \$720,000  | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>Client Leveraged (partner programs) |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F              |  |

### Strategic Priorities:

Education, learning tools and resource development to promote the Canadian Beef Advantage. Leverage Canadian Beef Centre of Excellence (CBCE) facility upgrades and investment in audiovisual and communications technologies.

### Objectives:

Develop and create resources to support all business units, stakeholder partners and trade-based clients in the domestic and export marketplace.

| Tactics   | Budget   | Deliverables   | Key Performance Indicators  |
|---|----------|--|---|
| <b>1. Educational Resource Development:</b><br>The CBCE team will create four new educational resources to support trade (2) and consumer marketing initiatives.                            | \$40,000 | <b>Q2-Q3</b><br>1. Development and production of 2 educational resources.<br><b>Q2-Q4</b><br>2. Development and production of 2 educational resources.<br><b>Target:</b><br>15% YOY increase in e-learn end-users.   | 1. Satisfaction index survey.<br>2. Industry utilization and feedback.<br>3. Number of stakeholder participation. |
| <b>2. Educational Resource Library Management and Distribution:</b><br>The CBCE team will manage and maintain e-learning content, distribution to trade, and to consumer learner audiences. | \$10,000 | <b>Q1-Q4</b><br>1. Ongoing development of CBCE training library.<br>2. CBCE Educational resources delivered through online portal to academic and trade channels and direct to consumer audiences.<br><b>Target:</b><br>15% YOY increase in e-learn end-users. | 1. Satisfaction index survey.<br>2. Industry utilization and feedback.<br>3. Number of stakeholder participation. |

| Tactics   | Budget   | Deliverables  | Key Performance Indicators   |
|---|----------|---|--|
| <p><b>3. Canada Beef Vocational Trades Program:</b></p> <p>1. CBCE will support faculty adjudicated training programs available from professional cooking and retail meat cutting program schools and colleges to promote beef cutting and culinary components and CBA theory.</p> <p>2. The CBCE team will provide in-class cutting and culinary demonstrations and lectures for each graduating class of the program. Provisions include virtual or in-person engagement depending on access to facilities or production schedule at the CBCE.</p> <p>3. Meat skills – Student Culinary and Butchery Competition (pilot). The CBCE will collaborate with industry organizations and vocational training institutes to develop and deliver a butchery and culinary competition for Canadian post-secondary students to encourage engagement and excellence in the culinary and meat cutting professions.</p> | \$50,000 | <p><b>Q1</b></p> <p>1. CBCE will manage pledge administration and distribution to eligible colleges for the scholarship programs.</p> <p><b>Q1-Q4</b></p> <p>2. Canada Beef scholarships for culinary arts and meat cutting excellence in collaboration with the Canadian Culinary Federation and the Canadian Professional Meat Cutters Association.</p> <p>3. Educational resources delivered through online portal to academic and trade channels.</p> <p><b>Target:</b></p> <p>15% YOY increase in program utilization and 25% YOY reach to students.</p> | <p>1. Satisfaction index survey.</p> <p>2. Industry utilization and feedback.</p> <p>3. Number of establishment participation.</p> <p>4. Number of students reached.</p> |

| Tactics   | Budget    | Deliverables  | Key Performance Indicators   |
|---|-----------|---|--|
| <p><b>4. CDN Beef Studios - CBCE Media Productions:</b></p> <p>1. CBCE will develop and produce 525 original videos plus adapted / partner branded versions to support Canadian Beef Information Gateway programs. Themes will include content for retail, producer, packer, and foodservice Gateways.</p> <p>2. CBCE will produce 525 enticing digital photo images to support retailer, producer, packer, and foodservice Gateway resources. Still images produced will also function to support, promotions, and advertising for digital and social media activities for all business units.</p> <p>3. CBCE will develop and deliver four new episodes of CDN Beef TV to connect with audiences on subjects relating to Canadian beef quality, performance, and utilization to increase client, end-user, and consumer experience.</p> | \$486,000 | <p><b>Q1-Q4</b></p> <p>1. Culinary videos produced and launched.</p> <p><b>Target:</b></p> <p>1. Create culinary and butchery videos that engage and inspire viewers and drive purchase decisions for Canadian beef products.</p> <p>2. Create culinary and butchery still photography imagery assets that engage and inspire viewers and drive purchase decisions for Canadian beef products.</p> <p>3. Amplify opportunities to connect with consumer and trade audiences and promote Canadian Beef resources through creation of new, hosted video series – CDN Beef TV.</p> | <p>1. Satisfaction index survey.</p> <p>2. Industry utilization and feedback.</p> <p>3. Quantity and quality of video productions.</p> |
| <p><b>5. CDN Beef Studios:</b></p> <p>1. AV and Media Management, Culinary, Butchery and Test Kitchen and Innovation Lab upkeep and maintenance</p> <p>2. CBCE will clean, maintain, and update AV equipment in studios and conference centre as well as maintain and update media production equipment and props to support the needs of projects, programs, and services.</p> <p>3. CBCE will manage and maintain data share system to support internal and external user data sharing for editing and distribution to all business units and associated partners.</p>  | \$50,000  | <p><b>Q1-Q4</b></p> <p>1. Maintain CDN Beef Studio equipment with weekly cleaning and maintenance schedule and monthly deep cleaning to ensure for dependable performance and maximize lifespan.</p> <p>2. Support for equipment (AV and culinary).</p>   | <p>1. Satisfaction index survey.</p>   |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators  |
|--|----------|---|---|
| <p><b>6. CDN Beef Test Kitchen and Innovation Lab:</b></p> <p>1. CBCE will develop, provide, and offer recipe and equipment testing services for Canada Beef business units and industry clients as needed to support trade and consumer marketing tactics across all segments.</p> <p>2. The CBCE team will leverage its creative talent, industry experience and CDN Beef Test Kitchen and Studios AV equipment to develop innovative applications for Canadian beef in support of trade and consumer marketing tactics across all segments.</p>   | \$15,000 | <p><b>Q1</b><br/>CDN Beef Test Kitchen and Innovation Lab programs and services menu development, launch and promotion.</p> <p><b>Q2-Q3</b><br/>CBCE Test Kitchen and Innovation Lab promotion and marketing outreach.</p> <p><b>Target:</b><br/>1. Reach all client contact list with video overview of programs and services offered by CBCE.<br/>2. 10 industry-based projects across all sectors.</p> | <p>1. Satisfaction index survey.</p> <p>2. Industry utilization and feedback.</p> <p>3. Quantity and quality of video productions.</p>                                    |
| <p><b>7. CBCE Distributor Education Programs - Workshops and Webinars:</b></p> <p>CBCE will create and deliver three workshop events leveraging in-person and virtual capabilities to support innovations in retail merchandising, foodservice, underutilized cuts, and culinary inspirations in alignment with channel and export marketing tactics.</p>  | \$9,000  | <p><b>Q1</b><br/>1. Development of themes, content, timing, and target audience.</p> <p><b>Q2-Q4</b><br/>2. Execution of webinars.</p> <p><b>Target:</b><br/>80% approval rating and 85% attendance.</p>  | <p>1. Satisfaction index survey.</p> <p>2. Industry utilization and feedback.</p> <p>3. Quantity of content focused on the target audience.</p>                           |
| <p><b>8. CBCE Partner Program:</b></p> <p>CBCE will create and execute cost-shared and eligible cost covered partner initiated and managed programs. Partner programs provide support for client led projects seeking to develop their own videos, merchandising resources, product innovations and recipes to support eligible branded marketing strategies.</p> <p>Branded and custom services will include use of CBCE's conferencing and audiovisual equipment at the CBCE in Calgary or remotely.</p> <p>Cost share partner programs will be available to partners seeking technical butchery and culinary support services for product display and samples delivery at tradeshow and events in domestic and international markets.</p> | \$60,000 | <p><b>Q1</b><br/>Creation of partner program guidelines and application form and vetting system.</p> <p><b>Q1-Q4</b><br/>CBCE partner program promotion and marketing outreach.</p> <p><b>Target:</b><br/>1. 100% distribution of CBCE partner program services to contact list.<br/>2. 85% approval rating among program participants.<br/>3. 5 projects completed across all categories.</p>            | <p>1. Satisfaction index survey.</p> <p>2. Industry utilization and feedback.</p> <p>3. Number of projects and value of partner investments to promote Canadian beef.</p> |



