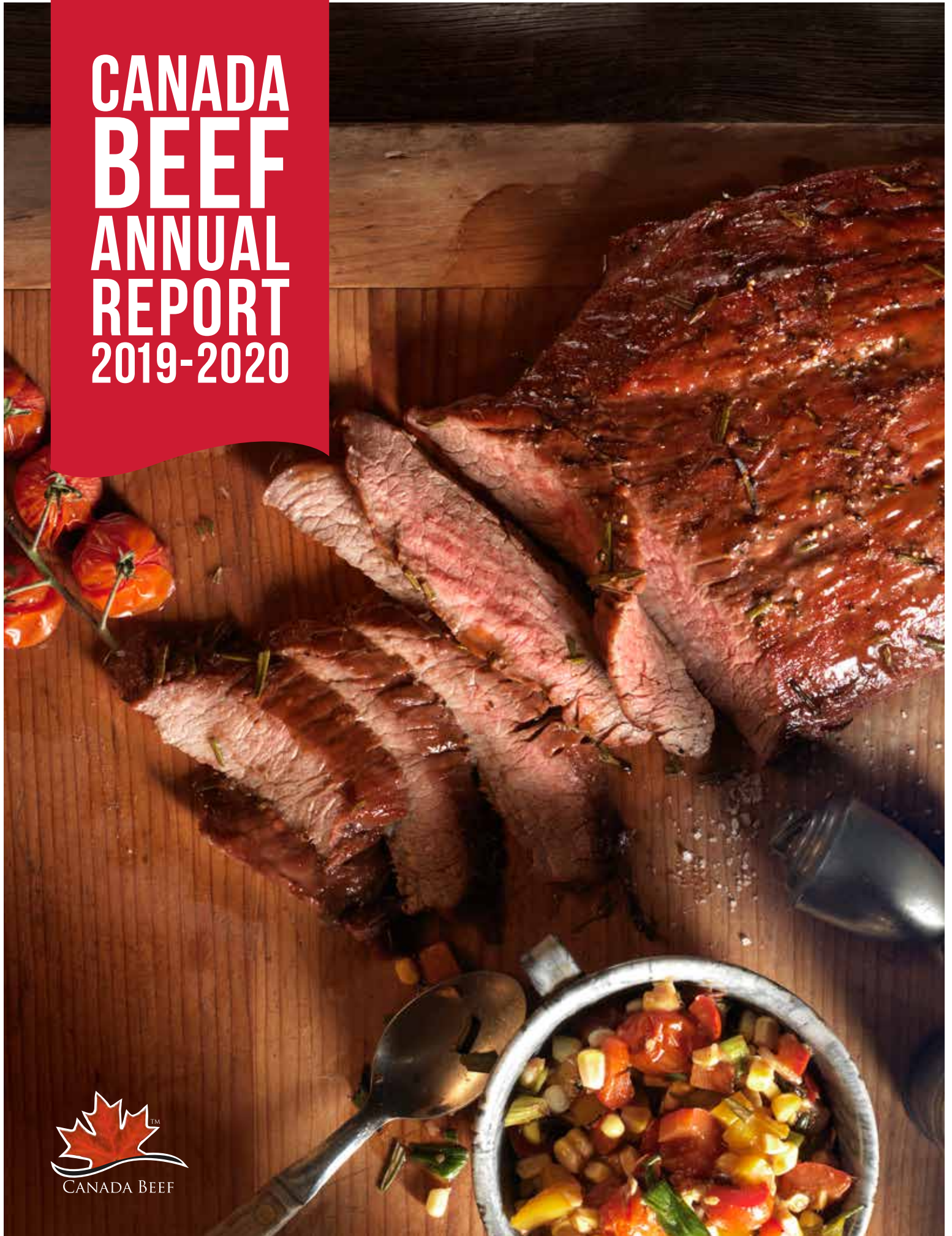


CANADA BEEF ANNUAL REPORT 2019-2020





Canada Beef provides market development and promotion services to the Canadian beef and veal industry. A division of the Canadian Beef Cattle Research, Market Development and Promotion Agency, Canada Beef is funded by cattle producer check-off, import levy and Federal and Provincial Government industry development funds. Canada Beef is responsible for the delivery of domestic and international market development and promotion through offices in Canada, Mexico, Japan, China and Taiwan.

VISION: Canadian beef brand loyalty provides growth and opportunities for the Canadian beef and veal industry.

MISSION: To strategically position the “Canadian Beef Advantage” to stimulate and sustain our premium global Canadian beef brand.





Message from the Chair

It has been my pleasure to once again chair the Canada Beef Market Development and Promotion Committee this past year. I am thankful for the support of Vice Chair Coral Manastersky, Finance Chair Russ Mallard and the rest of the Committee who have enthusiastically contributed to the strategic direction and overall success of Canada Beef.

Our Committee is responsible for the oversight of the Canada Beef business plan and budget, working with the President to ensure the business strategy is correct, overseeing its implementation, and evaluating its results. The Committee operates as the sole authority over Canada Beef under the Canadian Beef Cattle Research, Market Development and Promotion Agency.

2019/20 has been a year of evolution and adaptation for Canada Beef and the Market Development and Promotion Committee.

Last year, as part of an updated governance structure, the Committee welcomed four new members-at-large. These four members were elected under a separate process from the Agency Board members and bring additional skill sets and industry insights to the Committee from the foodservice sector, independent processor, and information tracking and exchange sectors. This year, additional expertise was added from the veal sector through the participation of Jennifer Haley, Executive Director, Veal Farmers of Ontario.

This past year saw the first full year with Michael Young as the new Canada Beef President. Michael has brought broad experience in domestic and global business development, branding and strategic leadership. He has facilitated many positive changes as part of his vision for market programs and services that deliver value with sound metrics for the benefit of all cattle producers and investors.

Michael has specifically worked to align Canada Beef direction with broader industry strategic objectives, and deepen relationships and communication with key industry stakeholder groups. He has realigned company investment and human resource allocations to areas that can provide the greatest return, increase stakeholder collaboration and co-investment, and allow Canada Beef to remain nimble in an ever-changing marketplace.

In the last quarter of the fiscal year, the rapid emergence of the COVID-19 pandemic significantly affected Canada Beef programs as virtually all domestic and international activities were impacted by physical distancing protocols on cattle processing, retail and foodservice operations, and the ability to export products to markets.

Canada Beef consumer and trade marketing efforts pivoted with the changing business landscape focusing on providing reassurance around the safety of meat and Canada's ability to maintain a stable supply, and providing merchandising support for the changing retail and foodservice marketplace. As well, Canada Beef's Consumer Marketing team has developed programs to help consumers cook and serve Canadian beef as people eat at home more often.

Canada Beef and the Market Development and Promotion Committee remain committed to working with the beef value chain to deliver value to our cattle producer funders and stakeholders.

Mike Kennedy
Chair, Market Development and Promotion Committee



Back: David Francis, PEI Cattle Producers; Hubert Lau, Member at Large; Alexandre Fontaine, Canadian Meat Council; Mike Kennedy (Chair), Canadian Meat Council; Russ Mallard (Marketing Finance Chair), Canadian Meat Council. Front: Mike Guest, Member at Large; Jack Chaffe, Beef Farmers of Ontario; Helen Langford, Member at Large; Steve Christie, Retail/Foodservice; Coral Manastersky (Marketing Vice Chair), I.E. Canada. Missing: Becky Bevacqua, Member at Large; Leslie Bielak, Canadian Meat Council.

Market Development and Promotion Committee

The Canadian Beef Check-Off Agency is governed by a board of 16 Agency Members. The Board is composed of 10 primary cattle producers nominated by the provincial cattle associations, four members named by the Canadian Meat Council, one representative of importers nominated by I.E. Canada, and another member from the retail and food service sector nominated by the delegates at the Annual General Meeting.

The Board works both as a whole and through focused advisory and operational committees to achieve their mandate. The Governance Committee and Finance Committee are advisory committees, and are made up of Agency Members only. The one operational committee,

the Marketing Committee, is made up through an appointment of Agency Members, and an election of producers and members-at-large.

The Marketing Committee is responsible for the oversight of Canada Beef, the organization tasked with investing check-off dollars into market development and promotion. The members of this Committee are appointed and elected from the best of the best in beef and marketing, ensuring that the Canadian beef industry receives strong value from their marketing investment through check-off.



MARKET DEVELOPMENT AND PROMOTION COMMITTEE

For more information about Canada Beef programs and services:

T / 403-275-5890
info@canadabeef.ca
cdnbeefperforms.ca

David Francis,
PEI Cattle Producers

Hubert Lau,
Member at Large

Alexandre Fontaine,
Canadian Meat Council

Mike Kennedy,
Chair,
Canadian Meat Council

Russ Mallard,
Marketing Finance Chair,
Canadian Meat Council

Mike Guest,
Member at Large

Jack Chaffe,
Beef Farmers of Ontario

Helen Langford,
Member at Large

Steve Christie,
Retail/Foodservice

Coral Manastersky,
Marketing Vice Chair,
I.E. Canada

Becky Bevacqua,
Member at Large

Leslie Bielak,
Canadian Meat Council



Message from the President

On behalf of the Market Development and Promotion Committee and the Canada Beef team, it is my pleasure to present the Canada Beef 2019-2020 Annual Report.

Canada Beef has achieved many successes since the creation of the Market Development and Promotion Committee and I am delighted to be part of the Canadian beef industry once again. This past year has been about change, accountability and adaptation as we entered a new decade and faced the beginning of the COVID-19 global pandemic.

The insights and direct feedback provided from the 2019 stakeholder satisfaction survey were instrumental in the change in direction for the organization. Satisfaction index values and targets for each area, program and service that Canada Beef brings to the table are now in place. Stakeholder feedback provided the driving force behind changes to programming, investment strategy, market representation and communications. The team created the Canada Beef Performs monthly e-newsletter highlighting activities, events and accomplishments in the domestic and export marketplace. Increased communication and reporting through the newsletter has been well received by producers and we now have more than 1,000 subscribers.

Internationally, Canada Beef worked with the Committee to create and implement a national Export Market Development (EMD) program to provide partner funding in five key areas for eligible activities to promote and grow premium quality Canadian beef brands in the export marketplace. Canada Beef also worked with the Alberta Government to create the Alberta Beef Export Market Development program that provides additional funding through a \$500,000 grant for eligible Alberta beef export market development projects over the next three years. This funding will be leveraged against national check-off investments to maximize export growth.

Domestically, Canada Beef focused on the fundamentals of demand building initiatives to increase carcass utilization and value optimization in the retail and foodservice sectors. These tactics introduce new and innovative ways of merchandising Canadian beef and veal to meet the opportunity gaps in the meat case and on the menu.

The Canada Beef 2019/2020 business plan focused on using market segmentation tools to identify high-growth, high-value consumer groups by demographics, behaviour, ethnicity and geography.

Working within the existing business plan and budget, Canada Beef refined the global marketing strategy to focus on five strategic priorities.

1. Promote the product to increase the awareness of Canadian beef brands, improve competitive position, and expand volume, value and market share.
2. Enable premium quality Canadian beef brands and co-branded programs to build on the Canadian beef brand platform.
3. Focus on both functional and emotional attributes to differentiate Canadian beef in the marketplace.
4. Improve competitive position through technical marketing resources, yield and financial performance benchmarking.
5. Invest in market development programs and services that deliver measurable results and return on investment back to funding partners.

The fiscal year ended as the global pandemic emerged in North America. The impact has had a significant effect on Canada Beef operations and programs and services in the domestic and export marketplace. The Canada Beef team responded quickly with an effective three-point plan of action: Respond-Recover-Reset. This plan focused on five strategic priorities.

1. Gather and interpret information and data to resolve immediate issues.
2. Pivot Canada Beef programs to be resilient, effective and relevant in the face of uncertainty and change.
3. Keep stakeholders informed.
4. Create solutions to mitigate the impact and adapt to the emerging new normal.
5. Plan for the post-COVID-19 environment.

While the past year has been challenging on several fronts, Canada Beef ended the year on solid footing with a clear path forward to achieve the goals and objectives identified in the National Beef Strategy.

My thanks to our staff who have truly gone above and beyond in these extraordinary times to deliver value for beef producers, clients and consumers around the world. Canada Beef has a dedicated team and I am grateful for their support as we move into the challenging year ahead.

Michael Young
President

National Beef Strategy

The spirit of collaboration is the anchoring pin of the 2020-24 National Beef Strategy. Developed by industry, for industry, the creation of the strategy was a dynamic process that engaged all industry sectors and provincial organizations. The Canadian Beef Advisors and provincial cattle associations believe a united industry is a stronger industry, and that a stronger industry benefits all those working in it today and into the future.

