



PREMIUM QUALITY
GRAIN-FED
CANADIAN BEEF
1973 50 Years of Leadership 2023

CANADA BEEF | A YEAR IN REVIEW

ANNUAL REPORT 2022-2023

2022 was a
GREAT YEAR for
CANADIAN BEEF on the
WORLD'S TABLE

2.9%

Canadian per capita beef consumption rose 2.9% in 2022 to 17.5 kgs per person (retail weight)

5%

Total beef disappearance was up 5% to 967,166 tonnes (carcass weight)

\$4.6B

Canadian beef exports set a new value record \$4.6 billion

2.6%

Retail beef demand was up 2.6%

511Kt

Canadian beef export volume reached 511,000 tonnes. Second largest on record



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 PROGRAMS THROUGH OFFICES IN CANADA, MEXICO, JAPAN, CHINA AND TAIWAN.

MISSION: A DYNAMIC, PROFITABLE AND COMPETITIVE CANADIAN BEEF AND VEAL INDUSTRY.

VISION: CANADIAN HIGH-QUALITY BEEF AND VEAL PRODUCTS RECOGNIZED AS THE MOST OUTSTANDING BY CANADIAN AND WORLD CUSTOMERS.

MANDATE: INVEST IN A STRONG FUTURE FOR CANADA'S BEEF AND VEAL INDUSTRY.

This was the second largest year for export volume on record and the largest year ever for export value.

INVEST IN A STRONG FUTURE

FOR CANADA'S BEEF AND VEAL INDUSTRY

Canada Beef celebrates the 50th anniversary of beef marketing activities in Canada and abroad in 2023, see p.38.

Canadian beef exports in 2022 were up 1% by volume at 511,000 tonnes and up 5% in value at \$4.68 billion.



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The Canadian Beef
Check-Off Agency
is governed by a board of
16 Agency Members.



Cameron Blake
Maple Leaf Foods



Jack Chaffe
Marketing Finance Chair,
Beef Farmers of Ontario



Stephen Christie
Marketing Vice-Chair,
Retail/Foodservice



Jeff Cline
Canadian Meat Council



John Curtis
Canadian Meat Council



Cam Daniels
Member at Large,
Harmony Beef



Andre Forget
Canadian Meat Council



Mike Guest
Western Prime Meat
Processors



Jennifer Haley
Veal Farmers of Ontario



Clay Holmes
Member at Large,
Intercity Packers



Russ Mallard
Marketing Chair,
Canadian Meat Council



Coral Manastersky
I.E. Canada



Julie Mortenson
Youth Member
Observer Seat



Chad Ross
Saskatchewan Cattlemen's
Association

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 foodservice 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 Market Development and Promotion Committee (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.

**For more information
about Canada Beef
programs and services:**

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cdnbeefperforms.ca

As the chair of the Marketing Committee, I am pleased to take over the reins from the very capable Mike Kennedy who stepped away from the role in August after 11 years at the helm. During his time as Marketing Chair, Mike worked closely with three Canada Beef Presidents to oversee the development and implementation of the organization's business plans and budgets. During his tenure, the Canadian beef industry has seen some of the highest beef demand and export volume and values in decades.

A big thank you to committee members as well for a seamless transition and unwavering commitment to deliver value for beef producers at a time of great innovation in the Canadian beef and veal industry.

As the operational oversight over Canada Beef under the Canadian Beef Cattle Research, Market Development and Promotion Agency (Agency), the Marketing Committee ensures that producer dollars and other investments are allocated strategically with the overall goal of increasing demand for Canadian beef globally.

The Marketing Committee is responsible for planning and establishing Canada Beef's strategic, business and operational goals and objectives and for the overall management and operation of the business and affairs. The committee provides oversight of the Canada Beef investment plan and budget, and works with the President to ensure the business strategy is correct, oversees its implementation, and evaluates its results.

The Marketing Committee consists of a broad range of representatives from all aspects of the beef and veal industry. The business insight, expertise and perspectives of our committee members results in effective dialogue and collaboration within the committee.

At the Agency's annual general meeting in August, the Marketing Committee elected their Executive Committee consisting of myself (Chair), Stephen Christie as Vice-Chair and Jack Chaffe as Finance Chair - a role I'd previously held since 2018. The committee also elected two new Members-at-Large for 2022-2023: Clay Holmes of Intercity Packers, and Cam Daniels of Harmony Beef.

Julie Mortenson of Saskatchewan, the Agency's first Youth Member, joined the Marketing Committee as an ex-officio member. The perspectives of young producers are a welcome addition to the committee.

Succession planning for the pending retirement of Canada Beef President Michael Young was activated to ensure adequate time to find a leader of suitable vision and purpose. The industry has benefitted from Young's extensive knowledge and experience and strong leadership. With retirement on the horizon, a search committee was formed and a candidate search process was launched to enable adequate time to find a suitable candidate. There will also be a transition period that will see Young train and mentor the successful candidate to ensure Canada Beef is left in capable hands going forward.

The drive to use producer funding efficiently extended to operational space.

Canada Beef's reduced operational footprint in the Calgary and Mississauga offices resulted in a significant cost savings that can be redirected to programming or other needs as identified.

This is a good example how the Canada Beef leadership team is focused on ensuring the maximum value for producer dollars.

Canada Beef's funding agreement with the Canadian Agricultural Partnership (CAP) concluded March 31, 2023. A funding application was submitted to its replacement, the Sustainable CAP, a new 5-year agreement effective April 1, 2023 to March 31, 2028, and at time of writing we awaited word on that.

Innovative initiatives created and introduced include the Provincial Marketing Alliance (PMA) to align the collective expertise and resources of participating provincial cattle organizations through shared strategic goals, objectives, and initiatives. The program will support co-funded projects between Canada Beef and the participating provincial cattle organizations through regional initiatives important to regional marketing strategies. Alberta Beef Producers (ABP) accessed the PMA 50% consumer marketing cost-share program this fiscal.



Russ Mallard

Chair, Market Development and Promotion Committee

Change, renewal and succession were operational priorities for the Market Development and Promotion Committee (Marketing Committee) this year.

MESSAGE FROM THE CHAIR



The retail beef demand index at 124 in 2022 is back to 2020 levels and above the 123 from 2015.

The Canadian Beef Information Gateway (Gateway) continued to gain momentum. The national Gateway was relaunched on the new database driven architecture and new modules were created to meet the needs of target audiences and broaden beef's appeal. The Gateway works to ensure beef remains a family favorite and does this in a digital format that aligns with current consumer behaviour and preferences for information.

The Canadian Beef Centre of Excellence (CBCE) facility reopened in January 2023. The newly renovated CBCE studio will ensure the facility can accommodate increased demand for video resources to support a variety of projects including the Gateway, Canadian Beef Advantage, educational programs, consumer test kitchen and hosting functions.

All of this is important work to drive sales and awareness of the Canadian Beef Advantage and build loyalty and commitment to Canadian beef and veal.

We were pleased to see retail beef demand was up 2.6% in 2022 demonstrating the Canadian consumer's resilience and commitment to Canadian beef. The retail beef demand index at 124 in 2022 is back to 2020 levels and above the 123 from 2015. The higher index in 2022 is a result of a 2.9% increase in per capita consumption and 1% increase in deflated retail beef prices.

Beef's market share by volume decreased 0.2% last year and accounted for 27.3% of all meat protein consumed. Market share by value remained steady with 2021 for all three major meats, with beef at 39.5%, pork at 17%, and poultry at 43.5%.

Canadian beef exports from January to December 2022 were at 511,000 tonnes and \$4.68 billion. This was just 10,500 tonnes short of the 2002 record high for export volume on record, and the largest year ever for export value.

Canada Beef has done a tremendous job of navigating the challenges on behalf of Canada's beef producers. The Canada Beef team will continue to collaborate with the beef value chain to ensure markets and products are prioritized appropriately in the strategic planning process. This ensures industry alignment and most importantly ensures producer investment is being maximized.

Russ Mallard,
Chair, Market Development and Promotion Committee

Canada Beef achieved a significant milestone in 2023 with the 50th anniversary of beef marketing activities in Canada and abroad. The Canada Beef team is proud to carry on a strong legacy of leadership and innovation to ensure a bright future for the Canadian beef industry.

As consumers, foodservice and restaurant operators everywhere grappled to manage the impacts of inflation on their household budgets and businesses, Canada Beef doubled-down on its commitment to deliver innovative programs, services and resources that will position Canada's beef and veal industry for continued success.

Consumer demand for beef was simply remarkable in a year defined by runaway inflation that kept retail beef prices high.

Retail beef prices increased 7.7% year-over year while inflation averaged 6.8% in 2022. Statistics Canada's 2022 disappearance data shows per capita beef consumption was up 2.9% in 2022 at 17.5 kg/person and total beef consumption rose 5% to 967,166 tonnes (carcass weight), a significant 5% increase from 2021, driven in part by population growth. Domestically produced beef achieved an 80.6% market share.

Canada Beef's work in international markets continues to create opportunities for the Canadian beef industry to realize greater value for the carcass than could be realized in the domestic market alone.

In international markets, which faced many of the same challenges as the domestic market, Canada Beef works with exporters and in-market distributors, retail and foodservice partners to deliver innovative solutions to these marketing challenges.

Canada Beef participated in 23 international tradeshows held in nine different countries to meet and identify new potential customers. Over 6.8K potential customers visited Canada Beef trade booths generating about 625 business leads. About 1.7K international meat trade professionals received technical training and education about Canadian beef products. Canada Beef executed marketing and promotion programs with 24 retail and 13 foodservice clients in 10 different countries. As well, Canada Beef partnered with Canadian Embassies and Consulates to conduct 16 promotional events in eight countries.

The Export Market Development (EMD) Program had another successful year. The program provided

cost-shared support to Canadian beef exporters and their clients for 14 separate incoming visitor missions from a variety of different markets including Japan, Vietnam, Europe, Mexico and South Korea.

Additionally, one outgoing Export Market Investigation mission, 19 trade show Export Market Diversification activities, 19 Promotion and Marketing initiatives and two Competitive Advantage Benchmarking projects were approved and supported under the program this fiscal.

China remained closed to Canadian beef this fiscal year. Canada's third largest beef export market in 2021 closed to Canadian beef in December 2021, when Canada reported a case of atypical bovine spongiform encephalopathy (BSE).

The export volume displaced by China was absorbed by other markets.

Canadian beef exports from January to December 2022 were up 1% by volume at 511,000 tonnes and up 5% in value at \$4.68 billion, compared to the previous year.

This was the second largest year for export volume on record (with 2002 being the highest) and the largest year ever for export value. Beef exports from January to March 2023 were up 5% in volume and 5% in value from the prior year.



Michael Young
President, Canada Beef

On behalf of the Market Development and Promotion Committee and the Canada Beef team, it is my pleasure to present the Canada Beef Annual Report 2022-2023.



The newly renovated Canadian Beef Centre of Excellence (CBCE) is a cornerstone to Canadian beef digital resource development, technical demonstrations and interactive conferencing capabilities. The state-of-the-art audio-visual and communications equipment, enhanced boardroom and three multimedia studios were put to use immediately once the facility reopened. A new online video series for consumers, CDN Beef TV, was developed and launched. The inaugural episode, which targeted the prevention of steak curling on the grill, was the first to originate from the new Consumer Culinary studio. The goal is to post a new episode quarterly.

The CBCE produced or assisted in producing 681 videos and 440 still images for various media projects to support foodservice, retail, wholesale applications, and nearly a dozen in-person promotional, marketing or educational presentations and events.

The Canadian Beef Information Gateway (Gateway) launched in Loblaw Companies Ltd. Real Canadian Superstore locations in the second quarter. The partnership with a national retail banner was the starting point for the Canada Beef initiative to keep beef on the dinner plates of consumers. The team actively pursued branded Gateway partnerships with additional national retailers. Stay tuned for announcements.

At the same time, a tremendous amount of work was undertaken to enhance the Gateway platform and offering to support partnerships. You can read about that in detail on page 9 of this report.

Canada Beef held its' first-ever goodwill campaign. The [Burger It Forward](#) campaign aimed to supplement the protein portion of food bank offerings while supporting locally owned restaurants.

The initiative was a remarkable success by all accounts; more than 110 restaurants participated in the campaign resulting in over \$53K in donations to local and national food bank efforts. Details are available on page 27. A big thank you to all those who supported the campaign.

Canada Beef supported two significant policy issues through the Health and Nutrition program area: Health Canada's Front-of-Pack (FOP) nutrition labelling proposal and the federal government's consultation on the development of a Pan-Canadian School Food Policy.

To support the industry on FOP, extensive work was produced by the team, including numerous analyses and summary documents with key messages, and other supporting resources that were used by national industry partners for communication to the government in advocacy efforts.

Following the publication of the final FOP regulations by the federal government, Canada Beef published two overviews to communicate the details of the program to stakeholders and developed an industry training tool to support implementation for applicable products.

On the school food policy, Canada Beef conducted extensive research on the topic including how the beef industry can support the government's proposed 'shared objectives.' This research forms a foundation document and will serve to support the policy groups with information and considerations for their efforts with government.

The results for the 2023 Canada Beef Global Stakeholder Satisfaction Survey are on page 42 of this annual report. Stakeholder participation in the survey measures awareness of and engagement with the programs, services and activities offered by Canada Beef. This feedback informs our efforts to make meaningful improvements to Canada Beef's programs, services and activities as we strive to increase satisfaction levels for all stakeholders. The results align with the prior fiscal year's results. We continue to explore ways to increase awareness with all stakeholders.