# EXPORT MARKET DEVELOPMENT PARTNER PROGRAM

## WORK PLAN #11 2023 – 2024

|  |   |   |
|--|---|---|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Export Market Development |   |
| <b>Total Budget:</b>                     | \$420,000                                     | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>ABEMD Grant Leveraged<br>Client Leveraged (partner program 50/50%) |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F     |   |

### Strategic Priorities:

Provide funding support for Canadian beef representative companies to expand their Canada Beef business in the export marketplace through a variety of essential marketing initiatives.

### Objectives:

Deliver an efficient funding program that supports industry needs to expand, explore, and innovate to improve competitive position and increase Canadian beef export volumes, value and brand recognition.

| Tactics   | Budget    | Deliverables  | Key Performance Indicators  |
|---|-----------|---|---|
| <b>1. Export Market Investigation EMI (Outgoing missions):</b><br>Includes outgoing missions to targeted markets outside of Canada. Outgoing missions must be incremental commercial business building initiatives that focus on new markets or market segments, product or specification development/refinement or meeting new foreign client buyers.  | \$30,000  | <b>Q1-Q4</b><br>Based on industry utilization.<br><br><b>Target:</b><br>100% EMD program allocation funding utilized. | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace.<br><br>3. Number of approved projects. |
| <b>2. Export Market Adaptations EM (Incoming missions):</b><br>Includes incoming missions from targeted markets outside of Canada. Incoming missions must be incremental commercial business building initiatives that focus on capturing and serving new markets or market segments, product or specification development/refinement or meeting new foreign client buyers.   | \$120,000 | <b>Q1-Q4</b><br>Based on industry utilization.<br><br><b>Target:</b><br>100% EMA program allocation funding utilized. | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace.<br><br>3. Number of approved projects. |
| <b>3. Export Market Diversification MDP (Trade shows):</b><br>Supports Canadian beef representative company participation or attendance at Canada Beef led or initiated trade shows, seminars, or promotional events in the export marketplace. Also includes trade shows, seminars and events not organized by Canada Beef including tabletop events organized by Canadian or provincial governments, or importer/distributor trade marketing events or shows. | \$100,000 | <b>Q1-Q4</b><br>Based on industry utilization.<br><br><b>Target:</b><br>100% MDP program allocation funding utilized. | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace.<br><br>3. Number of approved projects. |



| Tactics  | Budget    | Deliverables  | Key Performance Indicators  |
|--|-----------|---|---|
| <b>4. Promotion and Marketing Programs PMP:</b><br>Includes the development, production, and distribution of eligible branded, co-branded or generic marketing materials, collateral, sales and promotion programs, co-op advertising/social media, tasting programs, consumer marketing and recipe development.   | \$160,000 | <b>Q1-Q4</b><br>Based on industry utilization.<br><br><b>Target:</b><br>100% PMP program allocation funding utilized. | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace.<br><br>3. Number of approved projects. |
| <b>5. Competitive Advantage Benchmarking CAB:</b><br>Supports benchmarking activities in-market that evaluate meat quality, specifications, and packaging, processing attributes and yield/financial performance metrics to improve competitive position. Also includes sensory testing and comparative analysis vs. best-in-class competitor's products and focus group testing in foreign market conditions. | \$10,000  | <b>Q1-Q4</b><br>Based on industry utilization.<br><br><b>Target:</b><br>100% CAB program allocation funding utilized. | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace.<br><br>3. Number of approved projects. |



## EMERGING MARKETS

### WORK PLAN #12 2023 – 2024

|  |   |  |
|--|---|--|
| <b>Team Lead and Budget Holder:</b>      | Executive Director, Export Market Development |  |
| <b>Total Budget:</b>                     | \$270,000                                     | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>ABEMD Grant Leveraged |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F     |  |

#### Strategic Priorities:

Support emerging market development opportunities in the UK, EU, MENA, and other markets of interest to grow Canadian beef volume, value, and market share.

#### Objectives:

Develop, support, and implement B2B and B2C activities and sales promotions that will increase awareness of the CBA and drive Canadian beef sales growth in retail, foodservice and other channels.

