

THE BEEF INDUSTRY MOOVES FORWARD –  
**MAJOR GOALS ACHIEVED** IN THE LAST 5 YEARS

CANADA'S

# **NATIONAL BEEF STRATEGY**

STATUS UPDATE  2020-2024

# **FULL REPORT**

Covering activities from June 2022 to June 2024



## EXECUTIVE SUMMARY

**THE 2020-24 NATIONAL BEEF STRATEGY WAS DESIGNED TO TAKE ADVANTAGE OF THE OPPORTUNITIES FACING THE INDUSTRY WHILE SIMULTANEOUSLY ADDRESSING THE CHALLENGES.**

It got off to a rocky start with the Covid pandemic resulting in multiple supply and demand shocks. The first two years of the strategy were dominated by covid restrictions, drought, and feed shortages. This is all outlined in the *January 2020 to June 2022 Status Update*. This final Status Update covers the final two years of the strategy from June 2022 through June 2024. Subsequently, following the government support packages that supported consumption, recovery turned to dealing with rising energy prices and food inflation reducing consumer purchasing power. Inflation has significantly impacted both inputs and food prices; but unevenly in countries around the world depending on government stimulus. Interest rate hikes have started to curb further price rises in the winter of 2023/24 in Canada, but not everywhere. A strong North American economy and a tight labor market have continued to support wages and purchasing power.

Moving forward, North American beef supplies are forecast to decline from the 2022 peak to a bottom sometime around 2027 depending on forage availability. This has already resulted in higher cattle prices and a shift in leverage to a degree back to the primary producer.

The global population growth in the middle class and demand for protein in general, presents an opportunity for Canadian beef production to expand and increase exports while supporting domestic consumption. Beef prices are expected to get higher in the short term with tight North American supplies. This creates a double challenge of protecting domestic market share from pork and poultry and facing international inquiries about future supplies for export.



*This National Strategy Status Update is brought to you by the Canadian Beef Advisors – Beef Cattle Research Council, Canadian Beef Breeds Council, Canada Beef, Canadian Cattle Association (and its provincial members), Canadian Meat Council, Canadian Roundtable for Sustainable Beef, and the National Cattle Feeders' Association.*



**Industry is working together more closely, due to the National Beef Strategy. It has been a way to build trust between sectors and recognize there are profitable times in the cattle cycle for everyone – but they rarely happen simultaneously.**

Jeff Smith, Canadian Beef Check-off Agency

## DEMAND

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The Demand pillar was designed to enhance beef demand and maintain the comprehensive carcass cutout values above \$270/cwt. This was achieved! The retail beef demand index in 2023, was the third strongest year since 1985 despite being lower than the 2022 high. The wholesale beef demand index was the second highest year on record after 2015. The international beef demand index hit a new record high in 2023. In 2023, Canada exported 496,917 tonnes of beef at \$5.02 billion, this was the sixth year in a row of hitting record export values, reflecting the industry's long-term investment in market access advocacy.

The industry adapted to new realities post-covid by developing digital tools and resources, including virtual tours. Several vocational training and support initiatives were implemented to address industry challenges around trade labor skills and availability. Extensive global consumer and market research was conducted to guide strategy and program development. Investment continued in international markets, with new development efforts in markets like South Korea and Vietnam.

In 2021 Canada achieved BSE negligible risk status from the World Organization for Animal Health (OIE) (Now WOAH). As a result of the new status, Singapore removed all related restrictions in 2021. Japan fully expanded access to include processed beef products, and Taiwan removed all remaining BSE restrictions. Canada's exports to Japan and Vietnam grew because of our preferential access through the Comprehensive and Progressive Trans-Pacific Partnership Agreement (CPTPP).

The Canadian Beef Advantage (CBA) focuses on enhancing the brand's recognition and value by

highlighting the superior quality, safety, and sustainability of Canadian beef. Efforts included: nationwide and international marketing campaigns emphasizing the unique qualities of Canadian beef, such as its grain-fed flavor, strict safety standards, and sustainable production practices. Development of digital tools, including the Canadian Beef Information Gateway, to provide consumers with detailed information about the origins, quality, and benefits of Canadian beef. Strengthening and promoting certification programs that underline the quality and authenticity of Canadian beef, ensuring consumers and international buyers recognize the brand's reliability. To support and defend Canadian beef's place on the consumers' plate, significant investment was made in the areas of human health and nutrition. Regular outreach to key health and nutrition stakeholders and influencers such as dietitians and physicians were made.

Building trust through transparent practices and clear communication about beef production processes, animal welfare, and safety measures is necessary and valuable. *A 2021 article* stated that *Guardians Of The Grasslands*, has impacted consumer perception of the role of cattle as regenerative contributors...in a shorter period of time than research or advertising ever historically has.". Research by Public and Stakeholder Engagement (PSE) showed that while 23% are looking to reduce their meat consumption, with environment a leading motivation, 28% of Gen Z respondents aim to increase their meat consumption. Overall, the results continued to show strong support for the industry and identified very few negative perceptions about production practices. This research continues to guide the long-term strategy of PSE, identifying must-win audiences, key messages and channels of communication best positioned to build public trust.



**The Canada Beef team strives to fuel desire, ignite demand, and shape the future of Canadian beef consumption at home and around the world. We build marketing programs which propel demand and increase awareness, loyalty, and value, one tactic or initiative at a time. Our commitment is to pioneer pathways to create protein category leadership, setting new benchmarks.**

Russ Mallard, Canada Beef

## DEMAND (CONTINUED)

Promotion of sustainability certification programs that highlight the industry's commitment to environmentally friendly practices has been ongoing. Including educational campaigns to inform consumers about the sustainability efforts within the Canadian beef industry, reinforcing the message that choosing Canadian beef supports sustainable agriculture. Encouraging adoption

of sustainable practices that reduce the environmental footprint of beef production, such as improved grazing management, water conservation, and carbon sequestration initiatives. Investment in research to develop sustainable practices and technologies that enhance efficiency and reduce the environmental impact of beef production.

## OPPORTUNITIES AND CHALLENGES

The industry continues to adapt to evolving consumer preferences and regulatory environments. Efforts are made to stay ahead of market trends and address challenges such as rising input costs and competition from other protein sources. Continued focus on expanding international markets, with particular attention to regions showing high growth potential, such as Asia. Efforts include trade missions, partnerships, and participation in international food fairs to showcase Canadian beef. Additionally, ongoing adaptation to market changes and consumer preferences is necessary to maintain and grow demand. These efforts are aimed at solidifying the position of Canadian beef in both domestic and global markets, ensuring long-term demand and consumer loyalty.

The beef industry also faces rising protectionist international trade measures. Ongoing efforts in international forum, such as the WTO and United Nations bodies, are essential to ensure Canadian voices are heard against protectionist measures. A new Trade agreement with Indonesia is being completed which will expand access for beef and beef products that meet their Halal requirements. We advocated for Canada's participation in the Indo-Pacific Economic Framework and welcomed the establishment of the Indo-Pacific office that will support market access work in this region. Most of the growth in high-quality beef demand is expected in this region.

### CANADA'S BEEF EXPORTS IN 2023

496,917 TONNES

SURPASSING \$5 BILLION



In 2023, Canada exported 496,917 tonnes of beef at \$5.02 billion, surpassing \$5 billion for the first time and was the sixth year in a row of hitting record export values, reflecting the industry's long-term investment in market access advocacy.



Achieving record exports while not having access to China shows the strength of the CPTPP.

Calvin Vaags, Canadian Meat Council



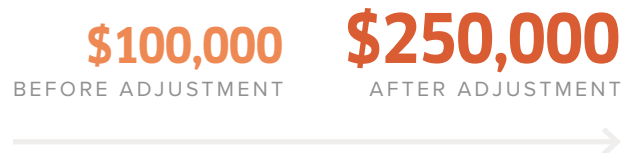
## COMPETITIVENESS

Supply chain resilience was tested over the last five years; and both strengths and weaknesses were identified. Drought and feed shortages highlighted the need for transportation (via rail and truck). Inflation has impacted everything from feed costs and machinery repairs to veterinary and medicine. But labour is top of mind, as wages move higher, in addition to challenges in finding people. The beef sector faces a significant labor gap, with an estimated shortfall of 5,856 jobs in 2022, projected to reach around 14,000 by 2029. Setbacks in labour availability have caused missed opportunities and increased stress for operators.

The Canadian Cattle Young Leaders (CYL) Program and the Canadian Cattle Youth Council are designed to build and support future leaders in the sector. The CYL collaborates with sponsors like MNP, Farm Credit Canada (FCC), and RBC Future Launch to offer resources on succession planning, business planning, and financial literacy. The Youth Council participates in advocacy efforts and international dialogues, enhancing youth engagement and providing opportunities for young leaders. Investing in the next generation is a shared goal, with increased communication among CCA, breed associations, and other industry groups opening more opportunities for youth involvement.

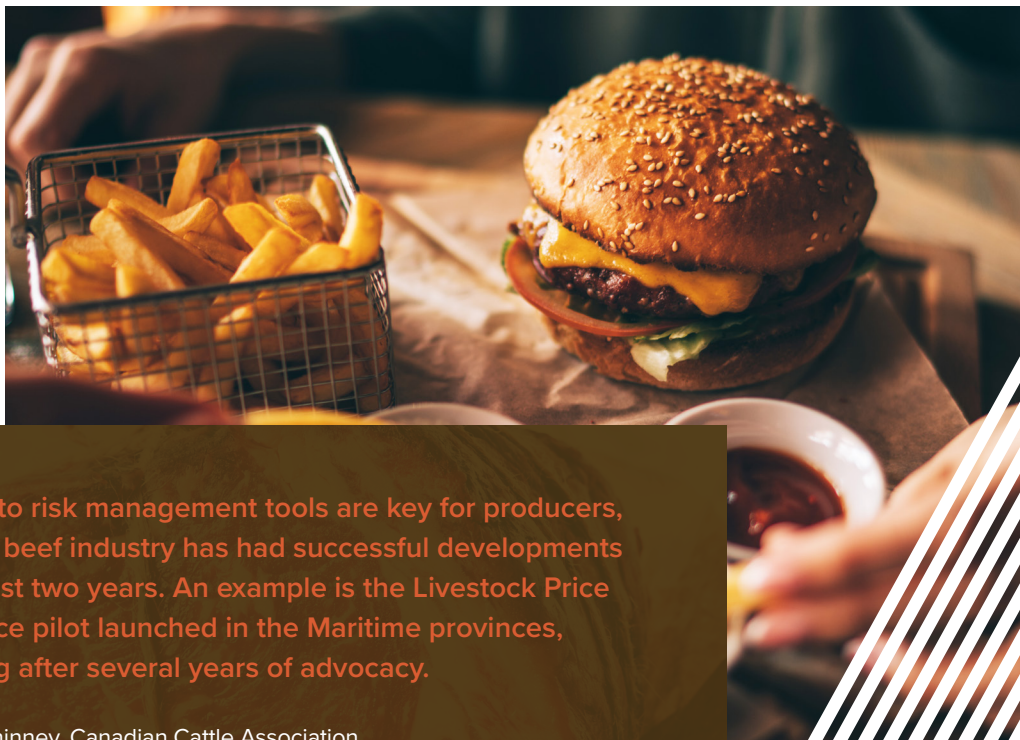
The regulatory framework has seen significant successes and promising developments. We successfully advocated against the front-of-pack labelling for ground beef, ensuring fair representation of our products. Our efforts in securing FMD funding for the Vaccine Bank and Preparedness Plan have also been fruitful, bolstering our biosecurity measures. Additionally, we secured a commitment to exempt producers from the Under Used Housing Tax reporting requirements. The Advance Payments Program saw a positive adjustment, with the limit for the interest-free portion reinstated to \$250,000 from \$100,000. Overall, our regulatory landscape is evolving positively, with ongoing consultations and stakeholder engagements paving the way for future advancements. In June 2024, the Livestock Price Insurance pilot was launched in the Maritime provinces, after several years of advocacy.