Michael Young,
President, Canada Beef

GLOBAL CANADIAN BEEF INFORMATION GATEWAY

The national Canadian Beef Information Gateway relaunched on the new database-driven architecture and a branded Gateway created for a national retailer will launch next fiscal. Three new Gateway modules were created to broaden beef's appeal – 'Recipe Collections' to address the needs and preferences of consumers, 'Diet and Wellness' to support individuals with specific dietary requirements or health conditions, and 'World Cuisine' with recipes that reflect different cultural traditions.

on the most popular Canadian beef products in each country and provides related recipes and preparation information. In Japan, Canada Beef partnered with retail customer, Kinsho Store, to launch the 'Gateway Japan' in their 35 locations. Canada Beef Korea partnered with retail customer Long Weekend to pilot launch a Gateway initiative in their store. Spanish and Taiwanese versions of the Gateway are in progress.

CANADIAN BEEF RESEARCH

Four research projects completed this fiscal year included attitudinal tracking studies and surveys to benchmark and/or evaluate consumer perceptions of Canadian beef quality, safety, and purchase intent, and beef preparation practices. Laboratory research performed with the Agriculture and Agri-Food Canada (AAFC) Lacombe Research and Development Centre (LRDC) evaluated current consumer practices and develop optimized approaches.

INTERNATIONAL MEAT SECRETARIAT MEMBERSHIP

Through the International Meat Secretariat (IMS), Canada Beef had the opportunity to contribute to nutrition and health-related consultations undertaken by the Food and Agriculture



Barcode reading capabilities were implemented to enable access to Gateway content with existing barcodes on retail packages. Access to a database of barcodes for national retailers was purchased.

A poster with takeaway cards was created for butcher shops and producers selling their own beef with linkages to Gateway content organized by carcass primal.

Digital provincial pages were created for the Gateway in partnership with provincial cattle producer associations to help communicate regional attributes of the supply chain and its contribution to local communities.

International versions of the Gateway either launched or were under development for export markets. The international approach focuses

Organization of the United Nations (FAO). Canada Beef submitted more than 100 comments and 19 references not previously identified by the FAO. Canada Beef's contribution, along with many other comments the effort received, allowed the FAO to carefully consider the full body of evidence on this topic.

Their report, released on April 25, 2023, concludes that "Animal source foods contribute to healthy diets" and could have significant positive policy implications globally.

This membership is a shared tactic with the Canadian Cattle Association (CCA).



Mark Klassen
Executive Vice President

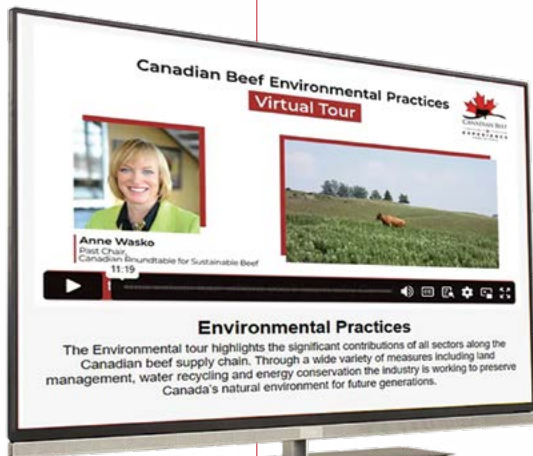


Kelly Hyde
Director,
Canadian Beef Information Gateway



Mauricio Arcila
Director,
Technical Services

Canada Beef's strategic priorities for Global Marketing include the development of marketing and technical resources to establish a platform for communicating the Canadian Beef Advantage and to support differentiation from competitors to enable industry partners to grow their volume and/or increase value.



GLOBAL MARKET INTELLIGENCE PROGRAM

Canada Beef's Market Intelligence Program was expanded to include the quarterly Foodservice Market Intelligence Report and Beef Watch featuring information related to regulatory or policy related issues. Regular reporting continued in the Market Intelligence suite of weekly, monthly and quarterly publications. The total monthly circulation of individuals who received market intelligence reporting directly from Canada Beef was 549. Readers of the Canadian Cattlemen's magazine generated approximately 285 unique page views per month.

CANADIAN BEEF ADVANTAGE RESOURCES

GLOBAL CANADIAN BEEF SUPPLY CHAIN VIRTUAL TOUR CONTENT

English language editions of the Canadian Beef Experience virtual tours for Environmental Practices

and the Beef Carcass Grading System were completed. The tours included animated content along with photos, video and audio contributed by industry partners and the AAFC LRDC. The Environmental Practices tour was translated for use in Japan, Mexico, Taiwan, China/Hong Kong, Vietnam and South Korea.

CANADIAN BEEF ADVANTAGE MARKETING RESOURCES

Still photographs of 80 beef products taken this fiscal were key to the development of a Canadian Beef wholesale product catalogue.

The images will support multiple initiatives next fiscal year including the Wholesale Canadian Beef Information Gateway.

A beef quality reference swatch developed with the support of personnel from the AAFC LRDC features images of Canadian beef with defined marbling scores as well as a QR code to access the Canadian Beef Grading System virtual tour. Distribution of the reference tool to industry is planned for next fiscal year, following review by industry partners.

CANADIAN BEEF ADVANTAGE WEBSITE CONTENT

Nine additional Canadian Beef Advantage (CBA) vignettes created in English highlight key aspects of the supply chain, attributes of Canadian beef as well as industry and government organizations that provide regulatory oversight. The vignettes feature animated content accompanied by audio narration. This fiscal 33 CBA vignettes (new and existing) were translated for use in Japan, China, Mexico, Taiwan, South Korea, and Vietnam. A web portal to feature the vignettes and virtual tour materials in English and other languages was created on the cdnbeefperforms.ca website. Additional pages developed support sharing of CBA resources on cdnbeefperforms.ca.

GLOBAL ECOMMERCE STRATEGY

Historical sales data for beef sales on ecommerce platforms used by major Canadian retailers was purchased to support ecommerce strategy development. Survey research related to consumer attitudes on ecommerce was completed.

CANADIAN BEEF EXPORT HIGHLIGHTS | Japan was Canada's second largest beef export market by volume in 2022 at **13.3% market share**. Beef exports at 67,793 tonnes and \$518 million in 2022 were **up 17% in volume** and **up 18% in value** from 2021.

RETAIL AND FOODSERVICE PROMOTIONS

Canada Beef supported a number of in-store sampling demonstrations from June 2022 to March 2023 to increase sales of Canadian beef. Of these, 420 demonstrations were held in Costco stores across Japan, which led to a year-over-year (YOY) sales increase of 260 metric tonnes (MT). A further 42 demonstrations held in Kanehide stores in Okinawa produced a 60% increase in value YOY.

A Canadian beef promotion with Rakuten, the largest ecommerce company in Japan, in December resulted in a YOY increase in value of 80%.

A Canadian beef fair was held in partnership with dinner harbour cruise ship "Symphony" to increase brand awareness and sales. More than 40K guests took a cruise during the promotion from October 2022 to March 2023, leading to a YOY increase in value of 80%.



Canadian Beef served on dinner cruise.

OTHER

Canada Beef partnered with a food truck contractor to launch a Canadian Beef Food Truck from July 2022 to March 2023. During that period, the truck made 46 appearances throughout East Japan, reached 235K customers, and generated 80K social media impressions.



Foodtruck project concludes after a successful year.



TRADE SHOWS AND SPECIAL EVENTS

Canada Beef participated in the CaféRes Show Japan in July for foodservice buyers, hotel chefs and restaurant owners in the Tokyo area. Approximately 23K buyers visited the show over two days, and generated 30 leads for Canada Beef.

Canada Beef participated in the Oie Sangyou Trade Show in August 2022 and again in January 2023. The Canadian beef distributor services two regional foodservice markets, Nagoya and Kobe. The Oie Sangyou attracted 1K visitors over two days and generated 30 leads for Canada Beef.



Ichiro Kiyotomi

Senior Director, Market Development, Japan/South Korea



Yuko Onizawa

Associate Director, Japan



Takako Toyama

Senior Manager, Operations

Canada Beef's strategic priorities for Japan are to promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canadian beef volume, value, and market share.

The Japan Foodservice Association is the largest foodservice association with 800 member companies.

32% OF INVESTMENTS - 37 PROJECTS

JAPAN REPRESENTED

32% OF TOTAL
GENERIC CANADIAN
BEEF PROMOTION
INVESTMENTS WITH
37 PROJECTS
THIS FISCAL.

The Fabex Kansai regional trade show in September 2022 targeted the west-Japan market in the Osaka region. Canada Beef participated in the show attended by approximately 27K food and beverage buyers over three days. The show generated more than 30 leads for Canada Beef.

Canada Beef participated in the Food Style Okinawa show in November 2022. Okinawa is a popular Japanese tourist destination and foodservice is a vital part of its large tourism industry. The show had 4.2K visitors over two days and generated 20 leads for Canada Beef.

In November 2022, Canada Beef participated in the Japan Foodservice Association (JFA) Buyers Meeting in Tokyo. JFA is the largest foodservice association with 800 member companies. Approximately 1.6K buyers visited the one-day private tradeshow and generated 10 leads for Canada Beef.

Canada Beef participated in the Supermarket Tradeshow in the Chiba region in February 2023. The show brought in 65K visitors over three days. Canada Beef secured four booths (36m²) to display Canadian beef products and distribute samples, and generated 80 leads for Canada Beef.

In March 2023, Canada Beef participated in the Foodex Japan tradeshow in Tokyo. Canada Beef secured four booths (36m²) to display Canadian beef products and distribute samples. About 74K food and beverage buyers visited the show over four days and generated 50 leads for Canada Beef.

Canada Beef held a Canadian beef demand building reception with 100 customers in November and December. The event featured Canada Beef's president and executive director, export market development from Canada. The Canada Beef team also visited 10 in-market customers to discuss current promotions and future opportunities.

In partnership with the Canadian Chamber of Commerce in Japan and the Embassy of Canada, Canada Beef helped to host a Canada Day barbecue July 1, with 180 people participating. Canada Beef donated beef for the event and the Canadian Beef logo appeared on a thank you banner at the event.

DIGITAL MARKETING

The Canada Beef Japan website was updated to fit the needs of both trade customers and public consumers. Over the year, the website generated 112K views and 32K unique users.

Canada Beef social media marketing generated 260 postings on Canada Beef Japan Facebook, Instagram, and Youtube resulting in 855K impressions.

Retail campaigns and Canada Beef news updates were advertised on Facebook while Instagram focused on increasing consumer demand for Canadian beef.

A well-known cooking expert was appointed as a Canada Beef Ambassador, with 81 recipes posted on Canada Beef Japan social media platforms.

TRAINING AND EDUCATION

In partnership with the Federal Meat Academy (FMA), Canada Beef provided Canadian beef courses to culinary college students in December. Three classes were conducted with 110 students attending. Each three-hour class began with a presentation by Canada Beef, followed by a Canadian beef cutting demonstration and tasting presented by FMA.



Canadian Beef food truck appearances.

CANADIAN BEEF EXPORT HIGHLIGHTS | South Korea was Canada's fifth largest beef export market by volume in 2022 with **3.7% market share**. Beef exports at 18,963 tonnes and \$192 million in 2022 were **up 48% in volume** and **up 65% in value** from 2021.



Canadian beef on TV home shopping channel in South Korea.

RETAIL AND FOODSERVICE PROMOTIONS

Canada Beef partnered with two foodservice partners in September 2022 and March 2023 to conduct Canadian beef promotions to increase sales. Canada Beef's work with Long Weekend generated 5 metric tonnes (MT) in new sales, and a promotion at 34 Hyundai Green Food restaurants across South Korea generated 90MT in new sales.

In partnership with two online shopping malls, Canadian beef promotions were held in October and December to increase sales and brand awareness. Approximately 530K people visited the websites during the promotion period. Emart SSG.com had 400K visitors and generated 4MT in new sales. Cattle Farm's Yagogi.com had 130K visitors and generated 5MT in new sales.

Canada Beef supported a number of in-store sampling demonstrations in October 2022, and February and March 2023 to increase sales. These included 84 demonstrations with Home Plus across South Korea, which generated new sales of 60MT, as well as 70 demonstrations with Emart Everyday throughout South Korea to generate 37MT in new sales.

TRADE SHOWS AND SPECIAL EVENTS

At the Seoul Food & Hotel show in June, Canada Beef secured three booths (27m²) to display Canadian beef products and hold tasting events. Approximately 50.5K importers, distributors, retail and foodservice buyers attended the show over four days and generated 70 sales leads for Canada Beef.

Canada Beef participated in the Busan Food Expo in July. Busan is the second largest city in Korea with a large foodservice market. Approximately 43.7K



Ichiro Kiyotomi
Senior Director,
Market Development,
Japan/South Korea

Canada Beef's strategic priorities for South Korea are to promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canadian beef volume, value, and market share.

13% OF INVESTMENTS - 18 PROJECTS

SOUTH KOREA REPRESENTED 13% OF TOTAL GENERIC CANADIAN BEEF PROMOTION INVESTMENTS WITH 18 PROJECTS THIS FISCAL.

NS Cable is one of the largest cable TV home shopping channels in Korea.

importers, distributors, foodservice buyers, and general consumers visited the show over four days and resulted in 20 sales leads for Canada Beef.

Canadian beef products were on display and a tasting event was held at the COEX Food Week Show in November. Approximately 50K importers, distributors, retail and foodservice buyers visited the four day show, which produced 50 sales leads for Canada Beef.

Canada Beef held a Canadian beef demand building reception with 70 customers in December. The event featured Canada Beef's president and executive director of export market development from Canada.

The Canada Beef team also visited eight in-market customers to discuss current promotions and future opportunities.

Canada Beef partnered with NS Cable in January 2023, one of the largest cable TV home shopping channels in Korea, to promote Canadian beef and increase brand awareness. Approximately 420K people watched the sales programs which generated an additional 8MT in sales.



Canadian beef on TV home shopping channel in South Korea.



Canadian beef on TV home shopping channel in South Korea.

DIGITAL MARKETING AND SOCIAL MEDIA

The Canada Beef Korea website was updated to fit the needs of trade customers and consumers. The website generated 670K views and 20K unique users this fiscal year.