| Tactics   | Budget    | Deliverables  | Key Performance Indicators   |
|---|-----------|---|--|
| <b>1. Retail/Foodservice Promotions:</b><br>Canada Beef will work with new and existing end-user customers via local Canadian beef importers and distributors to increase Canadian beef brand awareness, sales volume, and value at the retail and foodservice segment.   | \$60,000  | <b>Q1-Q4</b><br>1. Two retail promotions (TBD).<br>2. Two foodservice promotions (TBD).<br><b>Target</b><br>+10% YOY increase in Canada Beef sales volume and value in target market. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>2. Trade Shows:</b><br>1. Canada Beef will participate in one major international trade show to support Canadian beef brand awareness, the CBA and Canadian beef suppliers. Canada Beef will collaborate with Canada Pork and Canadian Bison to attend and exhibit at ANUGA 2023.<br>2. Other regional shows will be considered depending on market access conditions and Canadian beef brand owner participation. | \$130,000 | <b>Q3-Q4</b><br>1. ANUGA, Germany.<br>2. Location and date TBD.<br><b>Target</b><br>+10% YOY increase in export buyers visiting the Canada Beef booth.                                | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>3. Trade Advertising:</b><br>Development and placement of CBA and Canada Beef programs and services ads in market segments of interest and opportunity.  | \$20,000  | <b>Q1-Q4</b><br>1. Europe region publication.<br>2. MENA region publication.<br><b>Target</b><br>+10% YOY increase in Canada Beef sales volume and value in target market.            | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|----------|---|--|
| <b>4. Marketing Materials:</b><br>Adapt existing or develop new materials as needed to support the CBA in the European and MENA regions including POP materials and promotional resources.   | \$10,000 | <b>Q1-Q4</b><br><b>Target</b><br>+10% YOY increase in Canada Beef sales volume and value in target market or segment.                           | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>5. Demand Building Events:</b><br>1. In partnership with Canada Beef suppliers, Canada Beef will deliver one demand building seminar event to promote the CBA and support Canadian beef distributors in the EU or MENA region.<br>2. Other regions may be considered depending on market access and opportunities for growth. | \$20,000 | <b>Q1-Q4</b><br>Location and date TBD.<br><b>Target</b><br>+10% YOY increase in Canada Beef sales volume and value in target market or segment. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>6. Government Trade Commission:</b><br>Canada Beef will collaborate with Canadian trade commissioner service on promotional events and initiatives that meet common objectives in markets of interest not supported through Canada Beef foreign offices.  | \$20,000 | <b>Q1-Q4</b><br>Opportunities TBD.<br><b>Target</b><br>+10% YOY increase in Canada Beef sales volume and value in target market or segment.     | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>7. Canadian Beef Information Gateway (Gateway):</b><br>Canada Beef will launch limited QR code access solutions for clients in select regions not supported through Canada Beef foreign offices. Gateway opportunities may exist in EU, MENA, and other markets of opportunity.   | \$10,000 | <b>Q1-Q4</b><br>Opportunities TBD.<br><b>Target</b><br>+10% YOY increase in Canada Beef sales volume and value.                                 | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |



## JAPAN

## WORK PLAN #13 2023 – 2024

|  |   |  |
|--|---|--|
| <b>Team Lead and Budget Holder:</b>      | Senior Director, Market Development – Japan/Korea |  |
| <b>Total Budget:</b>                     | \$830,000   | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>ABEMD Grant Leveraged |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F         |  |

**Strategic Priorities:**

Promote the Canadian Beef Advantage and support Canadian beef suppliers and their end-user clients in the retail, and foodservice segments to increase Canada Beef volume, value, and market share in Japan.

**Objectives:**

Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.

| Tactics  | Budget    | Deliverables   | Key Performance Indicators  |
|--|-----------|--|---|
| <b>1. Retail/Foodservice Promotions:</b><br>Canada Beef will work with new and existing end-user clients, importers, and distributors to increase Canada Beef brand awareness and increase retail and foodservice sales promotions.            | \$150,000 | <b>Q1-Q4</b><br>1. Two retail promotions, client TBD.<br>2. Two foodservice promotions, client TBD.<br>3. 100 In-store sampling promotion planned for the retail sector.<br><b>Target:</b><br>+10 YOY increase in Canada Beef sales promotion activity.        | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>2. Trade Shows:</b><br>Canada Beef will participate in two regional trade shows, three national trade shows, and two distributors' trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events. | \$200,000 | <b>Q2-Q4</b><br>1. Two regional trade shows: Fukuoka, TBD.<br>2. Two distributors' trade shows.<br><b>Q3-Q4:</b><br>1. Three national trade shows in Tokyo: Supermarket Trade Show, Foodex, JFA.<br><b>Target:</b><br>+10 YOY sales volume and value increase. | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>3. Trade Advertising:</b><br>Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.   | \$10,000  | <b>Q2-Q3</b><br>1. Ad in summer edition of Japan Meat Journal.<br>2. Ad in summer edition of Daily Meat Livestock.<br><b>Target:</b><br>+10% YOY industry reach and awareness of key messages.   | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>4. Marketing Materials:</b><br>Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in Japan. Resources will include branded labels, POP graphics.                           | \$60,000  | <b>Q1-Q4</b><br>1. AAA/Canada Beef brand label production and distribution.<br>2. POP materials production and distribution.<br><b>Target:</b><br>+10 YOY increase in Canada Beef collateral utilization and distribution.                                     | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |

| Tactics  | Budget    | Deliverables  | Key Performance Indicators   |
|--|-----------|---|--|
| <b>5. Consumer Marketing:</b><br>Canada Beef will partner with a food truck contractor to support Canada Beef Food Truck operations in partnership with retail and foodservice clients across Japan. Canada Beef Food Truck will be mainly operated on weekends, public holidays, and school holidays. | \$170,000 | <b>Q1-Q4:</b><br>1. Canada Beef Food Truck operations.<br><b>Target:</b><br>1. 70 operations from April 2023 to March 2024.<br>2. +10 YOY sales volume and value increase from target markets.                                  | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |
| <b>6. Digital Marketing:</b><br>Content updates to both the trade and consumer Canada Beef Japan website. Support social media communication through new and existing platforms.   | \$100,000 | <b>Q1-Q4</b><br>1. Website upgrade. Social media content creation and distribution. 12 monthly social media plans for 3 platforms.<br>2. Monthly e-news letter distribution.<br><b>Target:</b><br>+20% YOY increase in traffic. | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |
| <b>7. Demand Building Events:</b><br>Canada Beef will organize and execute two major demand building seminar events to promote the CBA and support Canada beef supply clients.   | \$60,000  | <b>Q3-Q4</b><br>1. Canada Beef seminars, two strategic locations, TBD.<br><b>Target:</b><br>+10 YOY sales volume and value increase.  | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |
| <b>8. Distributor Education:</b><br>Partner with Federal Meat Academy to deliver Canada Beef education courses (lectures and cutting demos) to culinary college students and provide opportunities for distribution partners to participate in the class.  | \$15,000  | <b>Q3-Q4</b><br>1. Engage culinary collages to deliver 5 classes.<br><b>Target:</b><br>150 students attend the class.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>9. Government Trade Commission:</b><br>Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.  | \$5,000   | <b>Q1-Q4</b><br>1. Event details TBD.<br><b>Target:</b><br>+10% YOY increase in Canada Beef sales volume and value.   | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |

| Tactics  | Budget   | Deliverables   | Key Performance Indicators  |
|--|----------|--|---|
| <b>10. Sponsorship and Event Marketing:</b><br>Canada Beef will support eligible sponsorship and event marketing opportunities that meet objectives. Sponsorship and event marketing projects must facilitate the promotion of the CBA and support supply clients. | \$30,000 | <b>Q1-Q4</b><br>1. Membership fee for National Supermarket Association of Japan.<br>2. Second event TBD.<br><b>Target:</b><br>+10% YOY sales volume and value increase.      | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>11. Canada Beef Information Gateway (Gateway):</b><br>Canada Beef will further develop and expand Gateway QR code solution programs. The Gateway will include a limited menu of assets for each retail cut being offered in-market.                             | \$15,000 | <b>Q1-Q4</b><br>1. Upgrade Gateway contents and increase the number of the retailers having Gateway QR code.<br><b>Target:</b><br>+10% YOY sales volume and value increase.  | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>12. Out-going Missions:</b><br>Canada Beef will plan two buyers missions to Canada in collaboration with the Centre of Excellence.  | \$15,000 | <b>Q1-Q4</b><br>1. Two industry wide missions to Canada.<br><b>Target:</b><br>+10% YOY increase in new client visits or exposure to the Canada Beef delivery system and CBA. | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |



## SOUTH KOREA

### WORK PLAN #14 2023 – 2024

|  |   |  |
|--|---|--|
| <b>Team Lead and Budget Holder:</b>      | Senior Director, Market Development – Japan/Korea |  |
| <b>Total Budget:</b>                     | \$431,800   | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>ABEMD Grant Leveraged |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F         |  |

#### Strategic Priorities:

Promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canada Beef volume, value, and market share in South Korea.

#### Objectives:

Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.

| Tactics   | Budget    | Deliverables   | Key Performance Indicators  |
|---|-----------|--|---|
| <b>1. Retail/Foodservice Promotions:</b><br>Canada Beef will work with new and existing end-user clients, importers, and distributors to increase Canada Beef brand awareness and increase retail and foodservice sales promotions. | \$90,000  | <b>Q1-Q4</b><br>1. Three retail promotions, client TBD.<br>2. Two foodservice promotions, client TBD.<br><b>Target:</b><br>+10 YOY increase in Canada Beef sales promotion activity. | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>2. Trade Shows:</b><br>Canada Beef will participate in three trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events.  | \$100,000 | <b>Q1:</b><br>1. Seoul Food & Hotel.<br>2. Meat Expo.<br><b>Q3</b><br>1. Coex Food Week.<br><b>Target:</b><br>+10 YOY sales volume and value increase.                               | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>3. Trade Advertising:</b><br>Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.  | \$5,000   | <b>Q3</b><br>1. Ad in the winter edition of Meat Journal.<br><b>Target:</b><br>+10 YOY sales volume and value increase.  | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |
| <b>4. Marketing Materials:</b><br>Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in Korea. Resources will include branded labels, POP graphics.                | \$20,000  | <b>Q1-Q4</b><br>1. POP materials production and distribution.<br><b>Target:</b><br>+10 YOY increase in Canada Beef collateral utilization and distribution.                          | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace. |

| Tactics  | Budget   | Deliverables   | Key Performance Indicators   |
|--|----------|--|--|
| <b>5. Digital Marketing:</b><br>Content updates to both the trade and consumer Canada Beef Korean website. Support social media communication through new and existing platforms.  | \$85,000 | <b>Q1-Q4</b><br>1. Website upgrade<br>Social media content creation and distribution.<br>2. Monthly e-news letter distribution.<br><b>Target:</b><br>+20% YOY increase in traffic. | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |
| <b>6. Demand Building Events:</b><br>Canada Beef will organize and execute one demand building seminar event to promote the CBA and support Canadian beef supply clients.  | \$40,000 | <b>Q3</b><br>1. Canada Beef seminar in Seoul.<br><b>Target:</b><br>+10 YOY sales volume and value increase.  | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |
| <b>7. Government Trade Commission:</b><br>Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.                            | \$5,000  | <b>Q1-Q4</b><br>1. Event details TBD.<br><b>Target:</b><br>+10% YOY increase in Canada Beef sales volume and value.  | 1. Satisfaction index survey.<br>2. Volume/value market share of Canadian beef in the export marketplace.  |
| <b>8. Canada Beef Information Gateway (Gateway):</b><br>Canada Beef will further develop and expand Gateway QR code solution program. The Gateway will include a limited menu of assets for each retail cut being offered in-market. | \$10,000 | <b>Q1-Q4</b><br>1. Upgrade Gateway contents and increase the number of the retailers having Gateway QR code.<br><b>Target:</b><br>+10% YOY sales volume and value increase.        | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>9. Contract Service:</b><br>Canada Beef will partner with an independent Korean national contractor to develop and execute trade and channel marketing initiatives in South Korea.  | \$76,800 | <b>Q1-Q4</b><br>1. Execute trade and channel marketing initiatives.<br><b>Target:</b><br>+10% YOY sales volume and value increase.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |





# CHINA AND HONG KONG

## WORK PLAN #15 2023 – 2024

|   |   |  |
|---|---|--|
| <b>Team Lead and Budget Holder:</b>   | Manager, Market Development – China and Hong Kong |  |
| <b>Total Budget:</b>  | \$243,000   | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>ABEMD Grant Leveraged |
| <b>National Beef Strategy Alignment:</b>  | Pillar 1: Beef Demand – Focus Area: D,E,F         |  |
| <b>Strategic Priorities:</b><br>Promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to expand Canada Beef volume, value, and market share in Hong Kong and Macau. Maintain minimized market representation in mainland China in anticipation of market access being resumed this fiscal year. |   |  |
| <b>Objectives:</b><br>Develop and execute trade, channel and consumer marketing initiatives that will deliver results and provide ROI back to funding partners and stakeholders.  |   |  |

