

## Canada Beef

Statement Board of Directors Expenses (Marketing Committee, costs not covered by the Check-off Agency)

for the 9 Months Ended

December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual as % of Budget	Actual YTD (Prior Year)
<b>Board</b>					
Travel	0	0	40,000	0%	0
Meeting Per Diem	3,200	3,950	20,000	20%	7,600
Meetings Expense	0	0	5,000	0%	0
<b>TOTAL BOARD EXPENSES</b>	3,200	3,950	65,000	6%	7,600



## CANADIAN BEEF CHECK-OFF AGENCY

146, 6715 8<sup>th</sup> Street NE  
Calgary, AB T2E 7H7  
p. 403.275.5890  
f. 403.275.9288

## MARKET DEVELOPMENT & PROMOTION COMMITTEE AGENDA – Draft C

**January 27, 2022, 8:00am-11:00am mountain (10:00am – 1:00pm eastern)**

### **Microsoft Teams Video Conference Call**

- |     |   |                       |       |
|-----|---|-----------------------|-------|
| 1.  | Welcome and Roll Call   | M.Kennedy             | 5min  |
| 2.  | Approval of Agenda  | M.Kennedy             | 5min  |
| 3.  | Approval of Minutes   | M.Kennedy             | 5min  |
|     | a) Cmte Video Meeting Sept 22, 2021                             |                       |       |
|     | b) Cmte Video Meeting Dec 2, 2021                               |                       |       |
| 4.  | Business Arising from Minutes                                   | All                   | 5min  |
| 5.  | Financial Report December 2021                                  | R.Mallard/M.Shittu    | 15min |
| 6.  | Committee Roundtable Updates                                    | All Committee Members | 50min |
| 7.  | President's Report:   | M.Young               | 30min |
|     | • Domestic and export market review                             |                       |       |
|     | • CB Structure 2022   |                       |       |
| 8.  | 2021/22 Year End Update   | M.Young               | 10min |
| 9.  | Finalized 2022/23 Investment Plan                               | M.Young               | 5min  |
| 10. | Canadian Beef Information Gateway (BIG)<br>Triple Launch Update | M.Klassen             | 10min |
| 11. | Global Marketing Resources                                      | M.Klassen             | 10min |
| 12. | Key dates for 2022  | R.Glaser              | 5min  |
| 13. | Other Business  | All                   | 5min  |
| 14. | In-camera (as needed)   | M.Kennedy             |       |
| 15. | Adjournment   |                       |       |



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## MARKET DEVELOPMENT & PROMOTION COMMITTEE VIDEO CONFERENCE CALL MINUTES

### December 2, 2021, 8:00am-11:20am (mountain) Video Conference Call

#### Directors Present

Mike Kennedy  
Coral Manastersky  
Russ Mallard  
Cameron Blake  
David Francis  
Jennifer Haley

Hubert Lau  
Stephen Christie  
Jack Chaffe

#### Guests

Jim Clark, OCFA

#### Regrets

John Curtis  
Andre Forget  
Mike Guest  
Lindsay Westren, ABP

#### Staff Present

Michael Young  
Michael Shittu  
Mark Klassen  
Ron Glaser

#### 1. Welcome and Call to Order

M. Kennedy called the video conference call to order at 8:00am mountain.

#### 2. Approval of Agenda

**MOTION:** The agenda was reviewed and approved on a motion by H.Lau/R.Mallard.

#### 3. Finance and Budget Update

Finance Chair R.Mallard and M.Shittu provided a high level financial update to the Committee covering 7 months of the fiscal year to October 31, 2021 based on statements circulated to the Committee. The Committee was reminded that the reports are specific to Canada Beef and do not cover the NCO Board.

The balance sheet to the end of October showed a total assets position of approximately \$14.8 million and liabilities of \$1 million for a net asset position of \$13.8 million. This includes \$8.9 million in cash and cash equivalents (money in a premium investment account with RBC) and accounts receivable of \$2.3 million (check-off receivables and repayments due from the CAP program).

The statement of revenues and expenses show a year-to-date surplus of approximately \$1.2 million versus a budgeted deficit of \$1.56 million for the full year. The main source of funding for Canada Beef is national check-off projected to be \$9.2 million this year. To date approximately \$4.8 million has been received. Marketing expenses to the end of year were

budgeted at just over \$13.8 million with approximately \$5 million expended to the end of October.

Costs for the Committee were projected to be \$65,000 for the full year, with about \$3,200 spent to the end of October. These funds cover the four new directors-at-large positions while other committee members are covered under the NCOA board budget.

M Young shared that organization is on track to fully spend the budget this fiscal. Young noted that it was previously suggested that staff may come back to Committee with a plan to access unreserved funds for COVID recovery programs. However that will not be necessary this fiscal as Canada Beef has not been able to move forward with some aggressive tactics due to the prolonged effects of COVID in the marketplace.

#### **4. Import Levy Funding Update**

Shittu reported that revenue from the import levy was forecast at \$950,000 for the current fiscal year. To the end of October, approximately \$640,000 in revenue has come in. Young reported that staff has worked with NCOA to more closely identify how much of the import levy revenue is specifically coming from imported veal products. Of overall import levy revenue this fiscal, approximately \$32,000 was generated from veal products. Going forward, import levy revenue from veal sources will be specifically identified and allocated to veal marketing programming. Work will continue with the NCOA and Government to better differentiate veal and beef products and import levy revenues through clarification of import product codes.

#### **5. Draft 2022/23 Investment Plan and Budget**

M. Kennedy provided overarching comments on market conditions and possible impacts on consumer behaviour and marketing strategies. Young began the review of the draft 2022/23 plan with a SWOT analysis. He then reviewed long term funding opportunities (i.e. CAP and future government industry development funding, cash reserves, etc.) and strategies to reduce Canada Beef's unrestricted reserve to best position the organization for when it will need to operate on balanced budget basis.

Young reviewed seven strategic priorities for the draft plan:

- execution and full deployment of Canadian Beef Information Gateway platforms across all channels;
- value-cut options for retail and foodservice;
- French language assets;
- increased focus on Canadian beef advantage (CBA);
- development and launch of CBA assets for consumer space;
- CBCE expansion; and
- pandemic recovery and growth strategies.

New business units have been established to better deliver desired results. As well, veal tactics and funding are specified in plan. The draft plan features expenditures of \$13,900,640 (\$8,890,840 marketing, \$5,009,800 operating) with a projected deficit of \$1,446,640 to be funded from unrestricted reserves.



The Plan is organized into 16 separate business units designed to increase the clarity and transparency of the plan for industry stakeholders. Tactics, target audience and standardized KPI's have been incorporated to ensure effective, accurate and consistent ROI reporting back to stakeholder and funding partners.

#### **I. Generic Beef and Veal – Consumer Marketing**

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

#### **II. Public and Stakeholder Engagement**

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

#### **III. Global Marketing**

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

#### **IV. Channel Marketing**

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

#### **V. Consumer Marketing**

Canada Beef will deliver targeted initiatives to positively influence consumer preference for Canadian beef over other proteins. Defend, stabilize, and increase consumption of Canadian beef vs poultry, pork, and plant-based meat alternatives. Increase awareness, trust and confidence in the Canadian cattle and beef delivery systems with consumers through the Canadian Beef Advantage. Support and contribute to the development and launch of branded and generic Canadian Beef Information Gateway across all business units to achieve success.

#### **VI. Digital Marketing**

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

#### **VII. Health and Nutrition**

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

### **VIII. Stakeholder Communications**

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

### **IX. Canadian Beef Centre of Excellence**

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

### **X. Export Market Development Partner Program**

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

### **XI. Emerging Markets**

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

### **XII. Japan Market Development**

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

### **XIII. South Korea Market Development**

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

### **XIV. China / Hong Kong Market Development**

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

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

**XV. Taiwan / Southeast Asia Market Development**

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

**XVI. Mexico/Latin America Market Development**

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

**MOTION:** *The draft 2022/23 Canada Beef Investment Plan and Budget was approved for submission to the Canadian Beef Cattle Research, Market Development and Promotion Agency on a motion by R.Mallard/H.Lau.*

Staff will finalize the plan design and circulate to the Committee.

**6. Key Dates/Next Meeting**

The next Committee meeting was tentatively set for January 26<sup>th</sup>. If possible the meeting will be held in person in Mississauga with a virtual attendance option.

**7. Adjournment**

**MOTION:** *Meeting was adjourned at 12:00pm on a motion by R.Mallard/H.Lsu.*



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## MARKET DEVELOPMENT & PROMOTION COMMITTEE VIDEO CONFERENCE CALL MINUTES

### September 22, 2021, 8:00am-11:20am (mountain) Video Conference Call

#### Directors Present

Mike Kennedy  
Coral Manastersky  
Russ Mallard  
John Curtis  
Andre Forget  
Jennifer Haley  
Jack Chaffe

Mike Guest  
Stephen Christie  
Hubert Lau

#### Guests

Jim Clark, OCFA

#### Regrets

Becky Bevacqua  
Cameron Blake  
David Francis  
Lindsay Westren, ABP

#### Staff Present

Michael Young  
Michael Shittu  
Mark Klassen  
Karine Barlow  
Ron Glaser

#### 1. Welcome and Call to Order

M. Kennedy called the video conference call to order at 8:05am mountain.

#### 2. Approval of Agenda

**MOTION:** The agenda was reviewed and approved on a motion by R.Mallard/C.Manastersky.

#### 3. Approval of Minutes

**MOTION:** The minutes of the June 9, 2021 and August 17, 2021 video conferences were amended and approved on a motion by R.Mallard/S.Christie.

#### 4. Business Arising

In a response to a question from the previous Committee meeting, Young reported that approximately \$10,000 in check-off revenue was collected from veal imports in the last fiscal.

#### 5. Finance and Budget Update

Finance Chair R.Mallard and M.Shittu provided a high level financial update to the Committee covering 5 months of the fiscal year to August 31, 2021 based on statements circulated to the Committee. The Committee was reminded that the reports are specific to Canada Beef and do not cover the NCO Board.

The balance sheet to the end of August showed a total assets position of approximately \$14.7 million and liabilities of \$945,054 for a net asset position of \$13.8 million. This includes over \$9 million in cash and cash equivalents (money in a premium investment account with RBC) and accounts receivable of \$2 million (primarily repayments due from the CAP program).

The statement of revenues and expenses show a year-to-date surplus of approximately \$1.1 million versus a budgeted deficit of \$850,000 for the full year. The main source of funding for Canada Beef is national check-off projected to be \$9.2 million this year. To date approximately \$3.5 million has been received. Marketing expenses to the end of year were budgeted at just over \$12.3 million with approximately \$2.7 million expended to the end of August.

Costs for the Committee were projected to be \$65,000 for the full year, with about \$1,650 spent to the end of August. These funds cover the four new directors-at-large positions while other committee members are covered under the NCOA board budget.

Mallard and Shittu are investigating the option of investing a portion of the organization's cash reserve in a GIC to obtain a better interest return than what is available from a standard bank savings account. They will bring options to the Finance Committee to consider.

A 2022/23 check-off revenue forecast will be coming from NCOA later this year.

#### **6. CAP Funding Agreement 2021-23 Overview**

Glaser reported that the CAP 2021-23 funding agreement had been recently finalized and signed. It is a \$3.6 million agreement over two years primarily targeted to international programs covering activities in: Global, Mexico, Colombia, Panama, Guatemala, Japan, Korea, China HK, Taiwan, Philippines, Singapore, Indonesia, UAE, Qatar, Germany, France, UK, Spain, Italy and incoming missions through the CBCE. Canada Beef is in discussions with the Government regarding a media announcement and awareness activities, however there is a media embargo in place due to the election. The embargo will be lifted after the new Government is sworn in and the Agriculture Minister is in place.

#### **7. Supplemental Pandemic Recovery and Growth Plan**

Young reported that leadership staff were asked to provide additional tactics and strategies that could be implemented this fiscal year to deal with the impact of COVID-19 on the marketplace with the intent that a funding request would be brought to the MDP Committee to cover these additional activities. However, due to additional revenues coming from Canada Beef's CAP agreement and dollars coming available from certain tactics that had to be cancelled or postponed due to COVID, Young believes that there is sufficient dollars available in the existing budget to implement these supplementary tactics and that additional check-off funding will not be necessary in the 2021/22 fiscal year. As well, some of these supplemental tactics will be included in the draft 2022/23 investment plan currently under development.

#### **8. 2020/21 Global Stakeholder Satisfaction Survey Results**

Klassen reviewed the results of 2020/21 stakeholder satisfaction survey. This was the first survey to include global stakeholders, as previous surveys were strictly domestic. Canada Beef

surveyed domestic and international stakeholders including: retail, foodservice, packers, further processors, national and provincial industry associations, and government. Survey participants were recruited from staff contact lists. The survey tool was delivered in the local language of each international market. The survey measured satisfaction with Canada Beef as an organization – including: knowledge; willingness to help; and contribution – and satisfaction of our initiatives including: programs and services; resources and materials; and digital tactics. This year's survey had 382 respondents compared to 93 in the previous survey. An overall global satisfaction score of 72% was calculated. Typically, less than 5% of stakeholders indicated that they were dissatisfied with any of the attributes surveyed. A significant minority noted they were unable to comment which reduced satisfaction scores. Canada Beef will prioritize stakeholder communication initiatives to increase awareness and the expected removal of pandemic restrictions will greatly assist in this regard.

## **9. President's Report**

Young reported that world beef supplies are tightening due to a number of issues. Brazil's BSE cases leading to export bans, and Australian slaughter being down 27% due to weather conditions. The United States is also forecasting beef production to be down. ASF in China continues to drive international meat demand. Young reviewed geopolitical influences on international trade, particularly with China and discussed pressures on international shipping such as: labour shortages, shipping container shortages, port backlogs, etc.

Canadian beef exports YTD July 31 are up 24% to 285,735 tonnes worth over \$2.3 billion (up 28%). Imports are down year over year by 19% from 139,000 to 112,000 tonnes. Canada Beef recently completed the eighth and last 'Safeguarding the Canadian Red Meat Supply' seminar in partnership with Canada Pork and the Canadian Government. Seminars were delivered in China, Japan, Korea, Taiwan, Philippines, EU/UK, Mexico and Vietnam.

Young provided recent market activity updates for Japan, Korea, Mexico and Latin America, China and Hong Kong, Taiwan and Southeast Asia, and Emerging (UK, EU). Of note is that the ANUGA tradeshow, October 9-13, is proceeding and Canada Beef in partnership and Canada Pork will be hosting a booth. Three export partners are participating in the show. Young shared that uptake of the Export Market Development Partner Program continues to be slow due to the impact of COVID on the marketplace. However 12 projects have been completed this year with 6 more in progress.

Young reviewed recent domestic branded and generic consumer marketing, social media, and PSE activities including activities with regional provincial organizations. Young highlighted recent Channel Marketing activities including new resources, QSR partnerships, and CBCE initiatives.

## **10. Canadian Beef Information Gateway Update**

Klassen provided an update on the Canadian Beef Information Gateway program. To date 293 recipes with videos and supporting information have been completed which is 59% of the target set for this fiscal. Work continues with potential retail customers Freshco and Real Canadian Super Store to sort through implementation challenges unique to each banner. Staff are working on a management system for the Gateway that will enable clients to self-manage more

of the system to rationalize the amount of Canada Beef staff support needed to maintain the program. This includes pulling content from a database to populate web pages rather than building unique individual pages one by one. Ultimately, this will establish a virtual foundation for expansion of the Gateway to other sectors and other countries. Work also continues on how the Gateway system can support multiple brands in cases where the client wishes to recognize other partners in the product offering such as a regional supplier with the retailer. As well, the team is investigating using barcodes to access the same information as the QR code allows. Finally, work is underway to develop an advanced search capability that will allow users to search by product offering but also other parameter's such as recipes or nutrition and health.

#### **11. Connecting Consumers Diet and Wellness Interests to the Gateway**

K.Barlow gave a presentation specifically outlining the role of nutrition in supporting the development and rollout of the Gateway. Research shows consumers are interested in finding more information on health and nutrition and their diets. The Gateway can be a key method to provide that information in a clear and easily understood manner to consumers. Each recipe featured in the Gateway has full health and nutritional information including a nutrition facts table through a 'nutrition dashboard'.

#### **12. Canadian Beef Centre of Excellence Reimagined**

Klassen reported on future development plans for the CBCE physical space in order to meet the challenges of a changing marketplace. He shared that CBCE has three operating divisions: CBCE studio (video and webinars); CBCE learning solutions (industry and consumers); CBCE Canadian beef experience (virtual and in person missions). Digital content production is no longer a part time job as the need for this content continues to grow and has been accelerated due to the pandemic. Physical renovations are being planned to create a digital editing suite and broadcast studio and allow for multiple groups to utilize separate elements of the Centre at the same time. Renovations will minimize transition and set up time between different uses of the Centre. Klassen shared mock ups of what the renovations will look like. Estimates for the renovations are approximately \$800,000, with the bulk of those costs being related to upgrading camera and electronics.

#### **13. Committee COVID Roundtable**

Various Committee members shared recent observations concerning the market impact and future direction due to COVID-19. Many common themes emerged from various speakers. Drought through the Prairie Provinces and in Northern Ontario has had a significant impact on the beef industry. The impact and extent of cows being culled from the herd due to lack of feed has yet to be determined but will likely be significant. Feed costs across Canada are high. The lack of feed is influencing where calves are being marketed leading to more cattle movement into the U.S. and Eastern Canada. Producers are having to tightly manage their herd numbers and costs. These cattle marketing trends could influence future check-off revenues. The foodservice sector continues to be challenged by COVID. Consumer nervousness due to COVID, labour constraints, restaurants limiting capacity, and changing proof of vaccination requirements are complicating matters. There is more focus on take out and delivery as cold weather limits patio usage. Beef supplies area tightening along with higher prices is leading to

discussions about what future restaurant menus will look like with potential displacement of beef items. Labour shortages at processing is limiting cut choice.

**14. Key Dates/Next Meeting**

The next Committee meeting will be to review a draft 2022/23 Investment Plan and Budget. December 2<sup>nd</sup> was selected for the meeting. The draft plan will be circulated on or around November 22<sup>nd</sup>.

**15. Adjournment**

**MOTION:** *Meeting was adjourned at 11:15am on a motion by R.Mallard.*



## Canada Beef

### Statement of Financial Position (Unaudited)

as at

December 31, 2021

	Current Year (Previous Month)	Current Year (Current Month)	Prior Year
<b>Assets</b>			
Cash and Cash Equivalents	9,136,270	9,614,305	5,322,869
Accounts Receivable	2,087,713	2,104,993	4,035,366
Prepaid Expenses	60,633	58,848	76,968
Interco - Canadian Beef Check-Off Agency (CBCOA)	6,646	41,571	0
<b>Current Assets</b>	<b>11,291,262</b>	<b>11,819,716</b>	<b>9,435,203</b>
Long Term Debt - CBCOA	0	0	0
Restricted Cash Reserve - CBCOA	3,000,000	3,000,000	3,000,000
Fixed Assets	543,330	543,330	706,661
<b>Total Assets</b>	<b>14,834,591</b>	<b>15,363,046</b>	<b>13,141,864</b>
<b>Liabilities</b>			
Accounts Payable and Accrued Liabilities	147,011	322,967	218,433
GST Payable/(Receivable)	6,997	(0)	(25,091)
Interco - Canada Beef International Institute	(562,734)	(608,746)	47,617
Interco - Canada Beef International Institute Inc	640,245	834,966	452,327
<b>Total Current Liabilities</b>	<b>231,519</b>	<b>549,186</b>	<b>693,285</b>
Deferred Revenues	684,425	670,404	702,173
<b>Total Long Term Liabilities</b>	<b>684,425</b>	<b>670,404</b>	<b>702,173</b>
<b>Total Liabilities</b>	<b>915,944</b>	<b>1,219,590</b>	<b>1,395,458</b>
<b>Net Assets</b>			
Restricted	4,000,000	4,000,000	4,000,000
Unrestricted	8,578,648	8,578,648	6,631,457
Current Year	1,339,999	1,564,808	1,114,949
<b>Total Net Assets</b>	<b>13,918,647</b>	<b>14,143,456</b>	<b>11,746,406</b>
<b>Total Shareholder's Equity and Liabilities</b>	<b>14,834,591</b>	<b>15,363,046</b>	<b>13,141,864</b>

# Canada Beef

## Statement of Expenses (International Operations)

for the 9 Months Ended

December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual as % of Budget
<b>Japan</b>				
<b>OPERATIONS - Tokyo, Japan</b>				
Staff Salaries & Fees	217,670	244,840	353,007	69%
Government Benefits (Pension, Insurance, etc.)	29,853	33,859	50,000	68%
Office Rent	55,578	62,626	93,815	67%
Office Insurance	0	0	224	0%
Utilities	0	0	0	0%
Janitorial Services	0	0	0	0%
Telephone, Facsimile, Internet	2,117	2,281	8,913	26%
Cell Phones	2,764	3,159	6,426	49%
Office Help	0	0	0	0%
Office Move Expenses	0	0	0	0%
Office Expenses and Supplies	2,363	2,734	6,112	45%
Office Repairs and maintenance (Common Area Costs)	0	0	0	0%
Courier and Postage	1,548	1,817	3,485	52%
Computer Maintenance & Supplies	2,286	2,571	6,190	42%
Office Equipment - Lease Payments	3,045	3,402	4,627	74%
Travel Expenses	674	674	5,750	12%
Training and Professional Development	33	33	4,381	1%
Meeting Expenses	(129)	(129)	3,651	(4%)
Staff Entertainment & Incentives	465	465	0	0%
Hosting Expenses	550	955	2,483	38%
Dues, Fees, and Subscriptions	2,072	2,072	3,058	68%
Consulting and Legal Fees	0	0	0	0%
Audit Fees	1,684	2,920	7,118	41%
Bank Service Charges	1,200	1,484	2,262	66%
Consumption Tax Refund (JAPAN ONLY)	(31,827)	(45,992)	(60,000)	77%
Capital Purchases	0	0	2,500	0%
Capital Purchases - Capitalization	0	0	0	0%
Foreign Exchange Loss (Gain)	(109)	(109)	0	0%
	291,838	319,661	504,000	63%
<b>MARKET DEVELOPMENT AND PROMOTION</b>				
Retail/Foodservice Promotions	76,377	86,563	245,000	35%
Trade Shows	133,277	162,687	262,086	62%
Trade Advertising	17,278	17,278	20,000	86%
Marketing Materials	33,244	34,159	60,103	57%
CB Website	4,373	7,067	10,000	71%
Social Media and Consumer Marketing	26,511	31,066	60,259	52%
Out-going Missions	0	0	0	0%
Demand Building Events	0	4,844	54,897	9%
Government Trade Commission Partner Programs	0	0	0	0%
Distributor Education Programs	5,648	32,387	69,156	47%
Sponsorships and Event Marketing	2,047	2,047	10,000	20%
Ad-Hoc Programs	0	0	0	0%
	298,755	378,097	791,500	48%
<b>TOTAL - JAPAN</b>	<b>590,593</b>	<b>697,758</b>	<b>1,295,500</b>	<b>54%</b>

# Canada Beef

## Statement of Expenses (International Operations)

for the 9 Months Ended

December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual as % of Budget
<b>Latin America</b>				
<b>OPERATIONS - Monterrey, Mexico</b>				
Staff Salaries & Fees	41,758	50,297	63,591	79%
Government Benefits (Pension, Insurance, etc.)	7,294	8,126	8,778	93%
Office Rent	21,424	24,196	29,165	83%
Office Insurance	477	477	1,206	40%
Utilities	1,174	1,288	4,550	28%
Janitorial Services	5,615	6,238	5,149	121%
Telephone, Facsimile, Internet	1,351	1,351	2,482	54%
Cell Phones	724	788	3,309	24%
Office Help	0	0	0	0%
Office Move Expenses	0	0	0	0%
Office Expenses and Supplies	1,886	1,932	4,136	47%
Office Equipment Repairs and Supplies	779	1,023	0	0%
Office Repairs and maintenance (Common Area Costs)	207	207	5,614	4%
Courier and Postage	1,649	1,649	1,400	118%
Computer Maintenance & Supplies	1,012	1,129	5,500	21%
Office Equipment - Lease Payments	458	515	700	74%
Travel Expenses	38	38	2,922	1%
Training and Professional Development	0	0	0	0%
Meeting Expenses	644	644	827	78%
Staff Entertainment & Incentives	75	226	0	0%
Dues, Fees, and Subscriptions	4,157	4,457	2,900	154%
Consulting and Legal Fees	819	819	1,724	48%
Audit Fees	8,953	10,062	16,546	61%
Bank Service Charges	566	596	500	119%
Capital Purchases	0	0	0	0%
Capital Purchases - Capitalization	0	0	0	0%
	104,768	121,455	161,000	75%
<b>MARKET DEVELOPMENT AND PROMOTION</b>				
Retail/Foodservice Promotions	78,665	120,539	183,914	66%
Trade Shows	0	0	0	0%
Trade Advertisements	10,339	10,339	10,179	102%
CB Website	14,035	16,708	26,000	64%
Consumer Marketing Materials	20,476	20,476	20,675	99%
Social Media	29,135	31,365	50,000	63%
Out-going Missions	0	0	0	0%
Demand Building Events	34,721	38,911	42,742	91%
Government Trade Commission Partner Programs	2,691	2,691	6,836	39%
Sponsorships and Event Marketing	12,821	22,904	21,785	105%
Distributor Education Programs	1,148	9,118	7,869	116%
Ad-Hoc Programs	0	0	0	0%
	204,031	273,051	370,000	74%
<b>TOTAL - LATIN AMERICA</b>	<b>308,798</b>	<b>394,506</b>	<b>531,000</b>	<b>74%</b>

# Canada Beef

## Statement of Expenses (International Operations)

for the 9 Months Ended

December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual as % of Budget
<b>China</b>				
<b>OPERATIONS - Shanghai, Guangzhou, China</b>				
Salaries & Benefits	90,302	102,043	138,210	74%
Accounting Services	32,062	36,438	61,200	60%
Rent	25,737	29,094	38,593	75%
Utilities	292	333	750	44%
Janitorial Services	4,521	5,119	6,901	74%
Telephone, Fax & Internet, cell phone	2,350	2,537	2,700	94%
Office Expenses and Supplies	505	520	3,000	17%
Courier & Postage	801	871	2,400	36%
Computer Maintenance & Supplies	2,655	2,973	5,261	57%
Office Equipment - Lease Payments	635	723	946	76%
Travel	156	168	2,008	8%
Professional Development	0	0	1,500	0%
Photocopier	0	0	500	0%
Hosting	89	541	500	108%
Dues, Fees and Suscriptions	3,466	3,466	5,000	69%
Consulting and Legal Fees	6,243	6,243	11,247	56%
Audit	0	0	1,742	0%
Bank Service Charges	290	298	542	55%
Capital Purchases	0	0	2,500	0%
Capital Purchases - Capitalization	0	0	(2,500)	0%
Foreign Exchange Loss (Gain)	22	374	0	0%
	170,125	191,741	283,000	68%
<b>MARKET DEVELOPMENT AND PROMOTION</b>				
Retail/Foodservice Promotions:	110,914	121,148	191,500	63%
Trade Shows	163,241	170,528	200,000	85%
Trade Advertisements	139	139	6,000	2%
Consumer Marketing Materials	29,140	30,100	62,000	49%
Social Media	869	869	38,000	2%
Out-going Missions	172	172	500	34%
Demand Building Events	21,119	21,173	30,000	71%
Government Trade Commission Partner Programs	2,271	2,719	14,000	19%
Distributor Education Programs	5,543	5,569	90,000	6%
Sponsorships and Event Marketing	7,818	7,854	14,000	56%
Ad Hoc Programs	0	0	0	0%
	341,224	360,270	646,000	56%
<b>TOTAL - CHINA</b>	<b>511,350</b>	<b>552,011</b>	<b>929,000</b>	<b>59%</b>

# Canada Beef

## Statement of Expenses (International Operations)

for the 9 Months Ended

December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual as % of Budget
<b>South East Asia</b>				
<b>OPERATIONS - Taipei, Taiwan</b>				
Staff Salaries & Fees	36,803	41,552	80,000	52%
Government Benefits (Pension, Insurance, etc.)	4,624	4,625	12,000	39%
Company Benefits (Pension, Insurance, etc.)	0	0	0	0%
Payroll Processing Fee	0	0	0	0%
Employee Assistance Program	0	0	0	0%
Career/Employment Counselling	0	0	0	0%
Contract Services	0	0	0	0%
Recruitment Costs	0	0	0	0%
Office Rent	13,830	16,140	21,912	74%
Office Insurance	0	0	0	0%
Utilities	85	115	500	23%
Janitorial Services	876	1,005	1,443	70%
Telephone, Facsimile, Internet	477	541	1,000	54%
Cell Phones	963	1,088	1,500	73%
Office Help	0	0	0	0%
Office Move Expenses	0	0	0	0%
Office Expenses and Supplies	755	755	1,200	63%
Courier and Postage	621	1,338	928	144%
Computer Maintenance & Supplies	1,096	1,211	3,259	37%
Office Equipment - Lease Payments	1,433	1,617	2,061	78%
Travel Expenses	353	353	2,209	16%
Training and Professional Development	0	0	1,500	0%
Meeting Expenses	59	59	258	23%
Staff Entertainment & Incentives	173	323	206	157%
Dues, Fees, and Subscriptions	413	643	206	312%
Consulting and Legal Fees	0	0	515	0%
Audit Fees	0	0	1,200	0%
Bank Service Charges	71	86	103	83%
Foreign Exchange Loss/(Gain)	27	27	0	0%
	62,631	71,478	132,000	54%
<b>MARKET DEVELOPMENT AND PROMOTION</b>				
Retail and Foodservice Promotion	20,281	24,281	96,390	25%
Trade Shows	7,898	13,229	20,410	65%
Canada Beef Website	10,334	11,244	12,800	88%
Social Media	555	707	10,000	7%
Consumer Marketing Materials	11,000	15,638	44,200	35%
Demand Building Events	5,600	5,600	11,200	50%
Sponsorship and Event Marketing	0	0	0	0%
Government Trade Commission Partner Programs	0	0	2,000	0%
Ad Hoc Programs	0	0	0	0%
	55,668	70,699	197,000	36%
<b>TOTAL - SOUTH EAST ASIA</b>	<b>118,299</b>	<b>142,178</b>	<b>329,000</b>	<b>43%</b>