The increasing global demand for protein presented Canada's beef industry with the opportunity to position itself strategically and increase demand for its beef products. The strategy is designed to take advantage of the opportunities facing the industry while addressing the challenges.

The National Beef Strategy promotes a united approach to position the Canadian beef industry for greater profitability, growth and continued production of a high-quality beef product that meets the needs of markets at home and around the world.

The industry vision, mission and pillars remain unchanged from the 2015-19 strategy, but focus areas and tactics have been updated to reflect the current market and regulatory environment that producers face.

The four pillars provide a framework:

BEEF DEMAND | Support the comprehensive cut-out above \$270/cwt.

COMPETITIVENESS | Encourage a competitive regulatory, policy and market environment.

PRODUCTIVITY | Improve production efficiencies throughout the supply chain.

CONNECTIVITY | Enhance industry synergies and connect positively with government and partner industries.

These drive the goals and objectives. For more information about the National Beef Strategy, visit beefstrategy.com.

VISION: A dynamic profitable Canadian cattle and beef industry.

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





The Canada Beef team extended a thank you to the food processors, food industry and front-line workers for their commitment and dedication to feeding Canadians during this challenging time.

COVID-19

Canada Beef responded quickly to the COVID-19 pandemic. Work in the early days of the crisis was to respond to immediate issues and be resilient in the face of uncertainty and change. The focus was “Respond-Recover-Reset.”

Canada Beef responded to immediate issues related to the unprecedented demand for ground beef, the shift from foodservice to retail demand (putting pressure on carcass utilization), and the subsequent rolling plant slowdowns and closures. This situation had an impact on public perceptions about food safety and supply.

Working collaboratively with the national associations representing beef, veal and pork, Canada Beef developed resources for Canadian consumers and meat professionals in domestic and international markets. The focus was to provide reassurance about the safety of meat and our ability to maintain a stable supply by safeguarding the health of Canadians working in the sector. In addition, Canada Beef’s Marketing team developed programs to help consumers cook and serve a wide variety of available beef cuts.

INDUSTRY RESOURCES

A COVID-19 webpage with updates, fact sheets and links to resources was created and can be found at cdnbeefperforms.ca/covid19updates. As part of the ongoing efforts to protect the health and well-being of everyone in our industry, a COVID-19 Essentials Training Resource was developed to provides information on: Understanding COVID-19; Staying Safe at Home; Staying Safe at Work; and Self-Care and Symptom Assessment. The training materials are currently available in PDF form in English, French, Spanish, Tagalog, Simplified Chinese, Portuguese and Tigrinya.

RETAILER SUPPORT

“How to Cook” transparent cooking labels using Canada Beef’s tried, tested and true 3-Step Standard Cooking Instructions were created for retailer use. The transparent labels allow for the best view of the meat in the package and the instructions will help consumers have the best cooking and eating experience.

The One & Only Beef Retail point-of-sale toolkit was created to complement the One & Only Beef campaign. The toolkit features a consumer booklet with recipes for ground beef beyond traditional meatballs or spaghetti sauce, countertop displays, a tent card, decals and more.

CONSUMER OUTREACH

A two-page fact sheet for consumers with clear, easy-to-understand information on COVID-19 was created and is available at canadabeef.ca (both English and French).

As the pandemic kept people at home, Canadians were cooking like never before and one of the most popular items they were cooking was Canadian beef. Interest in buying, preparing and serving Canadian beef was at a record high and so were the questions coming from consumers, as shown by the increase in visits to the canadabeef.ca website.

Two consumer marketing campaigns scheduled for March 2020 shifted focus to meet consumer needs and provide information on culinary topics – with recipe inspiration and how-to information to enable consumers to brush up on their food skills.

YOUR CUSTOMERS ARE BUYING BEEF

LET'S HELP THEM LEARN HOW-TO-COOK!

Resources for Enjoying Canadian Beef and Veal at Home.

SAFEGUARDING THE CANADIAN MEAT SUPPLY

Measures taken by the Canadian Meat Industry to Protect Against COVID-19*

Symptom Monitoring

- All employees are advised to monitor symptoms and wear masks when at work.
- If you have symptoms of COVID-19, please stay home.
- If you have any symptoms or are advised to wear a mask, please stay home.
- If you have any symptoms or are advised to wear a mask, please stay home.

Temperature Monitoring

- 2 possible symptoms have been identified: elevated body temperature and coughing.
- If you have any symptoms or are advised to wear a mask, please stay home.

Travel and Exposure History

- Employees are advised to avoid travel to high-risk areas.
- Employees are advised to avoid contact with high-risk individuals.

Controlled Entry

- Access to the plant is restricted to authorized personnel only.
- All visitors must wear a mask and maintain social distancing.

Hand Sanitization

- Hand sanitization is required for all employees and visitors.
- Hand sanitization is required for all employees and visitors.

Facility and Equipment Sanitization

- All facilities and equipment are sanitized regularly.
- All facilities and equipment are sanitized regularly.

There is currently no evidence that food is a likely source or route of transmission of COVID-19.

inspection.gc.ca

FOOD SAFETY AND COVID-19

Information for You and Your Family

What is COVID-19?

- COVID-19 is a coronavirus that can cause severe illness.
- The incubation period ranges from 2 to 14 days.
- The most common symptoms are cough, fever, and shortness of breath.

How does it cause illness?

- The virus enters through the mouth, nose, or eyes.
- The virus enters through the mouth, nose, or eyes.

Food does not transmit COVID-19 illness.

- The Canadian Food Inspection Agency has said that there is no evidence that food is a likely source or route of transmission of COVID-19.

There is currently no evidence that food is a likely source or route of transmission of COVID-19.

Actions to protect you and your family

- Frequently touch surfaces.
- Avoid close contact with people who are sick.
- Stay home when you are sick.

Prevent the Spread of Germs

- Wash your hands often with soap and water for at least 20 seconds.
- Avoid touching your face.

LOOKING AHEAD

As we recover, Canada Beef will adapt to the new normal, which will include shifts in consumer behaviour around cooking at home and eating out; the impact on foodservice; and uncertainty over future pricing, future costs, and export demand.

As we look towards a reset in this new world, we need to rebrand and retrench the Canadian beef industry in the post-COVID-19 environment. At Canada Beef, we will capture and implement opportunities to reshape the image of the beef industry while we embrace new consumer behaviours by delivering strategies to meet their need.

FREE STARTER KIT

Handbook

Canada Beef Digital Consumer Culinary Resources

Japan and Korea

DEMAND BUILDING EVENTS

- Canadian Beef Road Show Japan 2019 brought together Japanese stakeholders from all areas of the beef industry to attend seminars across the country celebrating 30 years of a successful business partnership with Japan. The event took place in seven regional markets in Japan and one in Seoul, Korea (October 28 – November 8, 2019).
- Global Vision Seminar (Tokyo, September 11, 2019).
- Canada Beef International Institute (CBII) Japan partnered with Nick Foods (a leading Japanese meat distributor) to showcase Canadian beef at a seminar for 50 buyers from major hotel and restaurant chains (Tokyo, November 11, 2019).
- CBII Japan partnered with regional distributor NakamuraKaku and national premium distributor Shinpo Foods for a Canada Beef seminar (Hiroshima, January 29 and Osaka, February 4, 2020).

The Canadian Beef Road Show Japan 2019 celebrated 30 years of successful business in Japan by visiting seven regional markets across Japan and Korea.

TRADESHOWS, EVENTS & MEDIA

- CBII Japan organized a media event at the Canadian Embassy (Tokyo, April 2019).
- Satoh Co. Tradeshow (Sendai, September 9, 2019).
- CBII Japan partnered with dinner cruise ship “Symphony” for the Canada Beef Fair to celebrate the 90th anniversary of Japan-Canada diplomatic relations (November 1, 2019 – March 31, 2020).
- Embassy of Canada to Japan held a seminar delivered by CBII Japan on the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, or CPTTP (November 22, 2019).
- The Canada Beef Festival with CBII Japan strategic partners presented a series of Canada Beef promotional events to Korean end-user customers (January – March 2020).

- The Embassy of Canada to Japan presented a seminar where CBII Japan presented on the positive impact of the CPTTP at the Supermarket Tradeshow 2020 (February 12-14).
- CBII Japan promoted Canadian Beef and CBII programs, services and supply contact information to its South Korean market via three leading monthly magazines, representing a wide range of industry partners in production, distribution, retail, processing, import and hospitality. The three magazines (Meat Journal, Hotel & Restaurant, and Food Journal) together reach a total of 63,500 subscribers (March 2020).

RETAIL/FOODSERVICE PROMOTIONS

- CBII Japan participated in a BBQ at grocery chain Kinsho’s flagship store (Osaka, August 2, 2019).
- CBII Japan hosted a BBQ at a Tokyo venue for 150 invited guests, with 100 Canadian Ten retail stores participating (October 19, 2019).
- CBII Japan partnered with leading meat company Nippon Shokihin and Japanese trading house Sojitz Group for a Canada Beef seminar for over 100 hotel and restaurant buyers (November 6, 2019).
- In-store demos were held at 183 grocery stores and 60,000 samples were distributed in Japan and Korea in the 2019/2020 fiscal year.
- CBII Japan partnered with major Japanese trading house Sojitz Group to showcase the Canadian Beef Fair at Asahi Beer Restaurant (February – March 2020).

CANADIAN BEEF EXPORT HIGHLIGHTS

- Japan saw a 53.6% increase in volume over 2018 with 49,322 MT exported in 2019 and a 64.8% increase in value at \$353,715,000.
- South Korea saw a 27.5% increase in volume over 2018 with 5,659 MT exported in 2019 and a 41.4% increase in value at \$42,830,000.

As tariffs on Canadian beef products have declined since the CPTTP came into force in December 2018, domestic consumption of Canadian beef products has significantly increased.



TAKING IT ON THE ROAD — THE CANADIAN BEEF ROAD SHOW JAPAN 2019

The Canadian Beef Road Show Japan 2019 was a series of Canada Beef seminars created to celebrate 30 years of successful business in Japan. Canada Beef International Institute (CBII) Japan invited Japanese retail and food service buyers, chefs, distributors, media and other stakeholders to attend the seminars in cities across the country.

As tariffs on Canadian beef products have declined since December 2018, domestic consumption of Canadian beef has significantly increased in Japan. Awareness of Canadian beef by Japanese consumers has also increased, making it an excellent time to reach out to industry to promote the brand.

Seminar topics included an overview of the Canadian beef delivery system and beef quality, a cutting demo in some locations and an introduction to Canadian beef supply partners. Speakers for the sessions included Dennis Laycraft, Executive Vice President, Canadian Cattlemen’s Association; Michael Young, President, Canada Beef; and Ichiro Kiyotomi, Senior Director Japan & Korea, Canada Beef International Institute.

The road show travelled across the country from October 28 – November 8 to regional markets in seven locations in Japan and to Seoul, Korea. Response to the events was outstanding—more than 600 guests attended across eight cities.





FOOD & HOTEL CHINA 2019, NOVEMBER 12-14

The market in China re-opened in early November and the timing provided a great opportunity for Canada Beef. Canada Beef International Institute (CBII) China participated at Food & Hotel China (FHC) 2019—the largest and most important exhibition for the hotel and restaurant industry in China—which was held just after the announcement. The show provided the opportunity to roll out a new Canada Beef tradeshow booth, designed to facilitate B2B meetings. The booth design was a “show-stopper” in a prime location and gained widespread attention.

CBII China showcased Canadian beef products along with cooking demos and tasting activities. Key exporters, importers and distributors of Canadian beef were invited to participate with their products, displays and information at the CBII China booth. Canada Beef President Michael Young was in attendance at the show and was invited to present at the FHC Meat Forum where he spoke about the Canadian Beef Advantage to a standing-room-only audience.

The tradeshow had an attendance of over 133,751 people. Many meetings were held at the Canada Beef booth, providing a great opportunity for Canadian beef exporters, importers and distributors to meet with current and prospective clients and develop more opportunities in the China market.

The show provided the opportunity to roll out a new Canada Beef tradeshow booth, designed to facilitate B2B meetings. The booth design was a “show-stopper” in a prime location and gained widespread attention.

China, Hong Kong, Taiwan & Southeast Asia

DEMAND BUILDING EVENTS

- CBII partnered with Dairy Land, a major importer of Canadian beef in Macau, for an advertising promotion on Dairy Land trucks (Macau, August 2019).
- A Canadian Beef Steak Festival took place in China through key CBII partner Moorigns Steaks in their 25 stores (August 17 – September 15, 2019).