Canada Beef social media marketing generated 70 posts on Canada Beef Korea's Facebook and Instagram, resulting in 292K impressions. Retail campaigns and Canada Beef news and recipes were posted to increase consumer awareness and demand for Canadian beef.

NEWSLETTER AND TRADE ADVERTISING

A monthly Canada Beef Korea e-newsletter was distributed to 200 stakeholders. The content featured Canadian beef industry information, statistics, and Canada Beef marketing activities.

Canada Beef's president was interviewed for an article in the January 2023 edition of the Meat Journal, which introduced Canadian beef programs to readers. The Meat Journal is considered the leading meat industry monthly magazine with 8K subscribers.

Canada Beef arranged an interview article with its senior director to introduce Canadian beef programs and activities to readers in the March 2023 edition of Dining Out - the leading foodservice industry monthly magazine with 20K subscribers.

CANADIAN BEEF EXPORT HIGHLIGHTS | China and Hong Kong together were Canada's sixth largest beef export markets by volume in 2022 with **1.0% market share**. Beef exports at 4,867 tonnes and \$53 million in 2022 were **down 81% in volume and down 80% in value** from 2021 from a lack of market access to China.

RETAIL AND FOODSERVICE PROMOTIONS

A one-month Canadian Beef promotion launched with the American Club Hong Kong in June. This was the first entry of Canadian beef to the Club. The promotion was coordinated with a feature dinner as well as offline and online marketing. Through the promotion more than 270kg of Canadian beef was sold and the feature dinner attracted 60 guests.

Canada Beef supported Shanghai Bestmeat's new launch on the Tmall International platform with a five-day promotion of three Canadian beef products.

The combination of Canadian beef product being showcased on Tmall International's main page plus a buy one, get one promotion helped Bestmeat catch consumers' attention during the June campaign with 490 orders received, an 8% increase compared to the non-promotional period.

Canada Beef worked with Marae Limited in Hong Kong to promote a Canadian chilled beef promotion at seven of their premium supermarkets in the fall. The two-week promotion featured five Canadian beef cuts with marketing materials in-store and online. In-store cutting and tasting sessions highlighted Canadian beef. During the promotion, sales increased by 176% compared to the non-promotional period. Customer feedback on Canadian beef was very positive as well.



Canadian Beef Fair @Marae Supermarket in Hong Kong.

GOVERNMENT TRADE COMMISSION PARTNERSHIP

Canadian beef was one of the main ingredients to be showcased in the Canadian Food Promotion Workshop in Guangzhou hosted by the Consulate General of Canada in June. The workshop promoted high quality Canadian food to high end restaurants and hotels in Guangzhou. Approximately 40 guests from restaurant operators, hotel executive chefs or buyers and retail management teams, etc., attended the workshop. Canadian beef brochures and leaflets were distributed to the guests. The workshop created 13 new business leads for Canada Beef.

Canada Beef participated in the Canadian Food Promotion Workshop hosted by Canadian Trade Office in Chengdu in August. The workshop introduced and promoted high quality Canadian agricultural products to local importers, distributors, foodservice operators and hotel executive chefs. The event was great opportunity to work with the Canadian Consulate to showcase high quality Canadian beef and develop future business opportunities in the southwest China market. Canada Beef representatives presented the Canadian Beef Advantage (CBA) and brand materials to over 30 guests at the workshop.

Canada Beef supported the Meat from Canada Online Conference organized by the Canadian Embassy in China and the China Meat Association. A Canada Beef representative delivered the presentation during the online seminar by introducing Canadian beef attributes and advantages, and Canada Beef programs and services. Nearly 90 participants attended the seminar in December. Though Canadian beef is still under suspension in China, the participants were very interested in Canadian beef and 30 new contacts were obtained through the seminar.

In partnership with the Consulate General of Canada in Guangzhou and Corner's Deli, Canada Beef helped promote Canadian beef in the Canada Weeks promotion in six locations of Corner's in Guangdong and Hainan Province. It was the first time Canadian beef was featured in this new retail



Rachel Zhang,
Manager, Operations
China and Hong Kong

Canada Beef's strategic priorities for China and Hong Kong are to promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canadian Beef volume, value, and market share.

10% OF INVESTMENTS - 25 PROJECTS

CHINA AND HONG KONG REPRESENTED 10% OF TOTAL GENERIC CANADIAN BEEF PROMOTION INVESTMENTS WITH 25 PROJECTS THIS FISCAL.



Canadian Beef promotion at Corner's Deli.

Canada Beef partnered with Chinese Master Chef Qian to develop a recipe book with 80 creative beef recipes.

channel. The promotion took place in the fall. The opening ceremony saw Canadian beef showcased in a cooking demonstration by professional chef, and also highlighted by the Acting Consul General of the Canadian Consulate in Guangzhou. The promotion was also supported by in-store advertising and via digital screens in-store and on social media. Social media reached 360K+. Beef sales were over 240kg valued at nearly 100K CNY.

Canadian beef was one of the main ingredients showcased in the Canadian Food and Drink Promotion Workshop hosted by Canadian Trade Office in Hangzhou in September. More than 20 guests attended from the foodservice, meat importers and retail industry sectors. A Canada Beef representative presented the CBA and distributed Canadian beef marketing materials during the workshop. Through the workshop 13 new contacts were obtained and will facilitate future business opportunity development in the eastern China market.

Canada Beef participated in the Canadian Food and Drink Promotion Workshop on March 2023 in Beijing hosted by the Embassy of Canada. A Canada Beef representative presented the CBA to 40 guests, and Canadian beef resources were distributed. Although Canadian beef was still under suspension in China, most of the participants were very interested in Canadian beef, and would consider purchasing Canadian beef once trade returns to normal.



Canadian Beef Fair @Marae Supermarket in Hong Kong.



DIGITAL MARKETING

Canada Beef continued to update content on WeChat and Weibo on weekly basis. Postings focused on Canadian beef promotion events, the CBA, as well as technical messages such as meat cutting and recipes. This fiscal, 96 posts on WeChat and 181 tweets on Weibo were posted. Views reached more than 380K, WeChat followers reached nearly 15K, and Weibo followers reached almost 20K.

TRADE ADVERTISING

Canada Beef cooperated with MIG group to launch a Canadian beef advertorial in the "World Beef Guide" to communicate the CBA. The book targeted beef trade professionals, consumers and beef lovers. The initial print run of the book received positive feedback and was followed by additional printings. To date, 9K copies had been printed.

Tasting Kitchen publishes a lifestyle food and beverage magazine bimonthly and digital formats quarterly, reaching 500K readers in mainland China, Hong Kong and Macao. Canada Beef placed an advertisement in the July Issue of Tasting Kitchen in the Hong Kong and Macao edition. The CBA was introduced inside the page together with one Canadian beef dish developed by a celebrity chef. The magazine has a circulation of 45K in Hong Kong and Macao and the content was also posted on the publication's Facebook and website which received over 200K views.

Canada Beef partnered with Chinese Master Chef Qian to develop a recipe book with 80 creative beef recipes. The book featured Canadian beef as the exclusive beef ingredient with the introduction of key messages such as the CBA, grading systems, industry overviews, etc. The book targeted foodservice operators and professional chefs in the catering industry. The initial print run of 4K copies will be reprinted if demand allows.

CANADIAN BEEF EXPORT HIGHLIGHTS | Southeast Asia (including Taiwan) was Canada's fourth largest beef export market by volume in 2022 with **3.9% market share**. Beef exports at 19,806 tonnes and \$157 million in 2022 were **up 11% in volume and up 41% in value** from 2021.

Canadian beef exports to Taiwan at 1,185 tonnes and \$14 million in 2022 were **down 13% in volume and up 2% in value** from 2021.

RETAIL AND FOODSERVICE PROMOTIONS

TAIWAN

Canada Beef partnered with the Western-style restaurant The Diner in Taiwan to launch three unique Canadian beef burgers at four of their restaurant outlets. Five co-branded marketing resources were created for distribution in-store, for posting on social media platforms, and extended through key influencers to further reach additional potential audiences. Digital and social media views/hits reached over 900K; Instagram followers increased by 30. Canadian beef sales increased 36% compared to non-promotional periods.

In conjunction with the Trade Commissioner Service in Taiwan, Canada Beef worked on a month-long promotion in December with leading Taiwanese ecommerce online shopping site PC Home. Canadian AA chuck top blade was highlighted. Digital exposure reached more than 150K consumers. The distributor reported that Canadian beef sales increased 12% compared to non-promotional periods.

Canada Beef worked with retail partner City'Super to promote Canadian beef for the barbecue season (Moon Festival) at all seven City'Super stores in Taiwan. A month-long in-store promotion was held featuring chilled Prime and AAA grades of Canadian beef products such as rib eye, tenderloin, striploin, short ribs, chuck top blade, and short plate to satisfy upper income shoppers.

A total of 49 in-store samplings were held and feedback from customers was very positive. Canadian beef sales increased 12% compared to non-promotional months.

In partnership with luxury hotel Grand Mayfull Hotel Taipei, Canada Beef launched the Canadian Food Festival from February 23 to March 23, 2023. Five dishes were made from selected Canadian beef

cuts (rib eye, rib finger, top blade muscle, bone-in short rib, short plate) and served at the Mayfull Hotel buffet restaurant while Canadian AAA rib eye was served at GMT Italian restaurant. A press launch was held with 20 mainstream media. Four co-branded in-house marketing resources were created as well as digital marketing resources to be distributed in the hotel. The promotion aimed to interest affluent diners in a great experience with Canadian beef by increasing awareness of the quality attributes of Canadian beef. Sales increased 8% compared to non-promotional months.

PHILIPPINES

Canada Beef partnered with importer Hightower to run a month-long Canadian beef promotion with luxury retailer The Marketplace Philippine. Canadian beef features included rib eye, chuck roll, chuck clod, and chuck eye roll. Three in-store chef cooking shows and samplings were conducted during the Thanksgiving shopping season. Canadian beef sales increased 20% compared to non-promotional periods.

In partnership with fine dining franchise group Nikkei Group, a restaurant promotion was conducted at their newly established restaurant SUNAE from November 2022 to January 2023.

A Canadian beef menu was created, and two press launches were held with key business contacts and industry influencers. Four co-branded marketing resources were created for the promotion. Media coverage reached over 70K consumers and sales of Canadian beef increased 18% comparing to non-promotional periods.



Deana Kao,
Director, Market Development,
Taiwan/ Hong Kong/
Southeast Asia

Canada Beef's strategic priorities for Taiwan and Southeast Asia are to promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canadian beef volume, value, and market share.

12% OF INVESTMENTS - 17 PROJECTS

TAIWAN AND SOUTHEAST ASIA REPRESENTED 12% OF TOTAL GENERIC CANADIAN BEEF PROMOTION INVESTMENTS WITH 17 PROJECTS THIS FISCAL.



Retail promotions Taiwan/City Super & Phillipines/Marketplace.



Retail promotions Taiwan/City Super & Phillipines/Marketplace.



A total of 49 in-store samplings were held and feedback from customers was very positive. Canadian beef sales increased 12% compared to non-promotional months.

SINGAPORE

Despite limited access to Canadian beef in the Singapore market, Canada Beef still worked to raise awareness of Canadian beef with the Singapore industry and consumer. Canada Beef partnered with an industry influencer and the Trade Commissioner Service to run a series of online advertisements about Canadian beef at the Food & Hotel Asia trade show in September. Digital and social media reached 95K consumers while blog posts reached another 8K.

VIETNAM

Canada Beef worked with key Canadian beef importer partners to conduct a restaurant campaign to increase brand awareness and product preference. A consumer engagement activity was also held online to highlight and further boost the promotion. Three Bonjour Resto restaurants participated in the promotion using co-branded physical and electronic marketing materials. Digital/social media reaches/views reached 350K; while Instagram followers increased by 100. Total Canadian beef sales increased by 30% compared to non-promotion periods.

Canada Beef worked with key importer TD Food in Vietnam to promote Canadian beef at several retail banners (AEON, LOTTE Mart, WinMart) in January 2023 during the lunar new year season. Canada Beef and TD Food conducted 43 in-store sampling at 77 outlets.

Three co-branded point-of-sale marketing resources were created for in-store distribution. Sales increased by 12% compared to the non-promotion period.

TRADE SHOWS AND SPECIAL EVENTS

TAIWAN

The Taipei Food Show was held in June, however with COVID restrictions in place, foreign visitor participation was down. Despite the challenges, the show still attracted 28K Taiwanese visitors. Canada Beef debuted updated brand imaging and marketing resources at the trade show in Taipei. The four-day show attracted approximately 80 visitors to the booth, and about 10 qualified potential buyers interested in product and Canada Beef services. Two packer partners participated in the show.

SINGAPORE

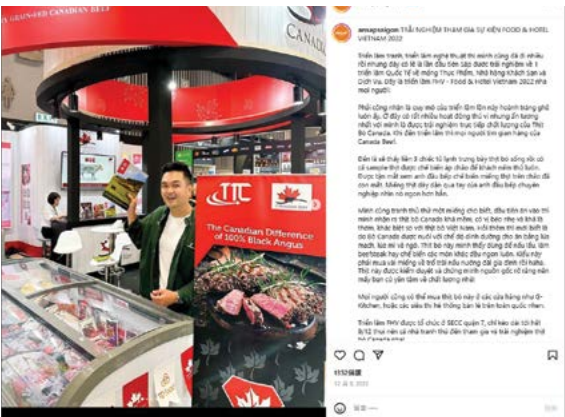
At the Food & Hotel Asia trade show in Singapore in September, one packer partner participated in the Canada Beef booth and showcased various Canadian beef cuts. Canada Beef further aligned with Canada Pork International to jointly host a Canadian Meat Seminar which attracted 30 industry buyers. The show attracted 50K visitors, with about 50 potential buyers and 20 qualified buyers visiting the booth.