### ADVANCE PAYMENTS PROGRAM ADJUSTMENT



Access to risk management tools are key for producers, and the beef industry has had successful developments in the last two years. An example is the Livestock Price Insurance pilot launched in the Maritime provinces, resulting after several years of advocacy.

Nathan Phinney, Canadian Cattle Association



## COMPETITIVENESS (CONTINUED)

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Canada aims to lead in regulatory processes to bring products to market efficiently and maintain industry competitiveness internationally. Regulatory positives have included CFIA moving to approve feed additive

Bovaer (3NOP) using a risk-based process that credited examinations of the product in other jurisdictions along with how it will be used.

### OPPORTUNITIES AND CHALLENGES

Regulatory Processes have created challenges for industry competitiveness. New antimicrobial products, vaccines, and other innovations face high costs and uncertain regulatory approvals, which deter pursuit of Canadian approval. Industry is seeking adoption of outcome-based and science-based regulatory policies to signal production standards to trading partners.

Canada can learn from the U.S. Agricultural Marketing Service to improve service orientation in navigating regulations. The Government of Canada can champion science-based and rules-based trade to counter politically driven protectionism and gain access to high-paying markets. Addressing trade barriers imposed by protectionist countries, especially in the European Union, to find profitable markets for Canadian exports is key to future success. The Canadian industry must not take for granted its ability to compete profitably, needing to manage and influence domestic and international rules and regulations.



**The policy associations continue to provide a united front advocating for science-based regulations. Regulatory positives included CFIA approving Bovaer (3NOP) using a risk-based process, leveling the playing field with other major beef exporters.**

Will Lowe, National Cattle Feeders Association





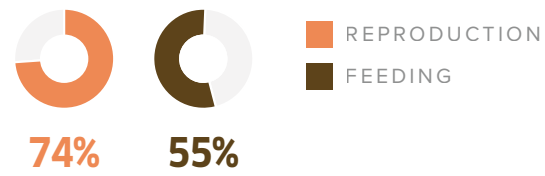
## PRODUCTIVITY

Advancements have been made in genetic selection due to collaborative efforts and communication about its value. Investments from government and national beef breed associations into the Canadian Beef Improvement Network (CBIN) have been crucial. Progress on the four pillars of the CBIN Development Plan includes improved data collection, beta pilot projects, increased resources for analytics, and expanded efforts to support genetic literacy and tool adoption. Utilization of genetic data for effective analytics and decision-making has become a priority, emphasizing data access, ownership, and security. Challenges include capturing opportunities in environmental sustainability through genetic selection and addressing resource access and collaboration. And transforming data and research into useful information for farm-level decision-making to drive change.

The 2021 National Beef Sustainability Assessment (NBSA) showed a 15 per cent reduction in greenhouse gas emissions to produce 1 kg of beef (boneless and consumed). Land used for beef production is estimated to hold 1.9 billion tonnes of soil organic carbon, storing

nearly 40 per cent of the total soil carbon across Canada's agricultural landscape. This is equivalent to annual CO<sub>2</sub> emissions from over two billion cars (~58 cars for every Canadian); and land used for beef production contributes the majority of critical habitat that wildlife needs for both reproduction (74 per cent) and feeding (55 per cent) when all of Canada's crop and pastureland is considered.

### BEEF'S CONTRIBUTION TO CRITICAL HABITAT



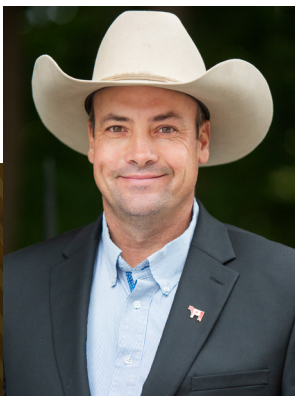
Investments in research and innovation have been pivotal in advancing industry and supporting producers through extension. The BCRC has around 100 projects underway or awaiting co-funding at any given time. Specific projects and initiatives can be found at [www.beefresearch.ca](http://www.beefresearch.ca). The 2018 increase to the Canadian Beef Cattle Checkoff expanded the BCRC's ability to support priority research projects, support research capacity and increase knowledge and technology transfer. In addition, the BCRC now funds four to seven new "proof-of-concept" trials to validate high-risk research ideas on a small scale to determine whether a larger investment is warranted.



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**There have been positive developments recently with investments into packing plants. Producers are looking forward to seeing the pull for cattle that comes from this. Continued research to support producer competitiveness in a higher cost structure is key to future expansion.**

Craig Lehr, Beef Cattle Research Council and Chair of the Beef Advisors



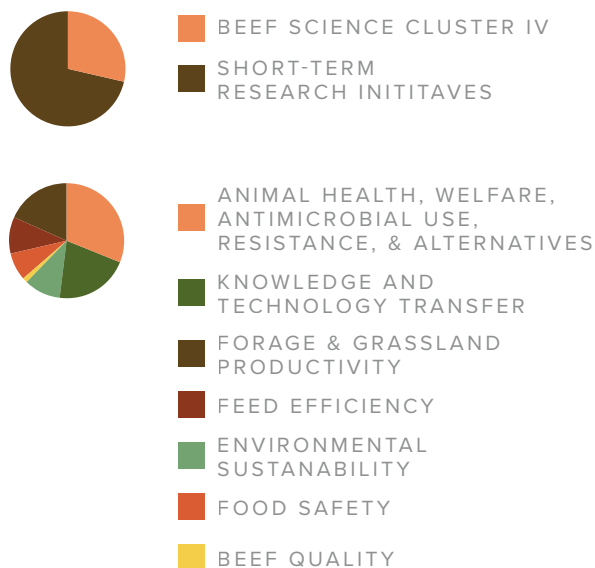
**The second National Beef Sustainability Assessment reported a 15% reduction in emissions intensity between 2014 and 2021. This is excellent progress in a short time.**

Ryan Beierbach, Canadian Roundtable for Sustainable Beef

## PRODUCTIVITY (CONTINUED)

Since the beginning of 2022, 87 new projects have started. Twenty-five of these were funded through Beef Science Cluster IV, which leverages NCO funding with federal research funds to support strategic 5-year research initiatives. The remaining 62 projects are shorter-term research initiatives to cover priorities not addressed under the Cluster. All projects address industry priorities across animal health, welfare antimicrobial use, resistance and alternatives (24 projects), forage and grassland productivity (16 projects), feed efficiency (8 projects), beef quality (1 project), food safety (6 projects) and environmental sustainability (8 projects). Fourteen projects address priorities in Knowledge and Technology Transfer. Collaboration with researchers and extension services ensured the dissemination of best practices.

### PROJECTS & PRIORITY AREAS



**Cattle producers have been the foundation of the beef industry's success to date. Ensuring grassroots engagement and a producer-centric focus will be instrumental to our future success.**

Dave Sibbald, Canadian Beef Breeds Council

Extension resources are available via the newly revitalized beefresearch.ca including videos, decision tools, infographics, articles, podcasts and webinars. BCRC also partners with industry publications and external extension organizations to ensure the broad distribution of its resources. Significant contributions have been made in developing new producer decision making tools and communication materials that support adoption. These efforts have resulted in tangible benefits for the industry, by supporting producers through drought conditions in 2021-23, feed testing and use of alternative feeds that allowed options for producers facing liquidation and subsequent rebuilding efforts. The adoption of recommended technologies and practices has historically reduced input costs and increased outputs.

### OPPORTUNITIES AND CHALLENGES

As the herd rebuilds and beef supplies are the tightest over the next five years. Investments that support producer profitability and competitiveness will be critical to addressing supply concerns from buyers. This requires ongoing investment in research, technology transfer and innovations.

Genetic selection offers significant opportunities for improving environmental sustainability and overall production efficiency. Access to necessary resources and maintaining collaboration and trust within the industry remain significant challenges. Collaborative efforts and investments have increased the availability of genetic resources, supported genetic research, and improved extension efforts for cattle producers. Integrating genetic data and technologies into management decisions is critical for the long-term profitability and competitiveness of Canadian cattle producers.

Opportunities exist in continuing to leverage technological advancements and research findings. There is potential for further gains in feed efficiency, animal health, and forage productivity. Challenges include the need for ongoing investment in research and the dissemination of innovative practices to ensure broad industry adoption.



## CONNECTIVITY

The pandemic highlighted the importance of robust communication practices, leading to improved coordination and proactive messaging. Collaborative advocacy efforts and strategic engagement in international fora have strengthened the industry's position, while ongoing challenges include ensuring the reach and impact of communication efforts.

Increasing coordination amongst the national and provincial organizations has allowed us to centralize issue response and effectively mobilize spokespeople to handle media requests at local, regional, and national level. This was seen during the pandemic as well as with other issues including the climate challenges, CP Rail strike, and proposed front-of-package labelling on ground beef, UK trade talk shutdowns, and animal health issues such as avian flu. Coordination among national and provincial organizations improved issue response, effectively mobilizing spokespeople for media requests at various levels.

Collaborative efforts with industry partners have been a cornerstone of success. National beef industry

communication meetings and crisis communication tabletop sessions facilitated collaboration. Advocacy campaigns like "Don't Label My Beef" and "Say No to a Bad Deal" have garnered public support and influenced policy decisions. The formation of the Agriculture Carbon Alliance highlights a commitment to sustainability and environmental matters.