TRADESHOWS, EVENTS & MEDIA

- A successful Canadian beef promotion took place at Golden Eagle Summit Hotels & Resorts in Nanjing (April 2019).
- CBII Taiwan office partnered with import partner Canadian beef brand TD Food to showcase Canadian beef to 13,000 delegates at Food & Hotel in Vietnam (April 24-26, 2019).
- CBII showcased Canadian beef products and advantages to over 110,000 visitors at the SIAL tradeshow in Shanghai, the third-largest tradeshow in the world (May 14-16, 2019).
- A Canadian beef demonstration took place at the HOFEX Hong Kong tradeshow (May 7-9, 2019).
- The Canadian Beef Festival took place at J Prime Steak and Seafood Restaurant in Shanghai (May 1-31, 2019).
- CBII China rolled out a new Canada Beef display booth at the Food & Hotel China (FHC) tradeshow, 2019, the largest of its kind in China with approximately 134,000 attendees (November 12-14, 2019).
- CBII China showcased Canadian beef to 100,000 participants at the Shanghai Wine and Dine Festival, the largest festival of its kind in China (October 18-20, 2019).
- CBII China partnered with Bolian Resorts and Spa Group in a Canadian Beef Festival at the Chongqing Bolian Hotel (September 12 – October 30, 2019).
- CBII Taiwan held a “Canadian Carnival” beef promotion event in partnership with the Canadian Trade Office at the Mandarin Oriental Taipei Hotel (September 16 – November 15, 2019).
- CBII China joined with the Canadian Chamber of Commerce Shanghai in hosting the 12th Annual Canadian Maple Leaf Ball, where Canadian beef was a featured menu item (September 21, 2019).
- CBII Taiwan and the High Commission of Canada in Singapore joined a new Canadian beef supply partner in beef promotion opportunities at the 6th Annual Epicurean Market event.

EDUCATION AND RESOURCES

- CBII Taiwan held a Canadian beef butcher training session in Manila, Philippines, for 75 attendees (August 5, 2019).
- CBII Taiwan hosted Beefing Up with Canadian Gastronomy—a Chef’s Table Event to educate Filipino food industry members on Canadian beef (August 8, 2019).

- CBII established a partnership with chef’s association Young Chef Horde and the Shanghai Institute of Tourism Culinary School for a Culinary Skills Contest using beef (November 11, 2019).
- CBII China’s Canadian Beef Culinary Workshop in Shanghai highlighted the promotion of Canadian Beef to over 50 executive chefs and restaurateurs from all over China (November 30, 2019).

RETAIL/FOODSERVICE PROMOTIONS

- CBII China partnered with food importer/distributor Parker-Migliorini International (PMI) Guangzhou to present a Canadian beef seminar (April 18, 2019).
- A Canadian beef promotion, the Canadian Beef Fair, took place at 8 Yata supermarkets in Hong Kong; Yata, a Japanese-style supermarket, showcased many cuts of Canadian beef (August 20-26, 2019).
- Canadian beef promotion at City’super Shanghai (December 2019).
- CBII Taiwan held 309 days of retail demos in Taiwan and Vietnam.

GOVERNMENT AND INDUSTRY STAKEHOLDERS

- CBII China presented the “East Meets West” Canadian Beef Culinary Innovation Workshop at the Canadian Consul General’s official residence in Shanghai (May 13, 2019).
- CBII China partnered with the Canadian government for a national Canadian Beef promotion with He Ma Xian Sheng, a retail chain developed by Chinese sales giant Alibaba (June 20-30, 2019).
- CBII showcased Canadian beef to 1,200 guests at two Canada Day events organized by the Canadian Consulate on June 27, 2019 (Hong Kong and Guangzhou).
- Canada Day Celebration, Shanghai.
- CBII Taiwan and the Taipei Canada Trade Office hosted the Canadian Food Festival at E-DA Skylark Hotel in Kaohsiung City with a major focus on Canadian beef (August 14 – September 15, 2019).
- CBII China and the Government of Canada showcased Canadian beef in Freshippo’s mobile app and at 34 stores (January 6-19, 2019).

CANADIAN BEEF EXPORT HIGHLIGHTS

- China saw a 17% increase in volume over 2018 with 12,052 MT exported in 2019 and a 7.1% increase in value at \$104,197,000.
- Hong Kong saw a 17.7% decrease in volume over 2018 with 16,882 MT exported in 2019 and a 10.5% decrease in value at \$156,499,000.
- Taiwan saw a 6.2% decrease in volume over 2018 with 2,790 MT exported in 2019 and a 6.1% decrease in value at \$21,800,000.

Mexico and Latin America

TRADESHOWS, EVENTS & MEDIA

- Canadian beef was featured in the “Dinner in the Sky” promotional contest dining event with Mexican supermarket giant HEB and its JBS “Northern Meat Shoppe” brand (May 16-June 16, 2019).
- Canadian beef was showcased at the Exp-Hotel FS/HRI tradeshow in Cancun, featuring Cargill and Sigma Foodservice, one of Mexico’s largest distributors of Canadian beef (June 10-13, 2019).
- The CB Latin America & Mexico team showcased Canadian beef in ABASTUR 2019, one of the most important foodservice tradeshow in Latin America with over 18,000 visitors (September 3-6, 2019).
- Canadian beef was featured at three promotional seminars at the Vallarta-Nayarit Festival in Guadalajara (September 30 – October 4, 2019).
- Canada Beef promotional videos featuring the AAA Canadian Cowboy Cut were shared on social media on December 17, with over 8,000 views and 791 Likes within 48 hours.
- Canada Beef placed two promotional insertions for AAA Canadian Beef in weekly editions of Sierra Madre magazine, with a reach of 25,000 subscribers in Mexico and 1.5 million digital users (January 2020).
- Canadian beef is the featured ingredient in “Grandes Chefs Mexico,” a cookbook that showcased 28 Canadian beef recipes from some of Mexico’s top chefs, media celebrities and influencers.
- The Canada Beef Latin Hub partnered with Cargill to highlight Canadian beef in Canada Day celebrations where 1,300 guests dined at gala events in three major centres.
- The Canadian Beef Festival was promoted in a newspaper insertion in Mexico City by Master Chef Ricardo Munoz for three of his Azul Restaurants (February 2020).

RETAIL/FOODSERVICE PROMOTIONS

- The Canadian Beef Story was prominently featured at two high-end restaurants, The Butcher’s Steak Joint in Monterrey and Sasha’s in Merida, as part of their Canadian beef promotion (February 2020).
- Canadian beef dishes featured at local restaurants and information on the Canada Beef Roundup app were featured in a two-month advertising promotion that showcased Canadian Beef on 10 buses in busy routes in Monterrey.

Canadian beef dishes featured at local restaurants and information on the Canada Beef Roundup app were in a two-month advertising promotion that showcased Canadian Beef on 10 buses in busy routes in Monterrey.

EDUCATION AND RESOURCES

- Canadian beef was showcased by Chef Federico Lopez at Beef Training Sessions in Cancun and the Mayan Riviera, co-presented by Canada Beef, Cargill and Sigma Foodservice.
- Master Chef Carlos Leal presented a beef cutting demo and sampling for chef-restaurateurs at the Canada Beef Latin America and Mexico (CBLATAM) Business Development Centre (October 20, 2019).
- CBLATAM released five short videos highlighting the Canada Beef Advantage, featuring Master Chef Mexico judge and food influencer Chef Adrian Herrera showcasing a range of Canadian beef feature cuts to promote Canadian beef and expand brand awareness (February 2020).
- Canada Beef produced a full-page promotional insertion on Canadian beef grades, production and industry standards in El Norte, a newspaper with 95,000 subscribers (December 20, 2019).

GOVERNMENT AND INDUSTRY STAKEHOLDERS

- Canada Beef partnered with the Canadian Embassy, the Mexican Meat Council and industry stakeholders in the interactive Borders Cities Meat seminar series (May through August).
- CBLATAM teamed up with the Canadian Embassy in Veracruz to present the Comecarne Border Seminars for distributors (October 3-4 & 21-23, 2019).
- Canada Beef and the Canadian Consulate of Monterrey co-hosted a meeting with Saskatchewan Minister of Agriculture David Marit and beef industry partners (October 8, 2019).
- CBLATAM and the Canadian Consulate in Monterrey hosted a beef tasting for participants at the Canadian Supplier Day event (October 28-29, 2019).

CANADIAN BEEF EXPORT HIGHLIGHTS

- Mexico saw a 7.1% increase in volume over 2018 with 16,530 MT exported in 2019 and a 15.1% increase in value at \$126,867,000.



FOOD PHOTOGRAPHY INSPIRATION

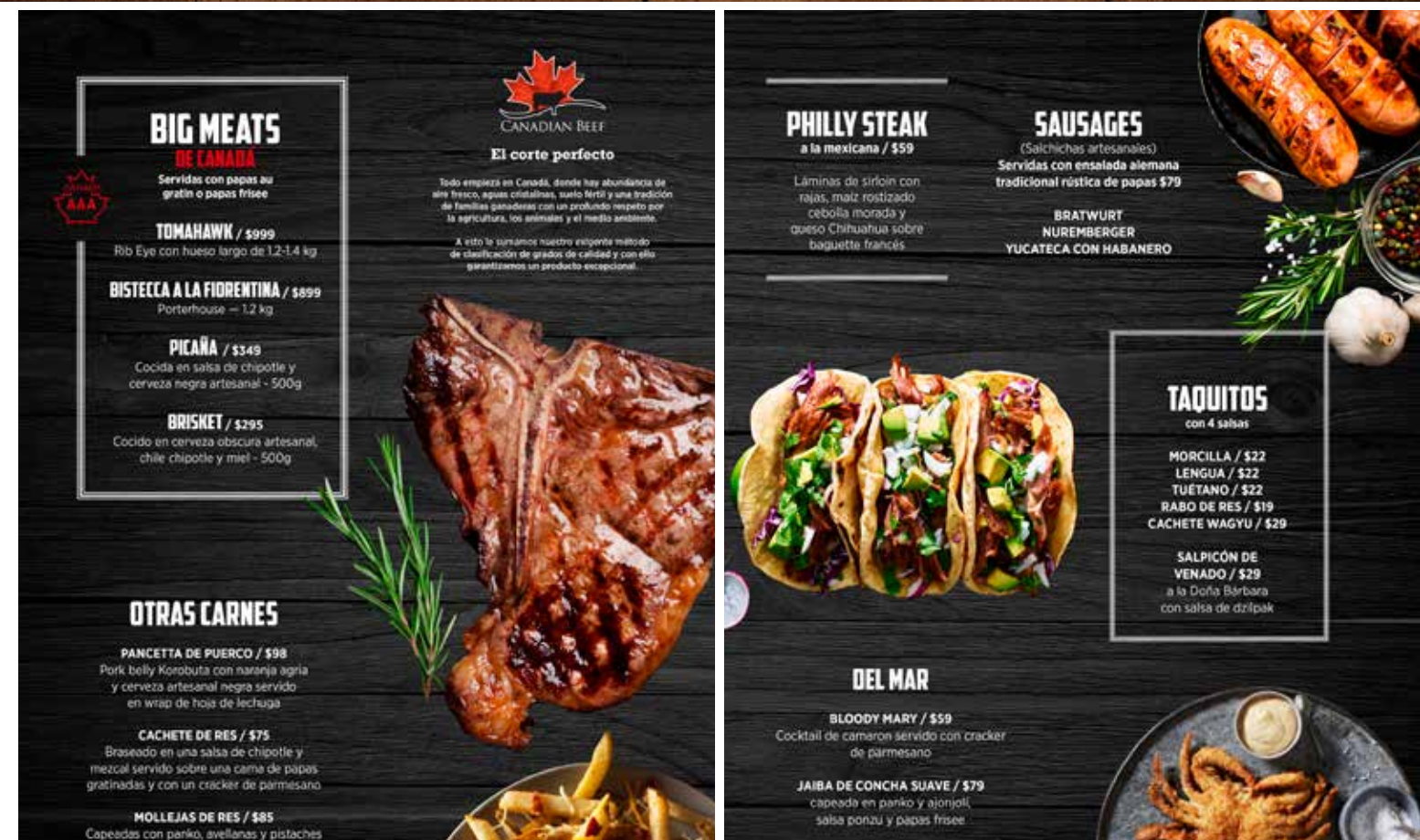
There is a saying that the eyes eat first. The LATAM team recognized this and facilitated the creation of mouth-watering beef photography to inspire consumers to enjoy Canadian beef.