Canada Beef activities in Vietnam.

PHILIPPINES

World Food Exhibition (WOFEX) is a major trade show in the Philippines, targeting fresh produce and food ingredients from local and abroad. Canada Beef worked with the Canadian Embassy to conduct a cooking demonstration and sampling daily that featured rib eye and short rib in the Canadian pavilion at WOFEX. The show attracted 45K visitors, with approximately 20 potential buyers and two qualified buyers. Canada Beef also worked with the chef association to conduct a young chef competition in collaboration with four Philippine culinary schools. The culinary students needed to design and create two dishes including a main course using Canadian top sirloin cap. Lastly, Canada Beef worked with the Trade Commissioner Service to host a Chefs Table event with up to 500 guests in attendance that included media influencers, chefs, importer/distributors, foodservice owners and retail buyers.



VIETNAM

Canada Beef participated in Food & Hotel Vietnam in December, working with two Canadian beef importers/distributors to showcase various Canadian beef cuts and brands. The show attracted 17K local buyers and generated 500MT of Canadian beef sales. Canada Beef hosted a livestream with a famous food influencer and Canada Beef's president, which generated 24K views and 122 messages. One Canadian packer participated in the Canada Beef booth. Approximately 30 potential clients and eight qualified buyers visited the booth.

DIGITAL MARKETING

Canada Beef continued to create new and interesting content for Taiwanese clients and consumers on the Canada Beef Taiwan website (canadabeef.tw). One new Canadian beef post or general beef-related content was created per month. Current website content (recipes, articles, updates) was expanded to digital media platforms. Canada Beef has generated over 900K views on the website with an increase in website visitors of 70K per year.

Canada Beef Instagram (Southeast Asia and Taiwan) maintained weekly updates on Canadian beef content including recipes, articles, beef facts, etc. Canada Beef further enhanced Instagram to have better visuals to attract visitors and drive traffic. Canada Beef also ran a 12-month campaign for Southeast Asia Instagram, with 2-3 posts plus one story per week. Canada Beef has generated over 500K views with an increase of 100 new followers.

The Food & Hotel Vietnam show attracted 17K local buyers and generated 500MT of Canadian beef sales.

Canada Beef has generated over 500K views with an increase of 100 new followers.





Claudia Herrera-Blanc
Director, Market
Development, Mexico
and Latin America

Canada Beef's strategic priorities for Mexico and Latin America are to promote the Canadian Beef Advantage and support Canadian beef supply, retail, and foodservice clients to grow Canadian beef volume, value, and market share.

26% OF INVESTMENTS - 43 PROJECTS

MEXICO AND LATIN AMERICA REPRESENTED 26% OF TOTAL GENERIC CANADIAN BEEF PROMOTION INVESTMENTS WITH 43 PROJECTS THIS FISCAL.

CANADIAN BEEF EXPORT HIGHLIGHTS | Mexico was Canada's third largest beef export market by volume in 2022 at **5.2% market share**. Beef exports at 26,521 tonnes and \$215 million in 2022 were **up 13% in volume** and **up 12% in value** from 2021. Canadian beef exports to Latin America (excluding Mexico) at 2,457 tonnes and \$5 million in 2022 were **down 13% in volume** and **up 4% in value** from 2021.

RETAIL AND FOODSERVICE PROMOTIONS

Canada Beef implemented two in-store retail sampling programs this year. The first was with El Florido at 13 retail outlets in Ensenada and Mexicali in May that generated a 50% increase in sales volume YOY. Canada Beef also worked with Carnes Premium XO to present six master classes at the Grill Academy, with weekend samplings that created awareness of Canadian beef brands and incremental sales growth.

Online and digital campaigns conducted with 11 nationwide radio broadcasts and podcasts reached an audience of 2.9M listeners. The campaigns with different distributors, chefs and influencers achieved a 68% increase in reach YOY. An email campaign with Grill House reached 11.3K readers and generated 8.6K views to create incremental sales growth and brand awareness.

Retail campaigns featured on-site training, signage, display case and other marketing resources, cutting demonstrations, in-store videos and advertising. Newspaper campaigns with Carnes Premium XO (February to March 2023) and Wildfork (February 2023) generated YOY volume increases of 45% and

10% respectively. Canada Beef worked with Soriana to place beef grading labels in 100 premium stores which generated incremental sales growth of 15% YOY.

Canada Beef conducted a number of foodservice campaigns. Among these were two product sampling events that highlighted 15 recipes at La Matera restaurant in Guadalajara and Montelena Restaurant in Monterrey. Held within the same timeframe as the ExpoANTAD and Expocarnes trade shows, the two sampling events attracted 105 customers from the beef distributors, importers, and retail/ foodservice operators attending the trade shows. Both activities generated incremental growth for packers and importers.

In collaboration with Chiapas, a boutique hotel in San Cristobal de las Casas, Canada Beef provided a five-course sampling, beef cutting demonstration and a seminar to local restaurants. Seventy people attended the event. Reach/hits and views were 3.7M which generated 10% increase in sales volume YOY.

TRADE SHOWS AND SPECIAL EVENTS

Canada Beef participated in five trade shows in Mexico, and one in Panama this fiscal year. Overall reach and awareness was 2.9M people. Highlights include:

ExpoANTAD 2022 in Guadalajara in May attracted an attendance of 20K. Social media communications from activities held during the show netted 519K digital views and an increase of 610 followers in social platforms. Four local distributors were part of Canada Beef's booth at the main hall. Two Canadian beef packers also participated at the Canadian Government Pavilion to showcase their products and provide information as part of the Canadian organizations doing business in Mexico.

ABASTUR 2022 in Mexico City attracted 20K visitors. Canada Beef supported distributors Sigma, Dipcen and Carnes Premium XO through three export market development programs for featuring Canadian beef at their booths.

Canadian beef ambassadors conducted several presentations and beef cutting demonstrations. Show activities reached 10K views and generated 15 business leads.

ExpoCarnes 2023 in Monterrey in February 2023 attracted 10K visitors, generated 50 business leads for beef distributors, and achieved 1M digital views and accounts reached. Two Canadian packers and six local distributors joined the booth and helped deliver 18 cooking demonstrations presented by three Canadian beef ambassadors. Canada Beef distributed 4.5K marketing resources at the show.

ANTAD 2023 in Guadalajara in March 2023 attracted 20K visitors. Canada Beef was joined in their booth by five local Canadian beef distributors and two Canadian packers. The show generated 30 business leads for distributors and Canada Beef's social media activities reached 744K views/hits.

EXPOCOMER PANAMA in March 2023 saw 5K attendees. Canada Beef's presence at the show resulted in 10 leads, 549K views through Canada Beef's social platforms, and the distribution of 300 marketing resources. A Canadian packer supplied the beef used for the display and nine cooking demonstrations.

TRADE ADVERTISING

Trade advertisements were placed in Retailers.mx Magazine to promote Canada Beef's programs and services for the retail sector. The print advertising reached a readership of 105K readers and electronic email distribution reached another 232K.

CONSUMER MARKETING

Canada Beef developed three video recipes that were available through the Canada Beef Latin America YouTube Channel. Total consumer reach from the videos topped 848K+, a 50% YOY increase.

To leverage the development of recipes and content produced for several streamings during the pandemic, Canada Beef printed this content in a cookbook to support marketing activities targeted to the consumer marketing channel. The digital version of the cookbook received 150K views.

Canada Beef's newsletter developed for the domestic market reached 1K subscribers, a 10% YOY increase in readership. The newsletter communicates Canada Beef activities in the Latin market as well as recipes and Canadian Beef Advantage (CBA) information.

DIGITAL MARKETING

Canada Beef's digital marketing program utilized a number of tools to reach consumers. These included monthly website updates, podcasts, newsletters, digital marketing materials, and social media platforms. The website achieved 208K+ views, social media reached 17M+ impressions and 224K followers - a 10% increase YOY.

DEMAND BUILDING EVENTS

Canada Beef developed trade-focused podcasts to promote the CBA and deliver trade seminars available through its Spotify and Apple channels. Canada Beef has been able to reach 24K customers and clients – a 10% increase over previous years.

DISTRIBUTOR EDUCATION

Canada Beef delivered three interactive training workshops for trade customers in August and December. The workshops focused on educating end-customers about Canada's high quality beef grades and standards. The events held in Cancun, Torreon and Merida reached 850 people.

Canada Beef worked with an expert butcher and professional designers and photographers to create a step-by-step butchery manual to support distributors and clients during onsite beef seminars and training sessions for the Mexican market.

GOVERNMENT TRADE COMMISSION PARTNERSHIP

Working with the Canadian Embassy and Consulates, Canada Beef helped to promote Canada Day in Monterrey (July). Canada Beef's booth was placed in an open market where customers and distributors interacted while learning about the CBA. Approximately 4K people visited the market during the four-hour event. The combined reach and digital views totaled 34K.

In conjunction with COMECARNE and the Canadian government, three border seminars focused on training industry segments and value chain leaders/players in Mexico were delivered June 2022 to March 2023. This year's edition gathered 3K online registrants for three virtual seminars which included participation from the Canadian Government (export processes to Mexico) and Canada Beef (CBA communication).



Expocomer Panama 2023.



Newspaper campaign to promote brand awareness.



Albert Eringfeld
Executive Director,
Export Market
Development

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

7% OF INVESTMENTS - 11 PROJECTS

EMERGING MARKETS REPRESENTED 7% OF TOTAL GENERIC CANADIAN BEEF PROMOTION INVESTMENTS WITH 11 PROJECTS THIS FISCAL.

CANADIAN BEEF EXPORT HIGHLIGHTS | Emerging Markets includes countries primarily located in the Middle East and Europe. Countries in the Gulf region of the Middle East are the main importers of Canadian beef reaching 3,891 MT in volume with a value of \$51 million CAD in 2022, representing an **increase of 65% in volume and 145% in value** vs. 2021. The EU-27 group of countries imported 1,208 MT of Canadian beef in 2022 with a value of \$23 million CAD, **down 21% in volume and 6% in value** vs 2021.

RETAIL AND FOODSERVICE PROMOTIONS

A retail promotion with Costco Spain ran over a seven-month period at four different locations and included in-store promotions and product samplings. A total of 61 Canadian beef in-store sampling days were supported over this period. An estimated 18.3K consumers were reached as a result of this Canada Beef initiative.

TRADE SHOWS

Canada Beef hosted a booth at the major international trade show SIAL Paris 2022 in collaboration with Canadian Bison and Canada Pork. Two Canadian beef supply partners and a European-based Canadian beef importer exhibited with Canada Beef at the show. Two Canadian bison suppliers also participated. Approximately 310K trade visitors attended the show where over 7K companies exhibited. The Canadian Beef/Canadian Bison booth attracted 2K visitors, and Canadian beef suppliers at the show attracted 30 new clients. Estimated new sales volume was 675MT with a value of \$6.15M.



Canada Beef Attends SIAL Paris 2022.

TRADE ADVERTISING

Two trade advertising campaigns focused on the Saudi Arabia foodservice sector (September) and on the broader Gulf/Middle East region foodservice sector (January – February 2023). The total circulation/reach was 29K foodservice industry professionals in the region with another 20K digital banner views leading to a Canadian beef landing page.



The Canadian Beef/Canadian Bison booth at SIAL Paris attracted 2K visitors.

A consumer advertising campaign focused on the German-speaking market in Europe via an advertisement placement in a German language cookbook. About 3K cookbooks were printed and sold on the initial publication.

MARKETING MATERIALS

Two new Canadian beef recipes were created for the German speaking market in Europe which will be distributed via various marketing initiatives and social media campaigns aimed at consumers in these markets.

GOVERNMENT TRADE COMMISSION PARTNERSHIP

Canada Beef completed five projects in collaboration with the Canadian Trade Commissioner Service: two in Germany, two in Qatar, and one in Kuwait. In Germany, Canada Beef collaborated on the ongoing Taste of Canada initiative with inclusion on the website and social media postings featuring Canadian food products in Germany as well as a Canada Day event to promote Canadian food and beverage products available for sale in Germany. In Qatar, Canada Beef collaborated with the Canadian government on a Canadian beef launch and Taste of Canada Canadian food promotion and networking event. In Kuwait Canada Beef collaborated on a Taste of Canada Canadian food promotion and networking event.

EXPORT MARKET DEVELOPMENT PROGRAM | Specific export markets targeted include the European Union and the Middle East Regions as well as the United Kingdom, South Korea, Japan, China, United Arab Emirates, Philippines and Hong Kong.

The Export Market Development (EMD) Program provides partner funding in five key areas for eligible activities to promote and grow sales of premium quality Canadian beef brands in the export marketplace.

The Export Market Adaptation (EMA) category of the EMD Program helps provide cost-shared support for travel costs of Canadian beef clients in export markets to visit Canada.

Canada Beef’s EMD program provided cost-shared support to Canadian beef exporters and their clients for 14 separate incoming visitor missions from a variety of different markets including Japan, Vietnam, Europe, Mexico and South Korea.

Additionally, one outgoing Export Market Investigation mission, 19 trade show Export Market Diversification activities, 19 Promotion and Marketing initiatives and two Competitive Advantage Benchmarking projects have been approved and supported under the program for the fiscal year April 2022 to March 2023.

Of these 55 projects approved, 31 different companies received support targeting 10 different export markets.

MEASURES OF SUCCESS (REPORTED BY PROGRAM USERS) FOR PROJECTS COMPLETED.