Engagement with government and global partners ensures that industry interests are represented in international fora and policy discussions. The Canadian industry's involvement in bodies like the WTO and Codex Alimentarius is crucial to counter protectionist policies and advocate for science-based and rules-based trade.

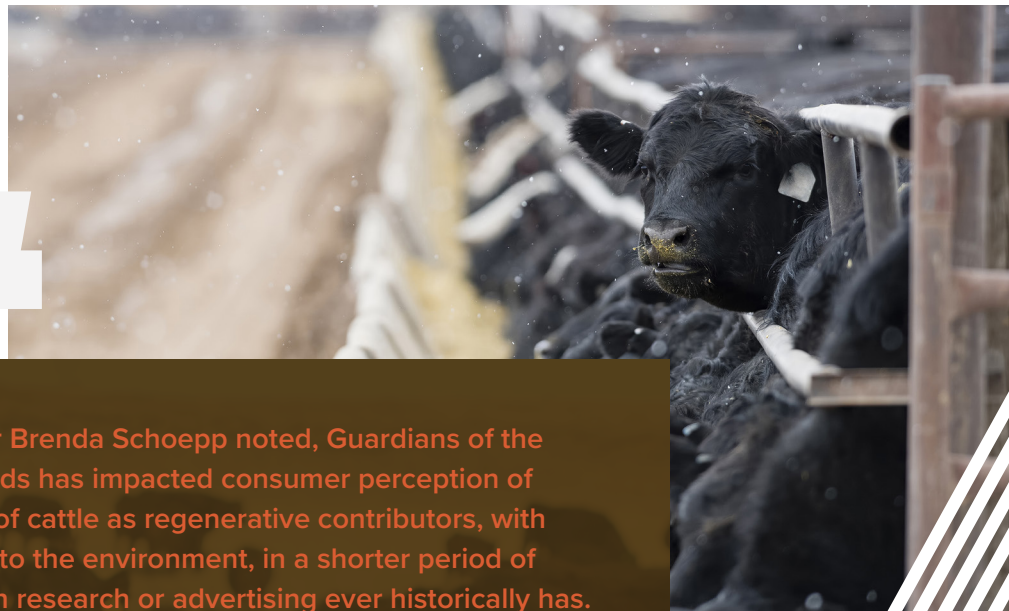
Increased coordination among organizations has centralized issue response, allowing for effective media engagement. This approach has been beneficial during crises like the pandemic, climate challenges, and trade disruptions. Enhanced communication practices have strengthened relationships within the industry and with external partners, ensuring a unified approach to addressing industry challenges.



As writer Brenda Schoepp noted, *Guardians of the Grasslands* has impacted consumer perception of the role of cattle as regenerative contributors, with benefits to the environment, in a shorter period of time than research or advertising ever historically has.

Public and Stakeholder Engagement continues to measure and benchmark consumer perception and seek innovative communications strategies to build public trust in raising beef cattle in Canada."

Bob Lowe, Public and Stakeholder Engagement



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**Some of industries greatest successes are the least noticeable, because they are behind the scenes. It's our role as an industry working together to bring them to light and share with the world.**

Dennis Laycraft, Executive Vice President, Canadian Cattle Association



**"Covid showed how quickly fractured we can become. And the need to be nimble and to shift when dealing with a perishable product. Addressing regulatory burden is key to future success."**

Janice Tranberg, President and CEO, National Cattle Feeders Association

LEARN MORE AT [WWW.BEEFSTRATEGY.COM](http://WWW.BEEFSTRATEGY.COM)



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## CANADA'S NATIONAL BEEF STRATEGY

The 2020-24 National Beef Strategy is designed to take advantage of the opportunities facing the industry while simultaneously addressing the challenges. It is about how to best position our industry to compete for a larger share of the world market and to become the high-quality beef product of choice in the world. The industry vision, mission and pillars remain unchanged providing consistency with the 2015-19 National Beef Strategy. Focus areas and tactics have been updated to reflect the current market and regulatory environment that producers and processors face.

**VISION:** A dynamic profitable Canadian cattle and beef industry

**MISSION:** To be the most trusted and competitive high-quality beef cattle producer and processor in the world recognized for our superior quality, safety, value, innovation and sustainable production methods.

The National Beef Strategy has been developed with the aim to achieve specific goals that are aligned with the industry's vision and mission under four pillars. The pillars identify focus areas where industry stakeholders will work together to collectively achieve the outcomes identified. Under each focus area specific outcomes have been defined that work towards meeting the goals established by industry.

### PILLARS AND GOALS:

- 1) **BEEF DEMAND:** Support the comprehensive cutout 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)*
- 2) **COMPETITIVENESS:** 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%*
- 3) **PRODUCTIVITY:** 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%*
- 4) **CONNECTIVITY:** Enhance industry synergies and connect positively with government and partner industries

More information on the 2020-24 National Beef Strategy can be found at [www.beefstrategy.com](http://www.beefstrategy.com).

## THE CANADIAN BEEF ADVISORS

The Canadian Beef Advisors consist of the current chair or president and senior staff of each of the seven national beef organizations responsible for policy, marketing, research and sustainability.

The **Canadian Beef Check-off Agency** ([the Agency](#)) manages and administers the Canadian Beef Cattle Check-Off, a mandatory levy collected on cattle sales throughout Canada to fund research and marketing activities on behalf of the entire industry. It is collected from cattle producers when they market their cattle by provincial organizations, using their existing collection systems involving auction markets, order buyers, brand inspectors and others who handle cattle sales. The goal of the Canadian Beef Cattle Check-Off is twofold – to increase sales of domestic and export beef and to find better and more efficient



methods of producing beef and beef cattle. To achieve these goals the Agency funds Canada Beef, the Beef Cattle Research Council and Public and Stakeholder Engagement Program. The Agency sits as an observer on the Beef Advisors.

The **Beef Cattle Research Council (BCRC)** is Canada's industry-led funding agency for beef, cattle and forage research. The BCRC's mandate is to determine research and development priorities for the Canadian beef cattle industry and to administer Canadian Beef Cattle Check-Off funds allocated to research. Priorities include: Animal Health & Welfare, Antimicrobial Use, Resistance & Alternatives, Beef Quality, Environmental Sustainability, Feed Grains & Feed Efficiency, Forage & Grassland Productivity, Food Safety, and Technology Transfer.

**Canada Beef** is the national [marketing and promotion](#) organization developing and delivering programs domestically and internationally to maximize the cutout value. The domestic market continues to be the largest and most stable market for Canadian beef. Canada Beef identifies and develops key export markets to increase the value of Canadian beef and veal products – in collaboration and cooperation with like-minded companies, organizations and institutions.

The **Canadian Beef Breeds Council (CBBC)** supports purebred cattle producers through service provision aimed at genetic improvement, animal health, extension services, and information dissemination. The CBBC is focused on the promotion of Canadian beef cattle genetics by identifying market opportunities, facilitating access through timely intelligence and informing the commercial industry of the attributes of the Canadian Beef Advantage both at home and abroad. The CBBC also represents the purebred cattle sector to government by advocating effective policy, ensuring market access and enhancing competitiveness. Funding is provided through member fees and matching government funds.

The **Canadian Cattle Association (CCA)** is the national voice for beef producers on policy issues for its provincial members. All policy activities performed by the CCA and provincial organizations are funded through the provincial check-off, which is \$2-3/animal marketed across the provinces. The CCA provides national policy representation in animal health and care, domestic agriculture policy, environment, foreign trade, and food policy.

The **Canadian Meat Council (CMC)** has represented Canada's federally registered meat packers, meat processors and suppliers of good and services to the meat industry for nearly a century. CMC provides evidence-based advocacy on behalf of its members, works to secure and improve Canada's global meat competitiveness and promotes a balanced diet, which includes high-quality and nutritious Canadian meat. Funding is provided through member fees.

The **Canadian Roundtable for Sustainable Beef (CRSB)** is a collaborative multi-stakeholder community devoted to advancing sustainability in the Canadian beef industry. Its membership includes organizations across the beef value chain and beyond; farmer/rancher associations, academic institutions, processor and processor associations, food and agriculture businesses, non-governmental associations (animal care and environmental organizations), retail and foodservice companies as well as governments and observers. Funding is provided through member fees and government grants.

The **National Cattle Feeders' Association (NCFA)** represents Canadian cattle feeders on national issues and works in collaboration with other cattle organizations across the country. Key focuses include improving industry competitiveness, increasing domestic value-added production, and expanding markets for Canadian beef. Funding is provided through member fees.

## PILLAR 1: BEEF DEMAND

The **Beef Demand** pillar goal is to enhance beef demand and as a result support the comprehensive carcass cutout values above \$270/cwt over the last five years. In March 2020, the Canadian Boxed Beef price series was suspended. The USDA comprehensive cutout averaged C\$399/cwt in 2023 with a five-year (2018-23) average of C\$338/cwt.

In 2023, retail beef demand remains strong at 122 (Index 2000=100). While down from the 2022 high, it is the third strongest year since 1985. Wholesale beef demand at 138 (2003=100) in 2023 is the second highest on record, after 2015. International beef demand made a new record high at 145 (index 2000=100) in 2023.

Food prices have been driven by inflation as government stimulus increased disposable incomes during the pandemic and due to restrictions food was a major outlet for price increases. Interest rate increases have started to curb further price rises, but a strong North American economy and tight labour market has been price supportive. Preventing demand erosion and supporting per capita beef consumption with imports are the priority for the near term.

## FOCUS AREA A: DOMESTIC AND GLOBAL MARKETING

The Canadian beef industry faced many challenges the past few years coming out of the COVID pandemic due its impact on labour, infrastructure, transportation, inflation as well as the impact of weather and feed shortages on beef production. In response, the beef industry had to be quick and nimble to adjust to changing market conditions.

Post pandemic, travel and the ability to meet in-person with customers and stakeholders changed as businesses adopted virtual meeting preferences, significantly curtailed in-bound and out-bound trade missions. This required a shift to the production and extension of digital tools and resources with clients. The Canadian Beef Centre of Excellence was retooled to become a state-of-the-art audio-visual multimedia studio to develop a wide range of digital and video marketing and technical resources that could be rapidly delivered to both domestic and international customers and clients.

Canada Beef also developed virtual tours of cow/calf, feedlot and processing establishments. The Canadian Beef Information Gateway was created including editions for meat professionals within the retail and foodservice sectors. Comprehensive information on specifications, merchandising and utilization can be accessed through QR codes on sector specific merchandising materials. The Gateway has been adopted by processors representing the majority of Canadian beef slaughter.

To help address the industry challenges around trade labour skills and availability, several vocational training and support initiatives were implemented. These programs include in-person and online training curriculum, and scholarships and bursaries with leading technical training institutions.