The team produced a full-page promotional insert about Canadian beef attributes for El Norte newspaper. The team also placed two insertions for AAA Canadian Beef in weekly editions of Sierra Madre magazine. Canadian beef is the featured ingredient in Grandes Chefs Mexico, a cookbook that showcased 28 Canadian beef recipes from some of Mexico’s top chefs, media celebrities and influencers. These publications all feature striking photography.

To build brand awareness, five short videos showcasing a range of beef cuts were produced featuring Master Chef Mexico judge and food influencer Chef Adrian Herrera.

The Canadian Beef Story was prominently featured at two high-end restaurants as part of their promotion of Canadian beef on their menus.

Offering outstanding visibility, local restaurants featuring Canadian beef dishes on their menu were highlighted in advertisements attached to the sides of 10 buses in busy routes in Monterrey. While buses might not be a traditional advertising venue, the high visibility of the buses and the stunning food photography captured the consumer’s attention.



Business Development

DEMAND BUILDING

- Canada Beef completed 13 Business Development Market Agreements with a variety of value chain clients, primary processor, Canadian beef brand owners, retail and food service operators.

RETAIL/FOODSERVICE PROMOTIONS

- Canada Beef messaging reached 3 million print readers and 2 million online readers through an advertising insertion in the Costco Connections Magazine (spring 2019).
- Canada Beef partnered with Alberta Beef for an intensive learning event with the Western Canada-based Centennial Foodservice team (April 2019).
- Canada Beef created the Independent Retail Operator Program (IROP), a retail meat case toolkit for independent and small-chain retailers to showcase their commitment to 100% Canadian beef.
- Walmart showed its commitment to 100% Canadian beef through a launch of on-pack labelling to provide consumers with correct cooking instructions for every cut of beef (December 2019).
- Canada Beef was a featured guest presenter at the Sysco webinar “The Truth About Beef” (October 16, 2019).
- Canada Beef partnered with Save-on-Foods, with 160 locations, on a Meat Case Branding Initiative, featuring meat case Point of Sale to showcase Save-on-Foods’ commitment to 100% Canadian beef.
- Canada Beef was the highlight in the “Twelve Roasts of Christmas,” an initiative by Federated Co-op to feature beef as a terrific roasting option during the Christmas season through December 2019.
- Canadian beef was the focus in the “Great Canadian Steak Event,” an on-menu and television promotion in November 2019 launched by Montana’s Bar and Grill (100 locations).
- Canada Beef’s Co-Branding Initiative worked with Harmony Beef in Alberta to develop a brochure highlighting their new Heritage Beef brand (early 2020).
- Canada Beef co-branded and printed the Retailer Canadian Beef Merchandising Guide wall chart in a partner program with Pre Pak Meats of Calgary, AB (January 2020).
- Canada Beef was prominently featured in a Harvey’s Canada promotion, demonstrating Harvey’s commitment to 100% Canadian beef through Canada Beef logo placement on informational materials, and profiles of local ranching families on the company website (January 2020).

TRADESHOWS, EVENTS & MEDIA

- Canada Beef reached thousands of end-users through four cross-Canada trade events and one sales rep training session during Gordon Food Service’s spring marketing events.
- The Canada Beef Advantage message reached thousands of end-users at Gordon Food Service’s Regional Shows in Winnipeg (September 16, 2019) and Edmonton (October 6, 2019).
- Canada Beef showcased educational materials and product information via participation in the Sysco Canada Foodie National Summit, a trade-style show in Toronto (October 1-3, 2019).
- Canada Beef addressed over 20 executive chefs on key aspects of the Canadian beef industry at the Compass Group Chef Ideation Session in Woodstock, ON (October 9, 2019).

- The Canadian Beef and Canadian Veal Pavilion hosted 10 Canadian beef and veal primary producers, manufacturers and beef and veal association representatives at the Grocery Innovation Show (Toronto, October 22 & 23, 2019). Canada Beef won the Grocery Innovation’s 2019 Best Multi Booth award for industry partnership, brand showcasing and innovation.
- Canada Beef attended the Gordon Food Service show in Vancouver (October 23, 2019).
- Canada Beef sponsored Team Koe, one of Canada’s national men’s curling teams. This sponsorship gave the Canada Beef brand recognition through Team Koe’s visibility at many different venues and media vehicles including 600,000 attendance at games; 52 hours of games on TV for a reach of 10.1 million; and a social media reach of 80,000. Canada Beef utilized this reach to convey positive Canadian beef production, product and culinary messages directly to consumers. In addition, a 6-month TV ad campaign and digital program were launched. The campaign highlighted a beef farming family speaking to members of Team Koe and was shown on the Weather Network, W Network, Bravo, Food Network and Discovery. The campaign generated 10.2 million impressions.
- Canada Beef participated at Canada’s premiere foodservice convention, the Restaurants Canada tradeshow in Toronto. With 18,000 attendees, this major event helped solidify Canada Beef’s engagement with, and continued support of, its thousands of restaurant partners (March 1-3 2019).

EDUCATIONAL TRAINING & RESOURCES

- Canada Beef launched 175 copies of its updated and revised Canadian Beef and Veal Handbook (April 2019).
- Canada Beef hosted Gordon Food Service for a Canadian Beef Experience in a two-day pasture-to-plate event, including local ranch tours, for foodservice partners and stakeholders (July 3-5, 2019).
- Canada Beef partnered with BC Cattlemen’s to co-host the Canadian Beef Educational Experience for 11 of Sysco Victoria’s top sales reps (June 10-12, 2019).
- Canada Beef hosted Sobey’s Wholesale in Toronto for a two-day Canadian Beef Experience (September 10-11, 2019).
- Canada Beef presented to executive and meat-management members of the Calgary Co-op (September 28, 2019).
- Canada Beef continued its support for over 50 of Sysco’s top customers at a series of educational seminars (November 26-28, 2019, at Sysco locations in Victoria, Vancouver and Kelowna).
- Canada Beef and Cargill representatives presented to Centennial Foodservice, providing education and support to members of the Centennial sales and culinary teams (Toronto, January 29, 2020).
- Canada Beef presented the Canadian Beef Experience to 12 marketing associates from Sysco Calgary and Sysco Alberta at a two-day e-session in Calgary (February 3-4, 2019).
- Canada Beef partnered with Ontario specialty grocer Denninger’s to provide in-store, print and digital consumer information resources to enhance the profile of Canadian beef roast options.



The team from Sysco Alberta on a Canadian Beef Experience tour.

THE IMPORTANCE OF EDUCATION

Educating end-users about Canadian Beef is an important part of a successful program—after all, you can’t sell what you don’t understand. The Business Development team puts a strong focus on educating retail and foodservice industries and their sales and meat management staff about the attributes of Canadian beef. This includes merchandising and sales promotion ideas, menu and meat case inspiration, and information on production practices, quality assurance and plant safety.

This year, the Business Development team presented to foodservice distributors including Centennial Foodservice, Gordon Food

Service, Sysco and the Compass Group. Retail customers included Sobey’s Wholesale and Calgary Co-op.

The Canadian Beef Experience is one of the programs offered. This two-day pasture-to-plate event includes local ranch and feedlot tours, a presentation about quality attributes and food safety measures as well as a cutting demonstration and menu or meat case merchandising ideas.

Darren Fry, National Merchandising Manager, Red Meats and Entrees for Gordon Food Service, notes, “With the assistance of Canada Beef, its staff, training portals and on-site learning facilities, we have been able to develop our sales and marketing teams to understand what Canadian beef means to our customers, communities and the countless Canadians that are part of this industry.”



The team from Sysco Victoria taking part in a Canadian beef seminar.

Canadian Beef Centre of Excellence

RETAIL AND FOODSERVICE PROGRAMS

- Canadian Beef Centre of Excellence (CBCE) hosted a Flank Steak Demand Building and Ideation Session for Centennial Foodservice execs, reps and chefs to showcase butchery, culinary concepts and product attributes (April 3, 2019).
- The CBCE team provided an extensive Canadian beef industry experience to a group of foodservice executives and chefs from Dubai (September 23-27, 2019).
- CB and CBCE teams hosted meat managers from Calgary Co-Op for presentations on optimizing production and sales of branded product lines (Calgary, September 25, 2019).
- CBCE and Pre Pak Meats collaborated for product development of commercial sausages using Canadian beef (October 16, 2019).
- Product development collaboration between CBCE and Brant Lake Wagyu culminated in the commercial production of Thrive Provisions, beef protein bars made from 100% local Albertan wagyu beef (March 2020).

EDUCATIONAL TRAINING & RESOURCES

- CBCE gave representatives of the Sawmill Restaurant Group a pasture-to-plate experience with a Canadian Beef presentation and culinary and butchery demonstration (May 13-14, 2019).
- CBCE hosted students of SAIT's Butchery and Charcuterie Management program to provide a foundational platform for the future generation of Canadian beef industry experts (April 8-9, 2019).
- The CBCE showcased the Canadian Beef Advantage at the Annual Canadian Chef's Federation Conference with foodservice-focused butchery demonstrations (Niagara, ON, May 27-30, 2019).
- CBCE hosted the Hawksworth Young Chef Scholarship finalists with the Canadian Cattlemen's Young Leaders for an immersive experience, providing opportunities for these two crucial sectors to enhance their understanding and appreciation of their industry, and of each others' roles in the Canadian Beef team story; the event was robustly covered by social media (June 10-13, 2019).
- CBCE alongside members of the Canadian Beef team proudly promoted the Canadian Beef Advantage at the ANUGA International Tradeshow in Cologne, Germany, the world's largest food & beverage tradeshow with over 170,000 visitors last year (October 5-9, 2019).
- The CBCE hosted a trade mission delegation of Japanese beef buyers for a Canadian Beef Advantage presentation and culinary showcase (November 15, 2019).
- The CBCE team presented Canadian Beef Advantage messaging and a butchery ideation session to our future Canadian beef industry leaders at the annual Canadian Junior Angus GOAL (Guiding Outstanding Angus Leaders) Conference, a networking, education and engagement venue for young Angus producers (Canadian Angus Headquarters, February 16, 2020).

GOVERNMENT AND INDUSTRY STAKEHOLDERS

- CBCE partnered with CBII Taiwan/SE Asia to host the Philippines Purchasing Association Canadian Beef Experience (June 24-28, 2019).

- Canada Beef and the Canadian Angus Association co-hosted the Brazilian Beef Producers in a seminar with a focus on Canadian beef quality and butchery ideation (Calgary, September 9, 2019).
- CBCE extolled the Canadian Beef Advantage to an EU Trade Mission of beef buyers from Spain (Calgary, September 15, 2019).
- CBCE, in partnership with the Saskatchewan Cattlemen's Association, presented at Agribition, North America's second-largest agricultural tradeshow (Regina, November 25-30, 2019).
- CBCE presented to the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) at the University of Guelph to educate Ontario government employees on Canadian beef market activity and butchery knowledge.
- CBCE Executive Director Mathieu Paré represented Canada Beef in a presentation for 50 Quebec beef producers and feeders at the Boeuf Québec Annual General and Investment Strategy Meeting (Drummondville, QC, February 27, 2020).

TRADESHOWS, EVENTS & MEDIA

- CBCE Team delivered Canadian Beef Advantage messaging to thousands of attendees at the Calgary Stampede and also presented culinary demonstrations in the Stampede Kitchen Theatre (July 2019).
- CBCE executive director Mathieu Paré hosted top foodservice professionals at the Philippines CBCE On the Road event, a follow-up to the Philippines Canadian Beef Experience (Sofitel by the Bay, Manila, August 5-8, 2019).
- CBCE delivered multiple presentations highlighting past engagements and the quality and versatility of Canadian beef during the Canadian Beef Industry Conference (Calgary, August 13-15, 2019).
- CBCE hosted the Jeunes Chefs Rôtisseurs, junior members of the Chaîne des Rôtisseurs, during their annual culinary competition. With CBCE support, Canadian Beef was a black box ingredient selected for the national and international competitions (Calgary, September 19, 2019).
- The CBCE's role in the development and public awareness of Canadian beef excellence was the key message in an extensive article in the January 2020 issue of The Furrow Magazine, a U.S. agriculture trade publication.
- The Canadian Beef Advantage and Canada Beef's Emerging Markets Program were highlighted in BEEF! Spain magazine in response to the EU Market's Spanish Trade Mission of September 2019.
- The CBCE team were proud participants in the Restaurants Canada Show, alongside Canada Beef's Channel Marketing Team. CBCE also partnered with two Ontario culinary schools to offer leadership to future Canadian beef industry professionals (Toronto, March 1-3, 2020).
- CBCE delivered a Canadian beef sample program that showcased partner products within the Canadian Beef Pavilion during the Canadian Federation of Independent Grocers annual show: Grocery Innovations Canada (October 22-23, 2019).