# Canada Beef

## Statement of Expenses (International Operations)

for the 9 Months Ended

December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual as % of Budget
<b>South Korea</b>				
<b>OPERATIONS - Seoul, South Korea</b>				
Consulting and Legal Fees	22,200	28,706	48,000	60%
	22,200	28,706	48,000	60%
<b>MARKET DEVELOPMENT AND PROMOTION</b>				
Retail and Foodservice Promotions	19,540	19,540	58,287	34%
Trade Shows	17,153	17,153	19,068	90%
Trade Advertising	7,573	10,000	14,800	68%
Canada Beef Website	1,638	1,638	1,763	93%
Consumer Marketing Materials	0	5,629	47,841	12%
Demand Building Events	15,800	15,800	18,240	87%
Ad-Hoc Programs	0	0	0	0%
	61,704	69,759	160,000	44%
<b>TOTAL - SOUTH KOREA</b>	<b>83,904</b>	<b>98,465</b>	<b>208,000</b>	<b>47%</b>

## Canada Beef

### Statement of Operations (Unaudited) for the 9 Months Ended December 31, 2020

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual (Current Month) as % of Budget
<b>Revenues (A)</b>				
Check Off - Marketing	4,667,574	5,271,307	8,160,000	65%
Check Off - Public & Stakeholder Engagement	131,359	149,627	226,000	66%
Import Levy	818,628	920,373	902,000	102%
Govt of Canada - CAP** (SEE NOTE BELOW)	520,618	597,782	1,818,600	33%
Western Econ - Deferred Revenue Recog.	0	0	106,000	0%
Alberta Agriculture and Industry - EMDP	21,066	36,392	225,000	16%
EMDP Adminsitration Fee	2,469	4,064	25,000	16%
Interest	21,777	23,199	50,000	46%
Miscellaneous	18,485	18,540	0	0%
<b>Total Revenues (A)</b>	<b>6,201,977</b>	<b>7,021,284</b>	<b>11,512,600</b>	<b>61%</b>
<b>Expenses (B)</b>				
Board of Directors (Marketing Committee, costs not covered by the Check-off Agency)	3,100	7,600	65,000	12%
Marketing and Promotion (Schedule 1)	4,918,747	5,892,257	12,296,730	48%
<b>Total Expenses (B)</b>	<b>4,921,847</b>	<b>5,899,857</b>	<b>12,361,730</b>	<b>48%</b>
<b>Surplus/(Deficit) - (A) minus (B)</b>	<b>1,280,131</b>	<b>1,121,427</b>	<b>(849,130)</b>	<b>(132%)</b>

\*\* Funding Agreement Amendment - maximum available for 2020/21 is \$1,614,398

## Canada Beef

### Statement of Operations (Unaudited) for the 9 Months Ended December 31, 2020

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual (Current Month) as % of Budget
<b>Schedule 1 - Market Development and Promotion</b>				
Public & Stakeholder Engagement	92,261	102,461	189,400	54%
Domestic - Generic Beef	591,564	689,558	827,000	83%
Domestic - Consumer Marketing	498,621	651,070	975,000	67%
Global Marketing	150,875	171,929	830,000	21%
Domestic - Channel Marketing	126,660	147,910	590,000	25%
Communications	285,449	378,318	590,000	64%
Export Market Development	49,979	97,772	263,000	37%
Emerging Markets	9,624	9,624	51,574	19%
Latin America Market Development	71,975	109,364	248,940	44%
Japan Market Development	161,376	210,898	471,000	45%
South Korean Market Development	20,331	20,331	100,000	20%
China/Hong Kong Market Development	150,768	173,073	443,000	39%
South East Asia Market Development	39,217	63,274	170,000	37%
Canadian Beef Centre of Excellence	86,233	95,524	510,000	19%
<b>Unallocated Program Budget</b>	<b>0</b>	<b>0</b>	<b>1,037,486</b>	<b>0%</b>
	<b>2,334,931</b>	<b>2,921,104</b>	<b>7,296,400</b>	<b>40%</b>
Staff and Office Costs (Schedule 2)	2,583,816	2,971,153	5,000,330	
<b>Total Marketing and Promotion Expenses</b>	<b>4,918,747</b>	<b>5,892,257</b>	<b>12,296,730</b>	<b>48%</b>

### Schedule 2: Staff and Office Costs

Public & Stakeholder Engagement	22,782	26,553	36,600	73%
Domestic - Generic Beef	46,108	54,109	75,000	72%
Domestic - Consumer Marketing	51,646	60,422	75,300	80%
Global Marketing	691,545	811,461	1,138,400	71%
Domestic - Channel Marketing	182,115	213,762	380,000	56%
Communications	117,425	137,592	179,800	77%
Export Market Development	101,341	118,436	135,800	87%
Emerging Markets	0	0	0	0%
Latin America Market Development	191,719	207,624	316,000	66%
Japan Market Development	329,411	372,228	530,000	70%
South Korean Market Development	18,852	22,310	50,000	45%
China/Hong Kong Market Development	154,991	177,844	434,000	41%
South East Asia Market Development	83,747	95,373	133,000	72%
Canadian Beef Centre of Excellence	287,195	324,860	799,500	41%
Calgary and Mississauga Offices	304,938	348,578	716,930	49%
<b>Total Staff and Office Costs</b>	<b>2,583,816</b>	<b>2,971,153</b>	<b>5,000,330</b>	<b>59%</b>



## Canada Beef

### Statement of Operations (Unaudited) for the 9 Months Ended December 31, 2021

	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual (Current Month) as % of Budget
<b>Revenues (A)</b>				
Check Off - Marketing	5,486,779	6,719,520	8,935,000	75%
Check Off - Public & Stakeholder Engagement	137,685	168,980	225,000	75%
Import Levy	721,507	762,411	950,000	80%
Govt of Canada - CAP** (SEE NOTE BELOW)	1,071,202	1,239,570	1,800,000	69%
Western Econ - Deferred Revenue Recog.	0	0	106,000	0%
Alberta Agriculture and Industry - EMDP	40,883	55,961	225,000	25%
EMDP Adminsitration Fee	6,338	9,685	25,000	39%
Interest	21,310	24,503	50,000	49%
Miscellaneous Revenue	6,253	6,487	0	0%
<b>Total Revenues (A)</b>	<b>7,491,958</b>	<b>8,987,117</b>	<b>12,316,000</b>	<b>73%</b>
<b>Expenses (B)</b>				
Board of Directors (Marketing Committee, costs not covered by the Check-off Agency)	3,200	3,950	65,000	6%
Marketing and Promotion (Schedule 1)	6,148,758	7,418,358	13,814,910	54%
<b>Total Expenses (B)</b>	<b>6,151,958</b>	<b>7,422,308</b>	<b>13,879,910</b>	<b>53%</b>
<b>Surplus/(Deficit) - (A) minus (B)</b>	<b>1,339,999</b>	<b>1,564,808</b>	<b>(1,563,910)</b>	<b>(100%)</b>

\*\*CAP application approved for \$3.6m over two years.

## Canada Beef

Statement of Operations (Unaudited)  
for the 9 Months Ended  
December 31, 2021

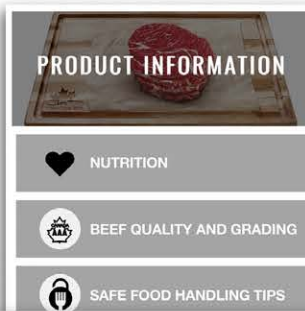
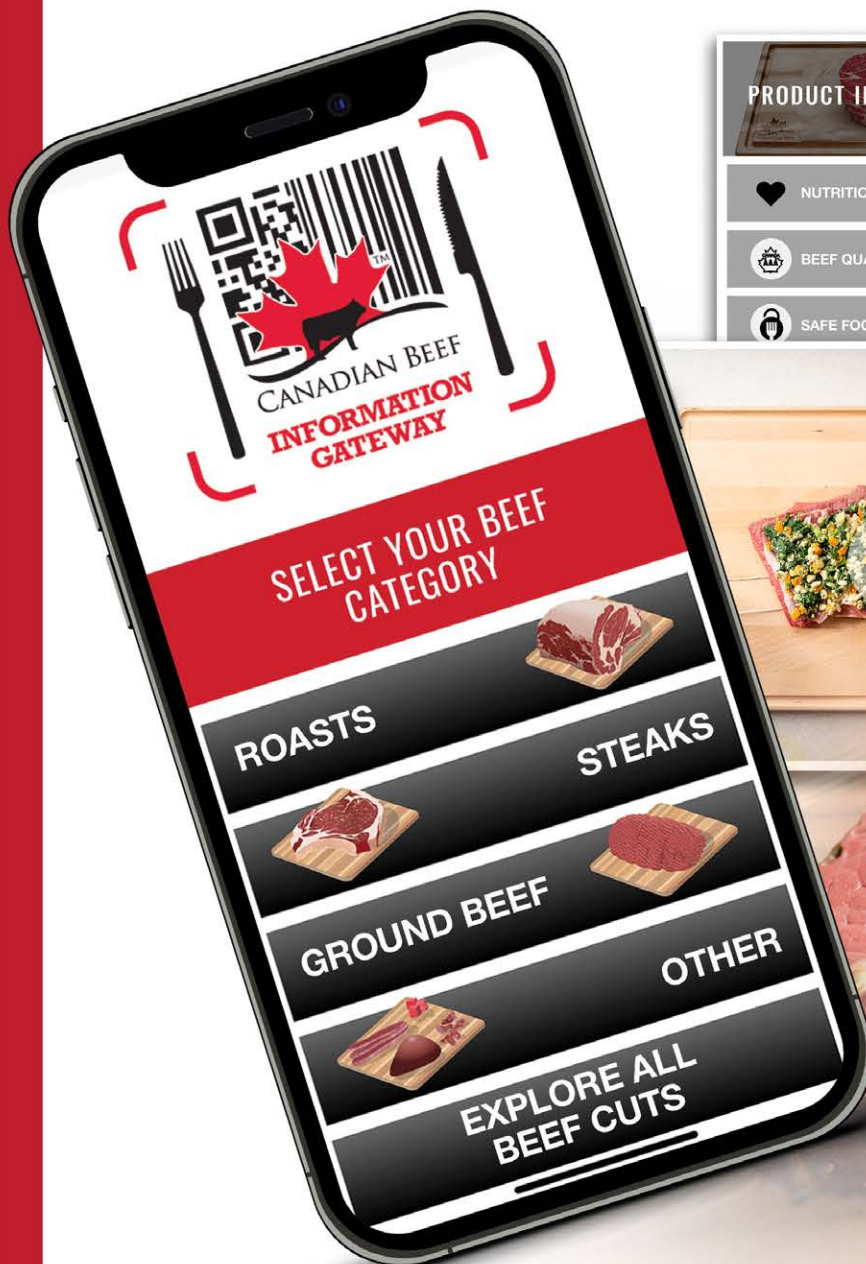
	Actual YTD (Previous Month)	Actual YTD (Current Month)	Annual Budget	Actual (Current Month) as % of Budget
<b>Schedule 1 - Market Development and Promotion</b>				
Domestic - Generic Beef	492,345	538,259	1,007,000	53%
Public & Stakeholder Engagement	59,230	75,137	227,000	33%
Global Marketing	654,905	742,411	1,060,000	70%
Domestic - Channel Marketing	130,602	212,394	1,185,000	18%
Domestic - Consumer Marketing	483,231	663,565	1,095,000	61%
Digital Marketing	245,912	300,675	510,000	59%
Communications	57,220	66,195	150,000	44%
Export Market Development	138,589	186,254	471,878	39%
Japan	298,755	378,097	795,500	48%
Latin America	204,031	273,051	370,000	74%
China/Hong Kong	341,224	360,270	642,000	56%
Taiwan/South East Asia	55,668	70,699	197,000	36%
South Korea	61,704	69,759	160,000	44%
Emerging Markets	92,632	128,322	199,622	64%
Centre of Excellence (CBCE)	213,426	258,213	952,990	27%
Prior Year Projects (Accrual Adjustments)	6,716	17,508	0	
	<b>3,536,189</b>	<b>4,340,808</b>	<b>9,022,990</b>	<b>48%</b>
Staff and Office Costs (Schedule 2)	2,612,569	3,077,550	4,791,920	
<b>Total Marketing and Promotion Expenses</b>	<b>6,148,758</b>	<b>7,418,358</b>	<b>13,814,910</b>	<b>54%</b>
<b>Schedule 2: Staff and Office Costs</b>				
Domestic - Generic Beef	74,917	88,727	77,400	115%
Public & Stakeholder Engagement	22,171	26,020	35,920	72%
Global	665,870	837,540	1,019,900	82%
Channel Marketing	174,209	207,565	409,200	51%
Domestic - Consumer Marketing	87,279	102,834	77,400	133%
Digital Marketing	119,648	140,320	185,200	76%
Communications	67,893	81,491	0	0%
Export Market Development	101,426	118,959	154,400	77%
Japan	291,838	319,661	504,000	63%
Latin America (Mexico)	105,001	121,689	161,000	76%
China/Hong Kong	170,125	191,741	283,000	68%
Taiwan/South East Asia	62,658	71,478	132,000	54%
South Korea	22,200	28,706	48,000	60%
Emerging Markets	0	0	0	0%
Canadian Beef Centre of Excellence (CBCE)	271,843	313,439	673,400	47%
Calgary & Mississauga	375,491	427,379	1,031,100	41%
<b>Total Staff and Office Costs</b>	<b>2,612,569</b>	<b>3,077,550</b>	<b>4,791,920</b>	<b>64%</b>



## INVESTMENT PLAN

2022 – 2023

Investing in a *Strong Future*  
for Canada's Cattle, Beef  
and Veal 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 2022 – 2023.

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, and Taiwan.

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 2022-2023.

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 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 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 a. METRIC 1: To support the retail beef demand above 115 (Index 2000=100) b. METRIC 2: To support the wholesale beef demand above 105 (Index 2000=100) 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 a. METRIC 1: To reduce the labour shortage by 50% b. METRIC 2: To reduce cost disadvantages compared to main competitors by 2%
	<b>3. PRODUCTIVITY</b>	Improve production efficiencies throughout the supply chain a. METRIC 1: To reduce average open rates by two percentage points in each region b. METRIC 2: To reduce average calf death losses to 5% in each region c. METRIC 3: To improve feed efficiency by 5% 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 has 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 Canada 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 Global Roundtable for Sustainable Beef, 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 Global Roundtable for Sustainable Beef.
- 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 roundtable 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 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, consumers, 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.  
  
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.
  - c. 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 Web Sites	•			•
Trade Web Sites	•	•	•	•
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.



## ORGANIZATION 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 and veal brands for stakeholder partners around the world.

These efforts increase awareness and demand for Canadian beef and veal and the value producers receive for their cattle. Canada Beef delivers its business strategy by leveraging Canadian beef and veal brands through consumer marketing and market development activities in Canada and key export markets around the world.

Canada Beef 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 USA) and the Canadian 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 25 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 third 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.

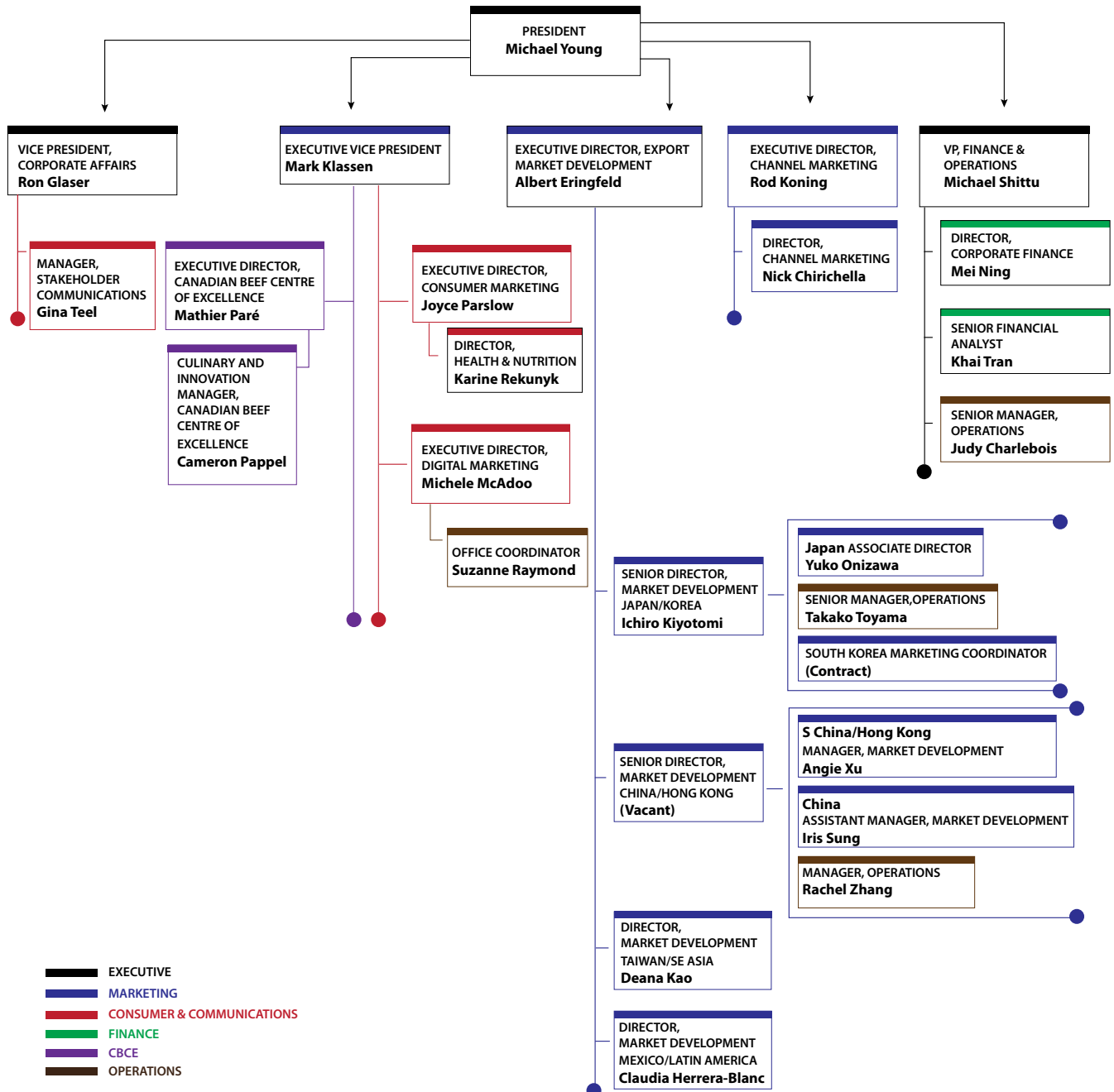
## Canada Beef Promotion and Marketing Committee 2022-2023

Table #3 Promotion and Marketing Committee 2022-2023

Name	Industry Association	Representation
Mike Kennedy (Chair)	Canadian Meat Council	Packers, processors
Coral Manastersky (Vice Chair)	Canadian Association of Importers Inc.	Further processors and importers
Russ Mallard (Finance Chair)	Canadian Meat Council	Packers, processors
John Curtis	Canadian Meat Council	Processors, traders, and brokers
Andre Forget	Canadian Meat Council	Processors, traders, and brokers
David Francis	PEI Cattle Producers Association	Primary producers
Jennifer Haley	Veal Farmers of Ontario	Primary producers
Jack Chaffe	Beef Farmers of Ontario	Primary producers
Steve Christie	Retail/Foodservice	Channel distribution
Cameron Blake	Member at large	Channel marketing
Hubert Lau	Member at large	Food supply chain traceability
Mike Guest	Member at large	Primary producer, regional packer
Vacant	Member at large	Retail/foodservice professional



**CANADA BEEF**  
November 5, 2021



## 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.*

# GLOBAL MARKET ANALYSIS

## THE OPERATING ENVIRONMENT

Table # 4: Global operating environment

### CONSUMER TRENDS

1. Global Gross Domestic Product (GDP) is closely correlated with global beef consumption. The increasing global population and middle-class are expected to increase global GDP and global beef consumption to outpace production and support global beef prices.
2. Per capita red meat consumption is closely correlated with disposable income. Declining transfer payments in countries that have not recovered from sharp increases in pandemic-related unemployment may find red meat consumption declining or product mixes demanded shift to value brands and cuts.
3. Food price inflation has the potential to trigger consumer price sensitivities and a decline in red meat consumption or a shift to value brands and cuts.
4. Higher meat prices may keep consumers cautious and open to trying protein alternatives.
5. Foodservice sectors in all major beef markets including the EU, UK, U.S., China, Canada, Japan, and South Korea were struggling under health restrictions in 2021; subsequently, demand shifts into retail, convenience channels and products remain present.
6. Consumers are seeking out red meat choices with free-from, animal welfare and sustainability claims and credentials.
7. The surge of beef imports into China and Southeast Asia caused by a pork supply gap from African Swine Fever is expected to slow in 2022.

### COMPETITORS

1. **Domestically:** Chicken and pork remain the two major animal protein competitors in the marketplace. The relative retail price ratio for beef/pork in Canada has been slightly above the five-year trend since spring 2020. The beef/chicken retail price ratio has increased then decreased cyclically every one to two months since spring 2020.
2. **Internationally:** Hog restocking in China has been delayed and will maintain a pork supply gap in 2022.
3. The U.S., 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. The global plant-based protein market's annual growth rate is anticipated to increase 9.5% (CAGR) from 2020-2027 to \$21.23 billion. Sales during the pandemic drove some market growth but are expected to moderate.
5. Canada's sustainable beef position provides an important competitive advantage if production can grow.

### MARKET ACCESS

1. Countries primarily importing inputs are paying large prices on the global market and may face cost disadvantages in production.
2. A temporary disruption in global trade flows in 2020 led to a collection of shipping containers stockpiling at select ports. Freight costs are up fivefold over the last 12 months.
3. China submitted its intent to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) in September 2021; several obstacles, including human rights sanctions and territorial disputes, would need to be overcome first. The Biden Administration does not support joining as is.
4. The Canada-UK Trade Continuity Agreement signed December 9, 2020, included provisions for further trade negotiations within one year and to work towards a new comprehensive agreement within three years. The UK submitted notification of its intent to join CPTPP in February 2021.

# DRIVERS AFFECTING THE OPERATING ENVIRONMENT

## STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

Table # 5: S.W.O.T

### STRENGTHS

#### Funding:

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

#### Safety and Integrity:

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

#### High Herd Health:

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

#### Eating Quality:

The Canadian beef grading system continues to deliver high-quality beef to the world's table.

#### Yield Performance:

Exact specifications combined with high-yield grades deliver profitable results for end-user customers.

### WEAKNESSES

#### Supply:

Global demand for high-quality grain-fed beef is outpacing supplies.

#### Global Demand:

Long-run per capita meat consumption is forecast to decrease 5% by 2030 in all countries except for Asia, including the U.S. (1%) and Canada (-7%).

#### Protein Competitors:

Plant-based proteins will continue to make gains in quick serve restaurant and retail channels. Poultry meat's share as a percentage of all protein from meat sources is forecast to increase 2% to 41% by 2030 on affordability and perceived health benefits with beef's share lower (20%).

#### Inputs:

Labour availability, feed prices and potential disruptions in supply chains, could impact production, availability, and prices going into 2022.

#### Outputs:

The proportion of Canada AAA and Prime grades (71% of all 'A' grades YTD 2021) increased in 2020 and 2021 but lags U.S. production (83% of all 'A' grades YTD 2021). Prime and Choice grades support domestic and export consumer demand and provide higher cash returns throughout the distribution channels.

### OPPORTUNITIES

#### Protein Competitors:

Per capita chicken consumption in Canada was down 1.9% and pork consumption was down 14.9% in 2020 versus 2019. Beef consumption in Canada is projected to be down 5% in 2021p, after a 0.3% increase in 2020.

#### Consumer Preference:

Consumers continue to seek food products based on quality certification, origin, price, traceability, and antimicrobial use. Food safety, price, quality and how cattle are raised are key factors in choosing beef.

#### Foodservice/Retail Shifts:

Foodservice sectors in most countries are recovering slowly. This will allow for greater carcass value.

#### 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.

#### Competition:

Australia and South American beef production is projected to be tight in 2021 and 2022, reducing exports and leaving a gap in the global market that Canada could fill.

#### Chilled Beef Pilot (China):

Pursue Chinese importers and distributors and end-user partners to fully develop and promote this sector.

### THREATS

#### Competition:

After years of drought the rains returned to Australia. Aggressive restocking has pushed Australian beef prices strongly higher. Consequently, lower priced lean trim is entering several markets (Asia, the U.S., and Canada) from less traditional sources.

#### Market Access:

The U.S. has gained considerable market share in China with their Phase 1 Trade Deal, as well as in South Korea and in Japan. Canadian exports to China in 2021 have matched 2019 volumes from January-July.

#### Increased Activism:

The actions of anti-meat groups invite greater scrutiny of industry practices.

#### Negative Media:

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

#### Economic Instability:

Economic recovery from the pandemic is uneven and complex within countries and among countries. A significant amount of uncertainty still exists with respect to recovery, especially with respect to incomes and in the full service restaurant sector.

## GLOBAL MARKETING HIGHLIGHTS & 2022 OUTLOOK

Rising beef prices in 2020 were attributed to supply and demand shocks. The global beef price rose further in 2021 following shipping and labour disruptions, periodic injections of returning foodservice demand, and inflationary support from government transfers. Prices for 2022 are at risk of rising higher with tight global cattle supplies.

At the same time, global Gross Domestic Product (GDP) is expected to rebound from contraction in 2020 (3.5%). Global GDP is strongly correlated with beef consumption which is expected to grow in tandem. If the historical relationship continues, global beef consumption could grow by approximately 12 million tonnes over the next 10 years. Global beef production is projected to rise but not enough to meet that kind of demand. In the next 10 years, the Food and Agriculture Organization (FAO) projects that beef production will grow by four million tonnes, leaving a shortfall of approximately eight million tonnes of beef.

African Swine Fever (ASF) is still sweeping Asia and is being watched in the Dominican Republic and Haiti off the coast of Florida. ASF in China, originally reported in August 2018, led to global pork production and consumption plummeting. Global protein trade flows have shifted to fill the gap in Asian pork supplies. These primarily pork consuming nations have shifted to beef and other proteins as an alternative to pork.

## CANADA 2021 SUPPLY HIGHLIGHTS

On July 1, 2021, total cattle inventories were up 0.2% at 12.23 million head. Beef cow inventories were reportedly down 1.7% to 3.55 million head, but beef replacement heifers were up 3.8% at 654,700 head.

Feeder imports at 364,900 head from January through November 2021 were up 54% from the same period in 2020. Feeder imports for year-end are projected to be up 40% to 370,000 head, keeping Canada a net importer of feeder cattle for the third year in a row. The feeder basis was positive until early June when it turned negative but remained around -\$5/cwt despite higher feed costs.

Fed cattle marketings are projected to be up 4.7% this year to 3.27 million head: with domestic slaughter up 7.0% to 3.02 million head, the highest since 2005, and exports down 17% to 254,700 head. Non-fed marketings increased after being down 7.2% in 2020 due to pandemic related logistics and as drought is moving more cows to town. Non-fed marketings are projected to be up 7.2% to 770,000 head in 2021; this is back to 2019 levels but is 8% higher than the five-year average. Non-fed domestic slaughter is projected to be up 11.9% to 556,700 head with exports down 3.4% to 213,600 head. Overall slaughter cattle marketings are projected to be up 5.1% in 2021.

Total beef production (domestic and live slaughter exports) in 2021 is projected to be up 5.2% at 3.58 billion pounds (1.62 million tonnes). The increase is driven primarily by domestic production, which is projected to be the highest since 2005, up 7.7% from 2020 to 3.10 billion pounds (1.41 million tonnes). Live slaughter exports are projected to be down 11.7% to 385 million pounds (174,500 tonnes) as a larger portion of cattle were processed in Canada this year (89% vs. 86% in 2020).

## CANADA 2022 SUPPLY OUTLOOK

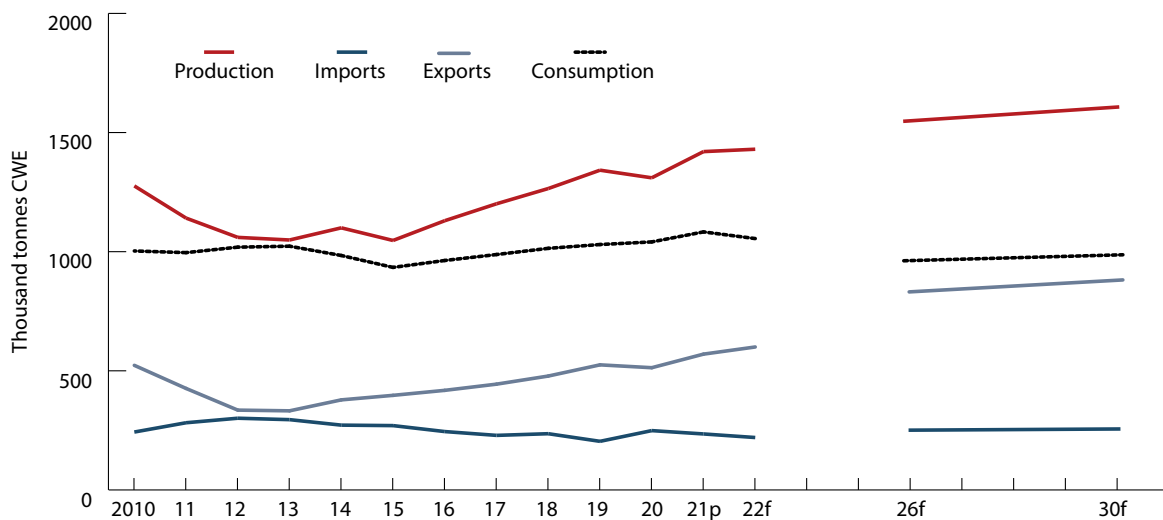
On July 1, 2021, the calf crop was 56,400 head larger and there were 10,500 head more beef feeders outside of feedlots than last year. However, drought resulted in early placement of calves into feedlots and more cows coming to market in the second half of the year. Cattle on feed inventories were up 139,700 head from last year on December 1<sup>st</sup>. Most of the larger placements seen in July and August will show up in 2022. From January through August, Canada was a net feeder importer of 155,300 head compared to being a net importer of 45,000 head.