Extensive global consumer and market research was conducted to guide strategy and program development during rapid and dynamic market impacts and changes. Regular market intelligence gathering and reporting was expanded for industry and value chain partners. These resources helped customers and stakeholders to understand and navigate changing market conditions.

Core international market development investment continued with an emphasis to support export customers in dealing with supply interruptions and uncertainties. New market development investment was added to take advantage of growth opportunities in under-served markets such as Vietnam and South Korea.



The beef industry also began partnerships with other Canadian commodity groups such as Pork and Bison at select key international tradeshows and events. This had the benefit of reducing participation costs, increasing organizational profile, and expanding reach to common customer groups.

The beef industry developed a new and innovative program called the Export Market Develop Program to provide cost-shared support to Canadian beef exporters and their clients. These programs are particularly valuable for clients exploring or entering new markets or market segments.

Domestically, the beef industry developed a program called the Provincial Marketing Alliance to cost-share regional consumer promotion and marketing initiatives with provincial producer associations. This allows for closer alignment and resource sharing between national and regional marketing programs, extending their reach and effectiveness.

### ***Impact for industry***

Despite the challenges, the beef industry has maintained strong retail and export demand. Also, the beef industry set records for export value and near records for export volume, despite beef production/supply challenges. These export markets provide significant additional carcass value supporting live cattle prices.

### ***Opportunities and Challenges***

Going forward, several challenges remain for the industry to address. These include the impact of inflation, beef supply challenges, changing demographics, cheaper imported beef, ultra-processed meat alternatives, and market access challenges such as voluntary product of the USA (vPUSA) and the continued closure of market access to mainland China.

## **FOCUS AREA B: MARKET ACCESS**

The USA remains our largest and most important market and trusted trading partner. Efforts to bring back Mandatory Country of Origin Labelling have been prevented but a new voluntary Product of USA rule will come into effect January 2026. CCA will be monitoring the new requirements to see if there is any discrimination against and segregation of live cattle imported from Canada. If there is discrimination, Canada has maintained its retaliation rights.

In 2021 Canada achieved BSE negligible risk status from the World Organization for Animal Health (OIE) (Now WOA). A joint industry-government working group teamed together to prepare the successful submission. As a result of the new status, Singapore removed all related restrictions in 2021. Japan fully expanded access to include processed beef products, and Taiwan removed all remaining BSE restrictions.

Canada's exports to Japan and Vietnam grew because of our preferential access through the Comprehensive and Progressive Trans-Pacific Partnership Agreement (CPTPP). The CPTPP provided secure market diversification with trusted trading partners that protected our industry from the arbitrary loss of access to China in late 2021. We remain supportive of the expansion of the membership of the CPTPP provided new entrants are prepared to meet the ambition achieved in the original agreement including accepting science-based market access.

A new trade agreement with Indonesia is being completed which will expand access for beef and beef products that meet their Halal requirements.

We advocated for Canada's participation in the Indo-Pacific Economic Framework and welcomed the establishment of the Indo-Pacific office that will support market access work in this region. Most of the growth in high-quality beef demand is expected in this region.

A formal application has been made to the European Food Safety Authority to seek approval for the use of peroxyacetic acid (PAA). It is used as a processing aid in Canada and the United States and is used extensively around the world.

CCA and CBBC have worked with CFIA to improve the import processes and reduce approval times for the import of purebred cattle particularly during the bull sale season.

The World Organization for Animal Health (WOAH) revised the BSE code to change the reporting requirements for Atypical BSE to annually. This is to send a message that market access should not be affected by the discovery of an Atypical case. If countries are carrying out proper surveillance, it is expected everyone will eventually find a case(s) at a very low rate.

China suspended access in December 2021 due to a case of Atypical BSE (and in 2020 for one plant due to Covid concerns). There is no justification to close market access due to atypical BSE.

The Canada-UK negotiations were suspended in February 2024 when the UK walked away. CCA has been opposing the UK's accession into the CPTPP until the UK accepts a science-based approach to its food safety requirements. "A Say No to a Bad Deal" campaign was launched and Canada delayed ratifying the agreement.

European Union access continues to become more difficult.

Each year since 2016 we have achieved new records for export values. Our growth is currently limited by our own supply.

### Impact for industry

In 2023, Canada exported 496,917 tonnes of beef at \$5.02 billion and 680,000 head of live cattle worth \$1.68 billion. Total exports topped \$6.7 billion for the first time. Canfax estimates that export sales increase the value of every fed animal produced by over \$1,295 per head (2019-23 avg). Exports are essential to our industry's long-term viability and reflect the industry's ongoing investment in market access advocacy.

**Table 1: Canadian Beef Exports & Market Access 2023**

Country	2018 (Mill \$)	2023 (Mill \$)	5-Yr % Chg	% of Total Beef Exports	Tariff Rate for 2023 (HS: 0201)	Market Access
<b>USA</b>	\$2,034	\$4,037	98.5%	80.4%	Duty Free	All beef, offal, liver
<b>Japan</b>	\$214.60	\$351.83	63.9%	7.0%	24.1%	All beef
<b>Mexico</b>	\$111.24	\$283.78	155.1%	5.7%	Duty Free	All beef, offal, liver
<b>Hong Kong &amp; Macau</b>	\$174.90	\$60.77	-65.3%	1.2%	Duty Free	All beef (HK) All beef and offals (Macau)
<b>China</b>	\$97.29	\$0.00	-100.0%	0.0%	12%	Beef (boneless and bone-in), excluding offal, from animals under 30 months of age, ractopamine free
<b>South Korea</b>	\$30.30	\$121.82	302.1%	2.4%	16.3%	All beef and offals, from animals under 30 months of age
<b>Taiwan</b>	\$23.22	\$10.20	-56.1%	0.2%	SD: 10NT/KGM = .43CDN/KGM	- All beef, specified offals from animals under 30 months of age,
<b>EU (excl. UK)</b>	\$7.77	\$24.90	220.5%	0.5%	Duty Free	All beef and offal (EU hormone free)
<b>UK</b>	\$7.75	\$0.00	-100.0%	0.0%	Duty Free	All beef and offal (EU hormone free)
<b>Other</b>	\$47.20	\$132.40	180.5%	2.6%	N/A	N/A
<b>Total</b>	<b>\$2,748</b>	<b>\$5,022</b>	<b>82.8%</b>	100.0%	N/A	N/A



***Opportunities and Challenges***

The growth of the middle class in Asia presents the greatest opportunity for global growth in high-quality beef demand. Maintaining the ambition of the CPTPP with all new members, the phase-out of tariffs in South Korea, and the Indo-Pacific initiatives provide the greatest opportunity for in Canadian beef exports.

China has the potential to be a substantial market for Canadian beef but strained Canada/China relations complicate the timeframe for re-opening and the security of that access. All actions including a WTO case and/or a stronger presence in China are being considered.

The review of CUSMA will commence by July 2026. Canada and the USA have the largest two-way trade of agriculture in the world, including live cattle and beef. It is vitally important that a successful review strengthens the agreement.

Canadian beef leadership continues to work closely with U.S. allies and Mexico on the importance of the integrated North American market and to advocate for greater regulatory cooperation.

Europe and the UK will be more and more challenging moving ahead.

**FOCUS AREA C: THE CANADIAN BEEF ADVANTAGE**

The beef industry was working towards implementing the National Beef Quality Audit – Beef Processing & Consumer Satisfaction component to demonstrate a reduction in carcass defects below 2016 levels and maintain or improve consumer satisfaction for tenderness, juiciness and flavour of inside round, cross-rib, top sirloin and striploin steaks. However, both these aspects were not performed due to COVID restrictions.

The beef industry was working towards implementing a National Retail Merchandising 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. However, the merchandising audit was not completed due to COVID restrictions.

The beef industry was working towards developing and implementing processes that would 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 National Beef Quality Audit and provide near real-time feedback to industry, including cattle producers. A system was created to monitor livers using computer vision assessment of CFIA liver stamps at a participating processing facility. A trial of remote inspection of carcasses was also conducted including involvement of veterinary experts from the CFIA following challenges during COVID with maintaining inspection staff. A report on both these activities was completed. Other aspects of the TQM were not completed due to COVID.

The beef industry was working towards increasing information exchange between sectors along the supply chain to better inform production decisions that ultimately improve carcass value and consumer satisfaction. A prototype of a Carcass Information System for mobile devices was created which was to be used to share liver information in a pilot study with industry. This work was ultimately discontinued due to COVID.

**FOCUS AREA D: CONSUMER CONFIDENCE**

The aftermath of the COVID pandemic gave rise to many short-term and potentially long-lasting changes to the domestic and international marketplace. In response, the beef industry adapted to changing market conditions.

Consumers rediscovered their kitchens as foodservice dealt with dining room closures and transitioned to focus on take-out and delivery. Consumer and digital marketing delivered initiatives on sustainable production and the health and nutritional aspects of beef to key audiences over numerous platforms. Marketing initiatives shifted focus to meet the needs of consumers cooking at home. Canada Beef developed and curated a robust library of digital resources and videos with topics ranging from how to cook a steak, to beef's nutritional benefits, to beef's sustainability story. This demand for digital resources was reflected in a significant increase in web traffic.

A major initiative was the creation of the Canadian Beef Information Gateway (Gateway). The Gateway optimizes the intersection of food and technology by using quick response (QR) codes and universal product codes (UPC) to drive the purchase and enjoyment of Canadian beef. The Consumer Retail Gateway Edition uses scannable codes on beef packages from over 30 major retailers to improve customer experience through the selection, purchase, preparation, and enjoyment of consuming Canadian beef. Each cut has a digital profile accessible via a mobile device or PC. Each profile features essential information including recommended cooking methods, food safety and storage information, written recipes, recipe preparation videos, nutritional information, and shopping lists. The information presented and the visual appearance of the Gateway program can be customized for retail and trade partners in global markets.

The beef industry conducted large annual consumer marketing campaigns focusing on the Canadian beef brand, culinary and nutrition messaging. The campaigns positioned Canadian beef as nutritious, sustainably raised, and delicious to counter negative perceptions and the challenges from other animal proteins as well as plant-based and meat alternatives. The beef industry also expanded the use of social media strategics and tactics to augment conventional advertising and to reach younger consumers. Research was regularly conducted to benchmark consumer confidence including attitudes and behaviours related to beef consumption.

Canada Beef pursued cooperative marketing programs to cost-share regional consumer promotion and marketing initiatives with provincial producer associations, allowing for closer alignment and resource sharing between national and regional marketing programs, extending their reach and effectiveness.