Young Chefs and Young Beef Leaders working together at a chili cook-off during sessions June 10-13, 2019.

CBCE BRINGS TOGETHER THE NEXT GENERATION OF BEEF PRODUCERS AND CHEFS

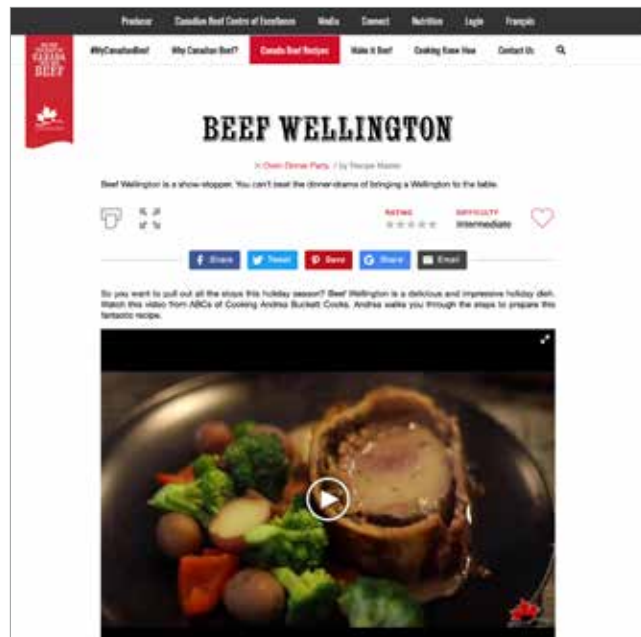
CBCE hosted the Hawksworth Young Chef Scholarship finalists together with the Canadian Cattlemen's Young Leaders for an immersive experience between these two crucial sectors to enhance their understanding and appreciation of the industry and each other's roles in the Canadian Beef story; the event was robustly covered by social media.

The objective was to pair up young Canadian beef producers with the nation's premier young chefs to provide the opportunity to recognize and appreciate each other's efforts to produce and utilize Canadian beef with the care, expertise and respect it deserves.

The final goal was realized when both young producers and young chefs established confidence in the Canadian Beef industry and were able to proudly tell the Canadian Beef Story to their customers and industry partners.

Young chefs and producers toured local ranching operations and learned about pasture management, cattle genetics, production practices and Canadian grassland sustainability from foraging expert Julie Walker. Chefs and producers were paired up to compete in an outdoor cooking competition where they had to build their own fire and cook chili at the BarU Ranch National Historic Site. On the final day, CBCE presented a comprehensive butchery and culinary ideation session.





COOKING KNOW-HOW

We know that cooking roast beef can be intimidating for consumers. How to Cook Roast Beef is consistently the top page viewed no matter the month or season. Under the “Cooking Know How” section at canadabeef.ca we provide consumers with detailed step-by-step instructions for each of the Cooking Categories for all beef cuts.

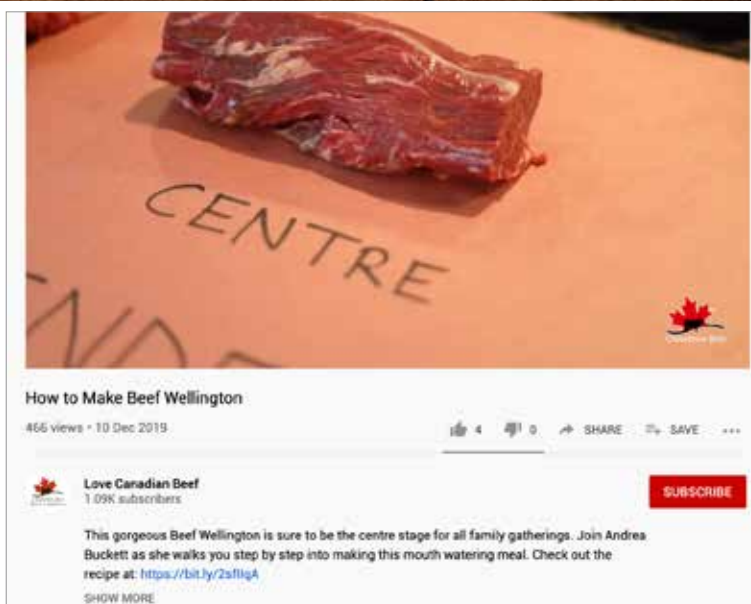
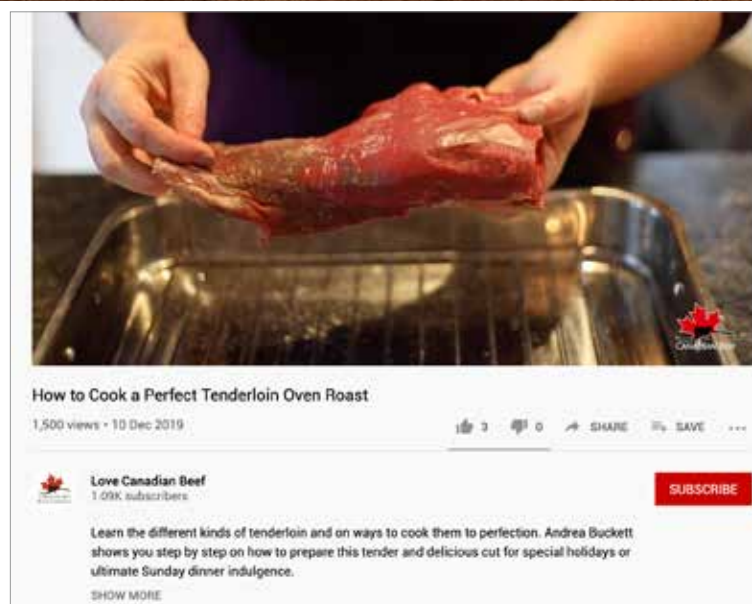
Cooking Tenderloin Oven Roast is very popular over the holiday season so we created a step-by-step video on how to divide a whole tenderloin into three roasts. One of the most popular festive recipes is Beef Wellington, which stars Tenderloin. We worked with social media culinary influencer Andrea Buckett to create a simple step-by-step video to demonstrate that this recipe is achievable for the holiday season.

Another way to help consumers roast beef with success and less stress was through a four-week online ad campaign featuring cheeky creative to entice Facebook and Google readers to click on the two videos.

We promoted the ads on both Facebook and Google because we could target two unique subsets of people. Facebook targeted those who have previously expressed interest in consuming beef while Google AdWords targeted people who were searching for beef information at that moment. Google has a larger reach due to the number of users while Facebook allowed for engagement and comments. We received amazing user submissions and comments on the Facebook ads.

CAMPAIGN RESULTS AND INSIGHTS

The engaging creative resulted in positive engagement through high impressions and clicks to both web pages, demonstrating the benefits of using both Facebook and Google AdWords.
1,773,943 / Impressions | 33,809 / Clicks



Consumer Marketing Programs

CANADA BEEF BRAND AWARENESS

– Canada Beef ran the Canadian Beef brand consumer marketing campaign #mycanadianbeef. There is nothing more powerful than the people who raise and work with Canadian beef telling their story. The campaign My Canadian Beef story does just that—enlists beef farmers, cooks and dietitians to share their stories focusing on nutrition, family meals, the pride of raising beef and the importance of beef farming and ranching to Canadians. Read about our advocates at canadabeef.ca/mycanadianbeef.

CONSUMER OUTREACH

– Canada Beef and the Saskatchewan Cattlemen’s Association hosted a meet and greet with Team Koe and Team Homan during the last tournament of the Grand Slam of Curling in Saskatoon, SK, with robust social media coverage, including Twitter and Facebook.

– Canada Beef developed 12 videos showcasing Team Koe with Chris and Stacey Israelson, a beef ranching family from Alberta. Each video focused on a specific question asked by consumers related to the beef industry. The videos were then highlighted on the YouTube channel and social media. The top-viewed video answered the question, “What do cattle eat?” and had 10,600 views. In total the combined videos received 45,000 views.

– Canada Beef worked with the Weather Network channel to create a six-week advertising campaign to showcase the three videos targeting both consumers (learn new information) and farmers/ranchers (to alert stakeholders). The campaign goal for impressions was 2 million; however, the campaign achieved 3,400,000 impressions for an over-delivery of 47% more impressions.

– Young Leaders Canadian Beef Experience (June 10-13, 2019): Social Media wrap-up on day one ended with the Hawkesthorn Young Chef Scholarship finalists taking control of the @loveCDNbeef Instagram stories on June 11, sharing highlights from the day while also asking questions of the page’s audience. The page saw a net growth of 10 followers during the takeover. Twenty-seven stories were added with impressions of 11,420 and average reach of 343. The average reach for Instagram Stories over the course of May was 290 per story, demonstrating the influence of third-party endorsement and audiences.

– Make it Beef emails were released monthly to our consumer database of 40,000 Make it Beef Club members with recipes, beef sustainability and beef know-how.

– A campaign called “20 Reasons to Love CDN Beef” was created to highlight top performing content from 2019 and layer in content priorities for 2020. We ran three targeted Page Like ads that promoted the campaign on the producer, consumer and French pages. Based on a result of \$1 per Page Like, the goal was to garner approximately 100 new Page Likes per FB page, for a total of 300. The final result was an average spend of \$0.46 across three pages with a total of 993 new followers.

SOCIAL MEDIA AND DIGITAL

– We created content for three platforms—Facebook, Twitter and Instagram—for a combined audience of 64,000 users. We have two different audiences for Facebook and Twitter: one targets consumers and the other targets stakeholders (producers). Facebook provides the most engaged audience as demonstrated through clicks, comments, Likes and shares. Impressions are the number of times our content is displayed to users. We received over 19 million impressions. Engagement is the number of times that a user engaged with our posts. We received over 520,000 engagements. Clicks are the number of times that users clicked on links from our posts. We received over 155,000 clicks.

– Compared to the previous year we were tracking similar results; however, the numbers significantly jumped (approx. +400%) in Q4 (Jan – Mar 2020) for a couple of reasons: 1) launch of the two national campaigns and 2) the impact of the COVID-19 pandemic.

– The Canada Beef English 2019/20 website saw a 25% increase in website users (701,000) and 87% in active users (107,000) compared to 2018/19. Unique page views were up +23% from the previous year for a total of 1,210,947 page views. The highest traffic months are typically between October and March. This year there were two months with high traffic. December had +78,000 users, which can be attributed to the social media campaign highlighting two roast beef know-how recipes and two technique videos. The other month was March with 114,000 users due to the launch of the #mycanadianbeef campaign and consumers seeking beef recipes and know-how because of the COVID-19 pandemic.

Canada Beef’s marketing goal is to create awareness and build loyalty and trust for Canadian beef through messaging on culinary know-how, nutrition, sustainability and convenience delivered across strategic media sources.

Consumer Marketing – Generic: ThinkBeef.ca branding

CONSUMER & PUBLIC RELATIONS

– The development of six Regional Spokespeople (dietitians/culinary experts) to gain unpaid media TV broadcast spots was a new effort to keep positive beef messaging in front of large consumer audiences without ad media investment. Much like mini cooking shows, each segment garnered 3 to 6 minutes of positive beef messaging in an editorial format coming from respected third party endorsers to enhance credibility of the message. Canada Beef tapped into four provincial urban-centre media markets with topics ranging from food waste to how much meat we really eat. The program helped to support provincial beef association consumer outreach efforts. As a result, 27 cooking show spots were delivered across the city-centres of Vancouver, Ottawa, Hamilton, Ottawa, Kingston, Saskatoon, Calgary, Regina and Kitchener. Estimates of audience outreach range from 320,000 to 8 M, across broadcasters such as BTV, Global, CTV and CHCH.

MARKETING PROGRAMMING

– The *Baby at the Table* campaign followed two celebrity new moms on the Team Homan Canadian Olympian curling team from pregnancy to birth to 6 months of age. This program goal was to leverage the Health Canada recommendation that baby's first foods should be iron-rich, like beef. Campaign efforts garnered a strong positive response rate – a striking difference to the combative nature of comments received when the message was distributed by Canada Beef alone.

– The *One & Only Beef* Consumer Ad Campaign concept and artwork/asset creation was fully developed for launch in April 2020. As a challenge to the simulated meat competition, the campaign message has a focus on beef's asset of "realness" and its unique and irreplaceable sensory and emotional characteristics. This campaign

approach has also proven to be adaptable and resilient to marketplace changes, and has promise to become a long-standing position for ThinkBeef.ca and the generic marketing program.