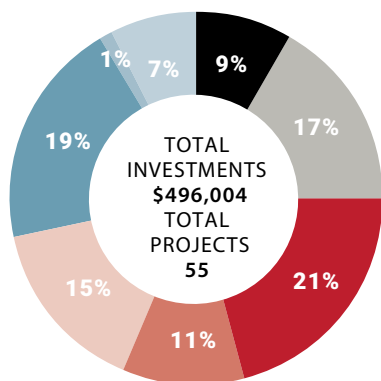
- 33 new market segments or channels entered
- 26 new international markets entered
- 3.6K new buyer introductions or leads
- 13M individuals reached
- 32M website or social media views
- 743 new corporate marketing resources developed
- 31K branded or co-branded resources created
- 24 trade and consumer advertisements completed
- 48 marketing and sales promotions completed
- 169 beef sampling demonstration days completed
- 8 competitive benchmarking activities completed
- 77 new products or specifications developed
- 84 participants received training
- 5.2MT in estimated new sales volume
- \$58M CAD in new sales value



Albert Eringfeld
Executive Director,
Export Market
Development

Canada Beef’s strategic priorities for the Export Market Development Program include education, learning tools and resource development to promote the Canadian Beef Advantage.

EMD PROGRAM INVESTMENT BY MARKET - 2022/23



- JAPAN \$42,657 (PROJECTS 10)
- EUROPE \$82,821 (PROJECTS 10)
- SOUTHEAST ASIA \$102,487 (PROJECTS 8)
- MEXICO \$52,628 (PROJECTS 2)
- MIDDLE EAST \$75,405 (PROJECTS 6)
- CHINA & HONG KONG \$96,491 (PROJECTS 10)
- SOUTH KOREA \$6,700 (PROJECTS 2)
- ALL MARKETS \$36,815 (PROJECTS 7)



Ron Glaser
Vice President,
Corporate Affairs

Canada Beef's objective for the Public and Stakeholder Engagement (PSE) program is to communicate with the public, consumers and meat trade to address concerns and build trust and confidence in how beef and veal is produced in Canada.

Ontario advertorials in various media reached 1.8M+ readers.

CANADIAN BEEF SUSTAINABILITY CAMPAIGN

A new sustainability communications campaign aimed at consumers and trade clients commenced in Q4 and will carry on into Q1 of the next fiscal year. The campaign focuses on the beneficial impacts of the beef industry such as improved biodiversity, ecosystem health, and carbon sequestration. The campaign features three sets of print and digital advertisements in Canadian Living's magazine and website, and in Canadian Grocer's magazine and website. The campaign is expected to reach a combined readership of 16.7M (print and digital platforms) and 480K impressions (digital ads). Final metrics will be available at the conclusion of the campaign.

DIRECT TO CONSUMER MESSAGING

Full-page advertorials placed in major Toronto and Vancouver newspapers in June and July highlighted the cattle industry's commitment to sustainability. The advertorials focused on the beef industry documentary 'Too Close to Home' and the use of cattle grazing in forested areas surrounding communities to reduce the risk for wild fires.

Ontario placements in the Toronto Star, regional National Post and Globe & Mail editions reached 1.8M+ readers. B.C. placements in the Vancouver Sun, Vancouver Province, and regional National Post and Globe & Mail editions reached 1.1M+ readers. The advertorials included a call to action to visit www.raisingcdnbeef.ca to learn more about the beef industry's commitment to stewardship.

Canada Beef, along with the Canadian Cattle Association (CCA) and the Canadian Roundtable for Sustainable Beef (CRSB), partnered with Star Metroland on the Cooking by Degrees campaign from mid-June to mid-August. Numerous articles and recipes from chefs showcased ground beef as a versatile, nutritious and delicious choice on Star Metroland platforms about the same time that ground beef was in the news around Front-of-Pack labelling.

The campaign results indicated page view deliveries and click-through rates for the sponsored advertisements met or exceeded industry averages.

The main key performance indicator of time spent reading the articles exceeded the average for the Toronto Star on all articles, an average of 1.5 times across all articles. Engagement rates were strong on accompanying sponsored social posts, and the campaign delivered more than 3.2M impressions overall.

The campaign earned top honours from the Canadian Agri-food Marketers Alliance (CAMA), in the Best of CAMA 2022 categories of 'Company or Industry-Funded Marketing Campaign Directed at the General Public' and 'News or Feature Article'.

A collaboration between Canada Beef and the CCA, "Good for you, great for the environment," saw five Instagram influencers visit Canadian cattle producers on-farm to explore the connection between beef production and sustainability. The campaign proved popular with 500K+ ad views on YouTube, a reach of 190K+ on Instagram via the influencers, and 120K+ views of the full-length videos on YouTube.

Canada Beef worked with social media influencer, the Foodies Group, to deliver positive messaging about the beef industry through five separate stories on topics such as: food upcycling, a day in the life of a 4-H competitor, women in agriculture, and raising beef responsibly. The campaign generated 8.2K views on YouTube, 1.3K blog views, and Instagram generated a reach of 2.7K and 3.2K views.



A social media campaign used online ads to drive awareness and viewership of Canada Beef’s environmental stewardship-themed YouTube videos. The campaign targeted 20 to 40 year-olds interested in food, cooking and sustainability topics in the Vancouver, Edmonton, Calgary, Toronto, Ottawa and Montreal markets. The online ads netted 7.5M consumer impressions and 1.1M video views - twice the expected performance of the campaign. The campaign’s overall reach was 4.48M unique users.

The campaign earned top honours from CAMA, in the categories of ‘Company or Industry-Funded Marketing Campaign Directed at the General Public’ and ‘News or Feature Article’.



CONSUMER MESSAGING THROUGH STAKEHOLDER PARTNERS

Canada Beef is a sponsoring partner of the ‘Cows on the Planet’ podcast featuring University of Lethbridge (U of L) Research Associate, Dr. Kim Stanford, and Agriculture and Agri-Food Canada Lethbridge principal scientist Dr. Tim McAllister.



Podcast episodes (36 to date/13K+ downloads) present complex science in an engaging manner to help Canadians understand the beef industry in an objective way. Cows on the Planet is available on Spotify, Apple and other podcast platforms.

KEY INFLUENCER OUTREACH

Canada Beef promoted the Cows on the Planet podcast and beef sustainability messaging to 300+ dietitians, academics and health professionals in attendance at the Canadian Nutrition Society annual conference in May. Canada Beef sponsored speaker Dr. Stanford from the U of L addressed questions about the impact of food production on the health of the planet/climate change – a topic of interest with these professionals.

INDUSTRY MEMBERSHIP AND PARTICIPATION

Memberships in the CRSB and the Canadian Centre for Food Integrity enable Canada Beef to work closely with likeminded groups to develop messaging and resources to safeguard consumer confidence and support for Canadian beef, and to address consumer curiosity and skepticism about food production.



Full-page advertorials placed in major Toronto and Vancouver newspapers in June and July highlighted the cattle industry’s commitment to sustainability.





Shelby VanSickle
Senior Director,
Channel Marketing



Todd Van Eyk
Merchandising Manager,
Channel Marketing

Canada Beef's objectives for Channel Marketing include retail and foodservice channel promotion and market development initiatives that drive sales volume, market share and competitive position; retail and foodservice demand building programs to increase product assortment; and marketing programs that drive sales and awareness of the Canadian Beef Advantage in Canada.



CANADIAN BEEF INFORMATION GATEWAY

Canada Beef worked with FreshCo to implement the Gateway, and assisted in the design of the label with their beef supplier. FreshCo's Gateway will roll out next fiscal to 140+ stores across the country. Canada Beef also worked with Sobeys Wholesale to implement the Gateway to 177 of their independently managed partner locations. Additionally, the National Gateway (formerly known as Generic Gateway) rolled out to 148 service retailers who have more of an interest in a turnkey approach.

Channel supported in the development and distribution of promotional Gateway marketing materials such as a refrigerator magnet.

DEMAND BUILDING PROMOTIONS

Resources were developed to deliver information about value cuts to end users. Presentations delivered to end user clients that discussed value cuts in conjunction with the Canadian Beef Advantage were well received.

DEMAND BUILDING MERCHANDISING RESOURCES

Three new demand planners were created to help retailers merchandise opportunity cuts to optimize value, expand meat case options and drive profits. Hip, Thin Meats and Chuck demand planners were developed to highlight items within these categories. These resources may be accessed digitally and via hard copy.

RETAIL AND FOODSERVICE PARTNER PROGRAMS

Several partner programs were executed in the retail and foodservice sector. Projects included the promotion of Canadian beef within the framework of retailer-specific publications, as well as working to have brands represented at Canada Beef-recognized trade shows.

RETAIL AND FOODSERVICE INDEPENDENT RETAIL OPERATORS PROGRAM

The Independent Retail Operators Catalogue (IROC) was created as a poster-sized treasure map as a creative way to highlight Canada Beef resources. The IROC advertises several Canada Beef assets available in digital and hard copy formats.

MARKETING MATERIALS

Grading labels and 'How To Cook' labels were updated to include QR code integration. The first batch was printed and advertised in the IROC.

Canadian Beef Merchandising Posters and Guides were reprinted with a call-to-action for the Gateway on each. Additional copies of the Ground Beef Tool Kit and the Beef and Veal Handbook were printed to satisfy demand.

MEMBERSHIPS AND SPONSORSHIP EVENTS

Memberships were held with multiple national organizations in the retail and foodservice sector.

Sponsorships included the Restaurants Canada (RC) show, the World Butchers' Challenge, and the 2022 Best New Restaurant in Canada's 100 Best. The latter partnership featured a print ad (112K magazines distributed), as well as a digital article with distribution of the digital magazine to nearly 500K American Express cardholders.

CANADA BEEF VOCATIONAL SCHOLARSHIP PROGRAM

Scholarship funding was provided to five vocational institutions this fiscal year. Digital programming was offered to the participating institutions, as well as hard copy resources to increase student awareness and proficiency in beef merchandising.

TRADE SHOWS

Participation in two trade shows targeted two key audiences in foodservice and retail. As a sponsor partner of the RC show, the Channel team showcased its programs and services within the Canada Beef Pavilion at the event, alongside a chef demonstration. At Grocery Innovations Canada, the team along with Canada Beef staff presented the Gateway to retailers in conjunction with other resources (e.g., demand planners).

HMR, TAKE-OUT, MEAL KIT SUPPORT PROGRAM

Conversations with potential partners resulted in one organization signing a Brand License Agreement this year.

TRADE ADVERTISING

Canada Beef worked with several publications to target retailers and foodservice. Ad topics ranged from the Gateway to grading and merchandising tips for value cuts and seasonals. A partnership with Canadian Grocer featured full-page ads and eblasts, with four ads placed between August and February. Two ads placed in Foodservice & Hospitality magazine targeted stakeholders within the industry. September's content theme was "Beef Up Your Business," while Winter 2023 focused on tips to help stakeholders add value to their sales.

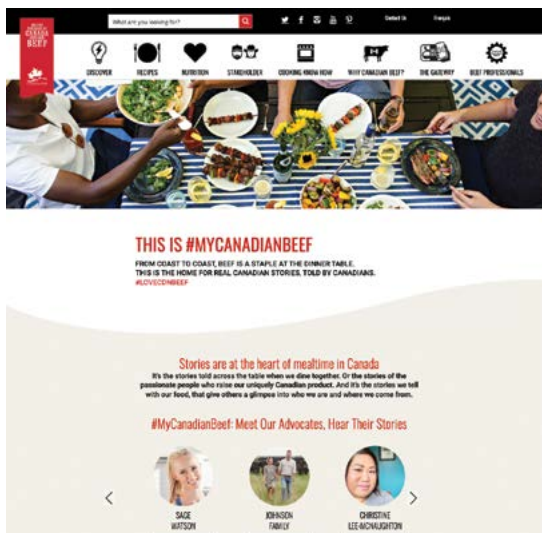
NATIONAL CANADIAN BEEF BRANDED ADVERTISING AND DEMAND BUILDING CAMPAIGN

This was the third year for the English only consumer campaign under the overarching banner, My Canadian Beef. With a focus on awareness and promotion for the Canadian Beef Information Gateway (Gateway) and the Canadian Beef Advantage (CBA), a design refresh for the webpage and digital advertising templates was undertaken.

Campaign outreach was through digital advertising, advocate outreach, public relations efforts, paid digital magazine article placement, and earned TV broadcast placements. The advertising component delivered 60M+ impressions, resulting in 350K+ clicks to the website, and a conversion rate of 20.4%. Spotify advertising netted 500K+ ad completions with engagement led by the 18-to-24-year old age group.

The beef advocacy portion of the campaign featured Canadians from different cultural cuisine backgrounds sharing their food traditions. Advocate Olympian Sage Watson created a TikTok video to promote the Gateway for deployment at 451 gyms across the country via Gym TV screen placement. Barbecue guru Ted Reader provided CBA messaging supporting beef quality in videos at Gym TV media as well.

Public relations efforts included a Pick a Cut assignment working with 12 food influencers. Each was assigned a beef cut from the Gateway and asked to report on their experience cooking a recipe specific to their assigned cut. Outreach totalled 235K+ followers with 10K+ engagements.



Stories authored by subject experts were featured in digital magazines Narcity and Daily Hive. Narcity ran a two-part series designed to communicate the CBA, with a focus on the benefits of fat from a culinary and nutrition/health perspective as it relates to Canadian beef. Daily Hive's articles looked at the importance of iron for infants and toddlers, as well as animal care, from a Canadian beef perspective.

FOODSERVICE CONSUMER MARKETING CAMPAIGNS

With the goal to support foodservice recovery at the local level while promoting the local beef supply, the Burger It Forward campaign launched in eight provinces in February 2023. This was Canada Beef's first-ever giveback campaign, partnering with restaurants and beef producer associations to raise funds to support food security efforts. Locally owned restaurants who serve 100% Canadian beef were solicited to join the month-long campaign by featuring a burger of their choice as a campaign burger.



For every campaign burger purchased, Canada Beef donated the equivalent of one meal to Food Banks Canada (up to a maximum value of \$10K). To add to the fundraising effort, producer associations supported foodbanks in their region/province. Atlantic Beef Products Inc. donated ground beef to the Newfoundland foodbank. Two Atlantic dairy associations contributed donations based on milkshake sales added to the burger



Joyce Parslow
Executive Director,
Consumer Marketing

Canada Beef's strategic priorities for Branded Consumer Marketing are to defend, stabilize, and increase consumption of Canadian beef vs. poultry, pork, and plant-based meat alternatives, and increase awareness, trust and confidence in the Canadian cattle and beef delivery systems with consumers through the Canadian Beef Advantage.