To support and defend Canadian beef's place on the consumers' plate, significant investment was made in the areas of human health and nutrition. Regular outreach to key health and nutrition stakeholders and influencers such as dietitians and physicians were made. Often these programs were developed and delivered in cooperation with other animal protein commodity groups as health and nutrition is considered a non-competitive area of joint concern and interest.

***Impact for industry***

Retail beef prices, pushed higher due to supply chain pressures and food inflation, faced additional pressures as robust exports and lower imports together resulted in less beef available for purchase in the domestic market. While consumers have generally remained tolerant of high beef prices (as evidenced by strong retail demand and steady consumption and market share), the industry has positioned the versatility of value-cuts as an option for shoppers. The industry will continue to develop cooking and



recipe support, effective promotions, nutrition outreach, and cutting-edge merchandizing solutions for retailers and foodservice to keep beef on the consumers' plate.

### ***Opportunities and Challenges***

Looking forward, new Canadians will represent a significant segment of potential new customers as Statistics Canada predicts that by 2048 immigrants and their families will represent more than half of the total Canadian population. As well, the ageing population will require tailored marketing focus for their changing consumption habits. The growing prominence of E-commerce will require new strategies and the industry will have to understand how to use new technologies such as artificial intelligence in its consumer and trade marketing. Consequently, the way the industry merchandises and prompts beef must adapt to these changing demographics, technological and socioeconomic trends.

## **FOCUS AREA E: PUBLIC TRUST**

Public and Stakeholder Engagement (PSE) benchmarked Canadian sentiment about the way beef cattle are raised in 2020. That research was repeated in 2023 on a three-year cycle that aligns with the program strategy. Results included increases in positive perceptions of producers (from 68% to 70%). While 23% are looking to reduce their meat consumption, with environment a leading motivation, 28% of Gen Z respondents aim to increase their meat consumption. Overall, the results continued to show strong support for the industry and identified very few negative perceptions about production practices. This research continues to guide the long-term strategy of PSE, identifying must-win audiences, key messages and channels of communication best positioned to build public trust.

Producers are the most trusted voice in the food system, so equipping representatives with tools and resources for advocacy is a primary focus. Media training (in both official languages), indigenous relations, and social media advocacy was provided to over 350 participants. The Canadian Beef Expert Network was established with 50+ subject matter experts able to take mainstream media interviews. The training platform [Beef Advocacy Canada](#) has been updated to largely video content with 100+ graduates. A [Public Advocacy Guide](#) was created for spokespeople with industry messages and statistics at their fingertips.

Proactive video content has focused [on the environmental benefits of raising beef cattle](#) in Canada. This includes the short documentaries [Guardians of the Grasslands](#), [Too Close to Home](#) and [Reduce, Reuse, Ruminates](#), which have been viewed by more than 500,000 online, and [other short videos](#). Campaigns and outreach with key influencers, including [culinary institutions](#), dietitians, [content creators](#) and [the classroom](#) bring sustainability stories to must-win audiences.

Issues managed included the [3% project with Steven Lee](#), [Weather Network](#), [Epicurious](#), [covid supply chain disruptions](#) and health concerns related to front of package labelling.

### ***Impact for industry***

[A 2021 article](#) stated that "GUARDIANS OF THE GRASSLANDS, has impacted consumer perception of the role of cattle as regenerative contributors...in a shorter period of time than research or advertising ever historically has." With 30+ film festival selections and screenings at landmark events like COP26 / 27 and the Biodiversity COP in Montreal, the film and resulting classroom game have been incredibly successful at [showcasing the role of beef cattle in preserving Canada's grasslands](#).

Aligned and timely responses to issues have maintained social license to operate while leveraging media interest to positively position the environmental benefits of beef production.

### **Opportunities and Challenges**

Our target audience identified in consumer research represents a huge opportunity for public trust. Internal research shows that while Canadians know little about how beef cattle are raised, almost everyone would like to know more about where their food comes from. While millennials (and younger) are more skeptical about the environmental benefits of beef production, providing examples quickly improves their perceptions.

This also represents a challenge for public trust communications. While many are interested, very few are actively seeking this information out, creating the need for innovative strategies to reach must-win audiences where they are already consuming content.

## **FOCUS AREA F: SUSTAINABILITY**

The Canadian Roundtable for Sustainable Beef (CRSB) is the go-to forum for beef sustainability in Canada – adding 13 new members over the past two years – and plays a strong leadership role in the Global Roundtable for Sustainable Beef, with a seat on the Board of Directors. The CRSB advanced two work streams over the past few years. The National Beef Sustainability Assessment and Strategy, and the *Certified Sustainable Beef Framework*, both of which came to fruition in 2024.

The [National Beef Sustainability Assessment \(NBSA\) and Strategy report](#) was released in January 2024. The assessment reflects three years of in-depth scientific analysis and highlights the Canadian beef sector's progress between 2014 and 2021 on sustainability indicators like greenhouse gas emissions, biodiversity, carbon storage, people's health and safety, animal care, economic contributions and more. These indicators provide science-based, credible national metrics about Canadian beef. A [sustainability strategy](#) complements the assessment and includes action items for member and partner collaboration as we prepare for the next assessment in approximately seven years. Several [research priorities and data gaps](#) were also identified and will be an area of focus for the organization.

Below are a few of the environmental results from the assessment:

- a 15 per cent reduction in greenhouse gas emissions to produce 1 kg of beef (boneless and consumed). This work is also published in the [Canadian Journal of Animal Science](#);
- land used for beef production is estimated to hold 1.9 billion tonnes of soil organic carbon, storing nearly 40 per cent of the total soil carbon across Canada's agricultural landscape. This is equivalent to annual CO<sub>2</sub> emissions from over two billion cars (~58 cars for every Canadian); and
- land used for beef production contributes the majority of critical habitat that wildlife needs for both reproduction (74 per cent) and feeding (55 per cent) when *all* of Canada's crop and pastureland is considered.

The *Certified Sustainable Beef Framework* (i.e., the CRSB Certified program) underwent a significant two-year review, and updated technical documents were published in January 2024. Producer incentives and live-cattle movement were key areas of focus. There are two producer incentives for CRSB certification: 1. the [Certification Recognition Credit](#), a partnership among Cargill, its customers and CRSB, and 2. [Farm Credit Canada \(FCC\)'s Sustainability Incentive Program](#), a partnership between FCC and CRSB. The Canadian Cattle Identification Agency was hired in October 2023 to verify live-cattle movement across all CRSB Certified supply chains. Active CRSB Certified Operations (beef producers) can see the "CRSB Certified" status (yes or no) of an RFID tag via [CLTS search](#).

In 2022, CRSB conducted a [consumer research study](#) and found that approximately one third of Canadians recognize the CRSB Certified logo. In 2023, CRSB completed a consumer-directed digital marketing

campaign promoting the CRSB Certified program. A comprehensive and collaborative communications strategy was implemented for the National Beef Sustainability Assessment launch, which led to the results being featured in mainstream media.

One challenge going forward is to drive supply growth for CRSB Certified program. One important opportunity is for the industry to leverage the National Beef Sustainability Assessment and Strategy in policy, communications, research and marketing, as well as environmental, social and governance (ESG) reporting.

## PILLAR 2: COMPETITIVENESS

Supply chain resilience was tested over the last five years; and both strengths and weaknesses were identified. Many doubted that the packing plants would recover quickly and safely to above pre-covid processing levels. However, that was achieved by July 2020 with weekly slaughter levels averaging above first quarter 2020 for the next 24 months. The backlog of fed cattle in the west was virtually eliminated by the end of 2020. Drought and feed shortages, highlighted the need for transportation (via rail and truck). Inflation has impacted everything from feed costs and machinery repairs to veterinary and medicine. But labour is top of mind, as wages move higher, in addition to challenges in finding people. According to the Canadian Agricultural Human Resource Council (CAHRC) Commodity Dashboard, the current labour gap in the beef sector for 2022 is 5,856 jobs and this estimate is expected to reach around 14,000 by 2029.

### FOCUS AREA A: YOUTH INVOLVEMENT AND SUCCESSION

The Canadian Cattle Association (CCA) youth programs play an important role building future leaders in the cattle sector. The [Canadian Cattle Young Leaders \(CYL\) Program](#), established in 2010, has seen over 180 young leaders come through the program, while the [Canadian Cattle Youth Council](#), celebrating its [10th anniversary](#) in 2023, and has had over 50 young producers serve on the council.

The Canadian CYL Program collaborated with sponsors like MNP, Farm Credit Canada (FCC), and RBC Future Launch to offer resources and content on succession planning, business planning, and financial literacy. Notable initiatives include the [MNP Case Study competition](#) at the 2023 CYL Spring Forum, sharing lending opportunities and virtual resources, and engaging in tax policy discussions impacting farm transitions. Overall sponsor relationships with program partners has also opened unique employment opportunities for young leaders .

Since Fall 2022, the Canadian Cattle Youth Council created two working groups to explore young producers' access to capital and succession planning. The [2022 beef strategy progress update](#) highlighted reasoning for continued work connecting young producers with existing industry resources being deemed more feasible than creating a new succession planning program for industry. The council also learned ag media publications are already heavily involved in creating and amplifying positive stories about succession planning.

The Youth Council actively participated in CCA advocacy efforts, including its [seventh-annual fly-in meetings](#) to Parliament Hill in March 2024. Young leaders have also engaged in international dialogues alongside CCA at events such as the [UN Committee on World Food Security Meeting](#), the [Global Agenda for Sustainable Livestock meetings](#), and the [World Food Forum](#). Following COVID, the annual youth programs trip to the Denver National Western Stock Show also resumed in [2023](#) and [2024](#), fostering relationships with U.S. counterparts.



In 2022, the Youth Council established a Youth Member position with the Canadian Beef Cattle Check-Off Agency that has been highly successful and is encouraging similar engagement opportunities be built with other industry organizations. Increased communication among CCA, breed associations, provincial associations and other industry groups has opened opportunities to enhance youth engagement.

### ***Impact for industry***

Investing in the next generation is a shared goal across various political parties and organizations. Putting youth in the beef industry front and centre has fostered new conversations, connections, and opportunities through advocacy efforts. CYLs and youth council delegates continue to move into leadership roles, serving as a succession tool for the industry.

CCA's youth programs have supported young producers in their succession journey as noted above. The [Beef Advocacy Canada](#) remains a graduation requirement for the Canadian CYL Program, with just under 200 total industry members having completed the training.

### ***Opportunities and Challenges***

The Youth Council working groups have identified numerous existing succession resources from non-profits like Farm Management Canada and industry stakeholders such as Farm Credit Canada, MNP, and RBC. The council will engage further with CCA on policy priorities related to succession planning. Amplifying these resources among young producers through the Youth Council and Canadian CYL Program networks will continue.