In 2022, fed cattle marketings are forecast to be up 2.8% at 3.37 million head with domestic slaughter up 0.9% at 3.01 million head and exports up 25.1% at 318,600 head. Non-fed marketings are forecast to be down 6.3% (assuming the drought does not continue) to 721,400 head with slaughter down 9.4% at 504,100 head (as packers prioritize fed cattle) and exports up 2.4% at 218,700 head. Overall, slaughter cattle marketings in 2022 are forecast to be up 1.1% at 4.09 million head, the largest since 2009. Total beef production (domestic and live exports) is forecast to be down 0.6% at 3.56 billion pounds. Domestic production is forecast to be down 0.4% around 3.09 billion pounds (1.40 million tonnes) and live slaughter exports down 2.7% to 3.75 million pounds (172,000 tonnes).

Overall, cattle marketings in 2021 and 2022 are expected to be the highest in over a decade and will support investments in marketing, research, and stakeholder engagement.

## CANADA BEEF SUPPLY AND DEMAND BALANCE 2010-2030F

### CANADA BEEF DISPOSITION



Source: USDA, FAS PSD, GIRA, FAO



## CANADA 2022 DEMAND FACTORS

Economic uncertainty surrounds the near-term outlook. Government transfer payments are winding down, but the unemployment rate is still high, at 6.9% in September 2021 versus 5.6% in September 2019. Carbon taxes, house prices, and consumer price inflation may have consumers looking to save where they can.

For many, the meat counter is perceived as a good place to start saving. Research by the Agri-foods Analytics Lab at Dalhousie this summer found that 49% of Canadians have limited meat purchases to save money on food. They also found that the older you are, the more aware you are of food inflation. News about inflation and rising grocery prices often target meat opposed to other aisles and can result in a more cautious consumer.

Perceived or actual, prices can only rise so high before demand falls. As a result, beef sales volumes at retail in Canada have reportedly declined 6% from May to September 2021, with pork sales down 17% and chicken sales down 12%. With sales declining, retail prices for beef are still high. There are many reasons for high meat prices: feed costs, the rising cost of doing business using heightened sanitary measures, transportation costs, labour availability, higher wages, carbon taxes and capital flight from the domestic food processing sector among them.

While most Canadians intend to keep meat in their diets, many other affordable options are on the market. The alternative protein market continues to see strong interest and investment. Drivers other than price include meat availability amidst growing global protein demand, resource allocation, technology and innovation, health and social justice perceptions, a generational shift, and a shift toward prepared and convenience food. Many are just looking for more variety in their diet.

The effort of consumers to save at the grocery store may accelerate demand for food rescuing businesses and platforms as well. The same Dalhousie research found 36% to 46% of Canadians across the country are willing to buy something to 'eat tonight' to save money. The services also satisfy the increasingly ethical approach consumers are taking when choosing their food. Whether it's an environmental or animal welfare outcome consumers shop for, wasting less food certainly satisfies a desire to do good.

The foodservice sector has borne the brunt of rising costs and declining demand more acutely than others. In the months following March 2020, many Canadians jumped off the treadmill of consumption, slowed down and reflected on their priorities. Families spent more time together, ate more meals together and cooked more together at home. Canada's Food Price Report 2021 estimates that pre-pandemic ratios of retail to foodservice buying were 62:38 before the pandemic, and that the ratio dropped as low as 91:9 during the pandemic, returning to 74:26. There has been less 'bounce-back' for full serve restaurants than quick-service restaurants that have benefitted from return to work and travel. The trend toward consumption at home and at quick serve and away from full serve restaurants will continue to affect the beef cut mix demanded at wholesale.

## INTERNATIONAL OUTLOOK

A primary driver of beef consumption projections for 2021 has been the variable performance of full serve and quick serve restaurants. Quick serve restaurants have recovered more fully than full serve options that have been sluggish to bounce back around the world. Full serve sales are still under pressure in Japan, South Korea, the U.S., Canada, China, and the European Union (EU) due to restrictions to gatherings and travel. Demand remains firm in the retail channels in these markets. Further headwinds affecting global demand and trade flows include diplomatic tensions (between China-Australia, China-Brazil), elevated unemployment rates, and food inflation.

More positively, economic growth is expected for 2021p and 2022f for major beef importing countries and is expected to support global beef consumption. Despite the positive outlook, growth will be uneven with many nations still recovering from severe economic hardships. While total beef consumption is projected to grow with increasing populations, middle-class incomes and GDP, per capita beef consumption is expected to shrink by 5% by 2030f in most regions except Asia.

## REAL GDP GROWTH PROJECTIONS FOR SELECT BEEF IMPORTING COUNTRIES AND MAJOR CANADIAN BEEF EXPORT DESTINATIONS 2021P - 2022F

Table # 6: GDP Projections for beef importing countries

Country	Share of global beef & veal imports (2018-20)	2021p GDP	2022f GDP
China	15%	+8.5%	+5.8%
U.S.	14%	+6%	+3.9%
Japan	9%	+2.5%	+2.1%
Vietnam*	5%	+4.8%	+6.5%
South Korea	5%	+4%	+2.9%
Russia	4%	+2.7%	+3.4%
European Union	4%	+4.2%	+4.4%
United Kingdom	3%	+6.7%	+5.2%
Canada	2%	+5.4%	+4.1%
Mexico	1%	+6.3%	+3.4%
Brazil	<1%	+5.2%	+2.3%
World		+5.7%	+4.5%

Source: OECD, \*World Bank

International demand for Canadian beef is projected to be up 4.2% in 2021p with the highest deflated export value per tonne on record since 1990. Market share of Canadian beef exports was down slightly to the U.S. (69%), increased slightly to Japan (11%), Southeast Asia (4%), and Mexico (5%), but remained relatively steady to South Korea (2%) and China and Hong Kong (6%) on increased volumes to China and lower volumes to Hong Kong. Canadian beef exports were up 25% from January to August 2021.

In the short run, there is potential to capture market share from Australia and Argentina, whose cattle supplies in 2021p were low and consolidating. The U.S. herd is in a liquidation phase. Brazil's young heifers have been put into production to meet Chinese demand, limiting supply of replacements for the future. This all means that global beef prices are likely to rise further before they decline.

## JAPAN OUTLOOK

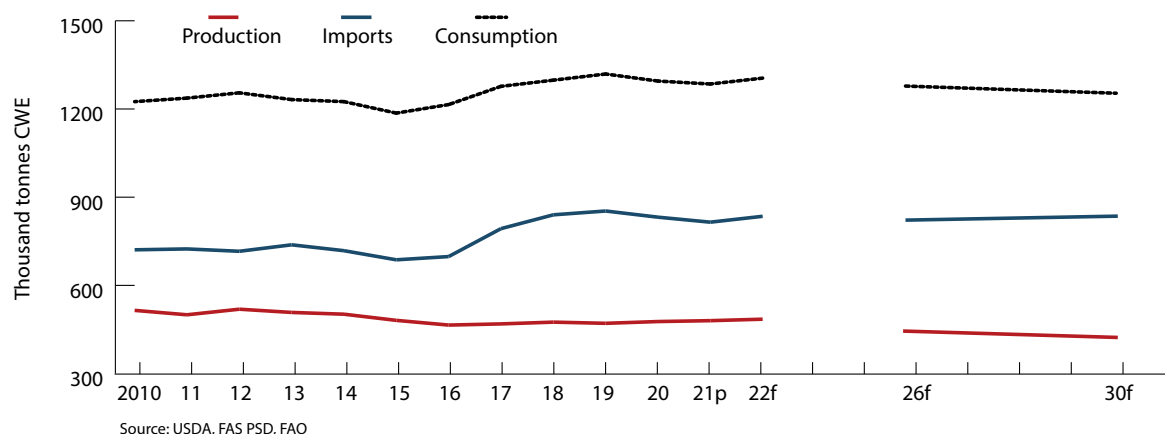
Cattle inventories in Japan are forecast to increase in 2022f, with a notable increase in cross-bred cattle, following Ministry of Agriculture, Forestry and Fisheries incentive for cattle producers. Higher inventories will support beef production in 2022f, forecast to be up 1.0% from 2021p. In the medium and long-run, beef production is forecast to decline, down 6.4% from 2021p by 2026f and down 12.1% by 2030f.

Like many countries, Japan is experiencing a decline in foodservice and tourism demand that is slowing its economic recovery. Tourism and foodservice account for an estimated 60% of beef consumption in Japan. Restrictions on restaurants and travel that were still in place in the first half of 2021 tempered beef consumption that is projected to be down 0.8% from 2020 in 2021p. Beef consumption is forecast to rebound in 2022f, up 1.6% from 2021p. In the medium term, beef consumption is forecast steady to down slightly. Long-run consumption is forecast to shrink, down 1.6% from 2021p by 2030f.

Japanese beef imports are forecast to increase in 2022f but will shift between international suppliers according to price sensitivities. In the long-run, imports are forecast to grow by 3.4% from 2021p levels by 2030f.

## JAPAN BEEF SUPPLY AND DEMAND BALANCE 2010-2030F

### JAPAN BEEF DISPOSITION



## CHINA AND HONG KONG OUTLOOK

African Swine Fever (ASF) outbreaks continue and are still impacting the global protein markets. The virus was first reported in August 2018 leading to the liquidation of two-thirds of China's hog herd and consequently half the global supply of pork. Reduced inventories led to unprecedented profitability in the Chinese hog sector that resulted in overproduction in 2020 and eventually lower hog prices. The low hog prices and the resurgence of ASF outbreaks in 2021 led to further liquidation and has delayed restocking. The disease has left a crater in global pork production while spurring an international search for alternative protein supplies. Prior to 2018, China imported less than US\$10 billion in pork, beef, and poultry products each year. By 2020, China was importing over US\$25 billion in protein, with similar figures projected for 2021p.

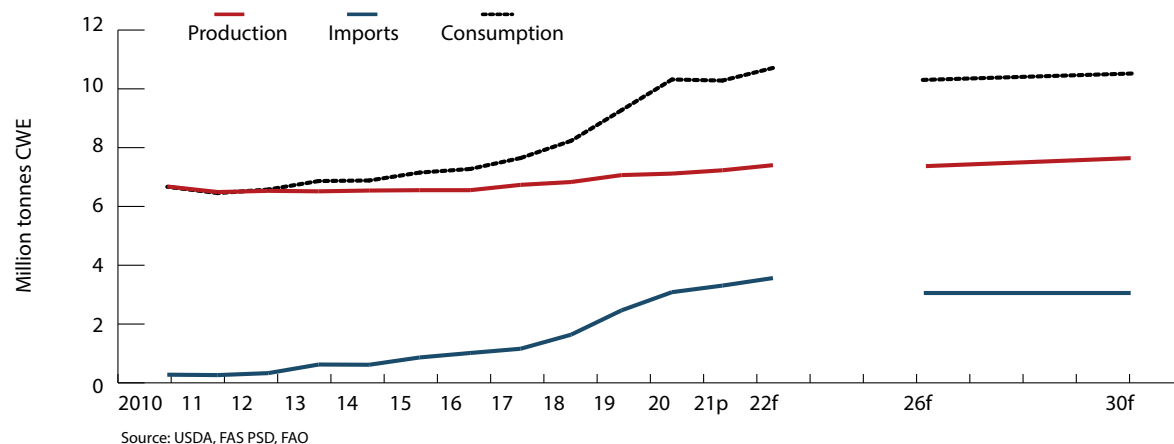
Much of Chinese protein demand was filled by South America. Brazil and Argentina supplied over 60% of China's beef imports January through July 2021. When two atypical cases of Bovine Spongiform Encephalopathy (BSE) were reported in Brazil in September, Brazilian beef imports were suspended, and remain that way as of October 28, 2021. China and others have called into question the Brazilian process for reporting to the World Organisation for Animal Health (OIE). China still has not re-opened to Ireland after their atypical BSE case in 2020 and banned British beef from cattle under 30 months of age on September 29, 2021, after a case of BSE was reported.

Australia has historically been the dominant supplier of grain-fed beef to China but diplomatic tensions between the two nations have Chinese importers looking to the U.S. to fill grain-fed supplies for hotpot, barbeque, and grill steak. Chinese imports of U.S. beef January through August 2021 were up more than eight-fold compared to the same period in 2020. These imports satisfy a portion of the U.S.-China Phase 1 Trade Deal. Imports of Canadian beef have more than doubled from January through August 2021, compared with the same period in 2020, but remain around 1% of China's total beef imports.

Chinese GDP is projected to remain strong in 2021p as the middle class is expected to grow further. Beef prices and import demand are expected to remain strong in 2021 and 2022. Higher beef prices will encourage production among Chinese cattle producers. Imports are expected to slow in 2022f then decline as production increases slightly and consumption steadies.

## CHINA BEEF SUPPLY AND DEMAND BALANCE 2010-30F

### CHINA BEEF DISPOSITION



### SOUTH KOREA OUTLOOK

In 2021, beef demand in South Korea was strong and remains firmly in the retail sector as pandemic related level 4 restrictions and restaurant curfews are still a reality in the region. The resulting decline in foodservice demand has been drastic. The Korean Rural Economic Institute reported that beef consumption patterns transitioned from 2019 to 2020 to higher consumption of beef at home (from 51.8% in 2019 to 54.9% in 2020) and to lower beef consumption of beef in restaurants (48.2% in 2019 versus 45.1% in 2020). Koreans have turned to Home Meal Replacement (HMR) items sold in convenience stores. Meal Kit options grew from 270 product types in September 2019 to 1,010 product types by October 2020. These HMRs, Hanwoo beef, and seasonal recipes such as rib soup for dining at home will drive imports in the near term. Korean beef consumption is projected to be up 8.3% in 2021p from 2020. While consumption will moderate in the near term, beef consumption is on a long-term growth trend. Beef consumption is forecast to be up 7.4% by 2030f compared to 2021p levels.

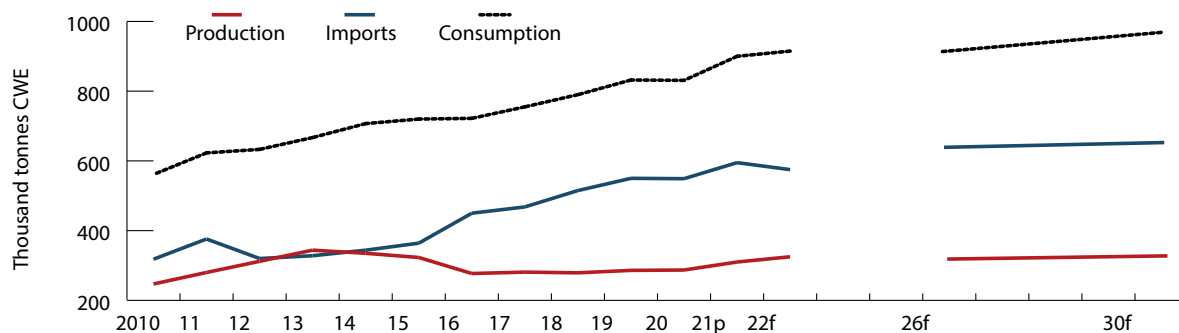
Cattle producers intensified production to take advantage of consumer demand for beef and strong cattle prices. Production is projected to be up 8% in 2021p from 2020 with steady growth. Beef production is forecast to be up 5.1% from 2021p by 2030f. Higher production will pressure beef prices and will have a slight effect on import levels in the short to medium term. Still, consumption volumes are roughly three times domestic production.

In the near term, beef imports are projected to rise in 2021p, up 8.4% over 2020 volumes to meet beef demand. Sustained year-over-year import growth at these levels is not expected. Imports are forecast to moderate in 2022f on a slowing economy and higher production. The medium and long-run trend for South Korean imports is generally higher though. Imports are forecast to be up 6.5% from 2021p by 2026f and up 8.5% by 2030f.

Imports of Canadian beef into South Korea were up 91% in volume and 122% in value in the first eight months of 2021, at 6,878 tonnes (product weight). Canadian beef has made an attractive alternative to importers wanting to avoid high prices from the U.S. and Australia. The U.S. remains the largest supplier with approximately 50% market share in 2021, followed by Australia at 40%.

### SOUTH KOREA BEEF SUPPLY AND DEMAND BALANCE 2010-30F

#### SOUTH KOREA BEEF DISPOSITION



Source: USDA, FAS PSD, FAO

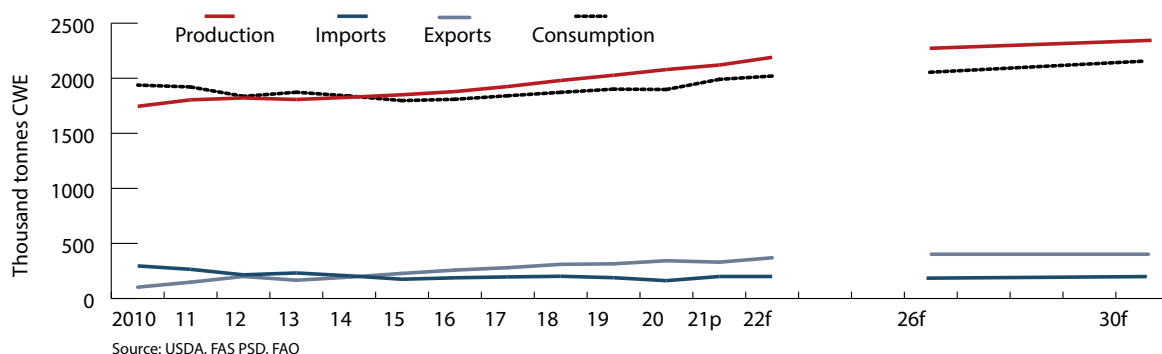
## MEXICO UPDATE

Domestic consumption is expected to strengthen as the economy rebounds in Mexico in 2021p and 2022f after a significant contraction in 2020. Domestic demand for family-style and value cuts strengthened during the pandemic, while demand for higher priced steaks and loins decreased. Imports plummeted in 2020 ( -14.3%) but are projected to surge ahead in 2021p (+23.5%) and stay steady in 2022f. The medium and long-run trend, however, will be toward declining imports into Mexico.

Production and consumption are projected to increase in the near, medium and long run, supported by population growth and international and domestic demand. Production is projected to be up 2.2% in 2021p and is forecast to increase another 3.3% in 2022f. By 2026f, production is forecast to be up 6.7% from 2021p levels and up 10% by 2030f. Record beef exports in value and volume, growing domestic demand as the economy rebounds and improved cattle productivity all support the production growth. As production ramps up on a long-term trend toward expansion and vertical integration, exports are projected to grow as supplies from other major suppliers could tighten. Domestic consumption is expected to grow 1.9% in 2021p from 2020 and another 4.4% in 2022f. Consumption is forecast to be up 7.3% by 2030f from 2021p levels.

## MEXICO BEEF SUPPLY AND DEMAND BALANCE 2010-2030F

### MEXICO BEEF DISPOSITION



### SOUTHEAST ASIA UPDATE

African Swine Fever (ASF) affected both domestic production of pork in Southeast Asia as well as the availability and price of nearby protein alternatives. Declines in domestic pork production since 2018 have led to sharp decreases in pork consumption, particularly in Vietnam and the Philippines. Taiwan has so far been successful in keeping ASF offshore. Taiwan, Vietnam, and the Philippines have historically been Canada's three primary export markets for beef in Southeast Asia.

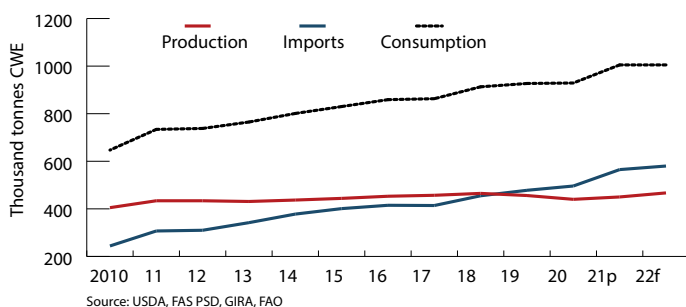
Southeast Asia will be recovering from ASF for several more years at least. The slow recovery of pork production combined with the 'rising wave' of the middle-class in the region will support beef consumption. Beef consumption is projected to increase by 8% from 2020 to surpass 1 million tonnes in 2021p and is forecast to grow another 3% in 2022f.

Higher beef imports were needed to balance the sharp increase in consumption in 2021p. Southeast Asian beef imports are projected to be up 14% to 565,000 tonnes in 2021p; but are forecast to moderate in 2022f, up just 2.7% to 580,000 tonnes. Imports will be needed to balance higher consumption over the next decade with only modest gains to be made in domestic beef production.

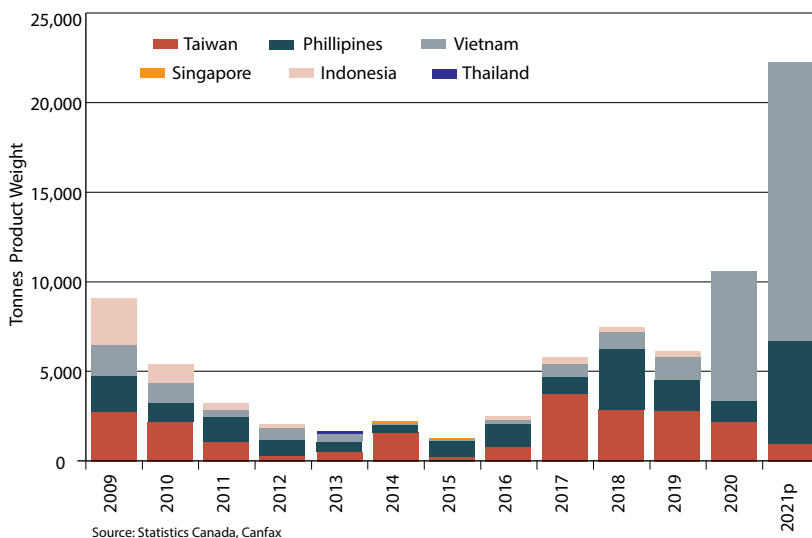
Canadian beef exports to Southeast Asia are projected to more than double in 2021p despite exports to Taiwan being down 48.5% year to date. The growth has come from the Philippines and Vietnam where growth has more than tripled. Canadian beef exports to these regions have historically been volatile from year to year. Export volumes may be sustained in 2022f if prices stay low (down 6% per unit year-to-date), but as Australian production ramps up in 2023 and 2024 and China rebuilds its hog herd, competition will affect Canadian volumes into the region.

### SOUTHEAST ASIA BEEF SUPPLY AND DEMAND BALANCE 2010-22F

#### SOUTHEAST ASIA BEEF DISPOSITION



#### CANADIAN BEEF EXPORT VOLUMES TO SE ASIA



### EUROPEAN UNION (EU27)

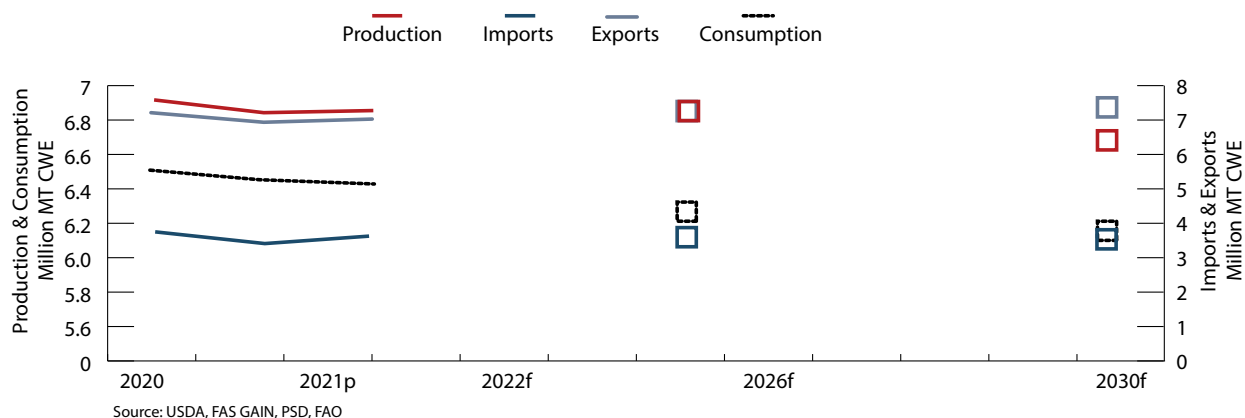
The EU27 is facing a tight beef market. Domestic production is projected to be down 0.6% in 2021p from 2020, with steady to negative growth in the medium term. Lower carcass weights are coming in alongside lower slaughter numbers. By 2030f, production is forecast to be 2.2% lower than 2021p levels.

Beef consumption, while steady for 2021p and 2022f, is forecast to be down 5% from 2021p by 2030f. Exports are projected to be down 3.2% from 2020 in 2021p but will expand in the medium term as lower domestic consumption is expected. Exports are forecast to increase by 2.3% from 2021p by 2026f and 4.7% by 2030f. Imports are projected to be down 8.8% from 2020 in 2021p, in part because demand for imports of high-quality beef have been limited by lackluster restaurant recovery where these products are sold.

Historically, the EU's main suppliers were Brazil and Argentina, followed by the U.S. and Australia. Canadian export volumes to the EU increased by 31% in volume (January through August 2021) as the unit price per kilogram was 5.5% lower than the same period in 2020. Importers may have turned to Canadian beef in 2021 as prices among the typical suppliers have increased for various reasons.

### EUROPEAN UNION BEEF AND VEAL SUPPLY AND DEMAND BALANCE 2020-30F

#### EU-27 BEEF DISPOSITION





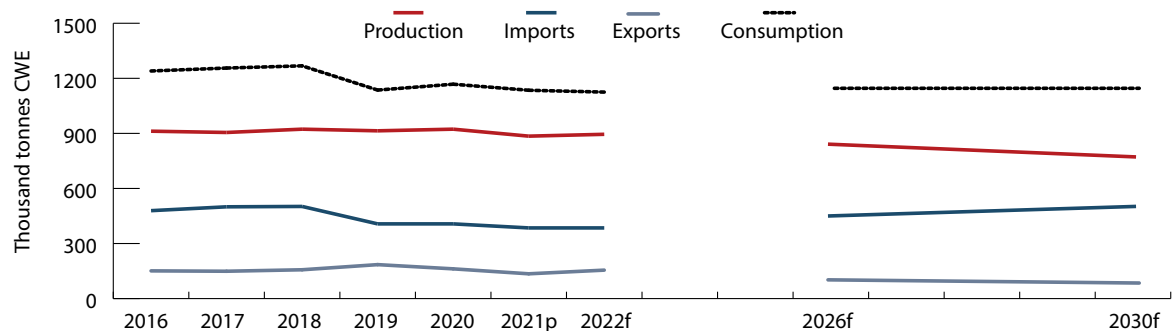
### UNITED KINGDOM UPDATE

The United Kingdom (UK) officially split from the EU27 and the departure, combined with the pandemic, has led to a period of instability for beef markets in the region. More stability is expected in 2022 as export rules, demand from export markets and domestic consumption become clearer in the newly re-emerged geo-political nation. In the near term, the UK remains a soft market with growth potential in the medium and long-run.

Beef consumption has trended downward since 2018 but 2020 brought a brief reprieve of increased consumption (+2.8%), particularly at retail outlets. Beef consumption is projected to be down 2.8% in 2021p to be steady with 2019 levels. The spike in retail sales that focused on steaks, roasts and burgers for home cooking has declined while the restaurant sector has yet to fully recover. Full restaurant recovery is not expected for several years although some demand returned in the second half of 2021 to support imports. Consumption is forecast to decline by 0.9% in 2022f due to the gap left by restaurant demand even as production is forecast to grow a modest 1.1%. In the medium and long-run, consumption should steady, while production falls. Imports are forecast to increase a significant 31.2% by 2030f from 2021p levels to address the imbalance of domestic supply and demand.