BURGER IT FORWARD

CAMPAIGN HIGHLIGHTS
FEBRUARY 1 - 28, 2023

HEY, BURGER IT FORWARD COLLABORATORS:

Together we raised an estimated
\$53,064
for 16 food bank efforts across the country!

You're all officially Burger Heroes!

DONATION OVERVIEW

BEEF GROUP CONTRIBUTION: \$43,000	RESTAURANT DONATIONS: \$6,276.00 REPORTED
DAIRY FARMERS CONTRIBUTION: \$3,288	<small>Bring Big Day Productions donated a total of \$3,000.00</small>
INDIVIDUAL CONTRIBUTION: CANADA BEEF GRAND PRIZE WINNER DONATES HIS \$500 PRIZE TO BRIDGES TO HOPE NEWFOUNDLAND. ANDREW LOCK, ST. JOHN'S, NEWFOUNDLAND (Blackout on Instagram)	TOP INDEPENDENT RESTAURANT DONATION: 100 MILE GRILLE (Liquor On: @100MILEGRILLE)

Logos: BCCA, Alberta Beef, SGA, Beef Farmers, Canada Beef, Atlantic Beef, Canada Beef

orders. More than 110 restaurants participated in the campaign to raise \$53K+ in donations. An estimated 29K+ burgers sold during the campaign. Restaurants experienced an average sales increase of 24%.

The campaign netted 36M+ impressions from traditional and social media and 147 unique earned media hits, to earn the advertising equivalent of \$300K.

CANADIAN BEEF INFORMATION GATEWAY PROMOTION AND ADVERTISING

Several ad campaigns across a variety of media outlets were initiated to promote the Gateway. A Be(ef) Inspired print ad in Canadian Living magazine's June issue announced a month-long contest draw for a \$400 prize pack, starting in May. The contest aimed to raise awareness for the Gateway, and provide entrants with in-home access to the Gateway QR code through distribution of a refrigerator magnet. The print ad reached 3.5M readers through 230K copies. More than 2K magnets were mailed to consumers as a result of the contest initiative.

In partnership with The Big Green Egg barbecue, QR codes linked to the Gateway were created for distribution through inclusion with every Big Green Egg online order received in summer 2024. Gym TV media advertising through video screens at over 400 gyms achieved nearly 5M impressions.

A partnership with Saskatchewan Farm and Food Care's Canadian Food Focus (CFF) initiative produced three cook-along videos featuring recipes developed by food influencers. The videos were featured in the CFF platform Global Flavours course, with links to the Gateway included in the course. The videos and recipes were also shared through their Great Food Grown Here consumer e-newsletter, Food Focus influencer Facebook Group and CFF social media.

CROSS PROMOTION, PARTNER PROGRAMS AND COLLABORATION

Canada Beef partnered with provincial beef associations to promote the Gateway through cooking demonstrations at major consumer events: Pacific National Exhibition (BC), Agribition (SK), Farm Fair International (AB), and Royal Winter Fair (ON). A spin-off benefit to these collaborations was the development of 10 new recipes for the Gateway.

Costco promoted the online version of the co-branded booklet Cut It Yourself Guide to Savings

through their digital and social media efforts. The two-month campaign drove 2K+ views of Canada Beef's cut-it-yourself videos, from the 15K+ page views from 6.5K unique visitors.

The Great on the Grill cross-promotion with Furlani Foods garlic bread products launched to promote the Gateway at store-level. From Furlani, the campaign included two QR codes on 900K packages on the top two varieties of garlic bread products along with point-of-sale signage, plus two recipes by influencers with outreach through the influencer audiences. All specially marked packages were sold from mid-May to mid-September, gaining an estimated 13M+ impressions. The codes saw 193 scans during the package circulation.

Canada Beef also promoted the four Great on the Grill recipes and microsite through Canada Beef social media platforms and four issues of Make it Beef (MIB) Club. These efforts reached 4.4K Facebook accounts and 160K MIB Club members.

CANADIAN BEEF ADVANTAGE CONSUMER MARKETING RESOURCES

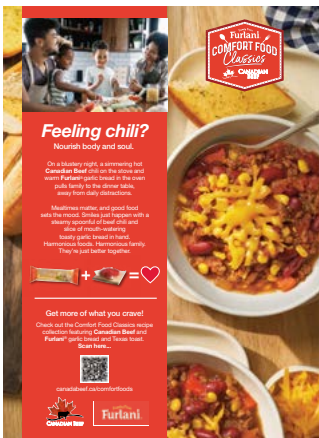
New CBA vignette video resources were integrated into canadabeef.ca: Beef Quality and Grading, Beef Feeds and Breeds, Food Safety and Safe Food, Animal Care, and Beef Cattle and the Environment. The topic of Safe Food Handling was also added to the Cooking Know-How section of canadabeef.ca.

MAKE IT BEEF NEWSLETTER

MIB membership is 43K members/subscribers. A video campaign to encourage new membership attracted 90 new members. Contest and recipe content are the most read features for MIB. With open rates from 24.5 to 28.3, and click rate of 4.4%, MIB outperforms industry standards. A new Mail Chimp service, Mayple, was used to track metrics and find opportunities to optimize the platform.

BEEF PRIDE ESTORE

The Beef Pride eStore provided support for approximately 20 Canada Beef efforts in consumer marketing, stakeholder relations, and digital and trade marketing programs. Promotions included a sampling program to bring traffic to the Canada Beef booths at the Canadian Beef Industry Conference and Maritime Beef Council events, a product feature in each issue of the MIB e-newsletter, a Wave Your Flag promotion in Canada Beef Performs e-newsletter, and a 'free shipping' offer for the Christmas holiday season.



Feeling chili?
Nourish body and soul.

On a stormy night, a warming hot comfort food can do the trick and puts family to the dinner table. Easy to make and delicious.

Make it warmer and good food warms the soul. Stirred just happen with a hearty spoonful of ground beef and a dash of multi-seeded, healthy maple mustard sauce. Homemade food. Homemade family. They just taste better together.

Get more of what you crave!
Check out the Comfort Food Classics recipe collection featuring Canadian Beef and Furlani® garlic bread and Texas toast. Scan here.

Logos: Canada Beef, Furlani

NATIONAL CONSUMER BEEF DEMAND BUILDING CAMPAIGN

This was the third year of the English only affirmation campaign for beef under the overarching banner, The One & Only Beef. The campaign approach was refreshed to reflect cultural diversity through the theme Explore the World of Beef. Media support included food influencers, earned broadcast placements, contesting, magazine print advertising, and targeted digital advertising.

Each Explore the World of Beef campaign element surpassed plan goals by 150%–340%. Web traffic was up 25% from last year, the largest gain in the One & Only Beef campaign.

In partnership with Kitchen Aid and a key food influencer, the Explore the World of Beef campaign included a four-part series contest to win an air fryer each time. The contests garnered 24K+ entries in total (the most entries received for a Canada Beef contest) and 2M+ people were reached through advertising and earned broadcast placements, driving nearly 300K website page views for ThinkBeef.ca.



NUTRITION/CULINARY FOCUSED CONSUMER MARKETING CAMPAIGNS/OUTREACH

Distribution of resources and messages to health-concerned Canadians about the important contribution of beef to health and wellness across all life stages was achieved through various partnerships and advertising.

First created in 2018, the Think Beef nutrition education resource, Fuel Up For Fun, was developed in partnership with a fitness-focused media-savvy registered dietitian as author to help sports-involved families eat well while eating on the run. This fiscal, her promotion efforts through earned media broadcast at four news stations across Canada gained exposure to an audience of 1.3M. Her outreach to a variety of sports associations gained mention in four association parent-targeted newsletters and an association web posting, garnering 725 orders for Fuel Up For Fun, with team orders resulting in multiple booklets



distributed. She also hosted four sports nutrition focused Instagram Lives with Olympian Sage Watson on the topics of eating well with sporty kids, cook-smart strategies, and the importance of protein and iron for life. Fuel Up For Fun was also delivered via insertion into Canfitpro Magazine to 15K+ professional fitness trainers via subscription, and digital advertising in the Team Snap App provided outreach to parents and coaches of Canadian community sports teams resulting in 13.6K orders for the resource in just over four weeks.

The Osteoporosis Canada (OC) partnership focused on the importance of beef as a quality protein source for bone health. A collaborative bone-smart recipe resource distributed to Canadian consumers via five OC-hosted cooking demonstrations included eight jointly shared recipes. Recipes posted on OC's website received 6K visitors with distribution to 200K+ OC e-newsletter subscribers and 89K OC Facebook and Instagram followers. The resource also became part of Canada Beef's health professional resource distribution program.

ParentsCanada's (PC) media platform was used to target parents of infants and toddlers with messaging about the importance of iron and beef's role as a quality iron source for their children. The partnership resulted in an all-family recipe resource, Baby at the Table and accompanying videos with mom/registered dietitian influencers. Efforts resulted in distribution of 60K PC magazines which included Baby at the Table recipe resources and related nutrition articles. Inclusion of recipes, four articles and five videos on PC digital platforms resulted in nearly 16K engagements.

Gym TV media was used to gain almost 6M impressions through three month-long campaigns using four nutrition videos.

Canadian Food Focus platforms were used to promote the ThinkBeef Ground Beef Tool Kit with five articles, and a Ground Beef Cooking Lesson. Also included were four beef and nutrition articles.

Page views for ThinkBeef.ca increased 28% this fiscal, led by the air-fryer contest page. Views of eBook consumer resources doubled, with Fuel Up For Fun the highest read resource at 14K+ reads tracked. Orders for resources increased by 175% with 19K+ resources delivered, based on orders through the resource centre.



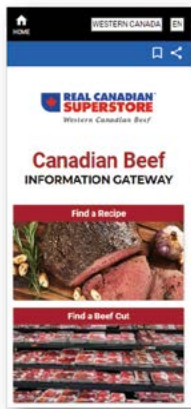
Joyce Parslow
Executive Director,
Consumer Marketing

Canada Beef's strategic priorities for Generic Consumer Marketing include promoting the positive attributes of consuming beef and veal from all sources in Canada through consumer education, awareness, and trust through public influencers directly to consumers.



Michele McAdoo
Executive Director,
Digital Marketing

Canada Beef's objectives for Digital Marketing are to create, deliver, maintain, and measure cost-effective and impactful content for all Canada Beef digital platforms to support the communication of the Canadian Beef Advantage.



CANADABEEF.CA CONSUMER WEBSITE

The Canada Beef website is an integral platform as it supports all key programs and campaigns. Regular updates ensure the website content and visuals remains fresh. This year the My Canadian Beef and Why Canadian Beef sections received new layouts. More than 80 new recipes were added to the website.

To support the Canadian beef quality and beef advantage strategy, a new section called Beef Up Your Skills was developed for consumers. This section will be updated regularly with new items featured in social media and articles. The website supported Public and Stakeholder Engagement's sustainability campaign and achieved 2.9K+ sessions and 3K+ page views.



The Facts and Resources section was refreshed with 13 new animation videos to provide consumers with important facts about raising cattle in Canada and beef quality.

Canada Beef's English website saw 650K+ users with 1.2M page views. On a 28-day average, this accounted for 68K active users. About 43% of the website traffic came from online searches, with Google being the top search engine used, followed by direct links through social posts. Consumers have viewed posts on feeds and clicked through to the website.

Over half of the website visits came through mobile followed by desktop and tablet. All of the website pages have been mobile optimized and reviewed in a mobile application.

Facebook and Pinterest were the top two social platforms that drove the most direct traffic to the website. The top content pages viewed and searched were Roasting Know How and Recipes.

The Canada Beef French website had 341K+ users. On a 28-day average, this accounted for more than 38K users. The website had a complete refresh with the website structure now matching the English website. Three new sections and 15 articles were added to enhance the website. Users came to

the website through organic searches and social media. The web team will continue to add new recipes, articles and videos to the website.

SOCIAL MEDIA

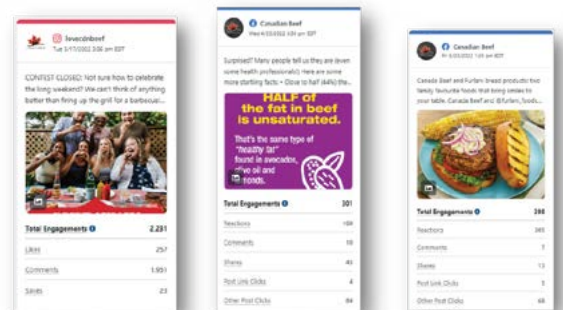
Canada Beef's social platforms continued to support marketing efforts by building brand loyalty, sharing beef facts and nutrition information and enhancing consumer awareness on raising cattle and beef production.

The combined results for the fiscal year saw: Impressions 29M+, Engagement 510K and Post Link Clicks 190K. These numbers demonstrate that consumers were interested in Canada Beef's regularly updated content. Canada Beef created and executed nearly 1.5K posts. New followers across all social platforms grew 2.3% for a total combined fan base of 72K+ followers.

Three giveaway contests were created for the Instagram platform (Valentines Day, Victoria Day and Christmas) to build the number of followers. The platform achieved 10K+ followers with 2M+ impressions and 20K engagements this fiscal.

A new 23 Reasons to Love CDNBeef campaign launched in 2023. The content, which focused on nutrition, sustainability, cooking information, educational tips and recipe content, saw some of the highest engagement and sharing. Two topics that received the most comments were infant nutrition and sustainability.