Youth participation in international events has fostered connections with global beef industry leaders and strengthened the industry's position as a sustainability leader. This will be an important consideration for the next strategy.

## **FOCUS AREA B: SUPPORTIVE REGULATORY FRAMEWORK**

The regulatory framework has seen significant successes and promising developments. We successfully advocated against the front-of-pack labelling for ground beef, ensuring fair representation of our products. Our efforts in securing FMD funding for the Vaccine Bank and Preparedness Plan have also been fruitful, bolstering our biosecurity measures. Additionally, we secured a commitment to exempt producers from the Under Used Housing Tax reporting requirements. Proposed traceability regulations have been released for consultation and are currently being reviewed with stakeholders, with implementation anticipated in early 2025. The CFIA's proposed pathway for the approval of feed products being already approved in the EU and the US represents a significant step forward in regulatory cooperation. While the protocol for reducing enteric methane emissions has been released for consultation, it has not yet been implemented. Our advocacy efforts on securing flexibility for ELDs (hours of service) for livestock transporters is moving slowly but moving forward. Our advocacy ensured that the overall guiding principles for the national school food policy do not create restriction for beef as part of the program. We also celebrated the successful implementation of the e-certification process by CFIA. The Advance Payments Program saw a positive adjustment, with the limit for the interest-free portion reinstated to \$250,000 from \$100,000. We are also eagerly anticipating the release of new feed regulations. Overall, our regulatory landscape is evolving positively, with ongoing consultations and stakeholder engagements paving the way for future advancements.

In June 2024, Livestock Price Insurance (LPI) launched a pilot in several Maritime provinces. The new program will permit producers from New Brunswick, Prince Edward Island and soon Nova Scotia, the

ability to purchase insurance on price protection for their beef cattle in the case of an unforeseen market disruption.

### ***Impact for industry***

The recent regulatory successes have significantly impacted the beef industry in multiple ways. By maintaining the current front-of-pack (FOP) labelling standards, we have preserved the recognition of ground beef as a nutritious option, avoiding any negative consumer perceptions that could have arisen. Securing federal funding for the FMD vaccine bank and preparedness plan will enhance the industry's resiliency, ensuring a rapid and effective response if the disease were to enter Canada. The exemption from the Under Used Housing Tax reporting will save agricultural producers valuable time and money. Streamlined feed approval processes are expected to reduce bureaucratic delays, allowing new products to enter the market more swiftly and keeping us competitive with international trading partners. The protocol for reducing enteric methane emissions (REME) presents a promising opportunity for beef producers to capture carbon credits through management changes, potentially adding a new revenue stream. The proposed traceability regulations are poised to enhance the speed and effectiveness of emergency and disease response plans, mitigating potential impacts on the industry. Our ongoing advocacy is focused on ensuring that these new regulations are practical, achievable, and do not create barriers for business operations.

### ***Recommended modifications***

To further enhance the regulatory framework and its impact on the industry, we recommend several key modifications. First, we advocate for faster, more streamlined approval processes for products such as feed, veterinary medicines, and pesticides, along with a reduction in associated red tape. This will help maintain our competitive edge and ensure timely access to products that can improve sustainability and provide efficiencies. We also emphasize the importance of science-based regulation and decision-making to ensure that policies are grounded in peer-reviewed research and evidence. Clear support and guidance for the industry in the implementation of new regulations are crucial, as is clear guidance to enforcement agencies to bridge the knowledge gap related to agricultural production. For example, defining what constitutes an emergency that would allow livestock to be transported beyond standard hours under ELD regulations is necessary. Furthermore, continued early and frequent industry engagement during the development of new regulations is essential for reducing friction and increasing successful adoption. This collaborative approach will help ensure that regulations are practical and beneficial for all stakeholders.

## **FOCUS AREA C: A RESPONSIVE MARKETPLACE**

The beef industry has made significant strides in enhancing its responsiveness to evolving market demands and consumer preferences during this period. A major focus has been on strengthening the Canadian Beef Advantage through initiatives that differentiate Canadian beef based on its quality, safety, and sustainability credentials.

Notably, the Canadian Roundtable for Sustainable Beef (CRSB) updated its Certified Sustainable Beef Framework in 2022 and again in 2024, enabling beef producers and processors to have their operations certified as sustainable. This framework, along with the consumer-facing Sustainable Beef logo, allows the industry to showcase its environmental, social, and economic sustainability efforts.

The industry has also invested in market research and consumer insights to better understand changing consumer trends and preferences. This has informed marketing strategies, product development, and communication efforts to align Canadian beef offerings with evolving demands for attributes like traceability, animal welfare, and environmental stewardship.

Collaborative efforts between industry organizations, such as Canada Beef and the Canadian Cattle Association, have facilitated the development of targeted marketing campaigns and educational resources to promote Canadian beef's quality, safety, and sustainability story to domestic and international consumers.

Furthermore, the industry has actively engaged with regulatory bodies and policymakers to ensure a fair and responsive regulatory environment that supports innovation, market access, and competitiveness for Canadian beef products.

### ***Impact for industry***

The focus on a responsive marketplace has enabled the Canadian beef industry to better align its products and messaging with consumer demands, enhancing its competitiveness and market positioning. Initiatives like the Sustainable Beef Framework have provided a competitive advantage, while targeted marketing efforts have strengthened the Canadian beef brand and consumer loyalty, both domestically and in export markets.

### ***Opportunities and Challenges***

Moving forward, the industry should continue to invest in consumer research, product innovation, and sustainability initiatives to stay ahead of evolving market trends. However, challenges such as supply chain disruptions, changing trade dynamics, and the need for continuous improvement in areas like animal welfare and environmental stewardship must be proactively addressed to maintain consumer trust and market access.

## **FOCUS AREA D: ACCESS TO COMPETITIVELY PRICED INPUTS**

Inputs captures many things needed to bring beef from conception to plate. Physical purchases come to mind easily. People that can do the work are critical to the industry and workforce needs are paramount to the entire supply chain.

The ability to source new employees in agriculture has been and continues to be very fluid. Applicant interest in many of the jobs in the sector is non-existent in much of rural Canada where cattle production needs people. Urbanization continues reducing rural labour pools. As this unfolds, immigration has helped alleviate the challenge on farms, feedlots and in processing plants when programs allow. Some are provincial and some are federal. The need continues and all avenues need to recognize the work is not “low skilled” and has multiplier effects. For every worker employed in the beef sector, another 3.9 (based on indirect and induced impacts) workers are employed elsewhere in the economy; with an employment multiplier of 4.86 person-years on a full-time equivalent basis (Kulshreshtha *et al* 2021).

The Canadian Agriculture Human Resources Coalition continues to lead on the many challenges that face Canadian agriculture including beef production and processing. Ongoing fluctuations in Temporary Foreign Worker rules, caps, and even classifications of jobs and workers continue. Improvements in some areas have been offset by subsequent or concurrent setbacks. Canadian agriculture is one aspect of the economy and is little understood in decision making beyond Agriculture ministries making ongoing input from cattle industry groups and coalitions like CAHRC necessary and beneficial.

Regulatory positives have included CFIA moving to approve feed additive Bovaer (3NOP) using a risk-based process that credited examinations of the product in other jurisdictions along with how it will be used. This along with an ongoing consult as of this writing into changing how somatic cell nuclear transfer (SCNT) produced cloned animals will be treated based on risk analysis are promising developments in approval processes.



There remains real concern that new antimicrobial products, vaccines (which could preclude the need for antimicrobials) and other innovative products are not being pursued or not being pursued for Canadian approval due to cost and uncertainty of regulatory approvals. Improvements in regulatory processes and timelines continue to be needed. The improvements above need to be followed with improvements in other processes.

Consolidation, inflation and product cycle maturity leading to reduced profitability all threaten producer access to competitively priced inputs already on the market. These realities need to be heard as governments can often view reduction of products as a positive or may not see the impacts of other industry events. The default view that reduced pest control products on the market is a positive is particularly concerning as the fallout from registrations lapsing or not being renewed or being cancelled is far reaching.

### ***Impact for industry***

Improvements in labour availability have meant improved viability, competitiveness and longevity. Setbacks have threatened viability, resulted in missed opportunities or added to the stress of operators working to staff their operations.

Improving regulatory processes keeps the industry competitive with U.S. and global producers. Moving to outcome based and maintaining science based regulatory policy provides important signals for all production and to trading partners.

While prices are high for cattle the cost of producing those cattle has also been subject to inflation. Market forces are enough of a challenge. Industry must continue to voice challenging barriers to innovation, workforce access and needless added costs for other inputs.

### ***Opportunities and Challenges (recommended modifications)***

Protectionist countries and areas such as the European Union are very creative in finding ways to protect their markets from competition. Canadian exports need to find their most profitable market. There is an opportunity for the government of Canada to champion science based and rules based trade and to counter politically driven protectionism based solely on desire to limit competition in markets. This would mean gaining access to high paying markets that are currently not profitable to access in major amounts due to many creative barriers. International fora including the WTO, Codex Alimentarius and WOHAI need Canadian export focused voices and impact to ensure protectionist voices do not carry the day. Similar needs exist in food policy discussions at various United Nations bodies. The Canadian industry has stepped up in many of these fora. Government of Canada support has helped and needs to continue both strategically and financially.

The demographic and demand growth reality is a huge opportunity for Canada as beef production is greater than Canadian consumption. We cannot take for granted that we can compete for that demand in a profitable manner. Domestic and international rules and regulations will have impacts that need to be managed and influenced.

Canada can lead in regulatory processes that bring products to market and there is opportunity to improve service orientation to help the industry navigate regulations and other processes. The Agricultural Marketing Service role in the U.S. is a worthy model worth learning from for Canada.

### PILLAR 3: PRODUCTIVITY

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 open rates, calving length, calf death losses as monitored through regional cow-calf surveys, improving feed efficiency, and hay yields.

Productivity is where producers and processors are in direct control. Research and technology adoption must include the entire supply chain from seedstock through to the packer, and all climatic conditions where beef is produced across Canada recognizing that what works in one location for that production system may not work elsewhere. Data and research must be transformed into information that is useful for decision making on the farm – it is only then that change occurs.

#### FOCUS AREA A: GENETIC SELECTION

Considerable advancements have been made as it relates to the collaborative efforts and communication of the importance and potential value of genetic selection to the Canadian beef production system. Significant investments from government and national beef breed associations into the Canadian Beef Improvement Network (CBIN) have supported the advancements that have been made and elevated the recognition of the value of genetic data for Canadian beef producers.