### UNITED KINGDOM BEEF SUPPLY AND DEMAND BALANCE 2016-30F

#### UNITED KINGDOM BEEF DISPOSITION

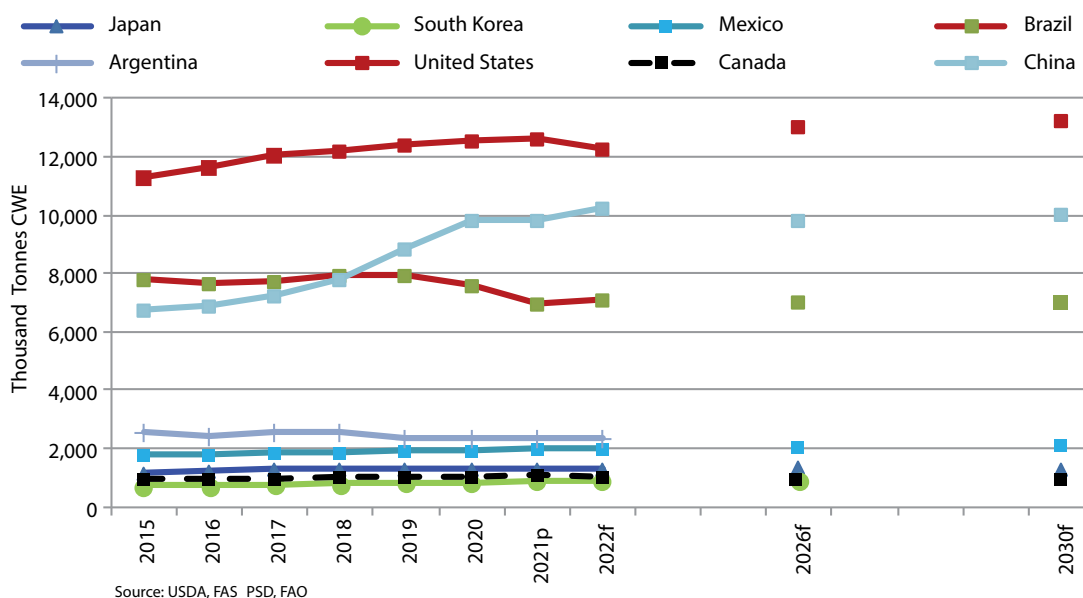


Source: USDA FAS, PSD, FAO

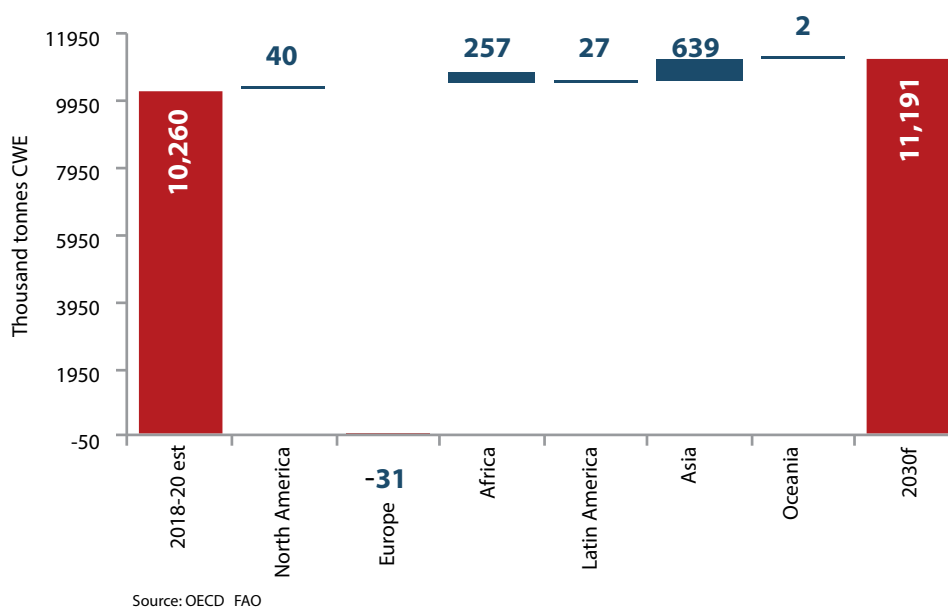
## GLOBAL BEEF CONSUMPTION OUTLOOK

Beef continues to be a staple on the world stage with countries in North America, Europe, and Asia recording surges of retail beef sales even as foodservice remains challenged. Slow recovery of foodservice around the globe may present near and medium-term shake-ups in the product mix demanded based on changing consumer behaviour and home cooking. Transfer payments have slowed and economies struggling with unemployment and financial hardships will see consumption drop. Regions in China and Southeast Asia affected by ASF and experiencing a rise in middle class citizens draw on the global protein supplies and are shifting trade flows. China's appetite for beef remains strong and is shifting the global beef sector as all eligible suppliers are seeing opportunities. Beef imports into Asia are forecast to increase by 639,000 tonnes by 2030f from a 2018-2020 average baseline.

## GLOBAL BEEF CONSUMPTION BY COUNTRY



## BEEF IMPORT GROWTH BY REGION 2018-20est - 2030f



## COMPETITOR ANALYSIS

Global beef cow inventories have been steady to slightly higher in 2021 for the sixth consecutive year, now at 207 million head. Brazil has a substantial allocation of the global cattle supply and beef trade of primarily grass-fed animals. Brazil has the largest beef cow inventory (59 million head) in 2021 and makes up 29% of the total global herd. Beef cow inventories in Brazil are projected to be their highest on record in 2021p, up 1.5% from 2020 and following four decades of slow, steady growth in the cow herd. Brazil is the world's largest beef exporter by far with exports projected to be 2.57 million tonnes in 2021p. Brazil exported 38% to 48% of its beef and veal to China annually in the last two years. Brazil has sustained these exports by mining away young heifers for slaughter. This leaves a gap in beef cow replacements and puts the national herd in a position to decline over the next few years.

Beef cow inventories are low or contracting in the world's foremost regions of grain-fed cattle production. In Australia, total cattle inventories in 2021 were their lowest levels since 1985. Restocking is currently taking place as La Nina brought rain in 2021 following a multi-year drought. The drought supported record high Australian beef prices. Low supply and higher prices alongside other trade tensions experienced by Australia have hampered exports into nearby markets such as Japan and China and affected the global availability of lean manufacturing trim.

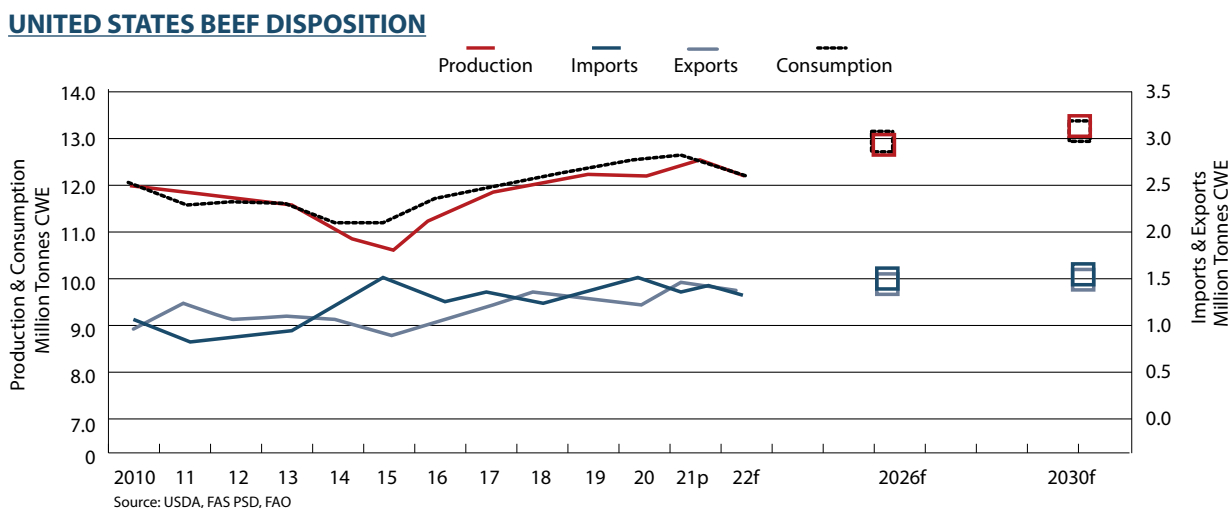
Imports of Australian beef in the U.S. are projected to be lower in 2021p and the U.S. has stepped in to backfill key Australian markets. Canada and Mexico are helping to offset lower U.S. imports from Australia. The U.S. is projected to export 1.55 million tonnes of beef in 2021p to become the world's second largest beef and veal exporter, and moving Australia (1.29 million MT 2021p) into third place behind the U.S. and Brazil. Beef cow numbers in the U.S. were down 2% on July 1, 2021, with total cattle inventories down by 1% as the U.S. herd contracts. Tighter inventories in the Western Hemisphere contrast with growing inventory in the Eastern Hemisphere to support the growing consumption and production of beef as demand grows in the East.

## U.S. UPDATE

The U.S. herd is in its third year of liquidation but may stabilize as beef replacement heifer numbers on July 1, 2021, were down just 100,000 head from last year. Production is projected to be record large for 2021p (+2.4% from 2020) at 12.7 million tonnes with heavier carcass weights and higher cow slaughter. A surge in exports for 2021p (+15.7%) is expected to be record large at 1.55 million tonnes. Domestic consumption is projected to be up slightly for 2021p (+0.7%). Production, consumption, imports, and exports are forecast to pull back slightly in 2022f and to steady in the medium-term. Long-run production and consumption are forecast to grow by 5.3% 2021p levels by 2030f.

Market share of U.S. beef and veal exports to China increased from 1.9% in January to August 2020 to 14.9% in January to August 2021. In the first eight months of 2021, China's share of U.S. beef exports was the third largest, following Japan (24.5%) and South Korea (23.4%). Mexico's share of U.S. beef exports January through August 2021 was steady with 2020 at 9.2%. Exports to Canada were lower in 2021 as Canadian domestic production surges. Exports to Hong Kong, Taiwan, and Vietnam were lower but volumes to Indonesia and the Philippines were up.

## U.S. BEEF SUPPLY AND DEMAND BALANCE 2010-30F

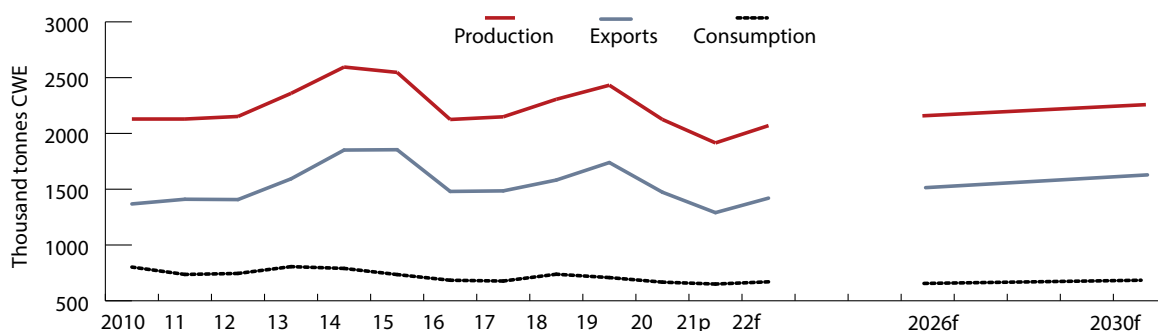


## AUSTRALIA

Drought in Australia broke in 2020 but not before significant strain was put on Australian production and exports. Production in 2021p is projected to be at the lowest levels since 1997. Production in 2021p is projected to be down 9.9% with exports down 12.4% from 2020. Australia has been losing market share in Southeast Asia and China, partly due to lack of supply and higher prices, and partly due to diplomatic tensions with China. Market share is also down in North America. A turnaround is projected for 2022f following Australia's aggressive restocking in 2021. Production is forecast to recover 8.1% in 2022f and exports are forecast to recover 10.1%. It will be several years before full recovery and peak production for Australia but when it happens it could be back to the 2019 peak.

### AUSTRALIA BEEF SUPPLY AND DEMAND BALANCE 2010-30F

#### AUSTRALIA BEEF DISPOSITION



## BRAZIL

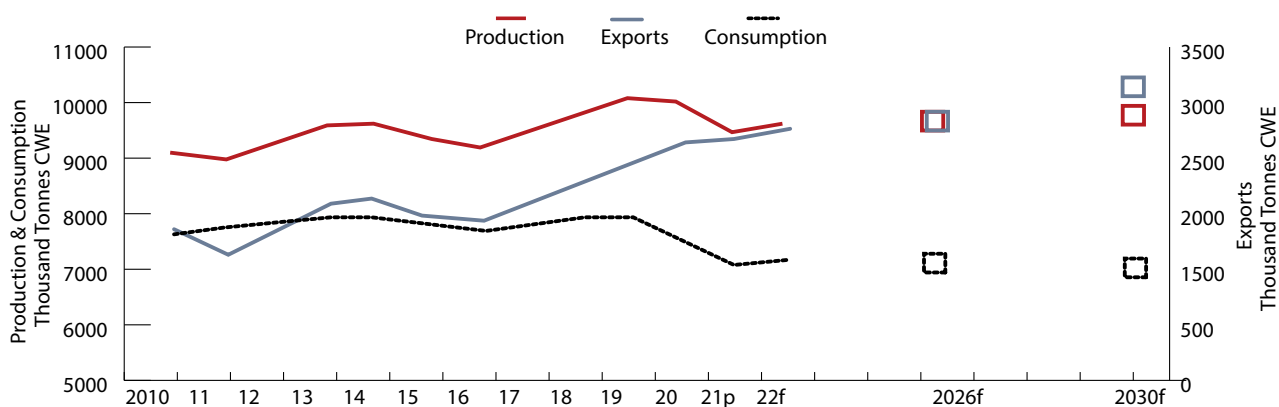
Brazilian beef production is projected to shrink 5.9% in 2021p despite strong prices boosted by strong exports primarily to China and Hong Kong. Brazil mined away its young female cattle and animals under 30 months of age to meet export demand from China leading to lower availability of cattle for slaughter. With reduced production and increased exports, domestic consumption is expected to decline on diminishing domestic availability. Consumers are responding to higher prices with reduced consumption. Domestic beef consumption is projected to decline in the near, medium, and long run as financial hardships being felt by Brazilians encourage them to turn toward less expensive proteins. Production is forecast to increase 2.1% in 2022f as more cattle become available at heavier weight (as animals are fed longer). Medium and long-term production growth is forecast to be moderate, up 4.2% from 2021p levels by 2030f.

Brazilian beef exports are projected to increase in the near, medium, and long run, to be up 21% from 2021p levels by 2030f. Brazil is heavily exposed to Chinese trade policy and the progression of China's own hog herd recovery. China and Hong Kong import well over half of Brazil's beef exports, followed by the EU and the U.S. Any pull back in Chinese demand in the near term is likely to have a drastic effect on Brazilian prices. Emerging controversy over Brazil's herd health status could also interrupt these projections.

Brazil will continue focusing on their systems and technologies to increase efficiencies over the next five to ten years. Brazil aims to increase the number of animals finished through feedlots (moving from 10-15% to 20%). It should be noted that this is not grain-fed beef but incorporates a variety of grain by-products to support feed utilization and average daily gains. Supplementary pasture feeding and genetic improvements are other key strategies currently being adopted.

### BRAZIL BEEF SUPPLY AND DEMAND BALANCE 2010-30F

#### BRAZIL BEEF DISPOSITION

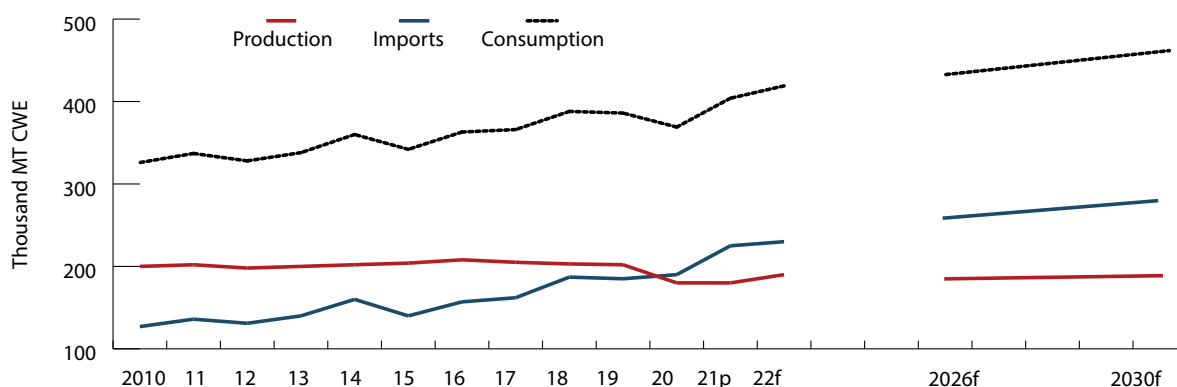


## PHILIPPINES

In the Philippines, beef consumption is projected to be up 9.5% to 404,000 tonnes in 2021f. By 2030f, beef consumption is projected to be up 14% from 2021f levels. Imports may grow to address the rise in consumption as production is projected to stay at or below 190,000 tonnes for the next decade. Total imports for 2021f are projected up 18.4% from 2020 to 225,000 tonnes. The large increase in beef imports in the Philippines in 2021 is expected to moderate in 2022 to be up 2.2%. Imports are projected to be up 22% to 26% by 2030f compared to 2021f levels to offset the difference between rising consumption and relatively flat production, representing long-term opportunities in this market.

### PHILIPPINES SUPPLY AND DEMAND BALANCE 2010-30F

#### PHILIPPINES BEEF DISPOSITION

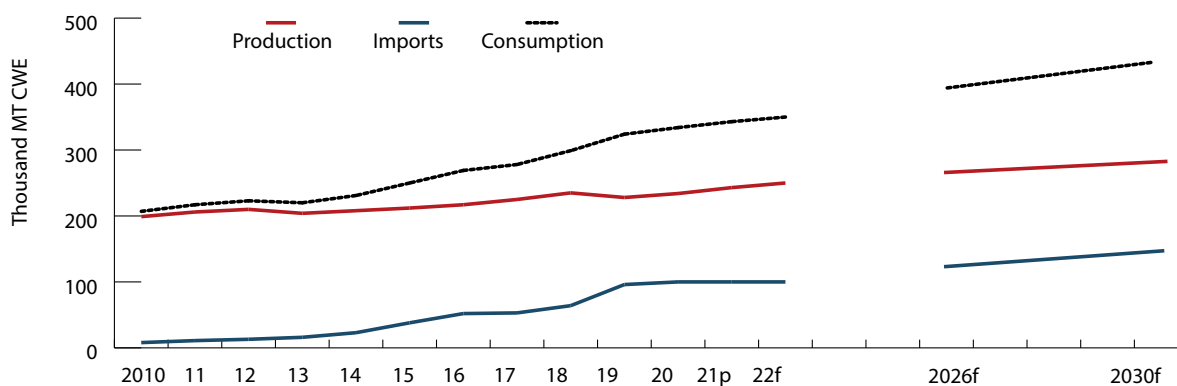


## VIETNAM

In Vietnam, beef consumption is projected to be up 2.7% to 343,000 tonnes in 2021f. Similar to the Philippines, long-term consumption is projected to rise. By 2030f, beef consumption is projected to be up 27% to 436,000 tonnes. Production is expected to increase 15% by 2030 to 281,000 tonnes but imports will still be needed. Total beef imports for 2021f and 2022f are projected to be steady at 100,000 tonnes even as imports of Canadian beef surged well above normal in 2021. Imports will grow in the long run to support consumption growth. Imports are projected to be up 49.5% or 50,000 tonnes by 2030f from 2021f levels.

### VIETNAM BEEF SUPPLY AND DEMAND BALANCE 2010-30F

#### VIETNAM BEEF DISPOSITION



## 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 Print/digital Resources Websites Advertising Video and Animations Partner Programs Event Marketing Demand Building Trade Missions 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> Volume disappearance of beef in Canada vs pork and poultry. <b>Export:</b> Volume, value, and market share of Canadian beef vs competing suppliers. <b>All Markets/Segments:</b> Satisfaction Index.
<b>2. Consumer Marketing Programs and Services</b>	Retail/Foodservice Sales Promotions Print/digital Resources Recipe Development Photography Nutritional Analysis Websites Social Media Gateway Solutions Round Up App Advertising Video and Animations Partner Programs Event Marketing Culinary Research 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> 1. Volume disappearance of beef in Canada vs pork and poultry. 2. Retail demand index. <b>Export:</b> Volume, value, and market share of Canadian beef vs competing suppliers. <b>All Markets/Segments:</b> Satisfaction Index.
<b>3. Market Intelligence Programs and Services</b>	Development/Reporting Internal and Commissioned Research Contract Market Intelligence Beef Quality and Yield Benchmarking	Strategic planning <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> Volume disappearance of beef in Canada vs pork and poultry. <b>Export:</b> Volume, value, and market share of Canadian beef vs competing suppliers. <b>All Markets/Segments:</b> Satisfaction Index.
<b>4. Stakeholder Communications Programs and Services</b>	ROI Analysis and Reporting Activity Reporting Satisfaction Survey Index Annual Reports Social Media	NCO <ul style="list-style-type: none"> <li>• Cattle, beef, allied associations</li> <li>• Federal/Provincial Governments</li> </ul>	<b>All Markets/Segments:</b> Satisfaction Index.
<b>5. Industry Education Programs and Services</b>	CBA Support Resources Distributor Education Online Learning Health and Nutrition Engagement	Education professionals <ul style="list-style-type: none"> <li>• Cattle, beef, allied associations</li> <li>• Health/nutrition</li> </ul>	<b>All Markets/Segments:</b> Satisfaction Index.

## Canada Beef -

### **Adapting to a Changing Market During the COVID-19 Pandemic**

Ever since early 2020, when the effects of the COVID-19 pandemic first began to manifest themselves, nations around the world have struggled to deal with the fallout of the virus on all aspects of society. Nearly two years on since the initial call for “two weeks to flatten the curve,” the pandemic seems to continue to defy efforts to fully manage and control its spread despite the introduction of all manner of public policy measures including travel restrictions, masking and vaccination mandates, new medical treatments, and social distancing guidance and controls.

The effects of the pandemic on trade and commerce, and the food industry in particular, have been dramatic as COVID-19 continues to impact people and disrupt business for supply partners, end-user clients, and consumers worldwide. The pandemic continues to severely test the infrastructure of the agri-food sector.

COVID-19 continues to significantly affect Canada Beef programs as virtually all domestic and international activities have been impacted by social distancing protocols on cattle processing, retail and foodservice operations and the ability to export products to markets. It is within this market context that Canada Beef has worked with cattle and beef sector groups, other commodities, downstream value chain partners, government, and stakeholder partners, to collaboratively find a way forward during these challenging times.

Canada Beef has remained responsive by pivoting and repositioning marketing efforts on a continual basis to provide proactive solutions to the pandemic challenges.

Resources were developed for Canadian consumers and for meat professionals in domestic and international markets. The focus was to provide reassurance around the safety of the meat and Canada’s ability to maintain a stable supply by safeguarding the health of Canadians working in the sector.

Fact sheets and an animated video to communicate Canada’s COVID-19 safeguards were developed for domestic and international markets. The materials were used as part of a global webinar series with support from Canadian Embassy personnel. As well, a COVID-19 training program for supply chain employees was developed and translated into seven languages.

When the pandemic saw in-store sampling for retailers suspended in many key export markets, Canada Beef responded by supporting virtual and online marketing and promotional initiatives due to changing consumer purchasing, searching and decision-making behavior. Canada Beef also expanded distribution of point-of-sale materials (labels, beef grading stickers and signage) to supermarkets and other retailers that sell Canadian beef.

In Canada, consumer marketing initiatives shifted focus to meet the needs of consumers cooking at home. As Canadians increased their home meal production, the Canada Beef website was integral to communicating with consumers as web traffic experienced massive increases from previous years. A website redesign was completed with a new-look home page featuring targeted categories and icon graphics to simplify navigation. The focus of consumer marketing campaigns were shifted to meet the changing consumer needs due to the pandemic.

Retail and foodservice operators responded to the pandemic by experimenting and innovating to remain competitive. All vendors are reimagining sales strategies, positioning and communication with clients, customers and consumers. Foodservice clients are trying new ways to take advantage of how consumers browse, shop, and buy food.



This business environment is presenting opportunities for Canada Beef to be a trusted trade partner that can bring marketing solutions to the table.

The Global Canadian Beef Information Gateway (Gateway) is one such opportunity. This innovative initiative optimizes the intersection of food and technology by using quick response (QR) codes and barcodes 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 will have a digital profile accessible via smart phone or tablet. Each profile will feature essential information including recommended cooking methods, food safety and storage information, written recipes, hands-in-pans 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 is now ready for launch in Canada and will be made available later in global markets.

As well, the Canadian Beef Centre of Excellence is being retrofitted to become a multimedia production studio, in order to meet the growing demand for digital media to support trade and consumer marketing programs.

Canada Beef's commitment to address the market challenges of the pandemic will continue in the 2022/23 Investment Plan. The plan is designed to be nimble and responsive, allowing Canada Beef to meet the needs of consumers and trade clients in both domestic and international markets. The plan gives Canada Beef the flexibility to direct resources to areas of opportunity or risk as warranted by continually evolving market conditions. The goal for Canada Beef is to address the challenges of the pandemic and find or create the market opportunities that can come from change that will set it apart from its competitors and provide the maximum benefit for Canadian cattle producers and other stakeholders.



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# GENERIC BEEF AND VEAL – CONSUMER MARKETING

## WORK PLAN # 1 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Consumer Marketing	
<b>Total Budget:</b>	\$870,000	Source: \$585,000: Beef Import Levy \$275,000: Beef Check Off \$10,000: Veal Import Levy
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E,	
<b>Strategic Priorities:</b> Promote the positive attributes of consuming beef and veal from all sources in Canada through consumer education awareness, and trust through public influencers directly to consumers.		

Tactics	Budget	Deliverables	Key Performance Indicators
<b>1. National Consumer Beef Demand Building Campaign</b> The One & Only Beef targeted consumer beef affirmation campaign.	\$500,000	<p><b>Q1 - Q4:</b> Strategy/creative/content development to support the campaign magnifying beef pride and contemporizing beef image through cultural diversity and up &amp; coming beef enthusiasts.</p> <p><b>Q1 - Q3:</b> Experiential Marketing: owning a placement in Rotary Club Rib fests across Canadian communities.</p> <p>A chef school contest challenging young chefs to consider how they cook once, eat twice with steak – to encourage the best use of the second steak or steak doggie bag for example with digital postings as the way to participate (Pinterest, Instagram, Taste Canada).</p> <p><b>Q2 – Q3:</b> Digital/Influencer postings of ‘todays beef’ – kabobs, shabu shabu, shawarma, etc.</p> <p><b>Q1 - Q4:</b> Appliance manufacturer as support partner – beef in the air fryer, beef done sous vide, beef dehydrator, etc.</p>	1. Annual beef disappearance in Canada vs pork and poultry. 2. Retail demand index. 3. Satisfaction index survey.
<b>2. Nutrition/Culinary Focused Consumer Marketing Campaigns/ Outreach</b> Collaboration with Health & Nutrition, CBCE, and Digital Marketing portfolios to develop and invest in the marketing strategies, creative and outreach for consumer marketing efforts around culinary/nutrition information and intelligence.	\$340,000	<p><b>Q1 - Q4:</b> Support Partner collaborative consumer marketing outreach (Osteoporosis, Parents Canada).</p> <p>Consumer marketing strategies and asset creation for consumer nutrition/messaging guided by Health &amp; Nutrition insights/content.</p> <p><b>Q2 - Q4:</b> Media investment for consumer marketing nutrition/food skills messaging (e.g., Gym TV.).</p> <p><b>Q1 - Q4:</b> Ambassador/PR earned media outreach to consumers (e.g., TV morning show nutrition/food skill spots).</p>	1. Annual beef disappearance in Canada vs pork and poultry. 2. Retail demand index. 3. Satisfaction index survey.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>3. Thinkbeef.ca</b> Provide the tools to support consumer marketing and education efforts for Consumer Marketing and Health & Nutrition, and Digital Marketing communication/education efforts.	\$20,000	<b><u>Q1 - Q4:</u></b> Support consumer marketing campaign efforts to drive consumer engagement with further content and provide measurement of campaign success. Provide consumer & influencer education resource dissemination capability. House references for nutrition data and position papers that support Health and Nutrition outreach Calls to Action.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Retail demand index. 3. Satisfaction index survey.
<b>4. ThinkVeal.ca</b> Adapt and format existing resources to populate the ThinkVeal.ca site in collaboration with Veal sector clients. Resources will include existing consumer marketing, health & nutrition, recipes.	\$10,000	<b><u>Q2 - Q4:</u></b> Develop and launch two Thinkveal.ca digital consumer resources with themes relevant to consumers (e.g., Veal Eat Out/Eat In recipe resource, + Veal 101 how to cook + nutrition culinary resource).	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey.



## PUBLIC AND STAKEHOLDER ENGAGEMENT

### WORK PLAN # 2 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Vice President, Corporate Affairs	
<b>Total Budget:</b>	\$300,000	Source: \$245,500: PSE Check Off \$55,000: Beef Check Off
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E, F Pillar 4: 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> Canada Beef will create and launch a sustainability communications campaign to increase the awareness of Canadian cattle and beef sector efforts to produce sustainable beef. This theme will focus on science-based proof points and target consumers, retail, and foodservice trade clients through high impact print and digital publications.	\$100,000	<b>Q1:</b> Collection and vetting proof points, development of theme and creative. <b>Q2 - Q4:</b> Print and digital insertion. <b>Q1:</b> Print and digital publications TBD. <b>Target:</b> High impact science-based messaging directly to consumers via all channels of distribution.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey.
<b>2. Direct to Consumer Messaging</b>	\$70,000	<b>Q2 - Q4:</b> Three direct-to-consumers public relations campaigns focused on trust and confidence issues. <b>Target:</b> Impactful story telling content combined with relevant issues of concern.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey.