| Tactics   | Budget    | Deliverables  | Key Performance Indicators   |
|---|-----------|---|--|
| <b>1. Retail/Foodservice Promotions:</b><br>Canada Beef will work with new and existing end-user clients, importers, and distributors to increase Canada Beef brand awareness and increase retail and foodservice sales promotions.<br>Canada Beef has confirmed 8 retail and foodservice promotions. | \$127,000 | <b>Q1-Q4</b><br>1. Retail: Marae Supermarkets HK - \$36,000.<br>2. Retail: YATA Supermarkets HK in August - \$15,000.<br>3. Retail: City Super HK - \$15,000.<br>4. Retail: YATA Supermarkets HK in March - \$15,000.<br>5. Retail: Dairy Land Macau - \$10,000.<br>6. Retail E-commerce: Jousun.com - \$10,000.<br>7. Retail E-commerce: HKTVmall.com - \$20,000.<br>8. FS: Canada Beef Menu Promotion @ the American Club Hong Kong - \$6,000.<br><b>Target:</b><br>+10% YOY sales volume and value increase. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>2. Trade Shows:</b><br>Canada Beef will participate in one trade show in Hong Kong to promote the CBA and support Canada Beef supplier clients at high traffic industry events.  | \$20,000  | <b>Q1</b><br>1. HOFEX 2023 in Hong Kong during May 10-12, 2023 - \$20,000.<br><b>Target:</b><br>+10% YOY increase in client visits at the booth.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>3. Trade Advertising:</b><br>Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.  | \$5,000   | <b>Q1-Q4</b><br>1. Canadian Beef featured advertising on Tasting Kitchen HK & Macao - \$5,000.<br><b>Target:</b><br>+10% YOY increase in reach to target audience.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|----------|---|--|
| <b>4. Marketing Materials:</b><br>Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in Hong Kong. Resources will include branded labels, POP graphics.               | \$31,000 | <b>Q1-Q4</b><br>1. Retail stickers printing TC versions -\$20,000.<br>2. Production of IMG & Canada Beef Recipe leaflet, foam boards -\$8,000.<br>3. Production of Brand License Plates -\$1,000.<br>4. Production of demo supply (red apron and toothpick etc.) -\$2,000.<br><b>Target:</b><br>+10% YOY increase in export volume and value. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>5. Digital Marketing:</b><br>Maintenance of site architecture and content updates. Support social media communication through new and existing platforms.   | \$15,000 | <b>Q1-Q4</b><br>1. Canada Beef Social Media content update service Apr.2023-Mar.,2024 -\$10,000<br>2. Canada Beef Social Media Campaign partner with Key Opinion Leaders (KOLs) and Celebrity Chef -\$5,000<br><b>Target:</b><br>+10% YOY increase in reach to target audience.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>6. Demand Building Events:</b><br>Canada Beef will organize and execute one demand building seminar event to promote the CBA and support Canadian beef supply clients.  | \$10,000 | <b>Q2</b><br>1. Canadian Beef online workshop --\$10,000.<br><b>Target:</b><br>+10% YOY increase in attendance of target audience.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>7. Distributor Education:</b><br>Canada Beef will plan and execute two DEP events to promote the CBA and support Canadian beef client suppliers in the market.  | \$10,000 | <b>Q1-Q4</b><br>1. Canada Beef Workshop partnership with Million Hong Kong -\$5,000<br>2. Canada Beef Workshop partnership with Oriental Partners Hong Kong -\$5,000.<br><b>Target:</b><br>+10% YOY increase in attendance of target audience.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>8. Government Trade Commission:</b><br>Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.                              | \$15,000 | <b>Q1-Q4</b><br>Canadian Food workshop or Canadian Food Seminar aligned with the Canadian Government trade commission, 5~6 events.<br><b>Target:</b><br>+10% YOY increase in attendance of target audience.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>9. Beef Information Gateway:</b><br>Canada Beef will further adapt and launch the Gateway QR code solution program in retail chains. The Gateway will include a limited menu of assets for each retail cut being offered in-market. | \$10,000 | <b>Q1-Q4</b><br>Beef Information Gateway launched in 1-3 more retail brands in Hong Kong.<br><b>Target:</b><br>+10% YOY increase in Gateway resources and utilization in market.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |



# TAIWAN & SOUTHEAST ASIA

## WORK PLAN #16 2023 – 2024

|  |  |  |
|--|--|--|
| <b>Team Lead and Budget Holder:</b>      | Director, Market Development – Taiwan & Southeast Asia |  |
| <b>Total Budget:</b>                     | \$340,000  | Source:<br>Beef Check-Off<br>SCAP Leveraged<br>ABEMD Grant Leveraged |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F              |  |

### Strategic Priorities:

Retail and Foodservice Channel development. Recover volume and value growth. Support Canada Beef marketing opportunities in the marketplace. Work with Canada Beef supply partners to maximize market development opportunities.

### Objectives:

Promote Canada Beef quality grades. Develop new retail and foodservice clients.

| Tactics   | Budget    | Deliverables   | Key Performance Indicators   |
|---|-----------|--|--|
| <b>1. Retail and Foodservice Promotions:</b><br>Canada Beef will work with new and existing end-user clients, importers, and distributors to increase Canada Beef brand awareness and increase retail and foodservice sales promotions.<br>1) Taiwan 1 RT + FS promotions<br>2) Philippines 1 RT + FS promotions.<br>3) Vietnam 2 RT + FS promotion<br>4) Singapore/Indonesia 1 RT + FS promotion based on trade condition. | \$100,000 | <b>Q1-Q4</b><br>1. In-store sampling demo programs in the retail sector (including Taiwan, Philippine, Vietnam, Singapore).<br><b>Q2-Q4:</b><br>2. Canadian Beef promotion at Hotel and Restaurants (including Taiwan, Philippine, Vietnam, Singapore).<br>3. Collaboration with importer, retail/foodservice and supply partner to promote Canada Beef brands. (Including Taiwan, Philippine, Vietnam, Singapore, Indonesia).<br><b>Q1-Q4:</b><br>4. Partner promotion with two new retail clients (including Taiwan, Philippine, Vietnam, Singapore).<br>5. Partner/promote with three new foodservice clients (including Taiwan, Philippine, Vietnam, Singapore).<br><b>Target:</b><br>+10% YOY increase in Canada Beef sales promotion activity. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |

| Tactics   | Budget    | Deliverables  | Key Performance Indicators   |
|---|-----------|---|--|
| <b>2. Trade Shows:</b><br>Canada Beef will participate in four trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events.   | \$100,000 | <b>Q1</b><br>1. Food Taipei - Major food show in Taiwan in collaboration with the Canadian Embassy to reach a broad range of buyers.<br><b>Q2 - TBC</b><br>2. Food & Hotel Vietnam –Major food show in Vietnam in collaboration with the Canadian Embassy to reach a broad range of buyers.<br><b>Q2 - TBC</b><br>3. WOFEX Food Show – Targeting foodservice industry and retail in the Philippines.<br><b>Target:</b><br>+10% YOY sales volume and value increase. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>3. Marketing Materials:</b><br>Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in Taiwan and SE Asia. Resources will include branded labels, POP graphics. | \$20,000  | <b>Q2-Q4</b><br>1. Development and production of POP materials as needed for supporting retail and foodservice promotions.<br>2. Development and production of CBA resources as needed (labels, guides, and standard materials).<br><b>Target:</b><br>+10% YOY increase in Canada Beef collateral distribution.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>4. Digital Marketing:</b><br>1. Maintenance of site architecture and content updates.<br>2. Support social media communication through new and existing platforms.   | \$50,000  | <b>Q1-Q4</b><br>1. Social media content creation, boosting plans, strategic and promotional posts to attract new viewer to increase and reach audiences. (Taiwan IG and Southeast Asia IG).<br><b>2. Website</b><br>Service, maintenance, domain hosting, website fees, adaptations and content development, translation, and placement. Development of Vietnamese sub-website.<br><b>Target:</b><br>+10% YOY increase in traffic.                                  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>5. Demand Building Events:</b><br>Canada Beef will organize and execute one demand building seminar event to promote the CBA and support Canada beef supply clients.   | \$20,000  | <b>Q1-Q4</b><br>1. One event will be planned and executed. Canada Beef demand building seminar. Location and dates TBD.<br><b>Target:</b><br>+10% YOY sales volume and value increase.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>6. Government Trade Commission:</b><br>Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.                         | \$5,000   | <b>Q2-Q4</b><br>Retail/foodservice promotion with Trade commissioner (including Indonesia, Vietnam, Taiwan, Singapore, Philippines.)<br><b>Target:</b><br>+10% YOY increase in qualified buyers attending.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |

| Tactics   | Budget  | Deliverables  | Key Performance Indicators   |
|---|---|---|--|
| <b>7. Sponsorship and Event Marketing:</b><br>Canada Beef will support eligible sponsorship and event marketing opportunities that meet objectives. Sponsorship and event marketing projects must facilitate the promotion of the CBA and support supply clients. | \$5,000   | <b>Q2</b><br>1. Canada Day Celebration for Indonesia, Vietnam, Taiwan, Singapore, Philippines.<br><br><b>Target:</b><br>+10% YOY reach of qualified attendees.  | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>8. Beef Information Gateway:</b><br>Canada Beef will further adapt and launch the Gateway QR code solution program in retail chains. The Gateway will include a limited menu of assets for each retail cut being offered in market.                            | \$10,000  | <b>Q1-Q4</b><br>Launch or expand on one or two Gateway projects in the retail sector.<br><br><b>Target:</b><br>+10% YOY increase in Gateway resources and utilization in market   | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>9. Vietnam Programs and Services (special project):</b><br>Canada Beef will contract a Vietnamese national specialist to support event marketing and client communications in Vietnam.   | \$30,000<br><br>Cost including monthly fees and allowances e.g., travel, phone bills, meeting expenses. | <b>Q1-Q4</b><br>Support Canadian beef marketing plans in Vietnam.<br><br>Secure communications with Vietnamese clients to provide supports.<br><br>Development of new potential buyers, retailers, and food services establishments.<br><br><b>Target:</b><br>+10% YOY increase in Canada Beef collateral distribution. | 1. Satisfaction index survey.<br><br>2. Volume/value, market share of Canadian beef in the export marketplace. |



## MEXICO AND LATIN AMERICA

### WORK PLAN #17 2023 – 2024

|  |   |  |
|--|---|--|
| <b>Team Lead and Budget Holder:</b>      | Director, Market Development – Mexico & Latin America |  |
| <b>Total Budget:</b>                     | \$595,000   | Source:<br>Beef Check-Off<br>SCAP (leveraged)<br>ABEMD Grant Leveraged |
| <b>National Beef Strategy Alignment:</b> | Pillar 1: Beef Demand – Focus Area: D,E,F             |  |

#### Strategic Priorities:

Develop new business opportunities in the Retail and Foodservice segments, support volume and value growth with existing supply partners and develop alliances with distributors in other Latin America markets. Communicate Canadian/U.S. beef grading equivalence.

#### Objectives:

Develop and execute marketing initiatives to increase both brand awareness and product demand that will deliver results and provide ROI back to funding partners and stakeholders.

| Tactics  | Budget  | Deliverables  | Key Performance Indicators   |
|--|---|---|--|
| <b>1. Retail and Foodservice Promotions</b><br>Canada Beef will work with new and existing end-user clients, importers, and distributors to increase Canada Beef brand awareness and increase retail and foodservice sales promotions. | \$145,000<br>1. \$45,000<br>2. \$25,000<br>3. \$25,000<br>4. \$15,000<br>5. \$15,000<br>6. \$20,000 | <b>Q1-Q4</b><br>1. In-store samplings in Soriana outlets to boost sales of imported Canadian middle meats<br>2. In-store product sampling at HEB supermarkets to promote Canada Beef quality grades equivalence and CAB Canadian origin program.<br>3. Signature Cuisine partnerships with five restaurants in different states, in co-op with distributors.<br>4. Eight-week sampling program at El Florido retail stores (36 outlets).<br>5. In store samplings for Carnes Premium XO's new Canadian brand.<br>6. Grilling and pairing events in San Miguel de Allende, Belmond Hotel.<br><b>Target:</b><br>+10% YOY sales volume and value increase. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |

| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|--|---|--|
| <b>2. Trade Shows</b><br>Canada Beef will participate in four trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events. Efforts will be made to partner with Canada Pork and/or the Canadian Embassy in these trade shows to maximize impact and cut costs. | \$155,000<br>1. \$60,000<br>2. \$65,000<br>3. \$25,000<br>4. \$5,000               | <b>Q1-Q4</b><br>1. ABASTUR MexCity (Aug 30,31, Sept 1, 2023).<br>2. ANTAD/ALIMENTARIA Guadalajara (Mar 2024).<br>3. ExpoComer Panama (Mar 28-30, 2024).<br>4. Exphotel (Jun 13-15,2023)<br><b>Target:</b><br>+10% YOY reach and awareness of CBA and Canada Beef programs and services.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>3. Trade Advertising</b><br>Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.  | \$8,000  | <b>Q2-Q4</b><br>1. Articles in digital and printed editions from: Colombia, Mexico + Latin America<br><b>Target:</b><br>+10% YOY reach to new clients.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>4. Marketing Materials</b><br>Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in Mexico and Latin America. Resources will include branded labels, POP graphics  | \$10,000<br>1. \$5,000<br>2. \$5,000   | <b>Q2 - Q4</b><br>1. POP resources (1,000 merchandising guides, banners, tent cards).<br>2. 50,000 Canada Beef labels.<br><b>Target:</b><br>+10 % YOY distribution.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>5. Consumer Marketing</b><br>Create, develop, or adapt new or existing marketing initiatives as needed to promote Canadian beef to consumers.   | \$80,000<br>1. \$25,000<br>2. \$10,000<br>3. \$30,000<br>4. \$15,000               | <b>Q1-Q4</b><br>1. Two recorded culinary episodes with brand ambassadors and local personalities in two different Latin America markets.<br>2. Three seasonal video recipes (Xmas, Father's Day, Super Bowl).<br>3. 6 Live radio broadcasts with nationwide coverage<br>4. Printed cookbooks from #Canadianbeef recorded series.<br><b>Target:</b><br>+10% YOY increase in consumer reach and exposure.   | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>6. Digital Marketing:</b><br>1. Maintenance of site architecture and content updates.<br>2. Support social media communication through new and existing platforms.  | \$90,000<br>1. \$25,000<br>2. \$10,000<br>3. \$5,000<br>4. \$25,000<br>5. \$25,000 | <b>Q1-Q4</b><br>1. Website management including: Service, domain hosting, website fees, placement, design/content updates, monthly analytics, maintenance, translation, and metrics service.<br>2. Monthly newsletters for the domestic market.<br>3. Virtual boutique maintenance fees.<br><i>Social Media:</i><br>4. Collaboration with Tik-Tok food influencers/celebrities/ chefs for cooking of Canada Beef cuts.<br>5. LATAM YouTube, Instagram and FB Channels- focused campaigns to increase user traffic.<br><b>Target:</b><br>+10% YOY traffic increase.<br>Digital targeted campaigns.<br>+80% YOY satisfaction score. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |



| Tactics  | Budget   | Deliverables  | Key Performance Indicators   |
|--|--|---|--|
| <b>7. Demand Building Events</b><br>Canada Beef will organize and execute two demand building events to promote the CBA and support Canada beef supply.  | \$15,000   | <b>Q3</b><br>1. Participation in Sabores del Norte & Sabores de Polanco<br><b>Q1-Q4</b><br><b>Target:</b><br>+10% YOY increase in new client reach and exposure.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>8. Distributor Education:</b><br>Canada Beef will plan and execute DEP events and road trip (style) to promote the CBA and support Canadian beef client suppliers in the market.  | \$22,000<br>1. \$15,000<br>2. \$7,000                | <b>Q1-Q4</b><br>1. Canada Beef seminar/training for three distributors and their sales teams.<br>2. Meat cutting workshop at Le Cordon Bleu MexCity<br><b>Target:</b><br>+10% YOY increase in importer/distributor reach.                                 | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>9. Government Trade Commission:</b><br>Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.  | \$17,000<br>1. \$5,000<br>2. \$7,000<br>3. \$5,000   | <b>Q2</b><br>1. Canada Day celebrations at Canadian Embassy in Mexico.<br><b>Q4</b><br>2. Comecarne seminars in collaboration with Canadian Government.<br>3. Collaboration in Trade Fairs<br><b>Target:</b><br>+10% YOY increase in qualified attendees. | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>10. Sponsorship and Event Marketing:</b><br>Canada Beef will support eligible sponsorship and event marketing opportunities that meet objectives. Sponsorship and event marketing projects must facilitate the promotion of the CBA and support supply clients. | \$43,000<br>1. \$5,000<br>2. \$28,000<br>3. \$10,000 | <b>Q1-Q4</b><br>1. Player's event with Sigma Los Cabos<br>2. Vallarta Nayarit Culinary Fest (Dinners & beef workshops with distributors.<br>3. Industry Grill Fest, in Saltillo.<br><b>Target:</b><br>+10% YOY increase in qualified attendees.           | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |
| <b>11. Beef Information Gateway:</b><br>Canada Beef will further adapt and launch the Gateway QR code solution program in retail chains. The Gateway will include a limited menu of assets for each retail cut being offered in-market.                            | \$10,000   | <b>Q1</b><br>1. Develop and produce QR code POP resources.<br><b>Target:</b><br>Launch one Gateway project in the retail sector.  | 1. Satisfaction index survey.<br>2. Volume/value, market share of Canadian beef in the export marketplace. |





## FINANCE AND OPERATIONS

### WORK PLAN #18 2023 – 2024

**Team Lead and Budget Holder:** Vice President, Finance and Operations

**Total Budget:** \$828,356      Source: Beef Check-Off

#### Strategic Priorities:

Ensure adequate funding for Canada Beef activities and programs and value-for-money for costs related to all sources of funding (check-off, import levies and leveraged dollars).

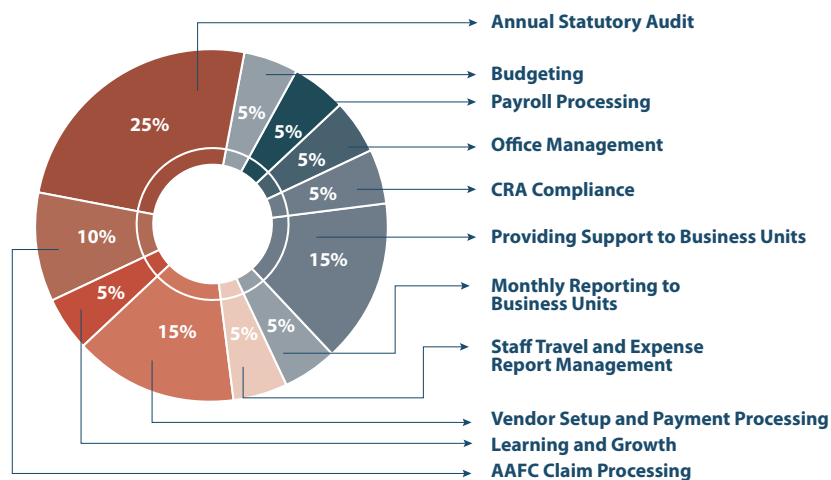
#### Objectives:

To provide sound financial policies and systems of internal controls, produce accurate and timely financial information, ensuring compliance with statutory and contractual obligations; to provide excellent customer service; to provide and maintain a fit-for-purpose, safe and functional office work environment.

| Tactics   | Deliverables   | Key Performance Indicators  |
|---|--|---|
| <b>1. Budgeting</b><br>Weight (5%)                            | 1. Annual programs and operations budgeting for Business/Investment Plan.<br>2. Operating plan spreadsheets set-up on SharePoint.<br>3. Budget performance report template set-up and budget loading on Sage 300.  | Complete by Nov 30.<br>Set-up by March 1.<br>Set-up by March 1.   |
| <b>2. Providing Support to Business Units</b><br>Weight (15%) | 1. Answering questions about finance procedures.<br>2. Payment of monthly international office operating funds.<br>3. Reimbursement of Staff expense.<br>4. Provide excellent customer service.<br>5. Reviewing vendor agreements and office rental contracts with business units. | Responses within 2 business days.<br>Operating funds wired to offices before 15th of month.<br>Response within 15 days of receipt.<br>Achieve 75% on Accounting Satisfaction Survey.<br>Responses within 2 business days. |
| <b>3. Monthly reporting to Business Units</b><br>Weight (5%)  | 1. Monthly budget reports for each work plan and office overhead.  | Reports delivered within 15 days of month end.  |
| <b>4. Payroll Processing</b><br>Weight (5%)                   | 1. Management of ADP payroll system.<br>2. Payment of salaries on time.  | Payroll input data to ADP by Tuesday before payday.<br>Bi-weekly, every second Friday.  |