Progress has been made on all four pillars of the CBIN Development Plan with numerous Canadian beef breed associations working collaboratively to improve and unify data collection, beta pilot projects underway to demonstrate the value of data linkages across the sectors, increased financial and human resources allocated to creating improved analytics for commercial cattle producers and expanded efforts to support genetic literacy and drive adoption of genetic tools.

Utilization of genetic data to develop effective analytics and meaningful decision-making tools has been at the forefront of the development of CBIN and through this process a recognition of the significance that access to data, data ownership, data security and meaningful data analytics for Canadian beef producers to remain competitive and sustain their businesses has become a top priority.

#### ***Impact for industry***

The collaborative efforts and investments to date have increased the availability of genetic resources to commercial cattle producers and elevated the investments to advance both genetic research and extension efforts for cattle producers. Building the research, analytics and knowledge to support the integration of genetic data and technologies to better inform cattle producer's genetic management decisions is critical for the long-term profitability and overall competitiveness of Canadian cattle producers.

#### ***Opportunities and Challenges***

Genetic selection is one of the key areas where further improvements in the environmental sustainability of the Canadian beef production system can be made. Utilization genetic data to inform management decisions that allow producers to improve their overall production efficiency remains a significant opportunity for the Canadian beef industry to full capture. Access to resources to assist the industry to fully capture these opportunities and continued commitment and trust in the advantages of collaboration are the biggest challenges facing the industry.

**FOCUS AREA B: INFORMATION FLOW**

Through the collaborative efforts of CBIN significant advancements have been made in unifying and standardizing data collection and increasing data sharing specifically as it relates to genetic data. The considerable efforts and investments to create a national beef cattle registry framework and data warehouse has facilitated increased data access, data sharing and the work to link genetic data across the entire production chain. That being said, through these development efforts the unique nature of the Canadian beef production system combined with the ever-changing dynamics of software development has created significant challenges. There is a significant shortage in human resource capacity in the areas of technical software development combined with the necessary beef industry acumen. While these challenges have created delays and frustrations, there have been considerable learnings and the core commitment to achieving bi-directional information flow within the Canadian beef production system remains and achieving this goal is as critical as ever.

Data, specifically genetic data, has the ability to further improve the overall sustainability of the Canadian beef industry when used to inform production decisions. Linking genetic data across all sectors of the production system and linking to other production metrics of importance can unlock considerable economic and environmental efficiencies for Canada's beef industry. The bi-directional flow of, not only genetic data, but all data of importance to further inform selection and management decisions has the potential to transform the Canadian beef production system and help to achieve our sustainability goals and improve our global competitiveness.

Not only will cross-sector information flow allow producers to make more informed selection and management decisions but this data capture allows all stakeholders to verify and validate our industry wide advancements. This only further necessitates the importance of achieving a national data platform.

***Impact for industry***

Data technology and utilization has revolutionized many industries and the Canadian beef industry is no different. Continued advancements in innovative technologies, data capture and analytics have the potential to assist Canadian cattle producers in making further economic and environmental gains at both the operational and industry level. Through improved genetic selection, bi-directional information flow and data-driven decision considerable gains on efficiency can be achieved.

***Opportunities and Challenges***

Considerable opportunities exist for all sectors of the industry through continuous advancements in data use capabilities and innovative technologies but in order to capture these opportunities trusted collaboration is required. Active engagement, commitment of resources and willingness to break down traditional silos will be required from all sectors is necessary for the creation of meaningful bi-directional information flow that will translate into realized value for all stakeholders. Without this commitment, the industry will struggle to realize any tangible return on investments made in this area.

**FOCUS AREA C: RESEARCH CAPACITY**

The BCRCs efforts to build beef and forage research capacity continue to evolve and yield results. The Beef Researcher Mentorship program mentored 8 additional researchers (5 in 2022/23 and 3 in 2023/24), bringing the total number of mentored researchers up to 38. Three research chairs are underway (the [BCRC-Hays Chair in Beef Production Systems](#) at the University of Alberta, the [NSERC/BCRC Industrial Research Chair in One Health and Production Limiting Diseases](#) at the Western College of Veterinary Medicine, and the [Beef Industry Integrated Forage Management and Utilization Chair](#) at the University of



Saskatchewan). In collaboration with provincial industry partners, a new capacity funding stream attracts high quality applicants to Canadian research institutions by providing start-up funds to help newly-hired researchers build their research programs. To date, Dr. Erick da Silva Santos [has been hired as an Assistant Professor of Forage Production and Management Science](#) (University of Alberta). Start-up funds have also been approved to hire a [Professor in Ruminant Health Management](#) (University of Guelph, hiring currently in-progress).

Surveillance is critical to protect the health of the national beef herd and to inform research priorities. Long-term efforts to re-establish surveillance systems to effectively detect and monitor animal disease issues continue. The [Canadian Animal Health Surveillance System](#) draws information from several BCRC-supported efforts including the [Canadian Cow-Calf Health and Productivity Enhancement Network](#) and the [Western Canadian Animal Health Network \(beef\)](#). Years of producer-funded checkoff research investments have led to the Government of Canada to announce funding for ongoing feedlot antimicrobial use and resistance surveillance through the Canadian Integrated Program for Antimicrobial Resistance Surveillance. This will allow industry to redirect focus to antimicrobial resistance priorities within beef cattle production.

Significant infrastructure investments made by government and provincial beef organizations at the [University of Saskatchewan](#) and [University of Guelph](#) support basic and applied forage, cattle and beef research into the future. Significant investment is also needed to maintain and continue beef carcass and quality research at [AAFC Lacombe](#). BCRC has worked in collaboration with provincial organizations to ensure program funding is directed to Institutions to address key priorities, while communicating the importance of both the maintenance and/or enhancement of key infrastructure to allow programs to continue.

### ***Impact for industry***

Maintaining satisfactory research expertise and infrastructure is key to supporting a productive, efficient, and competitive beef industry. Research capacity is tremendously costly to establish and maintain, but when done right, the basic and applied systems-based research it produces helps answer questions, solve problems, and identify new opportunities that benefit producers, industry, policymakers, consumers, and the public. Independent, third-party research also provides an additional layer of credibility, and relieves individual cattle producers and beef processors of the risk and requirement to individually test and demonstrate each potential technology or production practice on their own operations.

### ***Opportunities and Challenges***

Many of the students, post-doctoral fellows and research associates trained through industry-funded research projects are working in private industry or have been hired into key research positions at Canadian institutions. The BCRC is currently exploring opportunities to proactively have new researchers “bridged” into permanent positions before key researchers retire. This will help continue research program momentum while also benefitting from years of experience, wisdom, and insight.

Canada’s infrastructure for grazing, forage and animal research has improved significantly in recent years. Better coordination among research institutions would allow these facilities to be used more efficiently. However, carcass and meat research facilities are limited and urgently need renewal. Decreasing government:industry cost share ratios for research infrastructure and capacity increase the demand to invest limited producer dollars in these initiatives, which then limits funding for research activities to utilize these facilities and expertise. Public resistance increasingly challenges the construction or expansion of research facilities (particularly when located near urban university or federal facilities).

## FOCUS AREA D: RESEARCH AND DEVELOPMENT

Canadian Beef Cattle Checkoff research funding allocations allow the BCRC to leverage producer funds to strategically influence other funders' research decisions. The BCRC's approach to research funding is guided by the industry-led multi-stakeholder [Canadian Beef Research and Technology Transfer Strategy](#), as well as by the BCRC's robust funding decision process. The BCRC has around 100 projects underway or awaiting co-funding at any given time. Specific projects and initiatives can be found at [www.beefresearch.ca](http://www.beefresearch.ca).

The 2018 increase to the Canadian Beef Cattle Checkoff expanded the BCRC's ability to support priority research projects, support research capacity (see Focus Area C: Research Capacity) and increase knowledge and technology transfer (See Focus Area E: Technology Adoption). In addition, the BCRC now funds four to seven new "proof-of-concept" trials to validate high-risk research ideas on a small scale to determine whether a larger investment is warranted. As one example, a Beef Cluster IV project grew from a high-risk BCRC-funded proof-of-concept project that proved the potential opportunity of a new food safety technology.

Since the beginning of 2022, 87 new projects have started. Twenty-five of these were funded through Beef Science Cluster IV, which leverages NCO funding with federal research funds to support strategic 5-year research initiatives. The remaining 62 projects are shorter-term research initiatives to cover priorities not addressed under the Cluster. All projects address industry priorities across animal health, welfare antimicrobial use, resistance and alternatives (24 projects), forage and grassland productivity (16 projects), feed efficiency (8 projects), beef quality (1 project), food safety (6 projects) and environmental sustainability (8 projects). Fourteen projects address priorities in Knowledge and Technology Transfer. All new project funding decisions as well as the results of all completed projects are communicated to BCRC email subscribers.

### ***Impact for industry***

Research funded by the BCRC is guided by the [Canadian Beef Research and Technology Transfer Strategy](#), which is directly linked to the [National Beef Strategy](#), and focuses industry priorities. This Research strategy is renewed on a five-year cycle, based on input from seedstock, cow-calf and feedlot producers, the forage and feed grains sector, other industry stakeholders, research community and other funders of Canadian cattle, forage and beef research. This approach enables the results of individual projects to be communicated to check-off paying producers as well as synthesized into on-farm decision making tools to encourage adoption (see Focus Area E: Technology Adoption).

### ***Opportunities and Challenges***

As with Research Capacity (Focus Area C), declining government: industry cost share ratios increase demands for industry dollars to support these initiatives, limiting the number and scope of research projects that can be funded. This challenge is largely driven by static or declining federal and provincial research budgets, fragmentation of government programs and program delivery, and magnified by funding challenges facing key provincial industry partners. Continued efforts to coordinate the priorities and funding decisions among funders can help address this challenge. Ultimately, declining government: industry cost share ratios will give industry a louder voice regarding the prioritization and funding of projects and programs.

## FOCUS AREA E: TECHNOLOGY ADOPTION

BCRC continues to invest not only in research, but also Knowledge and Technology Transfer (KTT), which ensures the results of research are adopted by industry. This includes the development of significant extension resources via [beefresearch.ca](https://beefresearch.ca) including videos, decision tools, infographics, articles, podcasts and webinars. BCRC also partners with industry publications and external extension organizations to ensure the broad distribution of its resources.

The BCRC's technology transfer efforts consistently receive positive feedback from producers and other stakeholders. The newly redesigned and revitalized BeefResearch.ca continues to experience high traffic, receiving 434,298 pageviews in 2022/23. Analytics indicate that the audience is interested in a variety of topics, particularly those that are most practical and related to seasonal activities for the sector. Articles and other resources developed are frequently and increasingly redistributed by industry groups, trade magazines and other media, as well as by producers on social media.