Tactics	Budget	Deliverables	Key Performance Indicators
3. <b>Consumer Messaging through Trade Partners</b>	\$70,000	<p><b>Q2 - Q4:</b> Two consumer messaging campaigns delivered through/ with trade partners.</p> <p><b>Target:</b> Impactful story telling content combined with relevant issues of concern.</p>	<p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p>
4. <b>Consumer Messaging through Stakeholder Partners</b>	\$10,000	<p><b>Q2 - Q4:</b> Two consumer messaging campaigns utilizing stakeholder and influencer partners.</p> <p><b>Target:</b> Impactful story telling content combined with relevant issues of concern.</p>	<p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p>
5. <b>Key Influencer Outreach</b>	\$25,000	<p><b>Q2 - Q4:</b> 2-4 initiatives designed to ensure key influencers (trade, food writers, dietitians, home economists, media, NGOs) maintain confidence and support for beef and veal production.</p> <p><b>Target:</b> Impactful story telling content combined with relevant issues of concern.</p>	<p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p>
6. <b>Industry Membership and Participation</b>	\$5,000	<p><b>Q2:</b> Alignment and cooperation between organizations such as CRSB, CCFI, etc.</p>	<p>1. Satisfaction index survey.</p>
7. <b>Media and Spokesperson Training</b>	\$5,000	<p><b>Q2: 3</b> -Five individuals attending training sessions.</p> <p><b>Target:</b> +10% YOY participation rate of industry spokespersons.</p>	<p>1. Satisfaction index survey.</p>
8. <b>Resource and Content Development</b>	\$15,000	<p><b>Q1 - Q4:</b> 1. Design and translation of content. 2. Production of factsheets, backgrounders, photography, research, and resources. 3. 5-10 different resources produced.</p> <p><b>Target:</b> Impactful story telling content combined with relevant issues of concern.</p>	<p>1. Annual beef disappearance in Canada vs pork and poultry.</p> <p>2. Satisfaction index survey.</p>



# GLOBAL MARKETING

## WORK PLAN # 3 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Vice President	
<b>Total Budget:</b>	\$ 820,000	Source: Beef Check Off CAP 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 and clients.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>1. Canadian Beef Research</b> Commissioned research on key issues and opportunities for the Canadian beef industry including attitudinal survey research and quality benchmarking in global markets.	\$50,000	<b>Q1 - Q4:</b> Completed Research Studies.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Global Market Intelligence Program (GMIR)</b> Production of Canada Beef market intelligence resources for distribution to Canadian industry and government stakeholders. Includes purchase of statistical and market intelligence information to support reporting. - Canfax - Global AgriTrends - Neilson Canada - Contract services	\$225,000	<b>Q1 - Q4:</b> Weekly, monthly, and quarterly market intelligence reporting.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>3. International Meat Secretariat Membership (Shared tactic with CCA)</b> 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>	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>4. Global Canadian Beef Information Gateway</b> Development of information technology architecture and global content for the Gateway including wholesale, retail, and food service applications as well as integration of packer, producer, and partner brands.	\$200,000	<b>Q1 - Q4:</b> Content and IT architecture upgrades.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey.
<b>5. Global Webinar and Trade Show Content</b> Development of content to support communication of the Canadian Beef Advantage in webinars, meetings and trade shows targeting buyers in global markets for Canadian Beef.	\$50,000	<b>Q1 - Q4:</b> CBA webinar and trade show content.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Global Canadian Beef Advantage Marketing Resources</b> Development of content for global marketing resources including print, digital and point-of-sale that provide information on the Canadian Beef Advantage to buyers of Canadian Beef.	\$50,000	<b>Q1 - Q4:</b> CBA marketing resources.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.
<b>7. Global Canadian Beef Advantage Website Content</b> Development and maintenance of website content to communicate the Canadian Beef Advantage in global markets.	\$30,000	<b>Q1 - Q4:</b> CBA website content	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.



Tactics	Budget	Deliverables	Key Performance Indicators
<b>8. Global Canadian Beef Supply Chain Virtual Tour Content</b> Development and enhancement of virtual tours (including cow-calf, feedlot and packing plant) to support an understanding of the Canadian beef supply chain and the value proposition amongst buyers in global markets.	\$50,000	<b>Q1 - Q4:</b> Virtual Tour Content.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.
<b>9. Global E-commerce Strategy</b> Development of information technology architecture and digital content to support partner e-commerce initiatives involving Canadian Beef in global markets. This tactic will include potential e-commerce integration of the Canadian Beef Information Gateway content if requested by partners.	\$50,000	<b>Q2 - Q4:</b> Information technology architecture and digital content.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.
<b>10. Canada Beef Satisfaction Index Survey</b> 1. Conduct satisfaction survey in Canada and foreign markets. 2. Analyze results and prepare summary reports for promotion committee, NCO, funding partners and stakeholders.	\$10,000	<b>Q4 21-22:</b> Update survey questions, recipient list (Canada and foreign markets), deploy surveys. <b>Q4 21-22:</b> Analyze, summarize, and assemble results for committee and annual report. <b>Q2:</b> Develop a professional PPT presentation. <b>Target:</b> +60% return rate of survey.	Satisfaction index survey.
<b>11. Ad Hoc and Special Programs</b>	\$100,000	<b>Q1 - Q4:</b> Project brief to follow as needed.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Volume/value, market share of Canadian beef in the export marketplace.



# CHANNEL MARKETING

## WORK PLAN #4 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Channel Marketing	
<b>Total Budget:</b>	\$900,000	Source: Beef Check Off
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E, F	

### Strategic Priorities:

Volume, value and market share growth, carcass utilization, value optimization, Canadian beef brand growth, distributor education/support and promotion of the Canadian Beef Advantage.

### Objectives:

Retail and Foodservice channel promotion and market development initiatives that drive sales volume, market share and competitive position, retail, and foodservice demand building programs to increase product assortment, marketing programs that drive sales and awareness of the CBA in Canada.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>1. Retail and Foodservice Promotions</b> CB team will work with new and existing end-user clients to promote traditional cuts, brand awareness, sales volume and value growth through national and regional retail and food service promotions.	\$80,000	<b>Q1 - Q4:</b> <b>Retail promotions:</b> - Four national events. - Two regional events. <b>Foodservice promotions:</b> - Four national events. - Two regional events. <b>Target:</b> +10% YOY sales promotion activity. +10% YOY increase of CB logo usage in – market through new and existing client partners.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>2. Canadian Beef Information Gateway</b> CB team will work with end-user clients to support and promote customer awareness and attributes of the program through flyer tribute ads and point of purchase collateral. Promotional support for the Beef Information Gateway rollout through national and regional promotions.	\$100,000	<b>Gateway Retail Promotions:</b> - Four national campaigns. <b>Q1 - Q4:</b> - Eight regional campaigns. - Development of marketing collateral. - Coordinate with consumer marketing team for resources.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>3. Demand Building Promotions</b> CB team will work with end- user client partners to promote new value cuts, themes and seasonal opportunities, brand awareness, sales volume, and value growth through national and regional demand building promotions. <b>Demand Building Presentations (live or virtual)</b> The CB team will execute demand-building presentations to support distribution channel clients (retail case-ready and foodservice portion cutters).	\$100,000	<b>Q1 - Q4:</b> <b>Demand building retail promotions:</b> - Two national events. - One regional events. <hr/> <b>Foodservice</b> - Two national events. - One regional event. <hr/> <b>Demand building Presentations:</b> - Three events. <hr/> <b>Target:</b> 1. +10% YOY utilization of new cuts ideas. <hr/> 2. +10% YOY increase of CB logo usage in-market through new and existing client partners. <hr/>	1. Annual beef disappearance in Canada vs pork and poultry. <hr/> 2. Satisfaction index survey. <hr/> 3. Retail demand index.
<b>4. In-store Sampling Programs (pending pandemic restrictions)</b> The CB team will partner with retail clients to execute national and regional tasting campaigns in-store to support the underdeveloped roasting category, underutilized cuts, and new value-cut items.	\$50,000	<b>Q1 - Q4:</b> <b>Demo program execution:</b> - Two national events. - Four regional events. <hr/>	1. Annual beef disappearance in Canada vs pork and poultry. <hr/> 2. Satisfaction index survey. <hr/> 3. Retail demand index.
<b>5. Demand Building Merchandising Resources</b> The CB team will develop, produce, and distribute merchandising resources to support the growth of ethnic and convenience specialties that represent a profitable use of trim and balance cuts.	\$35,000	<b>Development and production of themes:</b> <hr/> <b>Q1 - Q4:</b> <hr/> <b>1. Convenience</b> - Stir-fry - Pan-fry <hr/> <b>2. Asian Style Specialties:</b> - Yakiniiku (BBQ) - Shabu Shabu (Hot Pot) - Kiriotoshi (Thin slice trim) <hr/>	1. Annual beef disappearance in Canada vs pork and poultry. <hr/> 2. Satisfaction index survey. <hr/> 3. Retail demand index.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>6. Marketing Materials</b> Adaptation, updating, development and production of technical marketing materials to increase the awareness of the CBA, grading system and POP materials. Adaptation of existing materials to be available from trade-based web site <a href="http://cndbeefperforms.ca">cndbeefperforms.ca</a> .	\$60,000	<b>Q1 - Q4:</b> 1. Retail resources. 2. Food service resources. 3. Vocational Resources.  <b>Target:</b> +10% YOY Sector utilization.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>7. Retail &amp; Food Service Partner Programs</b> The CB team will collaborate with end user clients to promote branded and co-branded CB programs through cost shared funding. Partner programs are available for primary/ secondary processors, distributors, and end user clients.	\$100,000	<b>Q1 - Q4:</b> 1. Retail partner programs. 2. Foodservice partner programs.  <b>Target:</b> +10% YOY utilization of partner programs.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>8. Retail and Food Service Independent Operators Program</b> POP materials and promotion resource development and distribution to support independent retail/ food service operators. Development and introduction of the Independent Foodservice Operators Programs (IFSOP).	\$40,000	<b>Q1 - Q4:</b> 1. Two retail distribution offers. 2. Two foodservice distribution offers  <b>Target:</b> +10% YOY sector utilization of IROP and Introduction/launch of IFSOP.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>9. Memberships and Sponsorship Events</b> CB collaboration and sponsorships through national/ regional organizations and conference events that reach target markets, audience, and sector specific segments. Provisions include virtual or in- person participation depending on pandemic restrictions.	\$55,000	<b>Q1 - Q4:</b> 1. Two retail distribution offers. 2. Two foodservice distribution offers  <b>Target:</b> +10% YOY sector utilization of IROP and Introduction/launch of IFSOP	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>10. Canada Beef Vocational Scholarship Program</b> CB will support faculty adjudicated training programs available from retail meat cutting schools and colleges to promote the meat cutting trade. The channel team will provide in- class cutting demonstrations and lectures for each graduating class on the program. Provisions include virtual or in person engagement depending on pandemic restrictions.	\$20,000	<b>Q1 - Q4:</b> 1. In collaboration with the Canadian Professional Meat Cutters Association: 2. Eight sponsorships will be awarded to qualifying students.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>11. Trade Shows</b> Trade Show participation provides a high impact venue for Canada Beef, Canadian Beef and Veal Brands, supply partners and end user clients to connect.	\$125,000	<b>Q3:</b> 1. Grocery Innovations Canada. 2. Restaurants Canada. <b>Q4:</b> Food service 3. GFS – TBD. 4. Sysco – TBD. <b>Target:</b> +10% YOY industry and client attendance at CB trade show events.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>12. HMR, Take-Out, Meal Kit Support Program</b> CB team will develop, produce, and launch marketing and promotion programs to support these emerging distribution channels.	\$50,000	<b>Q4:</b> CBA presentations to all supply partners and clients operating in this category. Development of features and benefits resources to support increased utilization of beef as the protein choice. Development of marketing support resources. <b>Target:</b> +5% YOY utilization of beef portions in mix. +5% YOY increase of CB logo usage in- market through this new channel.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>13. Trade Advertising</b> Targeted business to business messaging to promote CB programs and services, Canadian beef grading system and the Gateway. Budget includes cost of placement, creative and e-blast.	\$85,000	<b>Insertions:</b> <b>Q1 - Q4:</b> 1. Canadian Grocer x 8. 2. Grocery Business x 2. 3. Menu Magazine x 2. <b>Target:</b> +10% YOY industry reach and awareness of target messages.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.



# CONSUMER MARKETING

## WORK PLAN #5 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Consumer Marketing	
<b>Total Budget:</b>	\$1,214,000	Source: Beef Check Off
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E, F	

### Strategic Priorities:

Defend, stabilize, and increase consumption of Canadian beef vs poultry, pork, and plant-based meat alternatives. Increase awareness, trust and confidence in the Canadian cattle and beef delivery systems with consumers through the CBA.

### Objectives:

Support and contribute to the development and launch of branded and generic Canadian Beef Information Gateway (Gateway) across all business units to achieve success.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>1. National Canadian Beef Branded Advertising &amp; Demand Building Campaign</b> Build on the success of the “My Canadian Beef Campaign”. The campaign will integrate promotion and outreach of CBA messaging through advocates and Canada Beef consumer marketing platforms and tools. Canadian Beef Information Gateway, Make it Beef, and Canada Beef digital and social platforms.	\$500,000	<b>Q1:</b> Refresh strategy, creative and content to support the My Canadian Beef campaign.  <b>Q1 - Q4:</b> Execute media placement for the campaign content through digital marketing media investment, provincial alliance, advocate partnerships and PR investment.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>2. Foodservice Consumer Marketing Campaigns</b> Execute themed consumer marketing campaigns to support recovery and growth in the foodservice sector and support the Canadian beef brands.  <i>1. Regional programs to support burger sales at independent/community operators with consumer on-line participation.</i>	\$90,000	<b>Q1 - Q4:</b> Burger challenge campaign that encourages burger trial at multiple participating independent restaurants in select Canadian communities. Campaign partners TBD. <b>Target:</b> Two regional events.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>3. Canadian Beef Information Gateway Promotion and Advertising</b> Canada Beef will develop a set of impactful ads to be placed in high circulation print and digital culinary and lifestyle magazines to promote the Gateway and the client partners participating in this program. Seasonal themes will be utilized to increase impact and reach in English and French.	\$200,000	<b>Q1 - Q3:</b> 1. Canadian Living, two insertions. <b>Q2 - Q4:</b> 2. Readers Digest. <b>Q1 - Q4:</b> 3. Food & Drink. <b>Q1 - Q4:</b> 4. Two others TBD.  100% Investment is contingent on number of Gateway projects launched in Canada.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>4. Cross Promotion, Partner Programs and Collaboration</b> Canada Beef will identify potential perishable, CPG, appliance, or culinary accessory manufacturers in the marketplace interested in working with the Canada Beef team to promote Canadian Beef with their products across a wide variety of sectors and categories.	\$100,000	<b>Q1 - Q4:</b> Two national or regional cross-promotion events will be executed. Partners TBD.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>5. Canadian Beef Advantage (CBA) Consumer Marketing Resources</b> Canada Beef will create a suite of resources to support the CBA through the lens of the consumer to support digital, print, channel, and stakeholder communication opportunities. CBA resources will concentrate on the four pillars with a special focus on beef quality, grading system, on-farm food safety and quality assurance and demonstrable sustainability components. Considerations and alignment with various branded and generic Gateway projects and Canada Beef digital platforms will be incorporated to maximise impact and reach.	\$50,000	<b>Q1:</b> Development of CBA consumer marketing resources based on the four pillars. <b>Q2 - Q4:</b> Production and distribution of consumer resources. <b>Q1 - Q4:</b> Production and distribution of consumer resources co-branded with provincial cattle organization through the alliance program.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>6. Make it Beef Newsletter (MIB)</b> Development, production, and distribution direct to consumers and stakeholders.	\$40,000	<b>Q1 - Q4:</b> 1. Make it Beef consumer data base + quarterly releases to the advisory panel sub-group. 2. Promotion campaign to grow readership. <b>Target:</b> 10% YOY growth.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>7. Beef Pride E-store</b> Promotion and management.	\$40,000	1. Operation and inventory refresh 2. Promotion	1. Satisfaction index survey
<b>8. Provincial Marketing Alliance (PMA)</b> 1. The Canada Beef Provincial Marketing Alliance has been created to align the collective expertise and resources of participating provincial cattle organizations through shared strategic goals, objectives, and initiatives. The alliance will support co-funded projects between Canada Beef and participating provincial cattle organizations through regional initiatives important to regional marketing strategies. 2. Programs and services may include but are not limited to the creation and development of demand building programs, retail/foodservice sales promotions and consumer marketing tactics that meet both regional and national criteria. 3. Regional partner program funding maximum amounts are based on population, total check off and visibility in market.	\$194,000	<b>Q1 - Q4:</b> 1. Promotion of the PMA programs and services to all provincial cattle organizations. 2. Execution of co-funded projects based on provincial cattle organization initiation and execution.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.



## DIGITAL MARKETING

### WORK PLAN #6 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Digital Marketing	
<b>Total Budget:</b>	\$487,740	Source: \$465,000: Beef Check Off \$22,740: 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. Canadabeef.ca Consumer website</b> <ol style="list-style-type: none"> <li>Content, maintenance, monitoring and measurement of Canada Beef websites and social media platforms.</li> <li>Establish canadabeef.ca website as the consumer destination for all topics related to Canadian beef (educational resources, culinary inspiration and nutritional information).</li> </ol>	\$140,000	<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 CBA pillars for website pages.</li> <li>Work with health &amp; wellness team to build a robust Canadian beef nutrition section on canadabeef.ca.</li> <li>Recipe database - architecture development of system on canadabeef.ca. Harmonize content and Gateway recipe database architecture of canadabeef.ca.</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>
<b>2. Social Media</b> <ol style="list-style-type: none"> <li>Maintain a leadership position to promote Canadian beef initiatives through social media.</li> <li>Support consumer marketing messaging from provincial and national cattle organizations.</li> <li>Educate and inform Canadian beef producers about Canada Beef marketing and trade initiatives.</li> <li>Create new audiences through implementing a micro-influencer strategy to grow social followers and advocates of beef.</li> </ol>	\$110,000	<b>Q1 - Q4:</b> <ol style="list-style-type: none"> <li>Create and execute monthly content calendar focused on building awareness of Canadian beef, education, and inspiration.</li> <li>Quarterly review and identify content needs/gaps and build new and proactive creative.</li> <li>Develop and produce creative to promote the Canadian Beef Advantage.</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>Social media analytics.</li> </ol>



Tactics	Budget	Deliverables	Key Performance Indicators
<b>3. YouTube Channel</b> Establish Canada Beef as a video destination channel for culinary excellence, butchery skills, nutrition, and educational resources.	\$120,000	<b>Q1 - Q4:</b> 1. Execute consumer targeted video campaigns to build channel subscribers and increase video views (talking nutrition, seasonal culinary builds, culinary podcasts, CBCE culinary kitchen, recipe videos). 2. Create calendar and execute video cooking content to targeted audiences. Cross-promote through social channels and websites to maintain current subscribers and earn new subscribers.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index. 4. YouTube analytics
<b>4. Canada Beef Roundup Application</b> 1. Build and implement a transition strategy for the Roundup app to align with the Canadian Beef Information Gateway. 2. Maintain and support functionality of the native app program for the best consumer experience.	\$25,000	<b>Q1 - Q4:</b> 1. Create and execute a monthly notification plan and deploy content.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index. 4. App system analytics.
<b>5. Canadian Beef Information Gateway</b> Execute seamless alignment and promotion of Canadian Beef Information Gateways as generic and branded projects come online through social media platforms.	\$25,000	<b>Q1 - Q4:</b> 1. Execute program awareness through targeted social posts driving users to either Canadian Beef branded or industry partner Gateway programs. 2. Website – building Canadian Beef branded Gateway content and customizing Gateway content for retail partners in the domestic market. 3. Recipe database - architecture development of system on canadabeef.ca. 4. Harmonize consumer website with the Gateway system.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>6. E-Commerce Support Systems</b> 1. Develop e-commerce support resources to represent Canadian beef in this evolving domestic sector. 2. Incorporate e-commerce resources to align and support Gateway content across all e-commerce sectors.	\$25,000	<b>Q1 - Q4:</b> 1. Implement Canadian beef and Gateway content and e-marketing tools to integrate into on-line grocery purchase systems – Voila, Grocery Gateway, PC Express.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index.
<b>7. Canadian Beef Marketing Library</b> 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> 1. Maintenance, updates, management of library services. 2. Creation and uploading of new assets and system updates.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey. 3. Retail demand index. 4. Marketing library usage and system analytics.
<b>8. ThinkVeal.ca</b> 1. Build a dedicated generic veal website that operates as a consumer-focused resource centre to support consumer marketing campaigns on a dedicated generic veal website.	\$22,740	<b>Q1 - Q4:</b> 1. Create and launch a resource website based on the format and simplified version of ThinkBeef.ca in collaboration with the Canadian veal sector.	1. Annual beef disappearance in Canada vs pork and poultry. 2. Satisfaction index survey.



## HEALTH AND NUTRITION

### WORK PLAN #7 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Director, Health and Nutrition	
<b>Total Budget:</b>	\$560,000	Source: \$285,000: Beef Check Off \$275,000: Import Levy
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E, F	

#### Strategic Priorities:

Establish Canada Beef as the industry authority about the nutrition and health benefits of beef.

#### Objectives:

Educate consumers, stakeholders, and health professionals about beef's place in a healthy diet. Identify and develop communication and proof point resources that highlight beef's distinctive nutritional attributes, and the beneficial role beef can play in the diet.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>1. Nutrition Research &amp; Regulatory Intelligence</b> Foundational investments required to guide and shape the work in all health and nutrition communications.	\$130,000	<p><b>Q1 - Q4:</b></p> <p>1. Nutrition analysis and determination of allowable claims for cuts and recipes.</p> <p>2. Development of Just the Facts.</p> <p><b>Q3:</b></p> <p>3. Health Professional beef knowledge and attitudes insights research.</p> <p><b>Q4:</b></p> <p>4. Exploration of beef's amino acid profile and related health/wellness implications.</p> <p><b>Q1 - Q4:</b></p> <p>5. Participation in external expert networking groups and collaborations (IMS/NRA).</p> <p><b>Q1:</b></p> <p>6. Establishment of Expert Nutrition Advisory Committee.</p> <p><b>Q1 - Q4:</b></p> <p>7. Monitoring of government policy relevant to beef nutrition communications.</p> <p>8. Four new "Just the Facts" developed.</p> <p>9. Quarterly meetings with Expert Nutrition Advisory.</p>	1. Satisfaction index survey.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>2. Health and Nutrition Content Development</b> 1. Development of science-based content for consumers, channel clients, health and nutrition professionals and stakeholder partners.	\$30,000	<b>Q3 – Q4:</b> 1. Create the infrastructure and architecture to offer a beef cut nutrition data finder for food & health professionals, for Beef Information Gateway and/or website. <hr/> <b>Q3:</b> 2. Development of Beef Nutrition video for use on Gateway, CB digital platforms and stakeholders. <hr/> <b>Q1 – Q4:</b> 3. Animal and plant-based protein facts resources.	1. Satisfaction index survey.
<b>3. Health and Nutrition – Resource - Outreach</b> Development of nutrition content for use in targeted outreach programs	\$50,000	<b>Q1 – Q4:</b> 1. Create and distribute beef nutrition intelligence nutrition report for stakeholders. <hr/> 2. Develop iron intelligence toolkit. <hr/> <b>Q3 – Q4:</b> 3. Animal protein vs plant-based protein facts resources to support Canada Beef team needs. <hr/> <b>Q1 – Q4:</b> 4. Six nutrition intelligence reports developed and distributed.	1. Satisfaction index survey.
<b>4. Educational - Outreach</b> Communicate the role beef plays in the diet and its impact on health.	\$250,000	<b>Q1 – Q4:</b> 1. Gateway Health & Wellness Guide to Food & Health Professionals. <hr/> “Talking Nutrition” 2. Expert video/podcast series on key beef health and wellness topics. <hr/> 3. Distribution of beef health resources to consumers through Health Partners: Ashfield, Multiview, Canadian Blood Services. <hr/> 4. Four “Talking Nutrition” series resources developed and distributed. <hr/> <b>Target:</b> +10% YOY increase in reach.	1. Satisfaction index survey.
<b>5. Beef Nutrition Benefits Resources</b> 1. Communicate beef’s nutritional benefits vs other proteins, and diet types (e.g., vegetarianism, lifestyle diets).	\$100,000	<b>Q1:</b> 1. Development of science based creative ads. <hr/> <b>Q1 – Q4:</b> 2. Placement in high impact trade publications and digital publications. <hr/> 2. Sponsorships, conferences, and webinars. <hr/> 3. Ambassador (3rd party voice) media outreach to health professionals through print and digital. <hr/> <b>Target:</b> Reach 25K health professionals and 2 million consumers via ambassador outreach.	1. Satisfaction index survey.



# STAKEHOLDER COMMUNICATIONS

## WORK PLAN #8 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Manager, Stakeholder Communications	
<b>Total Budget:</b>	\$210,000	Source: Beef Check Off
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E, F Pillar 4: Connectivity – Focus Area: A, B	

### 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 CB story and CB 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. Canada Beef Annual Report</b> 1. Develop design and produce Canada Beef's annual report for distribution in August 2022. 2. English print version. 3. French version available in digital PDF.	\$25,000	<b>Q1:</b> 1. Compile information from each of the hubs and develop layout of the report. <b>Q2 – Q4:</b> 2. Completed English version printed and ready for distribution by August 2022. 3. French PDF ready for distribution in August 2022. 4. Mail distribution to all national and provincial cattle organizations. <b>Target:</b> +20% YOY distribution increase.	1. Satisfaction index survey.
<b>2. Canada Beef Performs Monthly e-newsletter</b> 1. Develop and produce 12 monthly Canada Beef Performs e-publications. 2. Publications will be created in both English and French and distributed digitally to all subscribers. 3. Canada Beef will expand readership through active engagement and promotion of the publication through French speaking stakeholders.	\$60,000	<b>Q1 – Q4:</b> 1. Work with all CB budget holders to assemble relevant and timely information, activities, and images each month. 2. Develop yearly media plan to increase readership and promote the publication in both English and French speaking Canada. <b>Q1 – Q2:</b> 3. Create 2 print ads and digital ads to support CBP to be placed in national and regional cattle industry and cattle association publications. <b>Target:</b> +10% YOY increase in stakeholder readership.	1. Satisfaction index survey.
<b>3. Stakeholder Outreach</b> Content will be created to support provincial newsletters, websites, annual reports, news releases, advertorials. Resource creation: Photo infographic	\$15,000	<b>Q1 – Q4:</b> 1. Create and deliver CB update, articles, reports, for provincial and national publications. 2. Create, manage, and deploy media releases as required. 3. Create infographic resources for stakeholders, deploy for use in their publications. <b>Target:</b> +10% increase YOY reach and awareness.	1. Satisfaction index survey.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>4. Media Monitoring Contract Service</b> Contract service to provide timely monitoring of media messaging to identify trends and opportunities.	\$30,000	<b>Q1 – Q4:</b> Contract Service.	1. Satisfaction index survey.
<b>5. Canadian Beef Industry Conference (CBIC)</b> Participation and planning support to deliver a successful CBIC.	\$30,000	<b>Q1 – Q2:</b> 1. Participate in planning and CBIC program development. 2. Develop two industry sessions to support trade and consumer trends. <b>Q2:</b> 3. Work with CB team to staff booth. <b>Target:</b> +10% YOY participation increase.	1. Satisfaction index survey.
<b>6. Communications Challenges Webinar</b> Create a professional development webinar focusing on communication challenges, emerging issues, and actionable solutions important to Canadian cattle and beef sectors and stakeholder clients.	\$15,000	<b>Q1 – Q2:</b> 1. Webinar planning, development, and outreach. 2. Marketing and promotion materials for the event. <b>Q3 – Q4:</b> 3. Webinar event execution. <b>Target:</b> The webinar will target communication professionals across all stakeholder sectors (primary processing, retail, foodservice, and allied associations).	1. Satisfaction index survey.
<b>7. Stakeholder Resources</b> Update and support Canadian beef cattle and beef fact sheets, information, corporate identity materials, and media kits.	\$10,000	<b>Q1 – Q4:</b> Update and streamline logo and branding of Canada Beef corporate identity materials. <b>Target:</b> Achieve a professional and consistent look to enhances corporate identity.	1. Satisfaction index survey.
<b>8. Issues and Crisis Preparedness</b> Canada Beef will develop an organizational preparedness plan to include: emerging issues, crisis management, crisis plan, key message development and emergency management.	\$15,000	<b>Q1 – Q3:</b> 1. Development of updated crisis plan. <b>Q4:</b> 2. Completion of crisis planning document.	1. Satisfaction index survey.
<b>9. Communications Support</b> Canada Beef will contract the services of editors, writers, designers, translators, to support various tactics and commitments as required.	\$10,000	<b>Q1 – Q4:</b> Contract services as required.	1. Satisfaction index survey.



# CANADIAN BEEF CENTRE OF EXCELLENCE

## WORK PLAN #9 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Canadian Beef Centre of Excellence	
<b>Total Budget:</b>	\$678,000	Source: Beef Check Off CAP leveraged
<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.