| Tactics   | Deliverables  | Key Performance Indicators   |
|---|---|--|
| <b>5. Vendor Setup &amp; Payment Processing</b><br>Weight (15%)<br><br><b>Staff Travel and Expense Report Management</b><br>Weight (5%) | 1. Sage 300 Accounts Payable vendor system management.<br>2. Biweekly local vendor payments.<br>3. Biweekly set-up and payment of RBC express wires to international vendors.<br>4. Implement paperless expense reporting and management system.  | Vendor information up to date before payment dates.<br>Less than 10 vendor complaints for fiscal year.<br>Less than 10 wire returns for fiscal year.<br>By end of Q1 (Jun 30/23).  |
| <b>6. Agriculture and Agri-Food Canada (AAFC) Claim Processing</b><br>Weight (10%)  | 1. Preparing/Filing of quarterly AAFC claim.<br>2. Responses to AAFC's requests for samples and other information.  | Claim delivered to AAFC within 90 days of the end of the quarter.<br>Responses to AAFC within requested deadline.  |
| <b>7. Annual Statutory Audit</b><br>(Weight 25%)  | 1. Delivery of Trial balance and General Ledger report to auditors.<br>2. Preparation of audit working papers.<br>3. Working with auditors to complete the field work.<br>4. Receive draft audited financial statements and audit findings report from the auditors and have a review with the finance committee.<br>5. Meet with the Board of Directors to approve the draft audited financial statements. | Delivered a week before field work commencement – May 20th.<br>Audit working papers delivered to auditors by 1st day of field work.<br>Field work completed by June 7th .<br>To be completed between June 15th – 22nd.<br>Complete by June 30. |
| <b>8. CRA Compliance</b><br>Weight (5%)   | 1. Provide information to NCO for preparing/ filing of GST/HST returns to CRA and payment of any taxes due.<br>2. Preparing/filing of T4 summary to the CRA annually.<br>3. Annual not-for-profit (NPO) and T2 returns to the CRA.  | By the 15th day following the end of relevant month.<br>By end of February of the following calendar year.<br>Complete by Sept 30.   |
| <b>9. Office Management</b><br>Weight (5%)  | 1. Monthly payment of rent and common area costs to property management.<br>2. Management of office supplies utilities and equipment to ensure that space is a workable environment.<br>3. Ensuring insurances are active, this includes.<br>- Cyber security insurance,<br>- Commercial general liability<br>- Multi-media policy<br>- Property insurance<br>- Office liability                            | Rent invoices are paid within first 7 days of the month.<br>Make procurements and address issues in a timely manner.<br>Renew insurances before expiry.  |
| <b>10. Learning and Growth</b><br>Weight (5%)   | 1. Strive for continuous improvement of finance and operations processes.<br>2. Training and professional development.  | Review and update finance and operations procedure manual once a year by March 15.<br>Staff to attend a minimum of 1 training event per year.  |

## FINANCE &amp; OPERATIONS INVESTMENT ALLOCATION %



|           |                                    | 2023/24                |               |
|-----------|------------------------------------|------------------------|---------------|
| Marketing |                                    | Proposed               | Confirmed     |
| 1         | Generic Beef & Veal                | \$ 424,990.00          |               |
| 2         | PSE                                | \$ 270,000.00          |               |
| 3         | Global Marketing                   | \$ 1,110,000.00        |               |
| 4         | Channel Marketing                  | \$ 475,000.00          |               |
| 5         | Consumer Marketing                 | \$ 1,545,000.00        |               |
| 6         | Digital Marketing                  | \$ 665,000.00          |               |
| 7         | Health and Nutrition               | \$ 560,000.00          |               |
| 8         | Stakeholder Communications         | \$ 285,000.00          |               |
| 9         | Canadian Beef Information Gateway  | \$ 381,000.00          |               |
| 10        | Canadian Beef Centre of Excellence | \$ 720,000.00          |               |
| 11        | Export Market Development          | \$ 420,000.00          |               |
| 12        | Emerging Markets                   | \$ 270,000.00          |               |
| 13        | Japan                              | \$ 830,000.00          |               |
| 14        | South Korea                        | \$ 431,800.00          |               |
| 15        | China and Hong Kong                | \$ 243,000.00          |               |
| 16        | Taiwan and Southeast Asia          | \$ 340,000.00          |               |
| 17        | Mexico and Latin America           | \$ 595,000.00          |               |
|           |                                    | <b>\$ 9,565,790.00</b> | <b>\$ TBD</b> |

# CANADA BEEF - ANNUAL BUDGET

**FOR YEAR ENDED MARCH 31, 2024**

| <b>Revenues</b> |  | <b>\$</b>            |
|-----------------|--|----------------------|
| 1               | Check Off - Marketing  | 8,900,000            |
| 2               | Check Off - Public and Stakeholder Engagement                                | 212,000              |
| 3               | Import Levy - Beef   | 870,774              |
|                 | Import Levy - Veal   | 31,726               |
| 4               | Government of Canada - Sustainable Canadian Agricultural Partnership (SCAP)* | -                    |
| 5               | Alberta Agriculture and Industry - EDMP**                                    | -                    |
| 6               | Export Market Development Administration Fee                                 | -                    |
| 7               | Interest   | 70,000               |
| 8               | Deferred Revenue Amortization (CBCE)   | 106,000              |
|                 |  | <b>\$ 10,190,500</b> |

| <b>Expenses</b> |  |                      |
|-----------------|--|----------------------|
|                 | Board of Directors - Marketing Committee | 100,000              |
|                 | Marketing                                | 14,669,710           |
|                 |  | <b>\$ 14,769,710</b> |

**(Deficit) to be funded out of unrestricted accumulated reserves** **\$ (4,579,210)**

|                  |                                     | <b>2022/23</b>      |                      |
|------------------|-------------------------------------|---------------------|----------------------|
| <b>Marketing</b> | <b>Programs</b>                     | <b>Operating</b>    | <b>Total</b>         |
| 1                | Domestic - Generic Beef & Veal      | 424,990             | 602,500              |
| 2                | Public and Stakeholder Engagement   | 53,431              | 323,431              |
| 3                | Global Marketing                    | 1,439,625           | 2,549,625            |
| 4                | Domestic - Channel Marketing        | 179,988             | 654,988              |
| 5                | Domestic - Consumer Marketing       | 145,026             | 1,690,026            |
| 6                | Digital Marketing                   | 363,795             | 1,018,795            |
|                  | Digital Marketing - Generic Veal    | -                   | 10,000               |
| 7                | Health and Nutrition                | 61,347              | 331,347              |
|                  | Health and Nutrition - Generic Beef |                     | 290,000              |
| 8                | Communications                      | 141,809             | 396,809              |
| 9                | Canadian Beef Information Gateway   |                     | 381,000              |
| 10               | Canadian Beef Centre of Excellence  | 500,601             | 1,220,601            |
| 11               | Export Market Development           | 185,693             | 605,693              |
| 12               | Emerging Markets                    | -                   | 270,000              |
| 13               | Japan                               | 415,000             | 1,245,000            |
| 14               | South Korea                         | 19,200              | 451,000              |
| 15               | China and Hong Kong                 | 214,300             | 457,300              |
| 16               | Taiwan and Southeast Asia           | 117,200             | 457,200              |
| 17               | Mexico and Latin America            | 192,000             | 787,000              |
| 18               | Calgary and Mississauga             | 927,395             | 927,395              |
|                  |                                     | <b>\$ 9,565,790</b> | <b>\$ 14,669,710</b> |
|                  |                                     | <b>\$ 5,133,920</b> |                      |

Notes:

Revenue

4 \*We will apply once new program is announced

5,6 \*\*Discussions started to renew agreement