HEALTH PROFESSIONAL PROGRAMMING AND INFLUENCE

– ThinkBeef.ca participated in four health professional conferences to engage in discussion and resource distribution with participants. Health professionals included physicians, dietitians and food educators.

– Food Skills programming for grades 6 to 10 were developed and executed in schools in the Greater Toronto Area with a nutrition/food skills educator. Although reach is modest, the assets developed are shared on ThinkBeef.ca and with provincial organizations for their regional school education programs.

– Health professional distribution services were used to distribute three key nutrition education resources to physician practices and public health practices: *Iron for Baby*, *Iron for Teen Girls*, and *Concerned about Cholesterol?*

The power of influencers: There are advantages to letting others champion your product and your message—enhanced credibility; association with an influencer “brand” and voice; and access to a new audience through influencer social media.

ThinkBeef.ca is dedicated to keeping beef on Canadians' plates by promoting the healthfulness and crave-appeal of beef and supporting consumer culinary skills. #Beefbelongs is the theme of the Generic Beef marketing program.

THINKBEEF.ca

NUTRITION ▾ RECIPES ▾ HEALTHY PLATES ▾ WHAT'S HAPPENING ▾ BLOG ▾ RESOURCES ▾ ORDER CENTRE THE ONE & ONLY BEEF



WHY WE LET OTHER VOICES CHAMPION (CANADIAN) BEEF

There are times when we want to shine a light on our brand and our company—after all, we have a good reputation for providing helpful info on beef and Canadian beef for decades now.

But there are also advantages for not “flying the flag,” and letting others champion our product and our message.

This power of working with influencers was most evident in our *Baby at the Table* campaign. The campaign message is centred around the Health Canada recommendation that baby's first foods need to be iron-rich with the inclusion of beef as a first food. A previous campaign approach was to go directly to young mom audiences with targeted online social media exposure to the message. And although this direct-to-consumer approach had wins in distribution, it also garnered a mix of both positive and negative comments online ranging from questions about the safety of feeding babies hormone-laced beef and disbelief of the Health Canada message as it was connected to “Big Beef” marketing efforts. Negative comments are difficult to erase and “defend” when it comes to emotionally charged debates about infant health, especially if the responding voice is a marketing organization.

By working with the Team Homan curling team moms to leverage the Health Canada recommendation, videos and posts had a strong

response rate with all positive sentiments—a striking difference to the combative nature of comments received when the message was distributed by Canada Beef alone.

Our work with these influencers demonstrates the following, which improved the campaign outcomes:

- Enhanced message credibility – 3rd party endorsement switches campaign messaging from the potential perception of propaganda to educational tone
- The campaign message gains the power of the influencer's brand and voice
- Outreach grew organically to a wider and new audience
- Enhanced positive outcomes to message delivery rather than creating a need for damage control efforts
- Blocking competitors from gaining influencer traction – Team Homan was not able to leverage plant-based protein products during our engagement

STRENGTH IN NUMBERS:

The last of three video posts reached 59,000 Facebook users and was shared by 165 users, garnering 179 comments, 165 shares, and 1,600 Likes. On Instagram, the program reached 11,500 users. On Twitter, this post had 8,800 impressions.

Canada's cattle have hidden talents

Beef cattle belong in Canada's landscape, doing their job to maintain healthy ecosystems.

The environmental benefits of cattle is a powerful untold story that needs to be herd (pun intended). There's a secret life to cattle that doesn't tend to make the headlines...



Cattle keep grasslands going.

Don't take grass for granted. Canada's pasture and prairie store up to 1.5 billion tons of carbon, equal to the emissions from 3.62 million cars annually. Cultivation of grasslands can lead to a 30-35% loss of soil organic carbon.



Cattle are key to healthy soil.

Healthy soil is the secret to life. Cattle sustain soil with the nutrients from manure for healthy grass. Healthy grass = ground cover protection from blazing sun and pounding rains. Cattle are the ultimate manure spreaders. No bull.



Cattle help birds.

Birds live in the grasslands that cattle sustain. Cattle maintain 68% of the wildlife habitat capacity that comes from our agricultural land. Many bird species would lose their habitat to overgrowth without cattle grazing. Keep calm. Graze on.



Cattle are 'upcyclers'.

Cattle do amazing things – they eat and digest grasses and crop by-products we can't, turning them into one of nature's most powerful proteins.

Cattle are a perfect fit with Canada's climate, pasture and prairie ecosystems. With 74% of Canada's native grasslands already lost to cultivation, grazing cattle are key to preserving these important spaces. For more info visit: canadabeef.ca/whycanadianbeef



Public and Stakeholder Engagement

EDUCATION AND RESOURCES

- Recognizing the value of key influencers, Canada Beef delivered an hour-long webinar with the national team of Loblaws dietitians to answer their Beefy Questions. The experts providing answers to the questions: Dr. Tim McAllister, Agriculture Agri-Food Canada, a research leader in ruminants and their carbon footprint, and Dan Ferguson, a beef farmer from Eastern Ontario. Together, McAllister and Ferguson answered about 12 questions sent in from dietitians in advance of the webinar, with both a science and practical on-farm practice perspective. The webinar was taped and distributed to all 81 members of the Loblaws dietitian team. The webinar is also archived in the Loblaws dietitian education resource platform. Full report from the webinar is pending.
- A series of 4 illustrative videos were developed for the LoveCDNbeef YouTube platform and are featured on canadabeef.ca under the Why Canadian Beef tab. The videos include:
 - Canada's Responsibility: the importance of ranching in Canada to help maintain our portion of the Great Plains ecosystem, the only home for many songbird species.
 - Ecosystem Conversion: if native prairie is not used for cattle ranching, but is converted to monoculture cropping, we lose our wild native grassland ecosystems, habitats for birds and other native wildlife species.
 - Myth-busting Greenhouse Gas Emissions: The truth about greenhouse gas emissions in Canada that come from raising beef cattle versus those for transportation.
 - Grasslands Need the Grazer: the importance of cattle on Canada's grasslands to maintain soil health and bird habitat.
- Registered dietitian Carol Harrison developed and delivered a guest lecture presentation for both culinary and nutrition students to help clarify misunderstandings about Canada's new food guide and provide suggestions about how to put the Health Canada recommendations into practice. The lecture content was turned into a video presentation called The Food Guide Demystified: How to Put the New Food Guide into Practice. This online teaching video is featured on the LoveCDNbeef YouTube channel and posted in the Nutrition tab at Canadabeef.ca.

PUBLIC & STAKEHOLDER ENGAGEMENT PROGRAM

- Guardians of the Grassland film tour: Sustainable Event Planner Forum & Guest Lecture School Tour. The short documentary format film Guardians of the Grasslands explores the current state of one of the world's most endangered ecosystems, the Great Plains grasslands, and the role cattle play in its survival. This engaging film by independent filmmakers Ben Wilson and Sarah Wray of Story Brokers Media House has been accepted in multiple film festival competitions, and as such is not yet in public distribution. guardiansofthegrasslands.ca
- Canada Beef partnered with Taste Canada to host filmmaker Ben Wilson at participating culinary schools as a guest lecture tour for culinary education programming. A Ryerson nutrition Food Systems class was also added to the program tour, for a total of nine school events across Ontario and in Montreal, QC, Brandon, MB, and Calgary, AB. Each event included a class Q & A session with a local beef farmer and Canada Beef staff.

CONSUMER OUTREACH

- The team worked with Media Planet to contribute an article to their Agricultural Innovation campaign. This campaign educates Canadians on the research, innovation and investment that goes into producing the food we all know and love. The campaign also presented a chance to dispel misconceptions and close knowledge gaps. The paper supplement was distributed through the National Post to 581,000 readers. This insert was also distributed to six agricultural events throughout Canada, for a total reach of 600,000+ people.
- Canada Beef worked with the LCBO magazine, Food and Drink, to create a unique and educational story for the March sustainability issue. The article explained how distillers' grains are used for cattle feed. Bill Sheard of Sunnymead Farms near Caledon adds a corn mash by-product from the production of Canadian whisky and other spirited-based products, a way of recycling what would otherwise be food waste. The Food & Drink magazine has a distribution of 2.5 million readers (1 million of them are located in Toronto). This article allowed us the opportunity to photograph different types of cattle feed images that are now stored in the marketing library.

COSTCO PRINT AD SPRING 2019: CATTLE HAVE HIDDEN TALENTS

Costco is one of Canada's leading retailers of Canadian Beef. Canada Beef created a print ad for the Costco Connection magazine. The ad highlighted the "hidden talents of beef cattle," which are the many ecological benefits of cattle grazing for wildlife and ecosystem management. A similar ad was also placed in the Walmart customer magazine as well

as in Western Grocer magazine in order to share the same messages with key value chain partners.

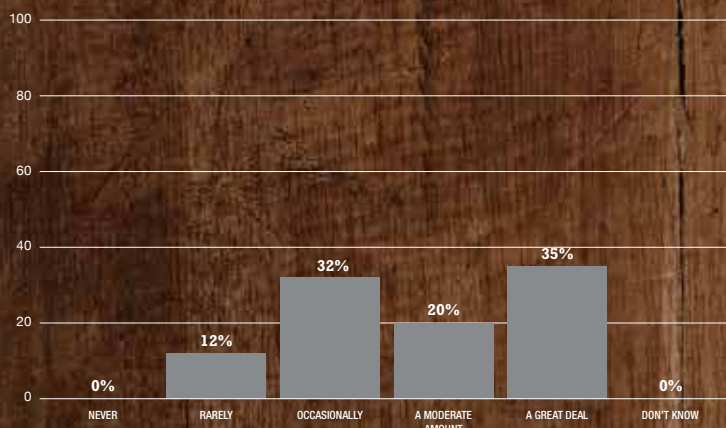
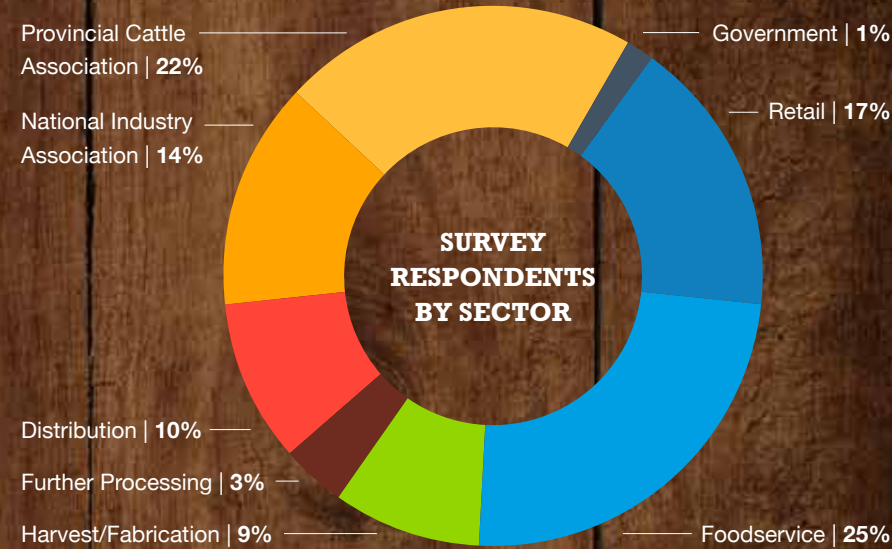
Through the Public and Stakeholder Engagement program, we are able to showcase these types of programs and practices in magazines such as Costco Connection to consumers. The Costco magazine has over 3.5 million subscribers, which is a huge audience to reach. This audience is also a dedicated Canadian beef consumer. We have consistently received positive comments from readers when we have contributed content to the Costco Connection magazine.

Public and Stakeholder Engagement's goal is to enhance the public image of the beef industry, emphasizing its many positive benefits as well as continuous improvement in sustainability, animal welfare and food safety practices.

Stakeholder Survey 2020

Canada Beef conducted an online survey of stakeholders and end-user partners in June 2020; this was the second year the survey was conducted. The goal is to obtain feedback on awareness and the level of satisfaction with Canada Beef programs and services.