### 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 Resources</b> The CBCE team will create three new educational resources to support channel marketing merchandising, themes TBD.	\$90,000	<b>Q2 – Q3:</b> 1. Development and production of Theme # 1. <b>Q2 – Q4:</b> 2. Development and production of Theme # 2. 3. Development and production of theme # 3.	1. Satisfaction index survey.
<b>2. Educational Resource Content Management and Distribution</b> CBCE will develop and launch a resource library to support online training and learning programs and services.	\$10,000	<b>Q1 – Q4:</b> 1. Development of CBCE training library. 2. CBCE Learning solution resources delivered through online portal.	1. Satisfaction index survey.
<b>3. Canada Beef Vocational Scholarship Program</b> 1. CB will support faculty adjudicated training programs available from commercial cook teaching schools and colleges to promote beef cutting components and CBA theory. 2. The CBCE team will provide in-class cutting demonstrations and lectures for each graduating class of the program. 3. Provisions include virtual or in person engagement depending on pandemic restrictions or product schedule at the CBCE.	\$20,000	<b>Q1:</b> 1. CBCE will confirm eligible colleges and details for the scholarship program. <b>Q1 – Q4:</b> 2. Canada Beef scholarships for culinary excellence program. 3. Educational resources delivered through online portal to academic and trade channels.	1. Satisfaction index survey.
<b>4. CBCE Culinary Video Productions</b> 1. CBCE will develop and produce 200+ original videos and adapted / partner branded versions to support Canadian Beef Information Gateway programs, themes to TBD.	\$190,000	<b>Q1 – Q4:</b> 1. Culinary video's produced and launched. <b>Target:</b> Create culinary videos that engage and inspire viewers and drive purchase decisions for Canadian beef products.	1. Satisfaction index survey.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>5. CBCE Test Kitchen</b> 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.	\$40,000	<b>Q1:</b> 1. CBCE test kitchen programs and services menu development and launch. <b>Q2 – Q3:</b> 2. CBCE Test Kitchen promotion and marketing outreach.	1. Satisfaction index survey.
<b>6. CBCE Test Kitchen and Video Studio Equipment</b> CBCE will upgrade equipment needs for the test kitchen and video production studio to support the needs of projects, programs, and services.	\$20,000	<b>Q1:</b> 1. Equipment list and itemized budget for the test kitchen and video studio. 2. Support for equipment (AV and culinary). <b>Q1 – Q4:</b> 3. Purchase and installation of new assets as required.	1. Satisfaction index survey.
<b>7. CBCE Webinars</b> CBCE will create and deliver two webinar events to support innovations in retail merchandising, underutilized cuts, and culinary inspirations in alignment with channel tactics.	\$20,000	<b>Q1:</b> 1. Development of themes, content, timing, and target audience. <b>Q2 – Q4:</b> 2. Execution of webinars.	1. Satisfaction index survey.
<b>8. CBCE Partner Program</b> CBCE will develop a partner program to support clients seeking to develop their own videos, merchandising resources or recipes to support eligible branded marketing strategies. Branded and custom services will include CBCE engagement in Calgary or off-site.	\$50,000	<b>Q1:</b> 1. CBCE partner program services menu and application form development and commercial studio productions. <b>Q2 – Q4:</b> 2. CBCE partner program promotion and marketing outreach.	1. Satisfaction index survey.
<b>9. CBCE AV Services Upgrade, Facility Renovation and Ventilation Compliance</b> Canada Beef will complete the renovation and addition of new audio visual equipment to accommodate increased demand for video resources to support a variety of projects including the Gateway, Canadian Beef Advantage, educational programs, consumer test kitchen and hosting functions. CBCE will upgrade ventilation in compliance with local requirements to accommodate the use of commercial equipment.	\$238,000	<b>Q1 – Q4</b> The renovations and upgrades will be fully completed, inspected and function within this fiscal year.	1. Satisfaction index survey. 2. Volume of completed resources and projects to support key initiatives across all business units.





# EXPORT MARKET DEVELOPMENT PARTNER PROGRAM

## WORK PLAN #10 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Export Market Development	
<b>Total Budget:</b>	\$450,000	Source: Beef Check Off CAP leveraged Alberta Beef Export Market Development Grant
<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.

### 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. Export Market Investigation (EMI)</b> <i>Outgoing Missions:</i> 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.	\$60,000	<b>Q1 - Q4:</b> Based on industry utilization.  <b>Target:</b> 100% EMD program allocation funding utilized.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Export Market Adaptation (EMA)</b> <i>Incoming Missions:</i> 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.	\$100,000	<b>Q1 - Q4:</b> Based on industry utilization.  <b>Target:</b> 100% EMD program allocation funding utilized.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>3. Export Market Diversification (MDP)</b> <i>Trade Shows and Seminars:</i> 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 government, or importer/distributor trade marketing events or shows.	\$80,000	<b>Q1 - Q4:</b> Based on industry utilization.  <b>Target:</b> 100% EMD program allocation funding.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>4. Promotion and Marketing (PMP)</b> 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.	\$200,000	<b>Q1 - Q4:</b> Based on industry utilization.  <b>Target:</b> 100% EMD program allocation funding utilized.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>5. Competitive Advantage Benchmarking (CAB)</b> 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> Based on industry utilization.  <b>Target:</b> 100% EMD program allocation funding utilized.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.



## EMERGING MARKETS

### WORK PLAN #11 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Executive Director, Export Market Development	
<b>Total Budget:</b>	\$260,000	Source: Beef Check Off Alberta Beef Export Market Development Grant
<b>National Beef Strategy Alignment:</b>	Pillar 1: Beef Demand – Focus Area: D, E, F	

#### Strategic Priorities:

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

#### Objectives:

Develop, support, and implement a variety of trade and consumer marketing activities and sales promotions to increase the awareness of the Canadian Beef Advantage and drive sales growth in all segments and viable markets of opportunity.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>1. Retail and Foodservice Promotions</b> Canada Beef will work with new and existing end-user clients, importers, and distributors to increase CB brand awareness and increase retail and foodservice sales promotions. Four promotions will be planned: -Two retail promotions -Two foodservice promotions	\$80,000	<b>Q1 - Q4:</b> 1. Costco Spain. 2. Retail/Foodservice promotions TBD. <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Trade Shows</b> Canada Beef will participate in one major international trade show to support supply clients and promote the CBA on the world stage. 1. Canada Beef will collaborate with Canada Pork and Canadian Bison to attend and exhibit at SIAL Paris 2022.	\$100,000	<b>Oct. 15 - 19:</b> 1. SIAL Paris. <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>3. Trade Advertising</b> Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace. 1. Europe region publication 2. MENA region publication	\$10,000	<b>Q1 - Q2:</b> <b>Q3 - Q4:</b> <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>4. Marketing Materials</b> Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in the EU, UK, MENA, and other markets of interest to supply partner clients.	\$10,000	<b>Q1 - Q4:</b>  <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>5. In-coming Missions</b> Canada Beef will plan or support one non-branded (generic) buyer's mission to Canada from emerging markets. Execution is based on pandemic conditions and opportunities for partnership.	\$20,000	<b>Q1 - Q4:</b>  <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Distributor Education Program</b> Canada Beef will plan and execute one DEP event to promote the CBA and support Canadian beef client suppliers in the market.	\$30,000	<b>Q1 - Q4:</b> 1. Market and segment TBD.  <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>7. Government Trade Commission Partnership</b> Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.	\$10,000	<b>Q1 - Q4:</b> 1. Market and event details TBD.  <b>Target:</b> +10% YOY increase in CB sales volume and value in emerging markets.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.



## JAPAN

## WORK PLAN #12 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Senior Director, Market Development – Japan/Korea	
<b>Total Budget:</b>	\$825,000	Source: Beef Check Off CAP (leveraged) Alberta Beef Export Market Development Grant
<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 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 and Foodservice Promotions</b> Canada Beef will work with new and existing end-user clients, importers, and distributors to increase CB brand awareness and increase retail and foodservice sales promotions. Four promotions will be planned: -Two retail promotions -Two foodservice promotions.	\$130,000	<b>Q1 - Q4:</b> 1. Two retail promotions, clients TBD. 2. Two foodservice promotions, clients TBD. 3. 200 In-store sampling promotions planned for the retail sector. <b>Target:</b> +10 YOY increase in CB sales promotion activity.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Trade Shows</b> Canada Beef will participate in four regional trade shows and three national trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events. <b>Trade Advertising</b> Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.	\$250,000	<b>Q2 - Q4:</b> 1. Four regional trade shows: Nagoya, Osaka, Fukuoka, Okinawa). <b>Q3 - Q4:</b> 2. Three national trade shows in Tokyo: Supermarket Trade Show, Foodex and JFA. <b>Target:</b> +10 YOY sales volume and value increase.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>3. Trade Advertising</b> Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.	\$10,000	<b>Q1 – Q4:</b> 1. Ad in summer edition of Japan Meat Journal. 2. Daily Meat Livestock e-newsletter. 3. Monthly trade newsletter release (12 newsletters). <b>Target:</b> +10% YOY industry reach and awareness of key messages.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>4. Marketing Materials</b> 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> 1. AAA/CB brand label production and distribution. 2. POP materials, production, and distribution. <b>Target:</b> +10 YOY increase in CB collateral utilization and distribution.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>5. Consumer Marketing</b> 1. Canada Beef will partner with a kitchen truck contractor to promote Canadian Beef tasting events in partnership with retail clients across Japan. Promotion events will be held weekends, public holidays, and school holidays.	\$170,000	<b>Q1 – Q4 (yearlong):</b> Canada Beef Kitchen Truck promotions.  <b>Target:</b> 100 promotions from April 2022 to March.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Digital Marketing</b> 1. Maintenance of site architecture and content updates to both the trade and consumer website.  2. Support social media communication through new and existing platforms.	\$70,000	<b>Q1 – Q4:</b> 1. Website maintenance and support.  2. Social media content creation and distribution. 12 monthly social media plans for 3 platforms.  <b>Target:</b> +20% YOY increase in traffic.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>7. Demand Building Events</b> Canada Beef will organize and execute two major demand building seminar events to promote the CBA and support Canada beef supply clients	\$50,000	<b>Q1 – Q4:</b> 1. Canada Beef Seminars, two locations TBD.  <b>Target:</b> +10 YOY sales volume and value increase.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>8. Distributor Education</b> Canada Beef will partner with Federal Meat Academy to deliver educational courses (lectures and cutting demos) for culinary college students and distribution partners to promote the CBA and support Canadian beef supply clients.	\$60,000	<b>Q1 – Q4:</b> 1. Engage three culinary collages to deliver 15 classes.  2. Deliver two DEP events for importers, distributors, and purveyors.  <b>Target:</b> 1,000 students attend the class from April 2022 to March 2023.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>9. Government Trade Commission Partnership</b> 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> 1. Event details TBD.  <b>Target:</b> +10% YOY increase in CB sales volume and value increase.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>10. Sponsorship and Event Marketing</b> 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>Q1 – Q4:</b> 1. Membership fee for National Supermarket Association of Japan.  2. Second event TBD.  <b>Target:</b> +10% YOY sales volume and value increase.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>11. Canadian Beef Information Gateway</b> Canada Beef will adapt and launch a Gateway QR code solution program. The Gateway will include a limited menu of assets for each retail cut being offered in-market.	\$15,000	<b>Q1:</b> 1. Determine cut assortment and assets on hand.  <b>Q1 – Q3:</b> 2. Create QR codes and build menu assets for each cut.  3. Develop and produce QR code POP resources.  <b>Q4:</b> 4. Launch Gateway.  <b>Target:</b> Launch four Gateway projects in the retail sector.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.



## SOUTH KOREA

### WORK PLAN #13 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Senior Director, Market Development – Japan/Korea	
<b>Total Budget:</b>	\$210,000	Source: Beef Check Off CAP (leveraged) Alberta Beef Export Market Development Grant
<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 and Foodservice Promotions</b> Canada Beef will work with new and existing end-user clients, importers, and distributors to increase CB brand awareness and increase retail and foodservice sales promotions.	\$40,000	<b>Q1 – Q4:</b> 1. Retail or Foodservice promotion TBD.  <b>Target:</b> +10 YOY increase in CB sales promotion activity.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Trade Shows</b> Canada Beef will participate in two trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events.	\$60,000	<b>Q1:</b> 1. Seoul Food & Hotel. 2. Busan International Food Expo.  <b>Target:</b> +10 YOY sales volume and value increase.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>3. Trade Advertising</b> Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.	\$10,000	<b>Q2:</b> 1. Meat Journal Q2.  <b>Q3:</b> 2. Food Journal Q3.  <b>Q4:</b> 3. Newsprime (Online) Q4.  <b>Target:</b> +10 YOY sales volume and value increase.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.
<b>4. Canadian Beef Information Gateway</b> Canada Beef will adapt and launch a Gateway QR code solution program. The Gateway will include a limited menu of assets for each retail cut being offered in-market.	\$15,000	<b>Q1:</b> 1. Determine cut assortment and assets on hand.  <b>Q1 – Q3:</b> 2. Create QR codes and build menu assets for each cut. 3. Develop and produce QR code POP resources.  <b>Q4:</b> 4. Launch Gateway Q4.  <b>Target:</b> Launch two Gateway projects in the retail sector.	1. Satisfaction index survey.  2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>5. Digital Marketing</b> 1. Maintenance of site architecture and content updates to the trade and consumer websites. 2. Support social media communication through new and existing platforms.	\$50,000	<b>Q1 – Q4:</b> 1. Website maintenance and support. 2. Social media content creation and distribution. 12 monthly social media plans for three platforms. <b>Target:</b> +20% YOY increase in traffic.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Demand Building Events</b> Canada Beef will organize and execute one demand building seminar event to promote the CBA and support Canadian beef supply clients.	\$10,000	<b>Q1 – Q4:</b> DEP event TBD. <b>Target:</b> +10 YOY sales volume and value increase.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>7. Distributor Education</b> Partner with Prof. Jong-Hyo Kim to deliver Canada Beef education courses (lectures and cooking demos) to culinary college students.	\$20,000	<b>Q1 – Q4:</b> Engage with two culinary collages to deliver 10 classes. <b>Target:</b> +10% YOY increase in new client exposure to the CBA.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>8. Government Trade Commission Partnership</b> 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> Event details TBD. <b>Target:</b> +10% YOY increase in CB sales volume and value increase.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.





# CHINA AND HONG KONG

## WORK PLAN #14 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Manager, Market Development – China and Hong Kong	
<b>Total Budget:</b>	\$665,100	Source: Beef Check Off CAP (leveraged) Alberta Beef Export Market Development Grant
<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 China and Hong Kong.

### 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 and Foodservice Promotions</b> Canada Beef will work with new and existing end-user clients, importers, and distributors to increase CB brand awareness and increase retail and foodservice sales promotions. Canada Beef has confirmed 13 retail and foodservice promotions.	\$214,000	1. Retail: Marae Supermarkets HK - \$18,000. 2. Retail: YATA Supermarkets HK - \$18,000. 3. Retail: City Super HK - \$12,000. 4. Retail: Ole Supermarkets - \$25,000. 5. Retail: Dairy Land Macau - \$6,000. 6. Retail: Metro Shanghai 4 Stores, Sept - \$5,000. 7. Retail E-commerce: HKTV. mall - \$20,000. 8. Retail E-commerce: JD.com, Jun - \$30,000. 9. Retail E-commerce: Tmall International, Nov - \$15,000. 10. Retail E-commerce: Dingdong Fresh, Dec - \$20,000. 11. FS: Canadian Beef Steak Festival @Moorigin Steak - \$35,000. 12. FS: CB Menu Promo: J Prime Shanghai – Nov - \$5,000. 13. FS: CB Menu Promo: Nikko Hotel Suzhou - July, new channel - \$5,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Trade Shows</b> Canada Beef will participate in four trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events.	\$195,000	1. Annu Food China 2022, Shenzhen, Apr.20-22, 2022 - \$20,000. 2. SIAL China 2022, Shanghai, May 18-20, 2022 - \$70,000. 3. CIMIE Summit & Trade Show 18 sqm - Qingdao, Sept, - \$15,000. 4. FHC China 2022, Shanghai, Nov 8 - 10, 2022 - \$90,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>3. Trade Advertising</b> Development and placement of B>B trade ads to promote the CBA and support supply clients in the marketplace.	\$8,100	1. World Beef Guide, MIG - \$2,100. 2. CB Trade AD. on CIMIE Qingdao Exhibition Leaflet - \$6,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>4. Marketing Materials</b> Create, develop, or adapt new or existing marketing resources as needed to promote the CBA and support sales growth in China. Resources will include branded labels, POP graphics.	\$62,000	1. Production of CB Brand License Plates - \$1,000. 2. Retail stickers printing - SC & TC versions - \$40,000. 3. Production of CBA Brochure & folded IMG & CB Recipe leaflet - \$10,000. 4. Production of demo supply (red apron and, toothpick, ice bag) - \$11,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>5. Canadian Beef Information Gateway</b> Canada Beef will adapt and launch a Gateway QR code solution program. The Gateway will include a limited menu of assets for each retail cut being offered in-market.	\$20,000	<b>Q1:</b> 1. Determine cut assortment and assets on hand. <b>Q1 – Q3:</b> 2. Create QR codes and build menu assets for each cut. 3. Develop and produce QR code POP resources. <b>Q4:</b> 4. Launch Gateway Q4. <b>Target:</b> Launch two Gateway projects in the retail sector.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Digital Marketing</b> 1. Maintenance of site architecture and content updates. 2. Support social media communication through new and existing platforms.	\$48,000	1. CB Social media update service Apr. 2022-Mar., 2023 - \$38,000. 2. CB Social Media campaign in HK - \$10,000. <b>Target:</b> Communication of CB messages and activities to professional followers and consumers.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>7. Demand Building Events</b> Canada Beef will organize and execute one demand building seminar event to promote the CBA and support Canadian beef supply clients.	\$44,000	1. Canadian Beef Workshop in South-West China - \$15,000. 2. CB Seminar partnership with Bester Food, Guangzhou - \$5,000. 3. CB Tech. Seminar - Retail, Shanghai/Nanjing/Suzhou - \$12,000. 4. CB Tech. Seminar - FS, Beijing/Qingdao/Shenyang - \$12,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>8. Distributor Education</b> Canada Beef will plan and execute one DEP event to promote the CBA and support Canadian beef client suppliers in the market.	\$40,000	1. Canada Beef & EFUN Pro-class (4 sessions). <b>Target:</b> Partner with credible culinary schools to deliver CBA education for existing and new students entering the marketplace.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>9. Government Trade Commission Partnership</b> Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.	\$12,000	1. Organic Plus HK partner with Canadian Consulate in HK - \$5,000. 2. Wuhan Wushang supermarket partner with CTO - \$5,000. 3. Canadian Food Reception during SIAL/FHC, Shanghai - \$2,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>10. Sponsorship and Event Marketing</b> 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.	\$22,000	1. Canada day in Guangzhou - \$2,000. 2. FHC 2022 Gala Lunch Day 1/2 - Shanghai, Nov - \$20,000.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.



# TAIWAN AND SOUTHEAST ASIA

## WORK PLAN #15 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Director, Market Development – Taiwan & Southeast Asia	
<b>Total Budget:</b>	\$265,000	Source: Beef Check Off CAP (leveraged) Alberta Beef Export Market Development Grant
<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 Taiwan and Southeast Asia.

### 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 and Foodservice Promotions</b> Canada Beef will work with new and existing end-user clients, importers, and distributors to increase CB brand awareness and increase retail and foodservice sales promotions.	\$100,000	<b>Q1 – Q4:</b> 1. In-store sampling demo programs in the retail sector (including Taiwan, Philippine, Vietnam, Singapore). <b>Q2 – Q4:</b> 2. Canadian Beef promotion at Hotel and Restaurants (including Taiwan, Philippine, Vietnam, Singapore). 3. Collaboration with importer, retail/food service and supply partner to promote Canada Beef brands. (Including Taiwan, Philippine, Vietnam, Singapore, Indonesia). <b>Q1 – Q4:</b> 4. Partner promotion with two new retail clients (including Taiwan, Philippine, Vietnam, Singapore). 5. Partner/promote with three new foodservice clients (including Taiwan, Philippine, Vietnam, Singapore). <b>Target:</b> +10% YOY increase in CB sales promotion activity.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>2. Trade Shows</b> Canada Beef will participate in four trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events.	\$80,000	<b>Q1 – June:</b> 1. Food Taipei - Major food show in Taiwan in collaboration with the Canadian Embassy to reach a broad range of buyers. <b>Q2 - April:</b> 2. Food & Hotel Vietnam –Major food show in Vietnam in collaboration with the Canadian Embassy to reach a broad range of buyers. <b>Q2 - August:</b> 3. WOFEX Food Show – Targeting food service industry and retail in Philippine. <b>Target:</b> +10% YOY sales volume and value increase.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>3. Marketing Materials</b> 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> 1. Development and production of POP materials as needed for supporting retail and food service promotions. 2. Development and production of CBA resources as needed (labels, guides, and standard materials). <b>Target:</b> +10% YOY increase in CB collateral distribution.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>4. Canadian Beef Information Gateway</b> Canada Beef will adapt and launch a Gateway QR code solution program. The Gateway will include a limited menu of assets for each retail cut being offered in-market.	\$15,000	<b>Q1:</b> 1. Determine cut assortment and assets on hand. <b>Q1 – Q3:</b> 2. Create QR codes and build menu assets for each cut. 3. Develop and produce QR code POP resources. <b>Q4:</b> 4. Launch Gateway. <b>Target:</b> Launch two Gateway projects in the retail sector.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>5. Digital Marketing</b> 1. Maintenance of site architecture and content updates. 2. Support social media communication through new and existing platforms.	\$20,000	<b>Q1 – Q4:</b> <b>1. Social media content</b> Creation, boosting plans, strategic and promotional posts to attract new viewer to increase and reach audiences. (Taiwan IG/FB and Southeast Asia IG). <b>2. Website</b> Service, maintenance, domain hosting, website fees, adaptations and content development, translation, and placement.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Demand Building Events</b> 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> 1. One event will be planned and executed. Canada Beef demand building seminar. Location and dates TBD. <b>Target:</b> +10% YOY sales volume and value increase.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>7. Government Trade Commission Partnership</b> 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> 1. Retail/foodservice promotion with Trade commissioner (including Indonesia, Vietnam, Taiwan, Singapore, Philippines). <b>Target:</b> +10% YOY increase in qualified buyers attending.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>8. Sponsorship and Event Marketing</b> 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> 1. Canada Day Celebration for Indonesia, Vietnam, Taiwan, Singapore, Philippines. <b>Target:</b> +10% YOY reach of qualified attendees.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.



## MEXICO AND LATIN AMERICA

### WORK PLAN #16 2022 – 2023

<b>Team Lead and Budget Holder:</b>	Director, Market Development – Mexico & Latin America	
<b>Total Budget:</b>	\$444,000	Source: Beef Check Off CAP (leveraged) Alberta Beef Export Market Development Grant
<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 Mexico and Latin America.

#### 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 and Foodservice Promotions</b> Canada Beef will work with new and existing end-user clients, importers, and distributors to increase CB brand awareness and increase retail and foodservice sales promotions.	\$135,000 1. \$20,000 2. \$25,000 3. \$20,000 4. \$16,000 5. \$5,000 6. \$4,000 7. \$30,000 8. \$5,000 9. \$10,000	<b>Q1 – Q4:</b> 1. In-store samplings in Soriana/City Club outlets to boost sales of Canadian roast beef, corned beef, and development of new cold meat products. 2. In-store product sampling and co-branding campaign at HEB supermarkets to promote CB quality grades equivalence and CAB Canadian origin program. 3. Signature Cuisine partnerships with five restaurants in different states, in collaboration with top chefs and distributors. 4. Eight-week sampling program (short plate) at El Florido retail stores (36 outlets). 5. Branding campaign and grilling master classes at Carnes Premium XO's 1st and 2nd stores. 6. Promotion of new chilled Canadian cuts available at Chef's Choice (through Susazon distributor). 7. CB Global Culinary Series in San Miguel de Allende Hotel (6 months, with 1 local chef + 6 CB brand ambassadors from CB international offices or international chefs). 8. Canadian week special menu campaign at three Azul Restaurants (Chef Ricardo Munoz). 9) Six live Radio broadcasts with nationwide coverage. <b>Target:</b> +10% YOY sales volume and value increase.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.

Tactics	Budget	Deliverables	Key Performance Indicators
<b>2. Trade Shows</b> Canada Beef will participate in three trade shows to promote the CBA and support Canada Beef supplier clients at high traffic industry events.  <i>Efforts will be made to partner with Canada Pork and/or the Canadian Embassy in these trade shows to maximize impact and cut costs.</i>	\$75,000	1. Expo Carnes Monterrey (Feb 21-23, 2023). 2. ANTAD/ALIMENTARIA Guadalajara (May 2022). 3. Alimentec Colombia (Jun 7-10 2022).  <b>Target:</b> +10% YOY reach and awareness of CBA and CB programs and services.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>3. Trade Advertising</b> 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> 1. Articles in Food & Wine/Forbes magazines in digital and printed editions from: -Colombia -Mexico -Latin America  <b>Target:</b> +10% YOY reach to new clients.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>4. Marketing Materials</b> 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.	\$13,000 1. \$10,000 2. \$3,000	<b>Q2 - Q4:</b> 1. POP resources (1,000 merchandising guides, 3,000 food markers and 150 tent cards). 2. 50,000 CB labels.  <b>Target:</b> +10 % YOY reach.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>5. Canadian Beef Information Gateway</b> Canada Beef will adapt and launch a Gateway QR code solution program. The Gateway will include a limited menu of assets for each retail cut being offered in-market.	\$35,000	<b>Q1:</b> 1. Determine cut assortment and assets on hand.  <b>Q1 - Q3:</b> 2. Create QR codes and build menu assets for each cut. 3. Develop and produce QR code POP resources.  <b>Q4:</b> 4. Launch Gateway.  <b>Target:</b> Launch two Gateway projects in the retail sector.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>6. Consumer Marketing</b> Create, develop, or adapt new or existing marketing initiatives as needed to promote Canadian beef to consumers.	\$30,000	<b>Q1 - Q4:</b> 1. Two recorded culinary episodes with brand ambassadors & local personalities in two different Latin America markets. 2. Three seasonal video recipes (Xmas, Father's Day, Super Bowl).  <b>Target:</b> +10% YOY increase in consumer reach and exposure.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.



Tactics	Budget	Deliverables	Key Performance Indicators
<b>7. Digital Marketing</b> 1. Maintenance of site architecture and content updates. 2. Support social media communication through new and existing platforms.	\$100,000 1. \$3,000 2. \$16,000 3. \$4,000 4. \$3,500 5. \$23,500 6. \$50,000	<b>Q1 - Q4:</b> <b>Web:</b> 1. Service, domain hosting, website fees and placement. 2. Design/content updates, monthly analytics, maintenance, translation, and metrics service. 3. Monthly newsletters for the domestic market. 4. Virtual boutique maintenance fees. <b>Social Media:</b> 5. Collaboration with 12Tik-Tok food influencers/ celebrities/chefs for cooking of CB cuts (1 per month). 6. LATAM YouTube, Instagram and FB Channels- grow existing audience with focused campaigns from developed videos to increase user traffic. <b>Target:</b> +10% YOY traffic increase. Digital targeted campaigns. +80% YOY satisfaction score.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>8. Demand Building Events</b> Canada Beef will organize and execute two demand building seminar events to promote the CBA and support Canada beef supply.	\$10,000	<b>Q3:</b> 1. CB cutting demo & samplings with packer/distributor in Colombia & Peru/Guatemala. <b>Q1 - Q4:</b> 2. Three seasonal video recipes (Xmas, Father's Day, Super Bowl). <b>Target:</b> +10% YOY increase in new client reach and exposure.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>9. Distributor Education</b> Canada Beef will plan and execute two DEP events to promote the CBA and support Canadian beef client suppliers in the market.	\$5,000	<b>Q1 - Q4:</b> 1. Canada Beef seminar/training for three distributors and their sales teams. 2. Meat cutting workshop at one culinary college (Universidad del Caribe). <b>Target:</b> +10% YOY increase in importer/distributor reach.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>10. Government Trade Commission Partnership</b> Canada Beef will collaborate with Canadian trade commissioner services to support eligible promotional events and initiatives that meet Canada Beef objectives.	\$10,000 1. \$5,000 2. \$5,000	<b>Q2:</b> 1. Canada Day celebrations at Canadian Embassy in Mexico. <b>Q4:</b> 2. Comecarne seminars in collaboration with Canadian Government Representatives. <b>Target:</b> +10% YOY increase in qualified attendees.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.
<b>11. Sponsorships and Event Marketing</b> 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.	\$23,000 1. \$2,000 2. \$15,000 3. \$6,000	<b>Q1-Q4:</b> 1. Culinary Fest with Brand Ambassador in Tulum/Los Cabos. 2. Vallarta Nayarit Culinary Fest (Gala Dinner & beef workshop sponsorship) with distributor. 3. CANACINTRA/ Industry Grill Fest, 2nd edition in Saltillo. <b>Target:</b> +10% YOY increase in qualified attendees.	1. Satisfaction index survey. 2. Volume/value, market share of Canadian beef in the export marketplace.



## FINANCE AND OPERATIONS

### WORK PLAN #18 2022 – 2023

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

**Total Budget:** \$5,003,800      Source: Beef Check Off

#### Strategic Priorities:

1. Deliver financial accounting and administration services to ensure Canada Beef operations, programs and services are funded adequately, efficiently and in a timely manner.
2. Ensure that all Canada Beef operations, transactions, and reporting systems follow accepted principles of Canadian corporate accounting practices.

#### Objectives:

1. Provide sound financial policies and analytical systems for internal controls, accurate and timely financial information and ensure compliance with statutory and contractual obligations.
2. Deliver and maintain excellent staff and client customer services.
3. Provide and maintain a fit-for-purpose, safe and functional office work environment for all Canada Beef offices.

Operations	Budget	Deliverables	Key Performance Indicators
1. <b>Generic Beef</b>	\$226,400	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
2. <b>Public and Stakeholder Engagement</b>	\$64,200	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
3. <b>Global</b>	\$1,108,300	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
4. <b>Channel Marketing</b>	\$475,000	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
5. <b>Consumer Marketing</b>	\$79,800	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
6. <b>Digital Marketing</b>	\$189,900	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.

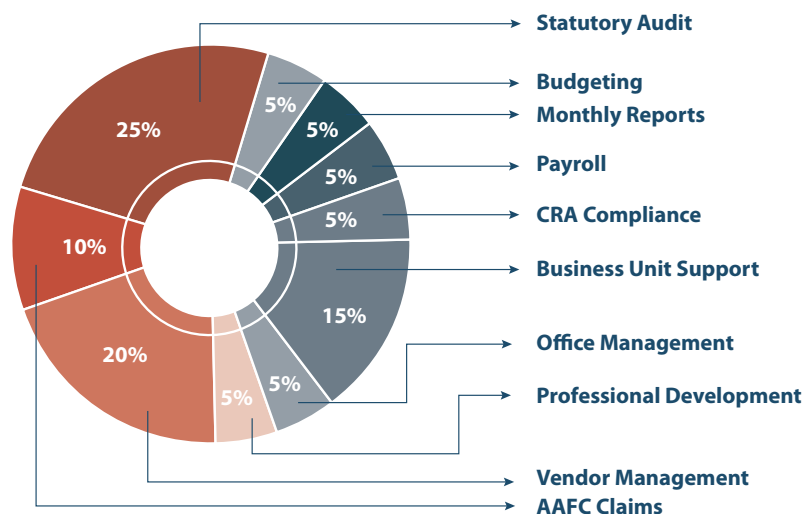


Operations	Budget	Deliverables	Key Performance Indicators
7. <b>Health and Nutrition</b>	\$55,650	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
8. <b>Communications</b>	\$125,950	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
9. <b>Canadian Beef Centre of Excellence</b>	\$571,150	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
10. <b>Export Market Development and Emerging Markets</b>	\$162,400	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
12. <b>Japan and</b> 13. <b>South Korea</b>	\$547,800	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
14. <b>China</b>	\$285,100	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
15. <b>Southeast Asia and Taiwan</b>	\$107,600	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
16. <b>Latin America and Mexico</b>	\$189,500	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.
17. <b>Calgary and Mississauga</b>	\$815,050	<b>Q1 – Q4</b> Administration, accounting, reporting, performance management supports.	1. Fiscal deadlines Accounting. 2. Satisfaction Index Survey.