The **Canadian Beef Technology Transfer Network** continues to gain momentum, bringing together groups and individuals actively involved in knowledge and technology transfer that support Canadian beef producers and advance the Canadian beef industry. A new funding program pilot to support regional extension activities launched in 2023/24. Applicants could receive up to \$5,000 in funding per activity. Thirteen activities were approved, including extension meetings, field days, workshops, video production, peer group coordination and veterinary student engagement.

The ongoing **Eastern content expansion** improves the visibility and uptake of BCRC content by beef producers in Ontario, Quebec, and Atlantic provinces by focusing on content and tools relevant to eastern Canadian producers. By leveraging existing relationships, the **Enhancing extension through veterinary collaboration initiative** identifies opportunities where veterinarians can further inform and persuade producers to adopt practices or technologies that benefit them and the industry, such as the #Calf911 resources.

The [Canadian Cow-Calf Cost of Production Network](#) is successfully underway, providing benchmarks and resources to producers across Canada.

### **Impact for industry**

The aim of the BCRCs KTT program is to be Canada's most credible, reliable source for beef research and production information. Some producers come directly to the BCRC for information; metrics for all BCRC's communication channels continue to rise. Agricultural media has also shown a strong appetite for repackaging and reprinting BCRC resources, providing a valuable and free opportunity for BCRC to reach additional producers who may prefer more traditional information sources. A 2021 independent review found that most producers surveyed described BCRC's KTT program as Useful and Relevant, and as well as a high level of satisfaction with the quality of information generated.

### **Opportunities and Challenges**

Provincial governments continue to reduce (or eliminate) their agricultural extension programs. While covid prevented many traditional extension activities, the BCRCs focus on electronic communication allowed our activities to proceed with minimal challenges and encouraged hesitant producers to become more familiar with these technologies. Lack of access to broadband internet remains a significant challenge in many rural areas. While monitoring KTT outputs, web analytics, numbers of publications and attendance is straightforward, quantifying actual producer adoption is an ongoing challenge which the BCRC continues to tackle through producer surveys and information available through other industry programs (e.g., VBP+ and the COP network).



## PILLAR 4: CONNECTIVITY

The Connectivity pillar objective is to enhance industry synergies; 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

As referenced in the [January 2020 to June 2022 Status Update](#) - the covid pandemic initiated communications practices aimed to keep producers and industry stakeholders apprised about the evolving situation. As the pandemic's effects wound down, it became apparent of the importance of utilizing communications tools more effectively and they have become relied upon as credible resources and sources of news and updates. In particular, industry email newsletters have gained popularity and subscribers. With social media channels like Facebook becoming more and more regulated with news content restrictions, stakeholders, partners and producers are turning to industry newsletters as their go-to sources for relevant information. In addition, building proactive relationships with ag media representatives has also helped industry organizations get their messages out.

PSE facilitates national beef industry communication meetings monthly (Canada Beef, CRSB, CCA, PSE). As well as the National Communication Managers meet quarterly (all provincial, regional and national communications staff). A Crisis Communications Tabletop session was held in 2023, bringing together 35 participants from across the country to collaborate on a simulated scenario.

#### ***Impact for industry***

Increasing coordination amongst the national and provincial organizations has allowed us to centralize issue response and effectively mobilize spokespeople to handle media requests at local, regional, and national level. This was seen during the pandemic as well as with other issues including the climate challenges, CP Rail strike, and proposed front-of-package labelling on ground beef, UK trade talk shutdowns, animal health issues such as avian flu.

Since the pandemic, communications activities included: virtual town hall meetings, bi-weekly issues of Action News, enhanced biosecurity banner links on CCA websites, development of regular industry briefing notes on specific, evolving topics, and social media updates.

#### ***Opportunities and Challenges***

Covid challenged the industry to think outside of the box. With a strong network of communications professionals across the beef industry, many ideas were generated and successfully executed during the pandemic. Crisis communications plans were updated and communications colleagues in the industry learned to be more proactive with messaging and delivery. Building internal organizational, external partner, stakeholder and producer relationships has been foundational in ensuring a united approach is taken.

The challenge remains assessing the reach of these communications efforts and to ensure communications are tailored for each audience so they are easily digestible and not redundant.

## FOCUS AREA B: ENGAGE INDUSTRY PARTNERS

Engaging industry partners through collaborative efforts has proven to be a cornerstone of our success. Our industry-wide advocacy campaigns, such as “Don’t Label My Beef” and “Say No to a Bad Deal,” have galvanized public support and influenced policy decisions. The formation of the Agriculture Carbon Alliance, with a focus on Bill C-234 and other environmental matters, highlights our commitment to sustainable practices. The Coalition for Beef Cattle Movement is actively working on traceability, ensuring a unified approach to this important issue. Animal Health Canada’s engagement with the industry on FMD vaccination strategy and emergency response planning, alongside collaboration with US counterparts, underscores the importance of cross-border cooperation. Strengthening partnerships within the value chain has led to increased joint submissions and correspondence, enhancing our collective influence. CAFTA continues to be a strong voice in trade matters. Additionally, new relationships with the biogas industry, including the Canadian Alliance for Net-Zero Agri-food (CANZA) and the Biogas Agriculture Coalition, present promising opportunities for the beef industry, particularly feedlots. The Animal Protein Roundtable, chaired by Janice Tranberg of the NCFCA, with other beef industry staff leading working groups, exemplifies our proactive leadership and commitment to advancing industry interests through strategic partnerships.

PSE partners with the Canadian Centre for Food Integrity, the Global Meat Alliance and CRSB on several initiatives. Amie Peck chaired GRSB Communications Council from 2020 to 2023 and now co-chairs with Andrea White.

### ***Impact for industry***

The collaborative efforts and strengthened partnerships within the industry have significantly amplified our impact. By presenting a unified or aligned voice, we can influence policy decisions more effectively. Engaging beyond the beef sector on broader issues, such as through the Agriculture Carbon Alliance, enhances our understanding of different perspectives, allowing us to amplify aligned messages and avoid conflicts. Regular engagement with industry partners both within and beyond the beef sector enables us to identify new opportunities and potential issues more quickly. This proactive approach ensures that we can respond swiftly and strategically to emerging challenges and capitalize on developments that benefit the industry. Overall, these partnerships and collective actions empower us to drive positive change and sustain the industry’s growth and resilience.

PSE has seen increased collaboration and impact at global events (United Nations Food Systems Summit, COP) and works to coordinate issue response globally.

### ***Recommended modifications***

To further strengthen our regulatory framework and industry impact, we recommend actively engaging industry partners on critical sector issues. This includes continuing to seek opportunities for cross-sector collaboration within agriculture and beyond, which can enhance our collective influence and address broader challenges effectively. Additionally, increasing discussions with international partners on issues of mutual importance, such as FMD, will foster global cooperation and knowledge sharing. These steps will ensure that our industry remains resilient, competitive, and well-prepared to navigate future challenges. By maintaining robust and dynamic partnerships, we can better advocate for our interests and drive positive change within the sector.

**FOCUS AREA C: ENGAGE GOVERNMENT AND GLOBAL PARTNERS**

The beef industry has made significant strides in engaging with government and global partners during the 2020-2024 period, in the aftermath of the COVID pandemic. Collaborative efforts with federal and provincial governments have resulted in the continued access to world markets at a time international borders were closed, the development of several support programs and initiatives to bolster the industry's competitiveness, sustainability and strengthen supply chains.

Notably, the industry has worked closely with Agriculture and Agri-Food Canada (AAFC) to secure funding for research and innovation projects focused on areas such as genetic improvement, precision livestock farming, and carbon sequestration. These initiatives have provided valuable insights and technologies to enhance productivity and environmental stewardship.

On the global front, the industry has actively participated in international forums and bilateral and multilateral trade negotiations, advocating for fair and open market access for Canadian beef.

The meat sector in Canada has been actively engaged at the WTO, on matters related to the dispute settlement system, science-based policy making, negotiating processes to address technical trade barriers, discriminatory policies, and improved market access for meat exports globally.

A major milestone during this period was Canada's ratification of the Canada-United States-Mexico Agreement (CUSMA) in 2020, replacing NAFTA. CUSMA secured continued preferential access to the large U.S. and Mexican markets, which are crucial for Canadian beef exports. Beyond CUSMA, Canada implemented new free trade agreements (FTAs) to expand global market access. The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) entered into force in 2018, providing preferential access to key Asia-Pacific markets. The Canada-United Kingdom Trade Continuity Agreement (TCA) also took effect in 2021, replicating CETA benefits for continued UK access with disappointing outcomes for Canada's meat sector. Recent negotiations to replace the interim TCA broke down without a new UK trade deal being finalized, largely due to disagreements around beef and dairy issues.

Global partnerships with organizations like the Global Roundtable for Sustainable Beef have facilitated knowledge-sharing and the adoption of best practices in sustainable beef production.

Furthermore, the industry has strengthened its engagement with key trading partners, particularly in the Asia-Pacific region. Collaborative efforts with government agencies and industry associations in these markets have helped promote Canadian pork and beef's quality, safety, and sustainability credentials, fostering increased demand and market access.

However, challenges remain in navigating the complex regulatory landscapes and trade barriers in certain markets. Ongoing dialogue and cooperation with government agencies and international bodies are crucial to address these challenges and ensure a level playing field for Canadian beef exporters.

***Impact for industry***

Increased market access through CUSMA and new FTAs opened new avenues for export growth, contributing to the industry's economic success and global competitiveness. Promotional efforts strengthened Canadian beef's reputation and demand. Engagement with partners yielded tangible benefits, such as increased funding for research, adoption of cutting-edge technologies, and improved productivity and sustainability.

***Opportunities and Challenges***

The industry should continue fostering strong relationships with government agencies and international organizations to stay ahead of emerging trends and regulations. Leveraging partnerships for collaborative research, knowledge exchange, and joint advocacy efforts will be crucial in addressing challenges like climate change, animal welfare concerns, and evolving consumer preferences.

However, maintaining a unified industry voice and effectively communicating sustainability efforts will be an ongoing challenge in an increasingly complex global landscape.

**CONCLUSION**

The National Beef Strategy demonstrates leadership and provides clarity as various stakeholders come together to work towards a common goal. The four pillars address every aspect of the industry from grass-roots supply to consumer demand and all the issues that arise in between. Communicating efforts that contribute to these goals will ensure duplication of efforts are reduced and existing investments are leveraged.

The 2020-24 National Beef Strategy builds on the successes reported from the [2015-19 National Beef Strategy](#) in the [Status Update](#).

Learn more at [www.beefstrategy.com](http://www.beefstrategy.com)