The social team supported key consumer marketing campaigns, The One & Only Beef and #mycdnbeef through sharing of content (recipes, stories and educational tips). The team also shared third party partnerships such as Furlani. These posts received high engagement and sharing. Through this partnership, we worked with new influencers, and gained new followers.



YOUTUBE CHANNEL

Canada Beef developed and added 106 new videos to the LoveCDNBeef YouTube channel. The videos cover topics such as cooking know-how, #mycanadianbeef campaign, the One & Only Beef campaign, and butchery and sustainability/educational videos. All of this content is shared via YouTube advertising, social media and website.

The LoveCDNBeef channel achieved 3M video views, and 23K+ hours of viewing with a total 845K impressions.

YouTube advertising (94%) and Google Searches (54%) were the top ways viewers found Canada Beef videos.

The consumer marketing team identified a need for recipes for meals to feed two people. The team created 12 new videos to go with these recipes and created the Dinner for Two video subscription campaign. The campaign leveraged the 'YouTube for Action' feature. Showing the creative before a YouTube video, to an audience most likely to take action, maximizes the potential by driving people to visit the YouTube homepage and ultimately, subscribe to the channel.

The March 2023 campaign produced tremendous results with 9.5K+ new subscribers to the channel for a total of 11.3K subscribers. The top three videos by subscriber growth were Beef Stroganoff Open-Faced Sandwiches (2.8K new subscribers), Personal Taco Pizzas (2.1K new subscribers) and Korean-Style Pan-Fried Steak Strips (1.5K new subscribers).

Building a subscriber base allows for the content Canada Beef creates to be seen by more people. As we add new video content to the channel, subscribers receive updates and notifications in their newsfeeds.

CANADIAN BEEF MARKETING LIBRARY

The Canadian Beef Marketing Library stores and monitors the resources (images, documents, artwork and videos) created by Canada Beef. The library allows Canada Beef the ability to share with groups such as provincial and national organizations, vendors, creative agencies and international team members.

Nearly 400 new resources were uploaded to the library. Several resources had multiple items added to each resource; 21K searches occurred on the library led by third party searches (61%) requesting access to content; and a how-to-use training document was created to help new users navigate the system.

THINKVEAL.CA

The searchable ThinkVeal.ca web space is a tabbed section within ThinkBeef.ca. The site includes Nutrition Information, a How-to-Cook section with information on the veal cuts and a recipe collection and resource focused on how to dine-in with veal. Plans for next fiscal will focus on driving traffic to the site and demand for the resources.



The top video by subscriber growth was Beef Stroganoff Open-Faced Sandwiches (2.8K new subscribers).





Karine Rekunyk
Director, Health
and Nutrition

Canada Beef's objectives for Health and Nutrition are to educate consumers, stakeholders, and health professionals about beef's place in a healthy diet, and identify and develop communication and proof point resources that highlight beef's distinctive nutritional attributes and the beneficial role beef can play in the diet.

NUTRITION RESEARCH AND REGULATORY INTELLIGENCE

Canada Beef supported two significant policy issues through the Health and Nutrition program area: Health Canada's Front-of-Pack (FOP) nutrition labelling proposal and the Government of Canada's consultation on the development of a Pan-Canadian School Food Policy.

Support provided to industry on FOP was extensive. Items developed included nutrient analyses of all forms of ground beef; comparing these with competing proteins; examining the government's criteria to show that many nutritionally poor foods would qualify for exemptions; and understanding the sources of saturated fat in the diet.

In addition, the team developed summary documents with key messages used by the Canadian Cattle Association (CCA), Canadian Meat Council, National Cattle Feeders' Association, and Canadian Pork Council in their respective advocacy efforts to the government.

From the analyses, seven stand-alone infographics were developed for the policy groups (and used by them in government communications), as well as a full "FOP toolkit" that contained the gathered research and key supporting messages. Canada Beef also provided answers to government questions arising from meetings held by the CCA.

Following the publication of the final FOP regulations by government, Canada Beef published two overviews to communicate the details of the program to stakeholders, and developed an industry training tool to support implementation for applicable products.

Development of a Pan-Canadian School Food Policy involved extensive research on the topic including how the beef industry can support the government's proposed 'shared objectives'. This research, now compiled into a foundation document, will serve to support the policy groups with information and considerations for their efforts with government.

Canada Beef initiated a working committee with the industry policy organizations to collaborate on the plan to communicate our findings to the government. The committee also jointly met with the federal government in Ottawa to discuss the consultation and inform them of a research review underway at Canada Beef. Work on this file will continue in next fiscal.

Reviewing and mining new research continued and five Just the Facts (JTF) research summaries were published. The new JTF's were used to inform Canada Beef's School Food Policy research, develop

new factsheets for stakeholders, and communicate the latest research at health professional conferences attended this year.

A knowledge and insights research study on the topic of infant feeding guidelines commissioned with Leger showed persistent gaps in parents' understanding of the importance of iron for infants. Study results will be used to communicate this important issue to health professionals next fiscal.

Canada Beef participated in external networking groups the International Meat Secretariat (IMS) Human Nutrition and Health Committee, and the Nutrient Rich Alliance (NRA). Both groups offer an important opportunity to network and collaborate on issues of shared concern. In 2022, 15 countries, including Canada, attended the in-person IMS meeting. Canada Beef contributed a review of five emerging global public health topics. The NRA group met twice and collaborated on two projects: consumer research investigating perceptions of plant-based foods and development of a brain health webinar.

Canada Beef also joined the University of Toronto's Program in Food Safety, Nutrition and Regulatory Affairs - a partnership of academia, government (incl. Health Canada) and industry, with a mission to address nutrition and regulatory issues facing Canadians.

To support the above work and more, Canada Beef's Nutrition Expert Advisory (NEA) committee was engaged on multiple occasions for consultation including: FOP analyses and messaging, school food policy messaging direction, guidance on standardizing nutrition information and an Alzheimer's review paper.



HEALTH AND NUTRITION – RESOURCE – OUTREACH

Nutrition reports were prepared on the topics of Alzheimer’s disease, brain health, gout, bone health, diabetes and nutrition considerations for school aged children.

Work on an iron toolkit started this year will continue into next fiscal. A “Iron is a Nutrient of Concern for Many Canadians” poster for health professionals was developed and used for conferences.

Several nutrition infographics were developed such as a comparison of the iron in beef to competing proteins (plant and animal) as well as a comparison of the protein density of beef vs. plant foods. The infographics were used in a variety of applications such as the school food policy work, and health professional communications.

The Health and Wellness factsheet and the Ground Beef Toolkit were revised with updated nutrition information.

HEALTH AND NUTRITION CONTENT DEVELOPMENT

Complete nutrition data was analyzed and assembled into a new database licensed this year to enable sorting of and efficient access to this information. All cuts, grinds and organ meats and associated nutrition information (including nutrition claims) are now available on an as needed, on demand basis for all applications required. Canada Beef uses the database to conduct nutrition analysis for the Gateway.

‘Discover Beef’s Nutrition Story’ was the first video of its type developed by Canada Beef. The video communicates beef nutrition information and messaging and provides a broad, foundational overview about beef’s remarkable nutrition story in engaging and easy to follow formats. The content went through a regulatory review and was fact-checked by the NEA. The video is available in English and French and with or without captions for use at trade shows and in digital programs.

EDUCATIONAL - OUTREACH

Canada Beef achieved a significant increase in educational outreach. The Ashfield “Sample Cupboard” resource distribution program saw nearly 450K health brochures (iron, cholesterol, bone health) delivered to primary care offices across Canada. Monthly orders were up 142% year-over-year to average 1.6K/month.

Canada Beef ran seven ads in the Dietitians of Canada newsletter (including one Gateway ad), resulting in 417K+ impressions and 500 click-throughs to our website/resources.

Canada Beef also reached other nutrition influencers such as occupational health nurses, nutrition interns and dietitians through articles, in-services, and video promotion. The estimated combined reach of these efforts is 3K+ health professionals for article/in-service work and 180K impressions for on-line video retargeting.

Through this tactic, several new resources were developed for application in various distribution routes, including two new videos (protein and bone health), a new nutrition banner, and related conference resources.

BEEF NUTRITION BENEFITS RESOURCES

Through four articles and one ad in Canfit Pro’s printed magazine, Canada beef reached 500K+ health and fitness professional members/subscribers, with three of the articles making the front cover and qualifying for a continuing education credit (CEC). Through Canfit, we also published two nutrition articles in their online magazine, each reaching 40K+ influencers. Articles addressed nutrient shortfalls of Canadians, protein requirements for bone health, protein density of meats vs. plants, nutrients needed for brain health, among others.

Canada Beef commissioned Ashfield to implement a direct-to-health professional engagement program. This initiative reached 1K+ health professionals (primarily GP’s and nurses) via one-on-one calls in Alberta, B.C., Ontario and New Brunswick to deliver the ‘iron matters’ campaign, raising awareness about high iron deficiency rates and Canada Beef’s educational patient resources.

Canada Beef attended and exhibited at several health professional conferences. Highlights include:

- Canadian Nutrition Society (CNS) May 2022 - attended by about 300 delegates, principally nutrition academics, policy makers (including Health Canada) and students in nutrition and health promotion. Canada Beef’s focus was to discuss the pending FOP issue and spread awareness that ground beef was likely to be labelled as high in saturated fat. Other messaging delivered included protein quality and density of beef/meats vs. plants and the poor intakes of iron in vulnerable Canadian populations.
- Nurse Practitioners Conference September 2022. Attended by 350 nurses. Canada Beef’s focus of discussion was iron as a nutrient of concern and our resources for patient education.
- Family Medicine Forum November 2022. This primary care physicians’ conference hosted 2.1K+ in-person delegates. Approximately 300 one-on-one conversations took place at the booth, with priority messaging focused on new research about iron intakes, infant feeding, and protein sources/diet quality of Canadians.





Gina Teel
Director, Stakeholder Communications

Canada Beef's objectives for stakeholder communications are to create and deliver timely and cost-effective communication of the Canada Beef story and team activities back to funding partners and stakeholders using a range of communications vehicles, ensure organizational preparedness for issues and crisis management and provide internal and organizational support during active periods.



CANADA BEEF ANNUAL REPORT

Canada Beef's annual report captures key program achievements, performance metrics and audited financial statements. The fiscal 2021-2022 report was produced in English and French for distribution to industry stakeholders in August. Available in print, PDF and electronic versions, the annual report was distributed to the Agency, Market Development and Promotion Committee, national and provincial beef associations, and other key stakeholders via postage mail, email, and online at canadabeef.ca.



CANADA BEEF PERFORMS MONTHLY E-NEWSLETTER

Canada Beef produced 12 monthly issues of the Canada Beef Performs e-newsletter in English and French (as of May), for digital distribution to subscribers.

This fiscal saw a 23% increase in subscribers, and open rates rise nearly 11% to 50.9%. This places Canada Beef Performs far ahead of the industry open rate average. The click-thru rate is 5.6%, which is also well ahead of industry averages.

Several tactics were deployed to expand readership such as promotion at industry conferences (118 new subscribers), the 2023 Stakeholder Satisfaction Survey (50 new subscribers), and a newsletter awareness campaign targeted to producers (92 new subscribers).

STAKEHOLDER OUTREACH

Outreach initiatives included providing content for stakeholder newsletters, annual reports and annual general meetings, news releases, producer advertorials, participation in national and regional meetings and sponsorships.

Content creation included regular Canada Beef activity update columns for provincial beef producer association quarterly publications Beef in BC and Ontario Beef. Each publication received five columns this fiscal, for a total circulation of 87K. Mid-year and year-end business/activity reports were prepared for national and provincial producer association annual general meeting packages as well as annual reports.

Two news releases, and two industry updates were issued to stakeholders. An ad campaign to promote the Canadian Beef Information Gateway was communicated to producers.

Various corporate activity promotional materials were produced for display at industry conferences and tradeshow (e.g. 120 double-sided information tent cards). Efforts included sponsorship of provincial producer association annual general meeting events.

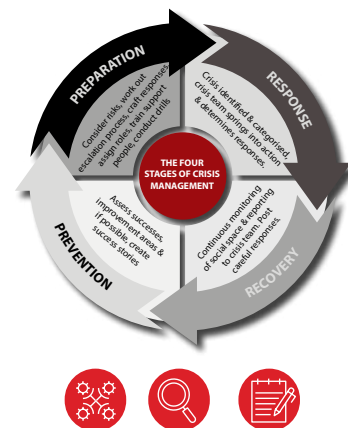
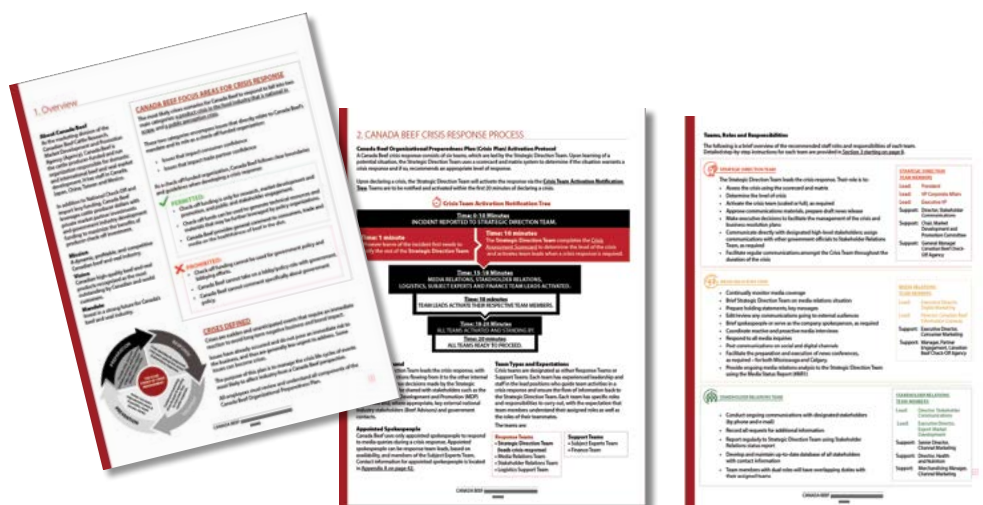
A sponsorship opportunity at the 2023 Alberta Beef Industry Conference allowed Canada Beef to present information about efforts underway at Canada Beef as well as achievements in recognition of the 50th anniversary of beef marketing activities in Canada and its contribution to the success and advancement of the Canadian beef industry.