Programs and Services	Deliverables	KPI's
1. <b>Budgeting and Monthly Reporting tools Weight (5%)</b>	<b>Q-4 (previous fiscal year)</b> 1. Annual programs & operations budgeting for Business/Investment Plan set-up. 2. Operating plan spreadsheets set-up on SharePoint. 3. Budget performance report template set-up and budget loading on Sage 300.	Satisfaction index survey.
2. <b>Business Unit Support Weight (15%)</b>	<b>Q1 - Q4</b> 1. Payment of monthly international office operating funds. 2. Reviewing vendor agreements and office rental contracts with business unit managers. - Responses within 2 business days. - Operating funds wired to offices before 15th of month. - Achieve 75% on accounting satisfaction survey.	Satisfaction index survey.
3. <b>Monthly Reporting to Business Units Weight (5%)</b>	<b>Q1 - Q4</b> 1. Monthly budget reports for each work plan & office overhead. - Reports delivered within 15 days of month end.	Satisfaction index survey.
4. <b>Payroll Processing Weight (5%)</b>	<b>Q1 - Q4</b> 1. Management of ADP payroll system. - Payment of salaries on time. - Payroll input data to ADP by Tuesday before payday.	Satisfaction index survey.
5. <b>Vendor Management Weight (20%)</b>	<b>Q1 - Q4</b> 1. Sage 300 Accounts Payable vendor system management. 2. Biweekly local vendor payments. 3. Biweekly set-up and payment of RBC express wires to international vendors. - Vendor information up to date before payment dates. - Less than 10 vendor complaints for fiscal year. - Less than 10 wire returns for fiscal year.	Satisfaction index survey.
6. <b>Agriculture and Agri-Food Canada (AAFC) Claim Weight (10%)</b>	<b>Q1 - Q4</b> 1. Preparing/Filing of quarterly AAFC claim. 2. Responses to AAFC's requests for samples and other information. - Claim delivered to AAFC within 90 days of the end of the quarter. - Responses to AAFC within requested deadline.	Satisfaction index survey.
7. <b>Statutory Audit (Weight 25%)</b>	1. Delivery of Trial balance and General Ledger report to auditors. - Delivered a week before field work commencement May 20th. 2. Preparation of audit working papers. - Audit working papers delivered to auditors by 1st day of field work 3. Working with auditors to complete the field work. - Field work completed by June 7. 4. Receive draft audited financial statements and audit findings report from the auditors and have a review with the finance committee. - Audit completed by June 22. 5. Meet with the Board of Directors to approve the draft audited financial statements. - Completed by June 30.	Satisfaction index survey.

Programs and Services	Deliverables	KPI's
8. <b>CRA Compliance</b> Weight (5%)	1. Preparing/filing of GST/HST returns to CRA and payment of any taxes due - Filed within 30 days of the end of relevant month 2. Preparing/filing of T4 summary to the CRA annually - By end of February of the following calendar year 3. Annual not-for-profit (NPO) and T2 returns to the CRA - Complete by Sept 30th	Satisfaction index survey.
9. <b>Office Management</b> Weight (5%)	<b>Q1 - Q4</b> 1. Monthly payment of rent and common area costs to property management. - Rent invoices are paid within first 7 days of the month. 2. Management of office supplies utilities and equipment to ensure that space is a workable environment. - Make procurements and address issues in a timely manner. 3. Ensuring insurances are active, this includes. - Cyber security insurance. - Commercial general liability. - Multi-media policy. - Property insurance. - Office liability. - Review and renew before expiry.	Satisfaction index survey.
10. <b>Professional Development</b> Weight (5%)	<b>Q1 – Q2</b> 1. Strive for continuous improvement of finance and operations processes. - Review and update finance and operations procedure manual once a year by March 15th. 2. Training and professional development. - Staff to attend a minimum of 1 training event per year.	Satisfaction index survey.

FINANCE &amp; OPERATIONS INVESTMENT ALLOCATION %



# CANADA BEEF - ANNUAL BUDGET

**FOR YEAR ENDED MARCH 31, 2023**

<b>Revenues</b>	<b>\$</b>
1 Check Off - Marketing	8,870,000
2 Check Off - Public and Stakeholder Engagement	233,000
3 Import Levy - Beef	1,012,260
Import Levy - Veal	32,740
4 Government of Canada - Canadian Agricultural Partnership (CAP)**	1,900,000
5 Alberta Agriculture and Industry	225,000
6 Export Market Development Administration Fee	25,000
7 Interest	50,000
8 Deferred Revenue Amortization (CBCE)	106,000
	<b>\$ 12,454,000</b>

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

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

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



# INVESTMENT PLAN

## 2022 – 2023

### Canada Beef 2022/23 Investment Plan Summary

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

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

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

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

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

#### **2022/23 Investment Plan**

The Coronavirus pandemic has continued to disrupt 'business as usual' for supply partners, end-user clients and consumers worldwide. Canada Beef's commitment to address the market challenges of the pandemic will continue in the 2022/23 Investment Plan. The plan is designed to be nimble and responsive, allowing Canada Beef to meet the needs of consumers and trade clients in both domestic and international markets.

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

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

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

### **1. Generic Beef and Veal – Consumer Marketing**

The Import Levy (collected on beef imports at the equivalent rate of \$1 per head) continues to provide funding to promote the positive attributes of consuming beef and veal from all sources in Canada through consumer education, awareness, and trust through public influencers directly to consumers. With consumers' diminishing food skills, concerns over healthy diets and public trust issues, Canada Beef will develop targeted initiatives to positively influence consumer preference for beef over other proteins and positively influence health professionals.

### **2. Public and Stakeholder Engagement**

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

### **3. Global Marketing**

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

### **4. Channel Marketing**

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

### **5. Consumer Marketing**

With consumers' diminishing food skills, concerns over healthy diets and public trust issues, Canada Beef will deliver targeted initiatives to positively influence consumer preference for Canadian beef over other proteins. Defend, stabilize, and increase consumption of Canadian beef vs poultry, pork, and plant-based meat alternatives. Increase awareness, trust and confidence in the Canadian cattle and beef delivery systems with consumers through the CBA. Support and contribute to the development and launch of branded and generic Canadian Beef Information Gateway (Gateway) across all business units to achieve success.

### **6. Digital Marketing**

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

### **7. Health and Nutrition**

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

### **8. Stakeholder Communications**

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

**9. Canadian Beef Centre of Excellence**

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

**10. Export Market Development Partner Program**

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

**11. Emerging Markets**

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

**12. Japan Market Development**

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

**13. South Korea Market Development**

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

**14. China / Hong Kong Market Development**

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

**15. Taiwan / Southeast Asia Market Development**

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

**16. Mexico/ Latin America Market Development**

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

**17. Canada Beef Operations**

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

# CANADA BEEF PRESIDENTS REPORT

Market Development & Promotion Committee  
Video Conference Meeting  
January 27, 2022





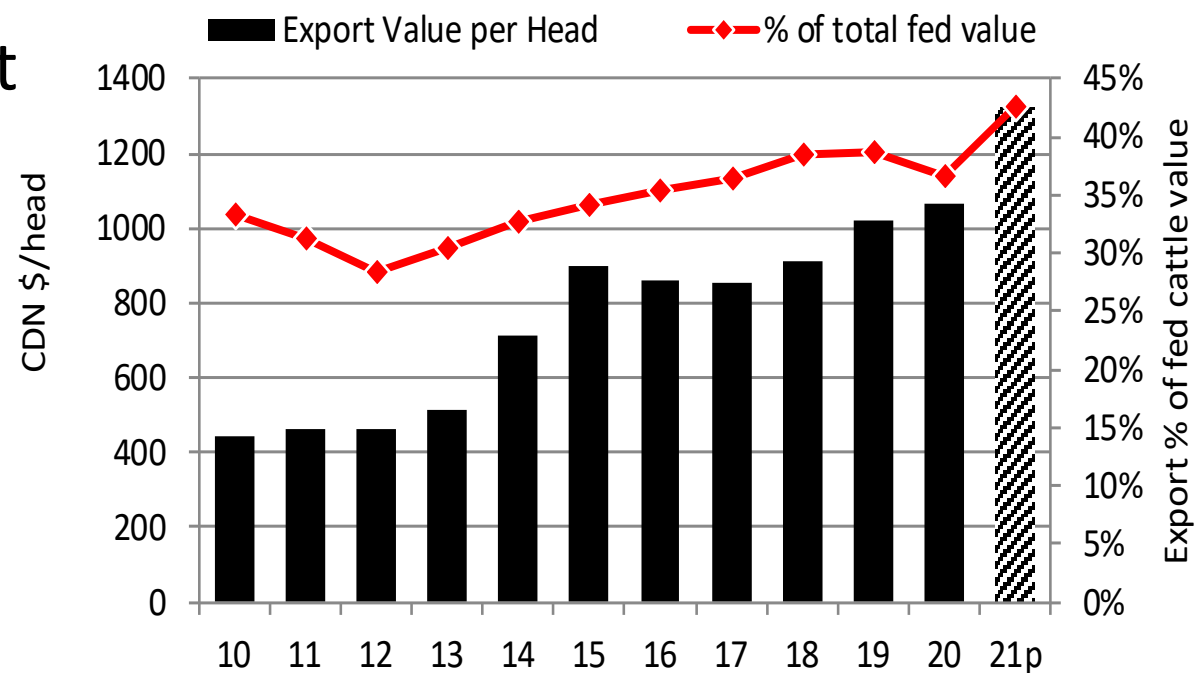
# Global Meat Market Trends

- IMF has complained that China's hardline approach to Covid is becoming a burden on the global economy.
- South Korea has reopened to Canadian beef, Philippines and China expected to open soon (likely after Chinese New year).
- Global beef prices rising to record levels (USA \$9.58, Australia \$9.09, Brazil \$5.26 USD/kg) and could hold strong till 2024.
- Wealthy urban Chinese consumers driving growth +117% inflation since January - 2012 on top of \$10 billion USD in beef imports.
- Wealthy urban Chinese represent approximately 10% of China's population. That's 140 million consumers with a growing love affair for imported beef.
- USA retail price increase: Beef +7.9%, Chicken +6.2%, Pork +7.7%.
- USA consumers pushing back: Beef -7.6%, Chicken -6.2%, Pork -8.7%.

# Export Value Contribution Per Head

- US box beef prices converted to CAD\$ and applied to CAD export contribution/head.
- For perspective only.
- Canadian packers no longer report prices needed for an accurate made in Canada calculation.

Export value contribution to Canadian Slaughter



Source: Statistics Canada, CBGA

# Beef and Veal Export Market Performance

## YTD November 2021

Market	Volume Tonnes	Value Millions	Unit Value \$/kg	YTD Change Volume %	YTD Change Value %	<b>All Markets</b> Volume: 475,492 tonnes (+22.3 vs YTD % 2020) Value: \$4,146,306 billion (+22.3% vs YTD % 2020) Unit Value: \$8.72/kg (+13.6% vs YTD % of 2020)
1. USA	329,691	\$3,016,377	\$9.15	15%	32.9%	
2. Japan	56,121	\$419,484	\$7.47	37.9%	51.1%	
3. Mexico	21,558	\$176,722	\$8.20	74%	102.6%	
4. China	19,012	\$181,964	\$9.57	99.4%	93.8%	
5. South Korea	12,178	\$35,386	\$8.93	130.2%	207.2%	
6. Viet Nam	11,528	\$80,550	\$6.99	88.4%	125.6%	
7. Hong Kong	7,992	\$73,930	\$9.25	-37.2%	-25.2%	
8. Philippines	4,681	\$14,097	\$3.01	409.5%	222.8%	
9. Taiwan	1,315	\$13,388	\$10.18	-37.8%	-23.1%	
10. Saudi Arabia	845	\$9,814	\$11.61	-27.4%	-29.9%	

Source: Statistics Canada, AAFC



# Canadian Beef and Veal Imports

## YTD November 2021

Supplier & Rank	Volume Tonnes	Value Millions	Unit Value \$/kg	YTD Change Volume %	YTD Change Value %	
1. USA (59.86%)	87,039	\$829,995	\$9.54	-9.7%	-5.2%	<b>All Suppliers</b> Volume: 145,402 tonnes (-16.7% vs YTD % 2020) Value: \$1,269 billion (-9.9% vs YTD % 2020) Unit Value: \$8.73/kg (+8.2% vs YTD % 2020)
2. EU 27 (10.41%)	15,134	\$93,709	\$6.18	-1.9%	-2.2%	
8. UK (1.71%)	2,486	\$14,861	\$5.98	-48.9%	-47.4%	
3. New Zealand (8.79%)	12,775	\$85,685	\$6.71	-27.8%	-28.7%	
5. Uruguay (5.64%)	8,197	\$48,041	\$5.85	-43.0%	-44.1%	
6. Australia (4.93%)	7,174	\$79,215	\$11.04	-48.5%	-28.3%	
4. Mexico (5.70%)	8,289	\$83,824	\$10.11	7.5%	32.8%	
7. Brazil (1.97%)	2,870	\$19,807	\$6.90	10.8%	15.7%	
9. Argentina (0.22%)	318	\$1,844	\$5.79	640.5%	286.2%	

Source: Statistics Canada, AAFC



# Domestic Market Trends

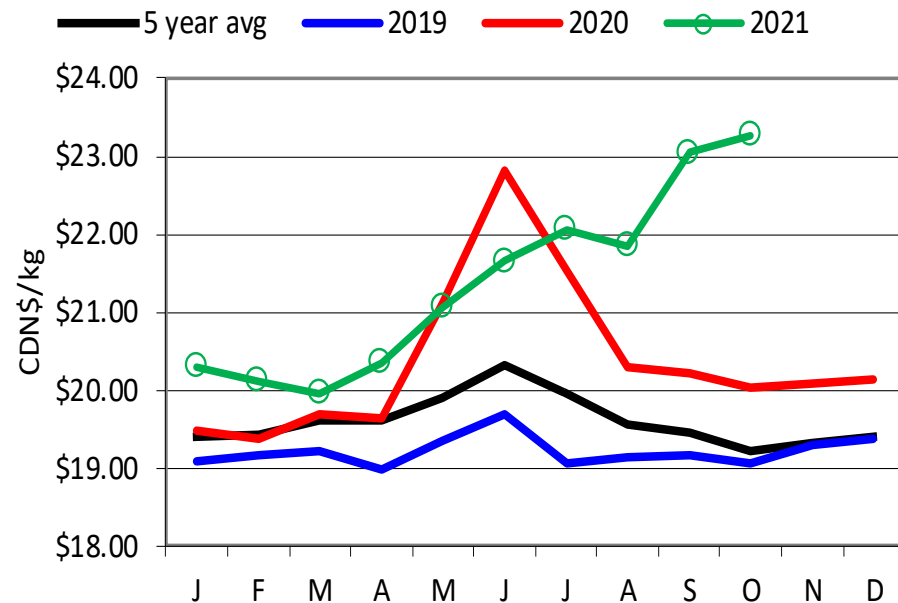
- Red meat consumption and demand declining in Canada.
- Overall food inflation rate in Canada is close to 5%, meat prices up about 10%.
- Lower household income, soaring meat prices and the struggling restaurant sector are contributing.
- Recent Stats Canada report indicates demand for beef began declining steadily after a peak in late 2020.
- Canadians appear to be compensating by purchasing more chicken.
- In addition to higher food prices, the pandemic has led to rising shipping costs, labor shortages, while widespread drought in 2021 negatively impacted the production of vital crops like wheat, canola and barley.

# Domestic Market Trends

- Canfax is projecting Retail Beef Demand to be down 1.5% in 2021.
- Deflated retail beef prices up 2.4% and per capita consumption down 5%.
- Pork production was up 0.8% in 2021 with pork exports -3.3% from Jan-Nov and imports -6.5%.
- In 2020, strong pork exports resulted in lower consumption and larger beef consumption.
- It appears things are adjusting back in 2021 with lower beef consumption driven by strong exports and larger pork consumption.
- There is potential for continued volatility as China's recovery from ASF fluctuates and continues to drive global animal protein trade.

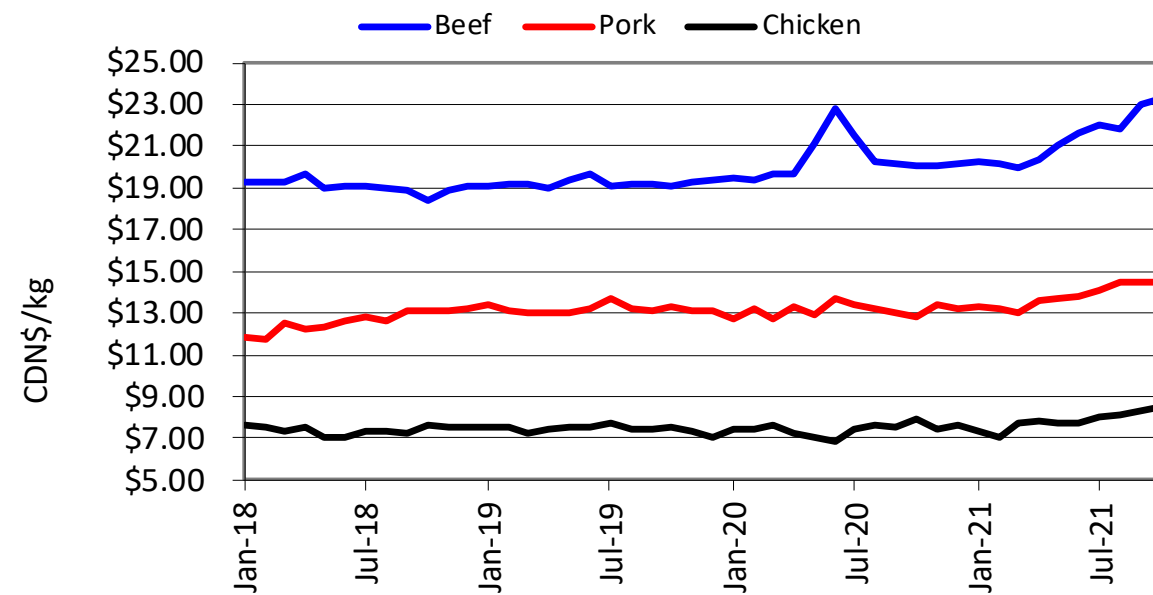
# Canadian Retail Beef Price Trends

Retail Beef Prices (Not Deflated)



Source: Statistics Canada

Canadian Retail Meat Prices (Not Deflated)



Source: Statistics Canada

# National Average Retail Prices – Beef and Pork Segments

## Beef Segment

Cuts	Jan. 2-2021	Jan. 1-2022	Change %
Cubes	\$16.02	\$19.37	20.91%
Grinds	\$11.15	\$11.15	No change
Kebobs	\$12.68	\$15.02	8.45%
Roasts	\$14.70	\$17.67	20.20%
Steaks	\$21.14	\$24.63	16.51%
All Other	\$16.41	\$14.54	-11.40%
Thin Meats	\$15.11	\$16.24	7.48%

Retail Tonnage Change % 2022 vs 2021

Beef: -9.71%    Pork: -2.83%    Veal: -40.42%

## Pork Segment

Cuts	Jan. 2 -2021	Jan. 1-2022	Change %
Cutlets	\$13.23	\$13.93	5.29%
Grinds	\$8.42	\$7.92	-5.94%
Kabobs	\$18.11	\$18.14	0.17%
Liver	\$5.29	\$5.82	10.02%
Chops	\$8.90	\$9.17	3.03%
Ribs	\$11.52	\$12.71	10.33%
Roasts	\$8.59	\$8.83	14.44%
Strips	\$15.04	\$16.98	12.90%

Source Nielsen Market Track Release January 1<sup>st</sup>, 2022





# Japan and South Korea

## Retail and Food Service Promotions

- 6 projects completed (3 demo and 3 retail/foodservice promotions), Costco Japan demo 2 retail promotions upcoming in Feb/Mar.

## Trade Advertising

- 6 projects completed and Grading Advertising upcoming in February.

## Trade Shows

- 5 trade shows completed and 4 trade shows including Foodex Japan upcoming in Jan-Mar.

## Website

- CBII website development and updates in progress.

## Social Media and Consumer Marketing

- Social media marketing in progress and Canada Beef Instagram launched in S. Korea.

## Distributor Education Program

- Canada Beef Course with culinary students completed in both Japan and S. Korea.

## Marketing Materials

- 5 projects (POS and Sensory Testing) completed and Canada Beef e-newsletter launched.

## Canada Beef Course at three culinary colleges in Japan



## Canadian Beef Export Trends

### Japan:

YTD (Jan-Nov 2021) growth rate was 31%, the highest growth rate % for the top three beef exporting countries to Japan.

### South Korea:

YTD (Jan-Nov 2021) growth rate was 55%, the highest growth rate % for the top five beef exporting countries to South Korea.

# China and Hong Kong

## Retail and Food Service Promotions

- 7 projects completed, 3 projects cancelled, 2 projects ongoing, 1 project upcoming.

## Trade Shows

- 3 shows completed (SIAL China 2021 May, CIMIE September and FHC 2021 November).

## Demand Building Events

- 1 project completed, 1 project upcoming.

## Social Media

- 1 project completed, 1 project ongoing.

## Distributor Education Programs

- 1 project completed, 2 projects ongoing, 1 project upcoming.

## Marketing Materials

- 10 trade and consumer marketing material projects completed.

## Government Trade Commissioner Partner Programs

- 3 projects completed, 1 project cancelled, 1 project upcoming.

## Sponsorships and Event Marketing

- 3 projects completed.

## CBII China at FHC 2021 Show Shanghai



## Canadian Beef Export Trends

**China:** Beef demand remains strong though growth of volume has started to slow down. The temporary suspension of Canadian Beef since Dec. won't impact the in-market supply in short term until it lasts longer than 6 mos.

**Hong Kong:** Beef import volumes continue to drop due to tighter control on grey channel into China and beef prices keep increasing.

# Taiwan and Southeast Asia

## Retail and Food Service Promotions

- 5 projects (in Taiwan, Vietnam, Philippines) completed, 2 projects ongoing in Vietnam and Taiwan. 1 retail project upcoming and 2 foodservice projects upcoming in Taiwan and the Philippines.
- Costco Taiwan has approved and completed product quality test for Canadian beef, currently waiting for order and shipping confirmation from supplier.

## Trade Shows

- Food Taipei 2021 trade show completed in December 2021. Food & Hotel Vietnam 2021 is canceled and 2022 show will be on December 7-9. Food & Hotel Asia in Singapore is postponed to Sept 5 – 8, 2022.

## Website and Social Media

- CBII Taiwan website has been optimized with ongoing regular update monthly.
- CBII Taiwan and Southeast Asia Facebook and Instagram are being updated with regular posts monthly.

## Marketing Materials

- 1 projects completed (CB Acrylic display divider). 1 project on going of translation and production of Canadian Beef and Veal Handbook in Vietnamese and Mandarin.

## Government Trade Commissioner Partner Programs

- 2 projects completed in Vietnam(partnered with influence chefs to promote on social media) and in the Philippine of conducted a public webinar and working with influence chef on Instagram.

## CB Retail promo at Landers Philippines



## Canadian Beef Export Trends

**SE Asia:** Exports grew 130% in volume and 136% in value to Nov 2021. Vietnam and the Philippines contributed most to growth.

**Taiwan:** Almost all major beef export countries volume were down as a result of COVID restrictions. Canadian beef volumes down 35% but signs of recovery since August 2021.



# Mexico and Latin America

## Retail and Food Service Promotions

- 1 completed branding-sampling project w/Retailer (11 stores) + 3 completed live streaming's + 12 completed live radio broadcasts + 5 completed events w/FS distributor & restaurants/hotels within the country + 1 ongoing branding/sampling campaign w/ 1 major retailer (7 stores) + 1 ongoing promo with wholesale club (35 stores) + 3 completed campaigns with different FS operators.

## Demand Building Events

- 2 completed projects ( CB virtual boutique mobile platform access, filming of 10 seasonal grilling videos in different locations).

## Trade Advertising

- 1 completed project (ad in specialized beef magazine).

## Sponsorships and Event Marketing

- 2 completed projects (workshop & demo w/Industry Chamber, Culinary festival).

## Website & Social Media

- 1 ongoing project f/monthly updates to webpage + 1 completed f/development of 2 podcast channels & content + 2 ongoing projects for SM and newsletter content creation and mailing.

## Distributor Education Programs

- 1 completed project (Carnes Premium XO sales force training).

## Marketing Materials

- 5 completed projects (3 digital cookbooks ,branded aprons and labels).

## Government Trade Commissioner Partner Programs

- 3 completed projects (Cdn. Embassy product catalog ,COMECARNE / ANETIF border seminars development).

## Canadian Certified Angus Beef promotion at select HEB stores



## Canadian Beef Export Trends

Mexican cattle production is expected to grow, thus domestic beef could gain some slight market share vs. imported beef, with cheaper offerings. However, Mexico's total beef imports volume 2021 was 19.3% up YOY, and Canadian beef exports to Mexico should continue its upward trend (74% increase in volume and 103% in value YTD Nov 2021).



# Emerging Markets

## Retail and Food Service Promotions

- 1 ongoing project in progress until March 2022 (Costco Spain).

## Trade Shows

- 1 show completed (ANUGA October 2021). Partnered with Canada Pork and Canadian Bison.

## Trade Advertising

- 1 project completed in September (Europe) and 1 ongoing December to March 2022 (Middle East)

## Government Trade Commissioner Partner Programs

- 1 ongoing project in progress until March 2022 (Germany) and 1 ongoing Jan/Feb 2022 (UAE)

## ANUGA 2021 Trade Show Cologne, Germany



### Canadian Beef Export Trends

Cdn beef exports to EU continued their growth Q4 2021 while UK exports remain weak compared to previous year. Tight supply of EU and UK hormone free cattle are being reported. Cdn beef sales to the Middle East remain stable vs. previous year.

# Emerging Markets

## BLOCK HOUSE Germany

- 52 steak house style operations (44 in Germany, 6 in Spain, 2 in Portugal).
- They operate their own production/portion cutting facility to supply their own restaurants plus hotels, retail, online and catering.
- They also import beef from Ireland, US, Argentina, Uruguay and local German supply.
- THEO'S Steakhouse Hamburg is their flagship restaurant.
- They now feature dry-aged Canadian rib, rib-eye and tenderloin steak as a regular menu item.
- BLOCK HOUSE has signed a CB licensing agreement.



EST. 2015 THEO'S

### STARTERS

Trüffel Onsen-Ei, auf gerahmtem Spinat mit umbrischem Trüffel 16  
 Beefatar mit buntem Zwiebelkonfit und Honig-Senf-Kapern 17  
 Surf & Turf, Carpaccio vom irischen Rinderfilet, 40 Tage dry aged, mit mariniertem Tintenfisch 19  
 Massachusetts Lobster auf geschmolzenem Sellerie und Hummerbutter-Schaum 24  
 Sashimi vom Ora King Salmon on the rocks mit hausgemachter süß-saurer Soja-Sauce und eingelegtem Ingwer, auf Eis serviert 19  
 Avocadotatar mit Tomaten-Melonen-Chutney und Paprika-Koriander-Limonen-Salat 14  
 Dreierlei THEO'S Starter  
 Beefatar | Avocadotatar | Sashimi vom Ora King Salmon, für zwei zum Teilen 38  
 Ochsenchwanzsuppe mit pochierem Kalbskopf 11

### AUS DER OYSTER BAR

Austern mit Schalotten-Vinaigrette und Zitronen 12 | 24  
 Fine de Claire 3 Stück | 6 Stück 12 | 24  
 Sylter Royal 3 Stück | 6 Stück 15 | 30  
 THEO'S Seafood selection, on the rocks für zwei zum Teilen:  
 Halber Massachusetts Lobster, 2 Fine de Claire, 2 Sylter Royal, 2 Donegal Austern, 4 Rotgarnelen, 6 Crevettes Roses, Safran-Mayonnaise, Schalotten-Vinaigrette und Zitronen p.P. 32

THEO'S Caesar Salad, am Tisch zubereitet, mit gehobelter Macadamianuss, Sardellen, Parmesan und Trüffelecrüttons 14  
 Schaumuppe vom Massachusetts Lobster 14

### US PRIME BEEF, dry aged

Roastbeef und Filet vom jungen Black Angus Rind aus Nebraska.

Für zwei zum Teilen, 700 g - 900 g	je 100 g	14
T-Bone Steak, 500 g - 700 g auch für zwei zum Teilen	je 100 g	14
Rumpsteak, Sirloin New York Cut	11 oz	ca. 300 g 45



### CANADIAN BEEF, dry aged

Rib-Eye, Bone-In, 650 g - 850 g auch für zwei zum Teilen	je 4 oz	je 100 g	11
Rib-Eye	12 oz	ca. 350 g	49
Filetsteak	7 oz	ca. 200 g	39



### BLACK ANGUS eigene Aufzucht Block, dry aged

Rib-Eye	12 oz	ca. 350 g	49
Rumpsteak, Sirloin New York Cut	11 oz	ca. 300 g	45

Zu Ihrem Steak servieren wir Ihnen gerne unsere hausgemachten Saucen, sowie zwei frische Beilagen. Jede zusätzliche Beilage berechnen wir mit 4 Euro.