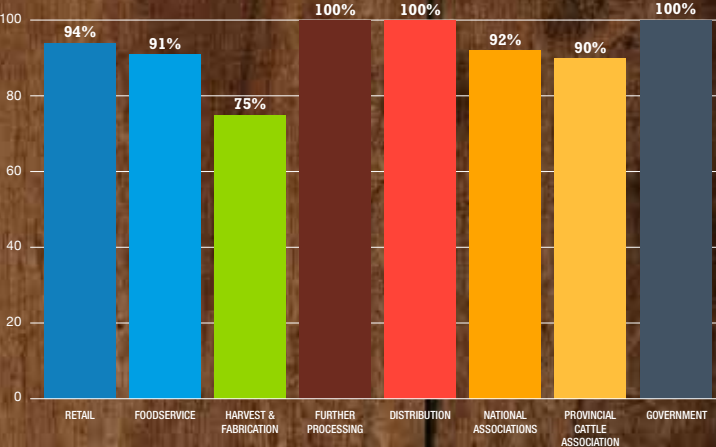
Survey invitations were sent by email to more than 236 stakeholders sourced from Canada Beef staff contact lists. Sectors represented by survey respondents were retail, foodservice, processing, distribution, government, national industry association and provincial producer associations. The survey was completed online directly by the respondent and 93 responses were received during the survey period of June to July 2020. This is a 39% response rate versus 56% in 2019.



UTILIZATION OF CANADA BEEF

Respondents were asked "Over the past year, how much has your organization utilized Canada Beef?"

55% (versus 69% in 2019) of respondents had utilized the services of Canada Beef at least moderately in the past year.



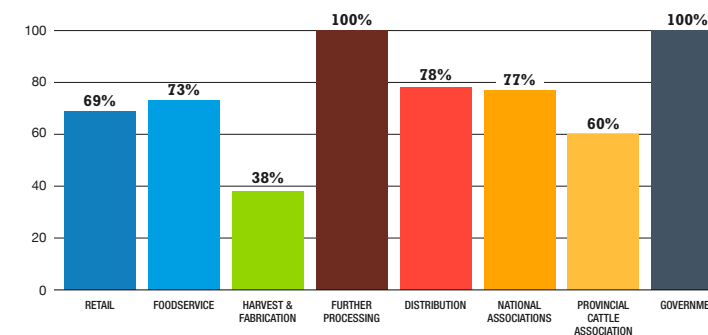
SATISFACTION WITH CB OVERALL CONTRIBUTION

Respondents were asked "How would you rate your satisfaction with Canada Beef over the past year?"

91% (versus 81% of respondents in 2019) indicated they were satisfied or very satisfied with Canada Beef's overall contribution.

Performance Measures

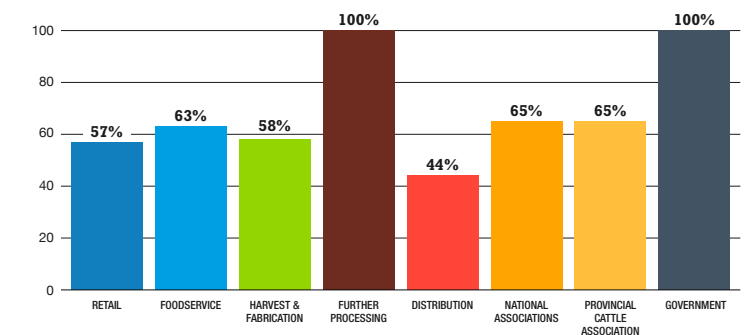
Respondents were asked to rate their satisfaction with four key areas: Canadian Beef Centre of Excellence; Canada Beef programs and services; resources and materials; social media, website and apps. Satisfaction results follow.



SATISFACTION WITH THE CANADIAN BEEF CENTRE OF EXCELLENCE

The Canadian Beef Centre of Excellence is the knowledge centre for all things beef. The Centre offers seminars, cutting and product demonstrations and product development sessions for industry stakeholders and partners. The Centre also presents to incoming missions both domestic and from around the world; it provides international and Canadian tradeshow support and produces special events.

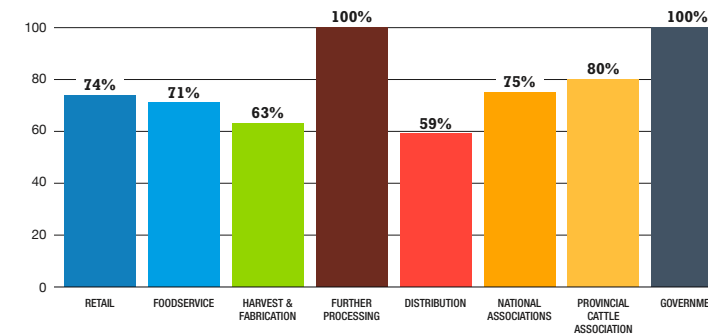
68% (versus 61% in 2019) of respondents indicated they were satisfied or very satisfied with the overall contribution of the Canadian Beef Centre of Excellence.



SATISFACTION WITH CANADA BEEF PROGRAMS AND SERVICES

Canada Beef offers a number of programs and services to stakeholders and industry partners including the Canadian beef brand mark program; Canadian beef education programs; business development programs; domestic and international missions; and product development, benchmarking and innovation.

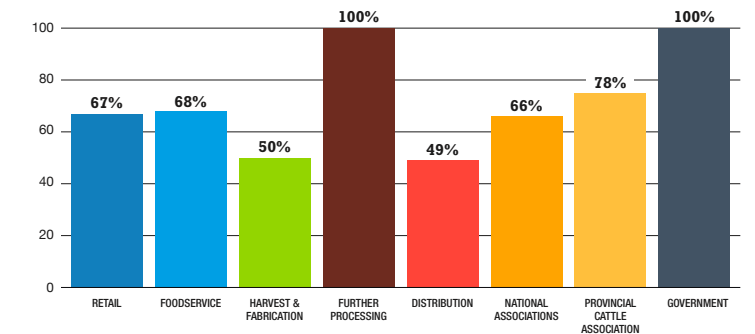
61% (versus 44% in 2019) of respondents indicated they were satisfied or very satisfied with Canada Beef programs and services.



SATISFACTION WITH CANADA BEEF RESOURCES AND MATERIALS

Canada Beef offers a number of resources and materials to stakeholders and industry partners including recipe development and cooking instruction communication; beef cut merchandising information; nutrition and know-your-beef fact sheets; print and TV advertising; ThinkBeef nutrition resources; thinkbeef.ca; Canadian Beef Advantage resources for trade; and market intelligence.

74% (versus 53% in 2019) of respondents indicated they were satisfied or very satisfied with Canada Beef resources and materials.



SATISFACTION WITH SOCIAL MEDIA, WEBSITE AND APPS

Canada Beef provides online and social media platforms to engage and inform consumers and stakeholders including social media campaigns; canadabeef.ca website; Canada Beef marketing library; the RoundUp App; and YouTube Channel videos.

67% (46% in 2019) of respondents indicated they were satisfied or very satisfied with these programs.

ALL MEASURES CANADA BEEF SATISFACTION INDEX

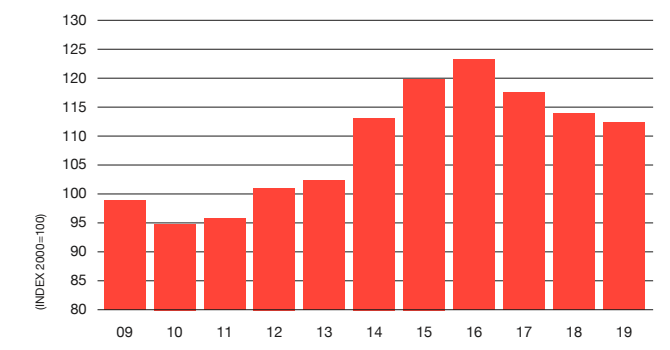
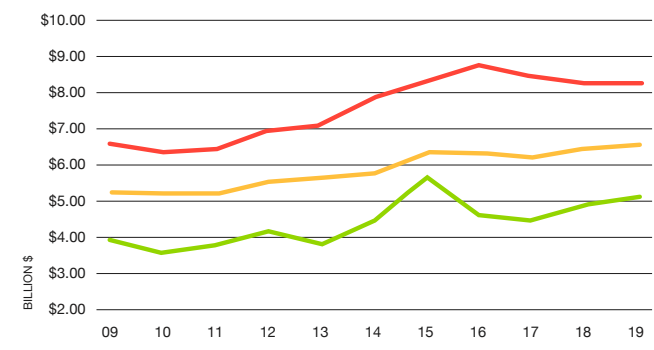
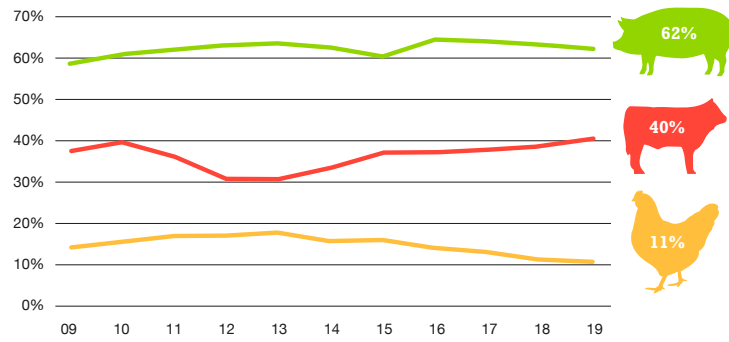
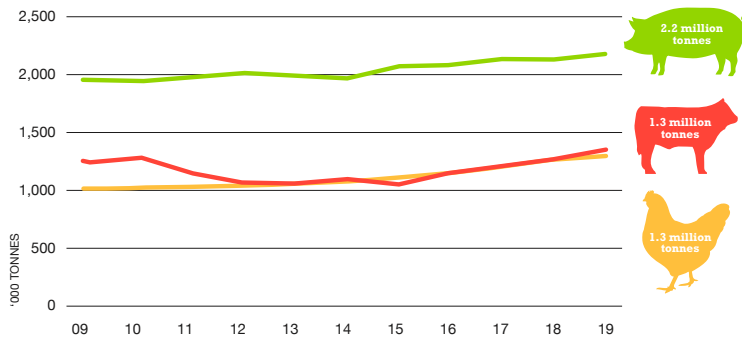
The All Measures satisfaction index was created by averaging results for the Canada Beef organizational measures with those for the major initiative categories. A new question was added this year about COVID-19 Response resources; 76% of respondents were satisfied with these resources.

"Overall satisfaction with Canada Beef was rated at 78%, a 12% increase over the previous year's survey—our thanks to the Canada Beef team. Their hard work is the reason we saw this increase."

— Michael Young, President, Canada Beef.

SATISFACTION MEASURE	2020	2019	CHANGE
Canada Beef Staff Knowledge/Skills	92%	91%	+1%
Canada Beef Staff Responsiveness	92%	88%	+4%
Canada Beef Overall Contribution	91%	81%	+10%
INITIATIVES			
Centre of Excellence Overall Contribution	68%	61%	+7%
Canada Beef Programs & Services	61%	44%	+17%
Canada Beef Resources & Materials	74%	53%	+21%
Canada Beef Social, Web and Mobile	67%	46%	+21%
Overall Satisfaction (Average)	78%	66%	+12%
COVID-19 Response Resources	76%		

Market Performance Indicators

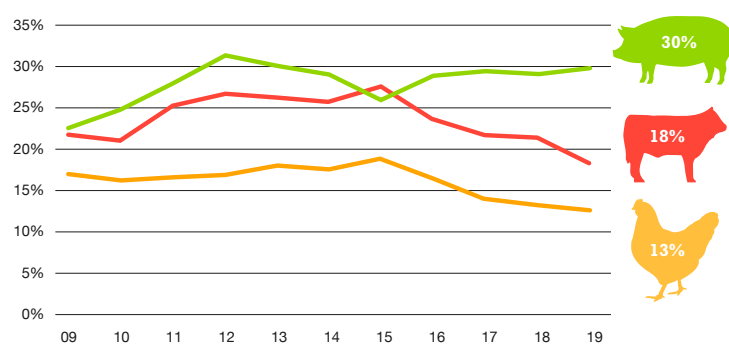
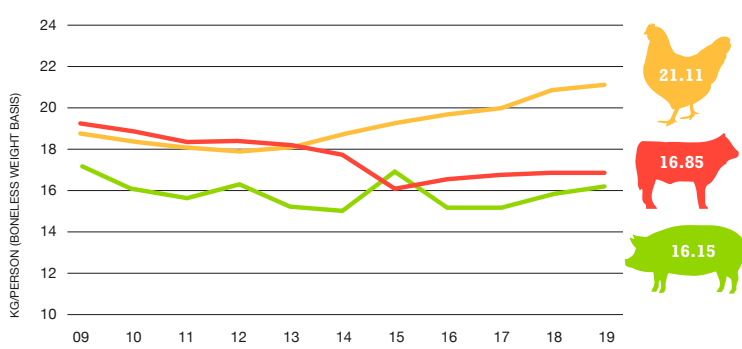