BBQ grünes Spargelgemüse  
 Möhren mit Thymianhonig  
 Portobello Pilze aglio e olio

French Fries  
 Getrüffelter Kartoffelpüree  
 Gerahmter Blumenkohl

THEO'S Beef Dip  
 THEO'S Beef Spice  
 Sauce Béarnaise

### FISH & LOBSTER

Nordseeinbutt-Filet mit Radieschen-Beurre blanc und Möhren mit Thymianhonig

Massachusetts Lobster  
 ca. 19 oz vom Grill mit Sauce béarnaise, Zitronen und getrüffelem Kartoffelpüree

Alle Preise in Euro, inklusive Mehrwertsteuer und Service.



# Consumer Marketing – My Canadian Beef Trust Campaign

## Digital Media Stories

- Narcity – 2x articles
- Daily Hive

### 3 surprising benefits of incorporating red meat into your diet

DH Daily Hive Branded Content | Nov 9 2021, 3:35 pm



## Digital Targeted Advertising



### Zinc: It's All Kinds of Good | Canadian Beef

Love Canadian Beef

59K views • 5 months ago

#MyCanadianBeef is...  
Quality Grade Eh



WATCH NOW



## Advocate Placements Six Advocates





# Consumer Marketing – The One & Only Beef Campaign

**L.A. Kalbi-Style Ramen**

What makes this recipe so crave-worthy? Probably the cozy warmth of the soothing broth, or the slurpy fun of the ramen noodles. Perhaps it's the flavour-filled, Los Angeles inspired Korean BBQ beef short ribs. Let's be honest, it's not debatable! It's the beef. **The one & only. Beef.**

**L.A. Kalbi:**  
noun  
A Los Angeles take on Korean short ribs, using thick-cut, flanker-style ribs rather than the traditional thick-cut short ribs.

Recipe development by Trevor Li  
Photography by wachandbook.com

**DOUBLE HAPPINESS**


Trevor has made a life and career surrounded by the sights and sounds of food and drink. He has also just released his inaugural cookbook, *Double Happiness*.

You know what you love, and you know why you love it.

**The One & Only BEEF**

Get more of what you crave at [thinkbeef.ca/real](http://thinkbeef.ca/real)  
A Canada Beef initiative.

**SCAN TO GET THIS RECIPE**



## Print Advertising Q3

- 2 placements in Food & Drink (LCBO – Ontario only)
- 2 placements in House & Home (national)
- Ads featured Influencer developed content + leveraged outreach
- Tease ads designed to drive engagement (recipe, purchase)
- Reach: 9.2 million readers

**Irish Whiskey Beef Stew**

What makes this recipe crave-worthy? It's the chunks of tender beef and harvest veggies in a hearty sauce spiked with Irish Whiskey. Did we mention the beef?

Prep time: 15 minutes | Cook time: 2 hours, 15 minutes | Total time: 2-1/2 hours | Serves: 4-6 servings  
Recipe development and photography by EatItEatOut Magazine – [eatiteatout.ca](http://eatiteatout.ca)

**Ingredients**

- 2-1/2 lb/1.3 kg Beef Blade Steak or Blade Pot Roast
- 3/4 tsp EACH salt and black pepper
- 3 tbsp olive oil, divided
- 1 large sweet onion, diced
- 4 strips bacon, diced
- 3 cloves garlic, minced
- 4 carrots, peeled and sliced into 1/2-inch pieces
- 3 large celery stalks, sliced into 1/2-inch pieces
- 3 tbsp all-purpose flour
- 1 can (500 mL) stout beer (like Guinness)
- 1/2 cup Irish Whiskey
- 1-1/2 cups beef broth
- 2 tbsp Worcestershire sauce
- 3 tbsp tomato paste
- 1/2 tsp dried thyme
- 2 bay leaves

**Instructions**

1. Preheat oven to 325°F. Cut meat into bite-sized cubes. Pat dry and season with salt and pepper.
2. Heat 2 tbsp of the oil in a heavy Dutch oven or stock pot over medium-high heat. Brown beef, in batches for 8 to 10 minutes, turning until browned on all sides. Transfer beef to a bowl.
3. Lower heat to medium and add remaining oil. Add onions and cook for 2 minutes. Add bacon and cook until bacon is browned and onions are soft and golden. Add garlic, cook for one minute. Add carrot and celery. Sprinkle flour over top, and stir for 1 minute until thoroughly moistened.
4. Gradually stir in stout, whiskey, broth, Worcestershire, tomato paste and bay leaves; stir up any browned bits at the bottom of the pot. Return beef and any accumulated juices to the pot (note: liquid level should just cover the beef and vegetables).
5. Cover and cook in the preheated oven for 2 hours, until beef is fork-tender. Skim off any fat on the surface, if desired. Adjust salt and pepper to taste. Remove bay leaves. Serve with mashed potatoes.

You know what you love, and you know why you love it.  
It's the **REAL** satisfaction and **REAL** nourishment that BEEF delivers.

**The One & Only BEEF**

Get more of what you crave at [thinkbeef.ca/real](http://thinkbeef.ca/real)  
A Canada Beef initiative.

**Scan for more crave-worthy recipes.**






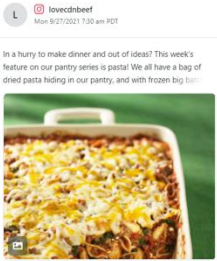
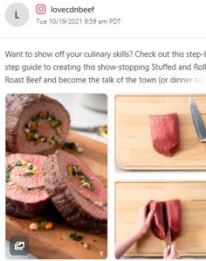
# Digital Marketing - Social Media

## September – December 2021

- Across 7 social networks – total of **70,250 followers**. A growth of 480 new followers.
- **Facebook** is the top social network referral site to Canadabeef.ca – (4,663) traffic to website
- **Pinterest** is #2 for referrals
  - ✓ Number #1 recipe on Pinterest (organic) is Quick and Easy Beef Pot Pie with over 1,200 pin clicks.
- **Instagram** – Platform with the highest increase of new followers 259. Top three posts 1) partnership with Furlani and recipe influencer; 2) weeknight dinner solution and 3) Cooking know how Eye of Round roast.

Social Network		Sessions
1.	Facebook	4,663
2.	Pinterest	3,772
3.	Instagram	933
4.	YouTube	302
5.	Twitter	278
6.	LinkedIn	30

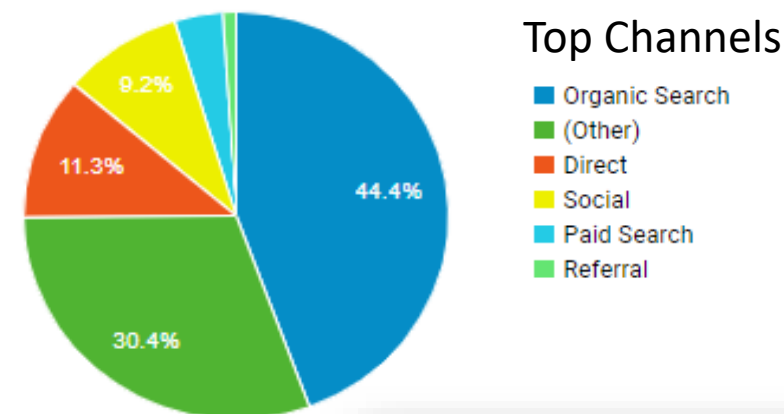
  

 <p>Wed 11/04/2021 1:04 pm PST</p> <p>We recently asked @furlanidina to come up with a recipe that marries @furlani, Foodie Garlic Tossar Toast and Canadian beef, and boy did she deliver! These Double Decker toasts...</p> <p>Total Engagements: 263 Likes: 254 Comments: 6 Saves: 3</p>	 <p>Mon 9/27/2021 7:00 am PDT</p> <p>In a hurry to make dinner and out of ideas? This week's feature on our pantry series is partial! We all have a bag of dried pasta hiding in our pantry, and with frozen big...</p> <p>Total Engagements: 212 Likes: 94 Comments: 109 Saves: 9</p>	 <p>Tue 10/19/2021 9:59 am PDT</p> <p>Want to show off your culinary skills? Check out this step-by-step guide to creating this show-stopping Stuffed and Rolled Roast Beef and become the talk of the town (or dinner)...</p> <p>Total Engagements: 197 Likes: 168 Comments: 6 Saves: 23</p>
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# Digital Marketing – Canadabeef.ca Website

## September – December 2021

- 229,664 active users on the website. (28-day average was 63,558)\*
- Where does our traffic come from?
  - ✓ Organic 44%
  - ✓ Other 30%
  - ✓ Direct 11%
- Mobile is the main device used to access website with **132,761** users.
- Top landing pages (pages visits begin on)
  1. Oven Roast Know-How page – 58,398
  2. Recipes – 37,357
  3. Main landing page (home page) - 13,738
  4. Back to School recipe page – 6,549
- Site Search\* – top search terms all related to cuts of beef – Sirloin tip, Ground beef, Prime Rib
- Recipe – over 170,000 page views. Top recipes were for comfort foods such as stews, pot roasts, meatballs and soup.

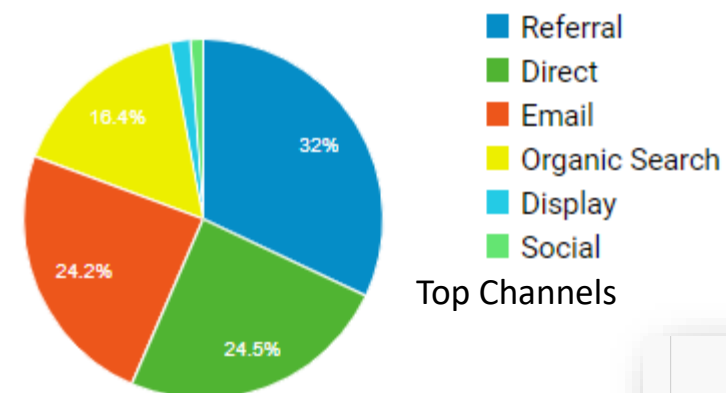


Search Term ?	Total Unique Searches ?
	4,171 % of Total: 100.00% (4,171)
1. sirloin tip roast	55 (1.32%)
2. ground beef	43 (1.03%)
3. prime rib	38 (0.91%)
4. beef stew	34 (0.82%)
5. Sirloin tip roast	34 (0.82%)
6. blade roast	33 (0.79%)

# Digital Marketing – Cdnbeefperforms.ca

## 2021 – September to December

- 2,203 active users on the website.  
(28-day average was 342)
- Where does our traffic come from?
  - Referrals\* – 32%
  - Direct - 25%
  - Email – 25 %
- Which site sends us the most traffic?
  - Canadabeef.ca website
  - QR Codes features at the ANGUA Show
  - GIC Virtual Tradeshow website



Top Channels

## Top landing pages (pages visits begin on)

1. Main landing page  
(Homepage) – 1,331
2. Europe\* – 574
3. Meat Packer list - 209
4. Statistics - 321

		3,002	71
		% of Total: 100.00% (3,002)	Avg for View
<input type="checkbox"/>	1. /	1,331 (44.34%)	
<input type="checkbox"/>	2. /europe/	574 (19.12%)	
<input type="checkbox"/>	3. /federally-registered-meat-packers/	209 (6.96%)	
<input type="checkbox"/>	4. /webinar-cd/	155 (5.16%)	
<input type="checkbox"/>	5. /aafc-beef-import-and-export-statistics/	79 (2.63%)	
<input type="checkbox"/>	6. /videos/	67 (2.23%)	
<input type="checkbox"/>	7. /market-reports/	44 (1.47%)	
<input type="checkbox"/>	8. /canadian-beef-advantage/	41 (1.37%)	
<input type="checkbox"/>	9. /irop/	41 (1.37%)	
<input type="checkbox"/>	10. /carcass/	40 (1.33%)	

# Health and Nutrition – Iron Matters

## Print and Media Tour

- Can Fit Pro, Narcity, Daily Hive, Dietitians of Canada and the Occupational Health Nurses association (combined reach of >10M Canadians)
- 6 TV spots (including Breakfast TV Toronto); combined reach of 2.3 million viewers
- Programmatic placement of Iron video on key websites

## Parents Canada Partnership

- Nutrition chapter in Baby & Childcare Encyclopedia (print circulation of 100k)
- Digital campaign including Thinkbeef infant recipe booklet featured on Parents Canada website (>700k impressions)
- Sponsored email blast to 60k Parent Canada subscribers
- Sponsored social posts for Parents Canada channels (in market in Q4)

## 3-month Health Professional communications blitz (in market currently)

- ~1,200 HCPs (predominantly RNs and MDs) in AB, BC, ON and NB

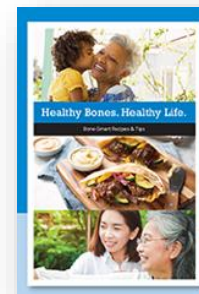
## “Talking Nutrition”

- Featuring conversations with RD's about health topics relevant to beef
- Launching in Q4: 5 videos about the critical importance of iron containing foods for babies and toddlers and 'How to feed beef to your baby' campaign



# Health and Nutrition – Beef and Bone Health

- Partnership with Osteoporosis Canada (OC) to deliver pro-beef messaging for bone health
- Protein & Bone Health webinar
  - ✓ Featuring speakers Debra Butt, MD & Shelly Hagen, RD
- Development of beef recipe booklet stressing the often-forgotten protein/bone connection.
  - ✓ Booklet promotion through OC and Dietitians of Canada
- Sponsored two beef cooking webinars with celebrity chef Emily Richards (two more planned for Q4).
- Canada Beef awarded OC Partner of the Year in recognition of the collaboration achieved in 2021.



**DYK?**  
12% of Canadians 40 years+ are living with osteoporosis. (PHO, 2018)

Click here to view, download and share the booklet



**PROTEIN & BONE HEALTH**

WEBINAR:  
MONDAY, NOVEMBER 29, 2021

THINKBEEFS

OC REPLAY

WATCHING SOME OF OUR MOST POPULAR ONLINE CONTENT

**Think Protein Density.**  
Protein foods are not all equal. Here's how much food you need to eat from various foods for the same amount of protein (25 g).

	AMOUNT	CALORIES
Beef (cooked)	100 grams = 1 serving* (the size of your palm)	250
Almonds	over 1 cup (3.3 servings); 1/4 cup (50 grams) = 1 serving*	900
Peanut butter	over 3 tbsp (3.4 servings); 1 tbsp = 1 serving*	860
Hummus	1 1/4 cups (14.2 servings); 2 tbsp = 1 serving*	740
Black beans (cooked/drained)	over 2 cups (4.3 servings); 1/4 cup = 1 serving*	520

**Healthy Bones. Healthy Life.**  
Good bones are the foundation for strength and resilience.

**THINKBEEFS** **OSTEOPOROSIS**

Brought to you by Canada Beef in partnership with Osteoporosis Canada



# Public and Stakeholder Engagement

## Costco Connection Consumer Magazine

- Canada Beef created a print ad for the January/February issue of Costco Connection magazine that featured a health and wellness theme.
- The ad highlighted the positive health and nutritional benefits of Canadian beef including how protein helps build strong bones and muscles; how zinc supports immune health; how vitamin B12 helps make red blood cells; and how plant and animal foods work together to support a healthy diet.
- The Costco magazine has over 3.5 million subscribers in both English and French Canada.

## Media Training

- Conducted media training for 12 key staff across various disciplines to improve media acknowledge, corporate procedures, and interview strategies and interview skills to help ensure the best outcomes possible when dealing with the press
- The virtual sessions included classroom instruction and practice interviews to drive home knowledge and skills needed to professionally manage media coverage

## New Photography for PSE, Consumer and Trade Marketing

- Acquired new livestock and landscape photography from two locations in southern Ontario for the electronic resource library
- New, fresh content is required regularly for the production of consumer and trade industry resources that represents environmental and animal welfare best practices

**Canadian Beef Benefits**  
BEEF FACTS THAT MAY SURPRISE YOU

**Beef's BIG on protein**  
One serving of cooked beef (100 g at 250 calories) has the same amount of protein (35 g) as over 1 cup of almonds (at 960 calories).

**Beef Does a Body Good**  
At every age and stage of life, the nutrients in beef can contribute to good health and well-being. Protein helps to build bones and muscles, zinc helps to support our immune health, and vitamin B12 helps make red blood cells.

**Beef (100g cooked) - % Daily Value (DV) of Key Nutrients**  
Excellent Source | Good Source | Source

MINERALS		
Zinc	28%	77%
Selenium	18%	
Phosphorus	18%	
Iron	6%	
Potassium	6%	
Magnesium	6%	
VITAMINS		
Vitamin B12	100%	148%
Niacin	28%	78%
Pantothenic acid	28%	
Riboflavin	18%	
Vitamin B6	12%	
Cobalamin	6%	
Thiamin	6%	

**Plant and animal proteins are better together**  
Each food in the diet contributes a unique nutrient package. Animal proteins champion heme-iron and vitamin B12—nutrients not available from plants. Plant foods champion fibre and folate—nutrients not present in meat. We need them both.

For more information on beef and nutrition, please visit [canadabeef.ca/nutrition](http://canadabeef.ca/nutrition)

Sources: Health Canada, Canadian Nutrient File 2015, Food values: Beef #172; Almonds #214  
% Daily Value is based on diet guidelines for adults. % Daily Value for children and teenagers may vary.  
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# Public and Stakeholder Engagement

## Cows on the Planet Podcast

- Canada Beef is a sponsoring partner of the 'Cows on the Planet' podcast featuring University of Lethbridge Research Associate, Dr. Kim Stanford, and Agriculture and Agri-Food Canada Lethbridge principal scientist Dr. Tim McAllister.
- Episodes present complex science in an engaging manner to help Canadians understand the beef industry in an objective way. To date, 12 podcasts are available with plans to release 36 episodes in total.
- Podcasts and other online discussion forums are a great way to share information about Canadian beef and sustainable cattle production. Cows on the Planet is available on Spotify, Apple and other podcast platforms.



## FAO Consult

- The Food and Agriculture Organization of the United Nations (FAO) is developing an assessment called '*Contribution of animal source foods to healthy diets for improved nutrition and health outcomes – an evidence and policy overview on the state of knowledge and gaps*'.
- Canada Beef contributed the Canadian component to the International Meat Secretariat (IMS) response highlighting:
  - ✓ Animal sourced foods have been recognized as being nutrient dense and an important source of high-quality proteins including digestible and indispensable (essential) amino acids.
  - ✓ Meat is among the most important dietary sources of highly bioavailable iron and zinc.
  - ✓ Animal sourced foods are rich in a variety of fats which helps in the absorption of fat-soluble vitamins. Animal sourced foods are a source of two essential fatty acids - alpha-linolenic acid (ALA) and linoleic acid (LA) - that cannot be synthesized by the human body.
- Beef industry involvement in these initiatives are important to ensuring that dietary and food policy recommendations coming from FAO are fact-based and accurately represents the contribution and value of animal protein in sustainable diets.



# Channel Marketing

## BIG Key Account Meetings

- ✓ Costco
- ✓ Loblaw Discount
- ✓ Metro
- ✓ Food Basics
- ✓ Save on Foods
- ✓ Freshco
- ✓ Calgary Coop
- ✓ Atlantic Beef Producer

## Beef Means Business Webinar

- October 21, targeting meat trade professionals.
- Canada Beef presented the BIG solution.
- Nielsen IQ presented a Canadian meat category review.
- 210 Analytics presented the “Power of Meat” USA meat category review and emerging trends.
- 58 clients participated.

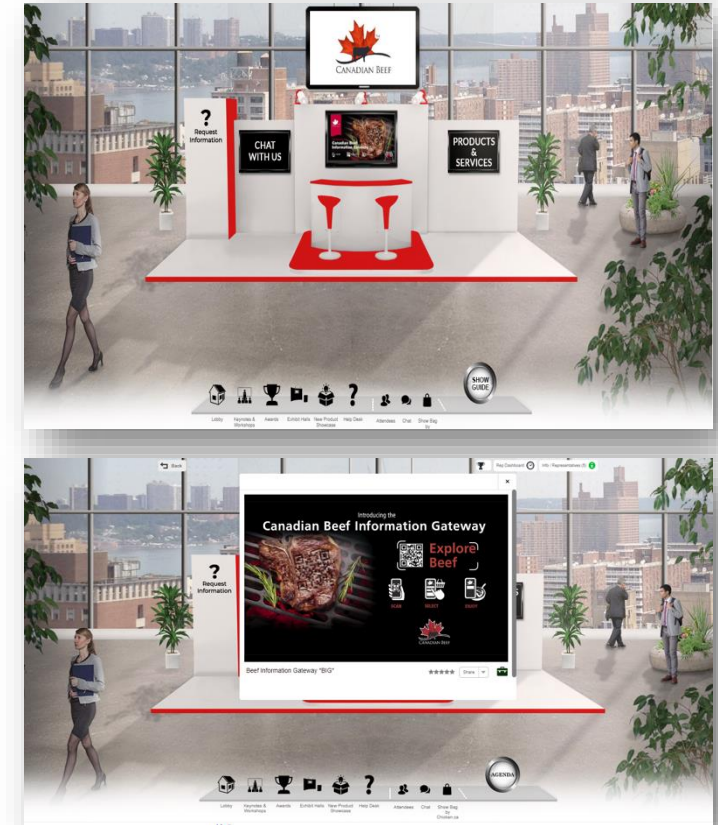




# Channel Marketing – Grocery Innovations Canada

## Virtual Trade Show

- GIC Show - second virtual trade show and conference October 26 – 28, 2021.
- Canada Beef was a sponsor of the tradeshow.
- Virtual booth highlighted Canada Beef resources, programs and services.
- Featured Beef Information Gateway in the new product showcase.
- Featured programs, technical and culinary resources available from the Canadian Beef Centre of Excellence.
- Canada Beef virtual booth - 179 visits, 21 virtual discussions, 308 resources reviewed by attendees.
- Additional meetings were booked for after the show to discuss Canada Beef's programs and services.



# Channel Marketing – Vocational Support

- Canada Beef partnered with six accredited schools in Canada teaching retail meat cutting and butchery programs.
- One award is offered per program. The recipient is chosen by program faculty members. The award focuses on exemplary students who demonstrate commitment and passion for the trade in addition to academic merit.
- The Canada Beef channel marketing team will provide presentations and cutting demonstrations promoting the Canadian Beef Advantage for each graduating class, as COVID-19 restrictions allow.
- Canada Beef also provides merchandising guides, food safety and grading information for each student enrolled in the program.

- ✓ [Northern Alberta Institution of Technology](#)
- ✓ [Southern Alberta Institution of Technology](#)
- ✓ [Thompson Rivers University](#)
- ✓ [Saskatchewan Polytechnic](#)
- ✓ [Fanshawe College](#)
- ✓ [Assiniboine Community College](#)



# Channel Marketing – QSR Promotion

## Tim Horton's Steak and Egg Sandwich

- Steak and Egg FCE Biscuit (Mass/Digital/ In restaurant promo Nov. 1 x 4 weeks, in store menu board support Oct. 27 x 16 weeks).
- National TV ad featuring English and French speaking beef producers.
- Steak and Egg FCE Biscuit drove incremental sales and helped lift TH's market share of breakfast to pre-pandemic levels.
- Sales overall were very strong, beating forecast by a significant amount.
- The campaign saw high incrementality potential and increase in visitation intent.
- Strong campaign breakthrough.



# Canadian Beef Centre of Excellence – Studio Productions

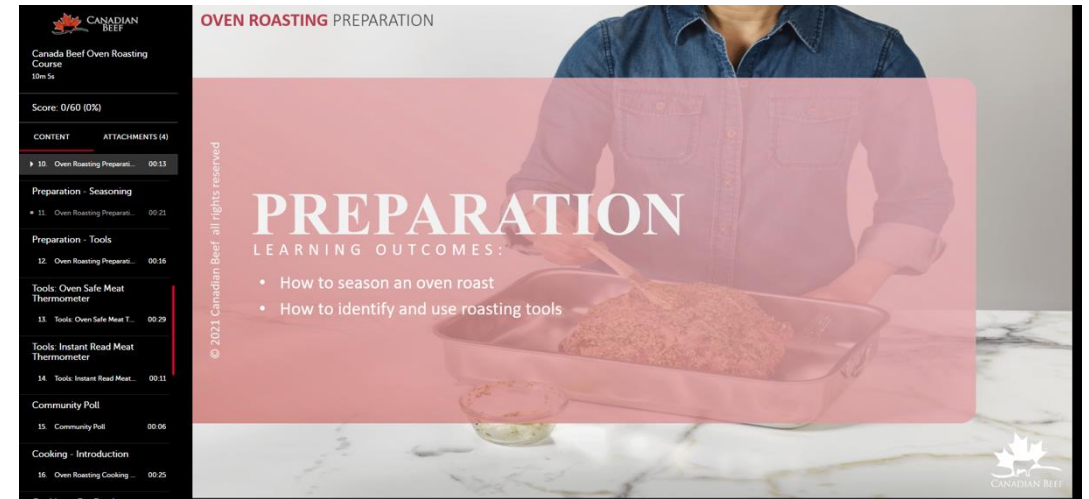
- Nearly 300 new consumer culinary videos and plated beauty shots finalized and uploaded to Canadian Beef Information Gateway launch (Phases 1-3)
- 130+ New consumer culinary videos and beauty shots in editing for next Gateway upload (Phase 4)
- 30+ New consumer culinary beauty shots in editing (Phase 5)
- Automation technology for video brand inclusions now at testing phase. Software edits videos with custom branding without need for manual editing.



Phase 4 production for Gateway featuring sous-vide recipes for consumers.

# Canadian Beef Centre of Excellence – Learning Solutions

- 1378 Online Courses delivered in 2021
- 61% increase in online course distribution over 2020
- Primary users are foodservice distributor reps
- CBCE Learning Solutions to expand user base and distribution reach in 2022/23
- New courses under construction – Foundational (CBA), Advanced Courses for Culinary and Butchery Professionals, Consumer Course (Pilot)
- New distribution platform will be leveraged to support expansion of learning solution offerings and reach broader learner audience in 2022/2023



Consumer Course Pilot – Oven Roasting



# Canadian Beef Centre of Excellence – Vocational Support

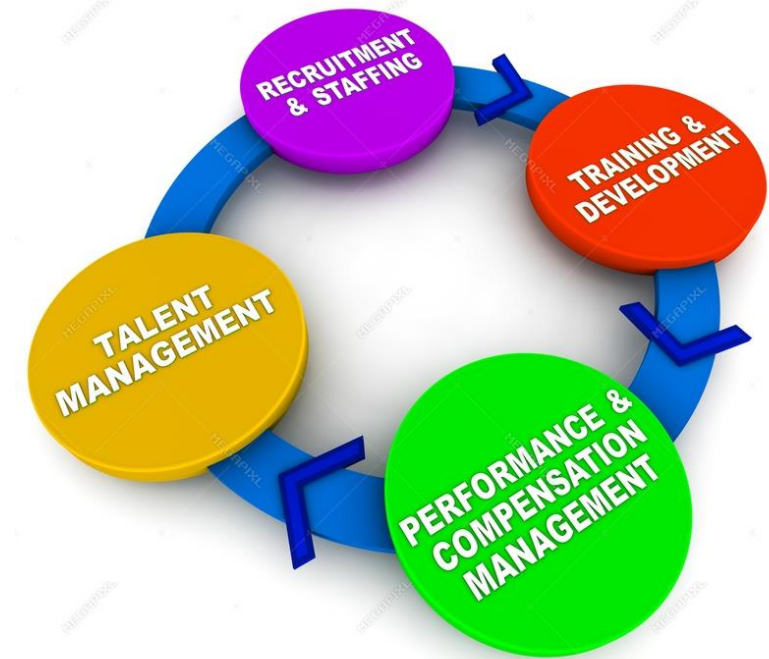
- CBCE has established new financial support for culinary arts students in partnership with Canada's leading institutes.
- The Canada Beef Award for Culinary Excellence.
- Value \$1000-\$1500 per student intake.
- This award is intended to encourage and recognize Culinary Arts students who demonstrate strength in beef butchery and cookery, passion for local ingredients and support for local producers, and who recognize the importance of Canadian beef in professional cooking.
- Academic partnerships and culinary excellence awards now established with SAIT, NAIT, Sask Polytec, Red River College, Holland College.
- CBCE will leverage academic partnerships to engage students and faculty with resources and presentations, virtually or live pending Covid-19 conditions.



Jan 24 Product ideation featuring  
Brisket, Tri Tip and Beef Short rib Riblets

# Canada Beef Structure 2022 - 2023

- CMC, CCA, Canada Pork trade advocacy office in Beijing, China – Proposal.
- China operations in holding pattern till market conditions improve.
- Director role in China still vacant pending market conditions.
- Canada Beef needs a BIG Solutions coordinator/project manager moving forward and we need to consider succession planning for the future.



# Canada Beef Investment Plan Updates

- 2021 – 2022 Investment plan is still on track to be fully spent.
- 2022 – 2023 Investment plan: Revised total \$14,227,640
- Deficit to be funded out of unrestricted accumulated reserves \$1,773,640.
- Addition of the reno and ventilation fix tactic and budget for the CBCE work plan \$238,000.
- Addition of extra liability insurance to cover BIG partnerships \$11,000.
- Operating costs for South Korea contract services \$48,000.
- Addition of Finance and Operations business unit and corresponding workplan # 18 on page 78.



# Thank You

Michael Young  
President  
Canada Beef  
T 403.275.5890 x 205  
C 250.216.5332  
[myoung@canadabeef.ca](mailto:myoung@canadabeef.ca)  
[canadabeef.ca](http://canadabeef.ca)  
[cdnbeefperforms.ca](http://cdnbeefperforms.ca)



### **Upcoming Key Dates**

February 22      NCO Finance Committee Meeting, virtual

March 2            NCO Governance Committee Meeting, virtual

March 9            NCO Board Meeting, virtual

March 23-25      CCA AGM, Ottawa/virtual

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