CANADIAN MEAT PRODUCTION 2009-2019
PORK | BEEF & VEAL | CHICKEN
Source: Statistics Canada

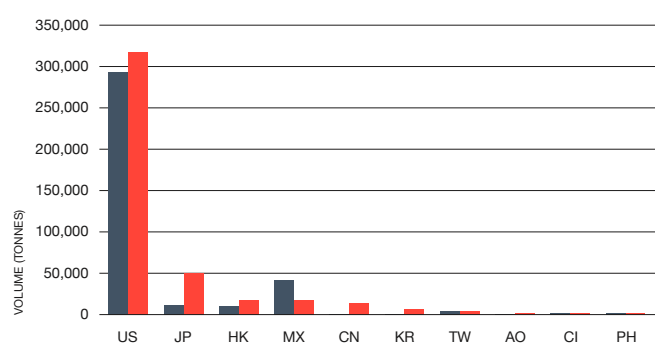
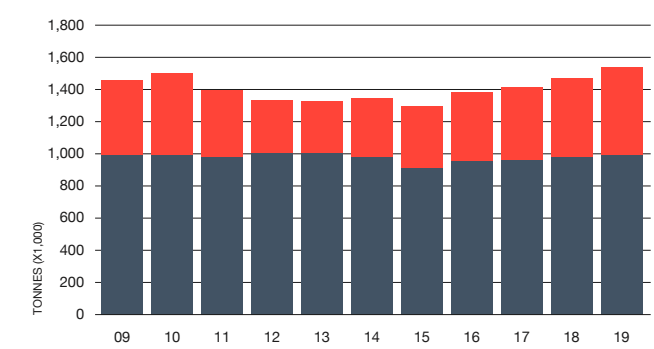
CANADIAN EXPORTS AS % OF PRODUCTION 2009-2019
PORK | BEEF & VEAL | CHICKEN
Source: Statistics Canada

CANADIAN REAL MEAT EXPENDITURES 2009-2019
DEFLATED RETAIL PRICE X DOMESTIC DISAPPEARANCE
Source: Statistics Canada, CanFax

CANADIAN RETAIL BEEF DEMAND INDEX 2009-2019
Source: CanFax Research

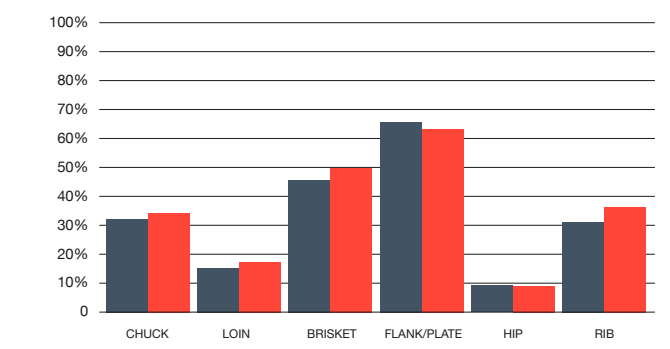
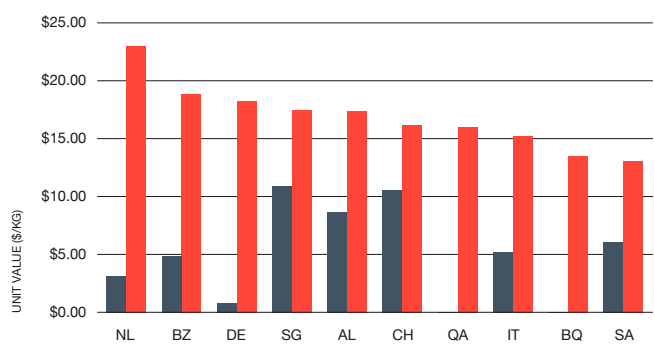
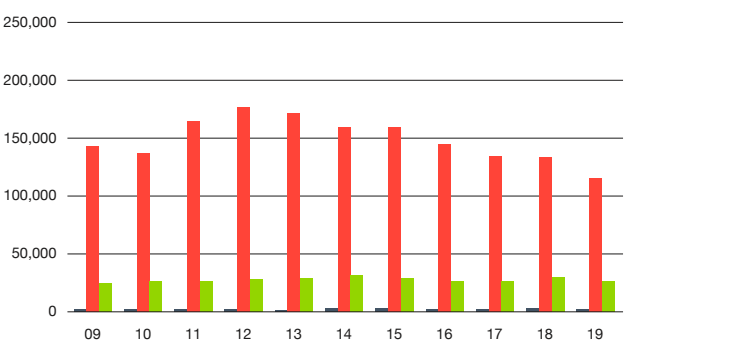
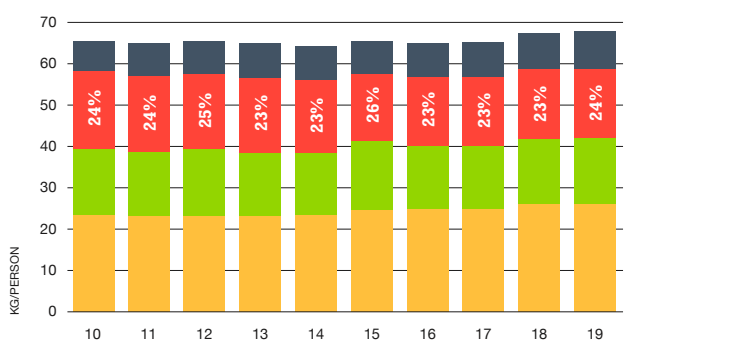


Export Performance Indicators



CANADIAN BEEF & VEAL DOMESTIC DISAPPEARANCE VS EXPORT 2009-2019
Source: Statistics Canada

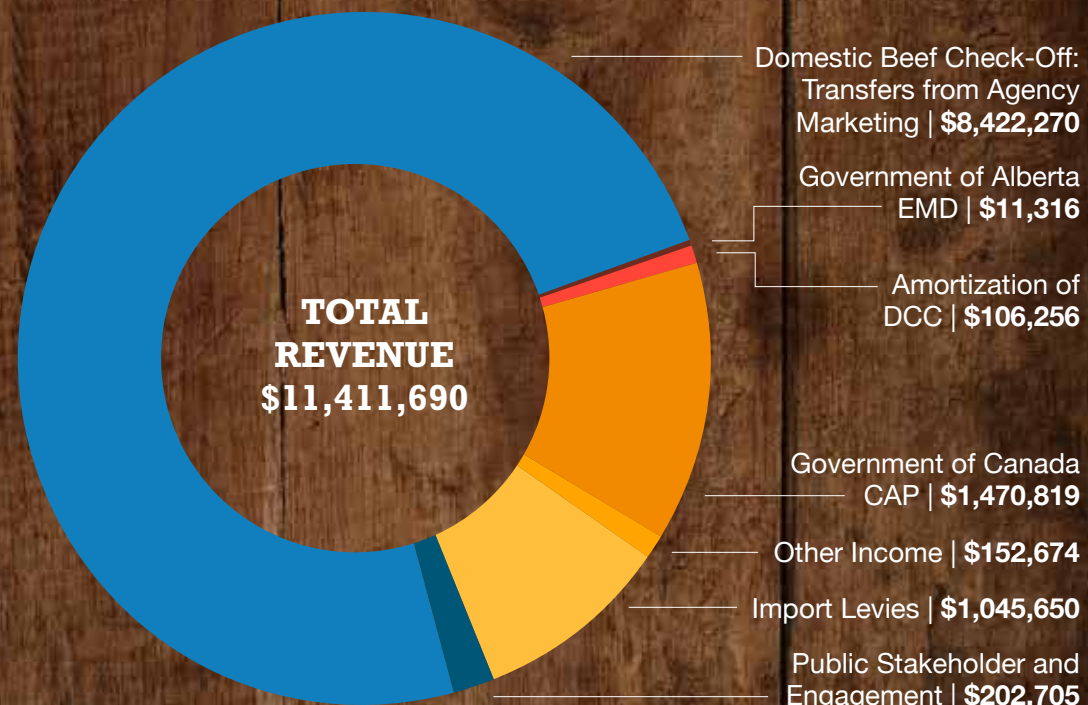
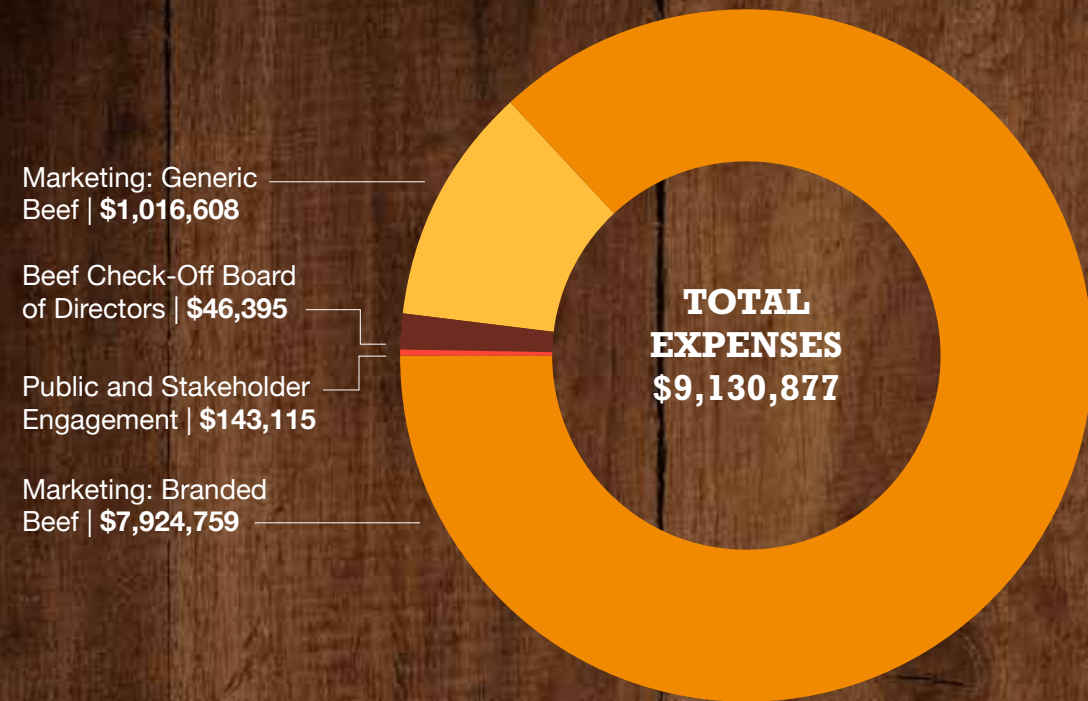
CANADIAN BEEF & VEAL EXPORTS, TOP TEN MARKETS BY VOLUME 2009 VS 2019
Source: Statistics Canada



CANADIAN BEEF & VEAL EXPORTS, TOP TEN UNIT VALUE MARKETS 2009 VS 2019
Source: Statistics Canada

PORTION OF PRIMAL VALUE FROM EXPORTS 2018 VS 2019
Source: CanFax

2019-2020 Financial Report



These charts represent information from the 2019/2020 audited financial statement of the Canadian Beef Cattle Research, Market Development and Promotion Agency.

Stay Connected with Canada Beef

Canada Beef is committed to keeping producers and stakeholders informed. Check out the many ways you can stay connected.

CANADA BEEF PERFORMS

Subscribe to our FREE monthly newsletter delivered directly to your inbox. You'll learn more about:

- International market statistics, and updates and information on tradeshows, promotions and events
- Domestic market updates including activities and resources
- Highlights about Canadian Beef Centre of Excellence activities
- Social and Consumer marketing team project updates and information

Sign up today at canadabeef.ca/sign-up-canada-beef-performs/

CDNBEEFPERFORMS.CA – NEW TRADE WEBSITE

This website is dedicated to providing information for meat professionals in the retail, foodservice and processing sectors. Check out COVID-19 information, industry statistics, and cooking and cutting videos for home and pro chefs and butchers.



STAY CONNECTED ON SOCIAL MEDIA

Be a CDN Beef Socialite. Whatever your platform, we invite you to follow along and be part of the conversation.



Canadianbeef



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Canada Beef



For more information about
Canada Beef programs and services:
Suite 146, 6715 – 8th Street NE
Calgary, AB Canada T2E 7H7
Tel: (403) 275-5890
info@canadabeef.ca
canadabeef.ca / cdnbeefperforms.ca