ISSUES AND CRISIS PREPAREDNESS

The Canada Beef Organizational Preparedness plan was revised to reflect current best practices and the evolving nature of crises. Additions include cyber security breaches that disable an organization’s IT and communications systems to key steps to enable Canada Beef to be proactive in the early hours of a response.

The plan provides comprehensive crisis management instructions, tools and resources for the duration of an emergency event. Improvements to the plan format include ease of navigation, and access to individual working templates for essential tools e.g. crisis evaluation documents and prepared key messaging maps for likely issues/crises. A tabletop exercise to test plan functionality will take place next fiscal.



CANADIAN BEEF INDUSTRY CONFERENCE

Canada Beef is one of the five national beef industry partners who facilitate the Canadian Beef Industry Conference (CBIC). The 2022 conference held in Penticton, BC, hosted domestic and international participants (producers, packers, retail, and industry experts) from across North America.

The program provided a range of relevant and timely sessions. Canada Beef offered an informative session on consumer insights based on new research conducted by Leger research group. Staff shared their culinary expertise in a beef and wine tasting information session.



Canada Beef booth at CBIC in Penticton.

Canada Beef’s updated trade show booth, with high impact graphics and visual displays, was well-received by producers and industry stakeholders. A special promotion involving Beef Pride eStore merchandise drew huge interest and made the booth a crowd favourite.

There were 464 full registrants for the CBIC. Total attendance numbers were 497 including single day and virtual attendees.

MEDIA MONITORING CONTRACT SERVICE

Canada Beef continued to use the Meltwater social listening and media monitoring tool and services. Daily media monitoring allows the team to track Canada Beef mentions in the media, follow the topic and top posts, and track the sentiment of key topics and initiatives. The Meltwater Engage social media management tool allows Canada Beef to track and monitor all social platforms, manage conversations, and surface actionable insights.





Mathieu Paré
Executive Director,
CBCE



Cameron Pappel
Director,
CBCE Studios

Canada Beef's objectives for the Canadian Beef Centre of Excellence are to develop and create resources to support all business units, stakeholder partners and trade-based clients in the domestic and export marketplaces.

EDUCATIONAL RESOURCES

Canada Beef continued to develop educational resources and learning solutions this fiscal year. An innovative course authoring and sales-readiness solution called Brainshark facilitated course creation.

Themes developed to support Canada Beef's Channel Marketing efforts included cost controls for foodservice operations and an exploration of Canadian beef food margins. An online course developed to enhance awareness of food margins demonstrated how Canadian beef menu offerings support higher revenues and profitability for foodservice operations.

The CBCE team created a new educational resource for Consumer Marketing, Understanding Canadian Beef: Pot Roasts. The resource explains the difference between an oven roast and a pot roast, its quality attributes, the benefits of cooking pot roasts and selection and preparation tips. This second consumer-facing instructional resource follows the original pilot course, Understanding Canadian Beef: Oven Roasts, launched last fiscal.

Canada Beef participated at the Calgary Stampede to promote the Canadian Beef Information Gateway (Gateway). The CBCE team created an interactive display where participants accessed the Gateway through scannable QR codes associated with the featured grilling steak cuts, followed by guided tours on how to navigate Gateway features and benefits.

CANADA BEEF VOCATIONAL SCHOLARSHIP PROGRAM

Canada Beef continued its support for the development of meat cutting, culinary and hospitality professionals, with a merit-based award to students who demonstrate excellence in meat cutting and culinary programs. The Canada Beef Award for Excellence recognizes standout students at seven institutions with 11 awards.

The award also recognizes students who value and promote local sourcing and the importance of Canadian beef in hospitality and foodservice operations. Partnerships with key institutions has created opportunities for Canada Beef to engage with educators and students. This engagement with

young leaders in culinary and butchery programs and the support for academic institutions and vocational programs comes at a critical time as industry, and foodservice in particular, rebuilds its human resources post COVID-19.

The participating institutions are Centennial, Holland, and Red River colleges; Southern Alberta Institution of Technology, Northern Alberta Institution of Technology, Saskatchewan Polytechnic and Thompson Rivers University.

CBCE CULINARY VIDEO PRODUCTIONS

With the CBCE closed for ongoing renovations until January 2023, the Centre refocused its efforts to the completion of previously captured material and supported projects filmed offsite. This resulted in the development of 221 original videos plus 414 videos based on original videos from prior fiscal productions.

Once reopened, the CBCE leveraged its newly acquired experience in consumer content creation to develop and deliver a new consumer facing TV-style production, Canadian Beef TV. Part of a broader consumer facing initiative "Beef up your Skills," a first episode pilot launched in February 2023. The Steak Curling episode developed in partnership with some of Canada's top scientific experts provided recommendations on how to prevent steaks from curling away from the grill during cooking.



CBCE WEBINARS

The CBCE deployed its new broadcasting and AV capabilities to five professional culinary and butchery training labs simultaneously via the Taste Canada/Cooks the Books network. The presentation to vocational training institutions focused on Canadian Beef Advantage (CBA) knowledge with special emphasis on quality and consistency of Canadian beef for foodservice operations. The presentation included a demonstration of three opportunity cuts to grow knowledge of beef cuts outside of the highly sought after middle meats.



Participating students “cut-along” with the CBCE demonstrator who presented cutting technique and culinary ideation for tri tip, flank and petite tender.

In addition, 35 viewers attended the online presentation; in many instances, the viewers represented multiple activity participants sharing a classroom monitor.

The product knowledge and industry familiarization was further shared via broadcast at George Brown Culinary Training Institute in Toronto, Ontario to an estimated 200 guests, students and faculty in the dining halls. Taste Canada/Cooks the Books recorded the presentation and shared it via YouTube Channel.

CBCE PARTNER PROGRAM

A partner program created for clients seeking to develop their own resources to support eligible branded marketing strategies contributed to the development of Canadian beef packer partner Harmony Beef’s Heritage beef brand.

**CBCE AV SERVICES UPGRADE, FACILITY RENOVATION**

The CBCE renovation was completed this fiscal with new audio-visual equipment to accommodate increased demand for video resources to support a variety of projects such as the Gateway, CBA, educational programs, consumer test kitchen and hosting functions.



TIMELINE AND KEY ACHIEVEMENTS OF CANADA BEEF 1973 - 2023



CANADA BEEF STARTED GLOBAL OPERATIONS AS A SINGLE ORGANIZATION ON JULY 1, 2011, BUT ITS ROOTS GO BACK TO 1973 WITH THE CREATION OF THE BEEF INFORMATION CENTRE (BIC). WITH THE 50TH ANNIVERSARY OF CONTINUOUS CANADIAN BEEF MARKETING SERVICES TAKING PLACE IN 2023, IT IS IMPORTANT TO LOOK BACK AND ACKNOWLEDGE THE EVOLUTION THAT LED TO THE CREATION OF CANADA BEEF.

BIC started as a domestic consumer information and education organization.

1973



1981

BIC conducted its first consumer research project to determine concerns about beef.

BIC initiated the first national TV and magazine ad campaign, "Beef Sounds Good." The success of the campaign paved the way for further national TV ad campaigns into the 90s.

1982

1987

New nutrition data for beef published in Health and Welfare Canada Nutrient Files, replaced 50-year-old U.S.-based data.



Beef Marketing Services International (BMSI) was created to address the looming threat of country of origin labeling in the U.S. to serve as an unbiased trade facilitation marketing service with a mandate to create, support and implement branded programs utilizing Canadian beef in the continental U.S.

1999



1999

CBEF opened Mainland China office.

CBEF developed the Canadian Beef and Veal handbook.

1998

1996

BIC launched an innovative new naming system for beef cuts based on cooking methods vs anatomical location.

Canada Beef Export Federation (CBEF) is established to promote and support Canadian beef sales in the export marketplace.

1989



1989

Calgary-based CBEF opened offices in Japan and Mexico prior to NAFTA. Canadian beef exports to Japan and Mexico grew exponentially year over year.

BIC, originally an operating division of the CCA headquartered in Toronto, eventually expanded to 7 offices across Canada with 12 professional staff through the 90s.

1990



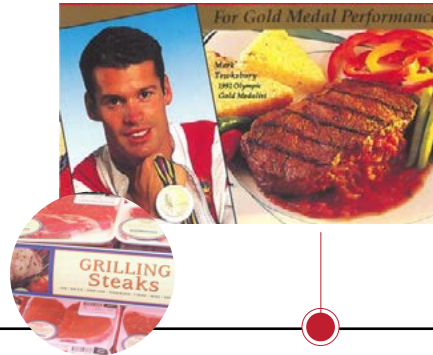
1990's

CBEF's team developed and implemented numerous in-coming missions to bring new customers to experience Canadian beef and veal production systems across Canada.

CBEF opened offices in South Korea and Hong Kong.

1995

"Beef's Got it Good" TV campaign was the highest performing campaign BIC had done to date to increase awareness.



1992

BIC sponsored champion swimmer Mark Tewksbury, who went on to win gold at the 1992 Olympics in Barcelona.

CBEF introduced differentiation and demand building seminars.

1990's



BIC streamlined operations and consolidated offices in Calgary and Mississauga.

Initially responsible for consumer marketing with a keen focus on recipes, nutrition and product safety, BIC evolved to include trade marketing and merchandising programs and services to drive business solutions for packers, distributors, retail and foodservice clients.

2000's

2000

BIC developed the "Canadian Beef Merchandising Guides" featuring new cuts.



2002

BMSI operations, originally sponsored by CCA, are rolled into BIC.

Import levy funds generate approximately \$1 million annually, invested in generic beef marketing programs that support the promotion of unbranded beef sold in Canada.



The working group recommended that BIC, CBEF, and the Agency merge into a single organization. The working group released its final report in January 2011 and on July 1, 2011 Canada Beef came into being.

2011

2013

An amended Beef Cattle Research, Market Development and Promotion Levies Order was gazetted that allowed check-off to be collected on beef imports.

2010

A Canada Beef Working Group is struck to investigate a new organizational structure that would streamline the beef marketing, research, and promotion activities carried out separately by BIC, CBEF and the Canadian Beef Cattle Research, Market Development, and Promotion Agency (Agency).

Canada Beef opened the Canadian Beef Centre of Excellence. This state-of-the-art facility promoted new beef products, provided training and education, and built Canadian beef brand loyalty in international markets.



2015

Canada Beef offered enhanced education solutions for packers, processors, end-user clients and educators.



Canada Beef developed the Canadian Beef Information Gateway. Its use of QR codes is another example of how Canada Beef continues to reach out to consumers in a manner to which they are accustomed.

2021

BIC developed and launched "Financial Tools for Meat Professionals" (retail and foodservice).

2002



2002

Canadian beef exports reached an all-time volume record of 521,000 tonnes (\$2.2 billion).

BSE discovered in Canada.

2003



CCA, BIC, CBEF, provincial producer associations, Cattle Feeders, GOC, CMC, Retail/Foodservice Associations mobilized.

Canadians rallied behind beef producers and industry to purchase beef suspended from export trade.

No other country in the world had experienced growth in beef consumption in the aftermath of a BSE case.

A testament to consumer confidence in the Canadian beef delivery system.

The Canadian Beef brand mark is developed, trademarked and launched everywhere.

2003 - BIC developed and launched "Good Retail Practices" in cooperation with the pork sector.

2009

The brand mark provided a global symbol to differentiate Canadian beef vs competitors in all markets paving the way forward.

2003

2003
BIC developed and launched "Ground Beef Management Tools"

2003

BIC developed and launched an OTM strategy including merchandising and grading resources to support the sector.

The Gateway is officially launched.

2022



Extensive renovation at the CBCE is complete. Renovations and audio/visual upgrades to the CBCE ensure the facility continues to play a key role in communicating the Canadian Beef Advantage across digital platforms to consumers, culinary and butchery students, and meat professionals worldwide.

2023



“Canada Beef’s efforts resulted in improved satisfaction levels across multiple categories and our overall result for 2023 aligns with the prior year’s result.

The 2023 Global Stakeholder Satisfaction Survey also identified areas where we have some work to do to improve stakeholder awareness about our programs and services.

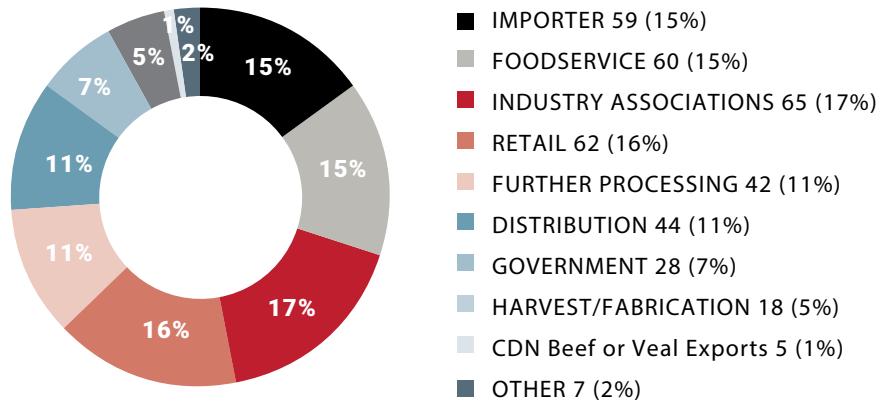
The feedback received will guide future enhancements to Canada Beef’s initiatives as we strive to increase satisfaction levels for all stakeholders.”

Michael Young
President, Canada Beef

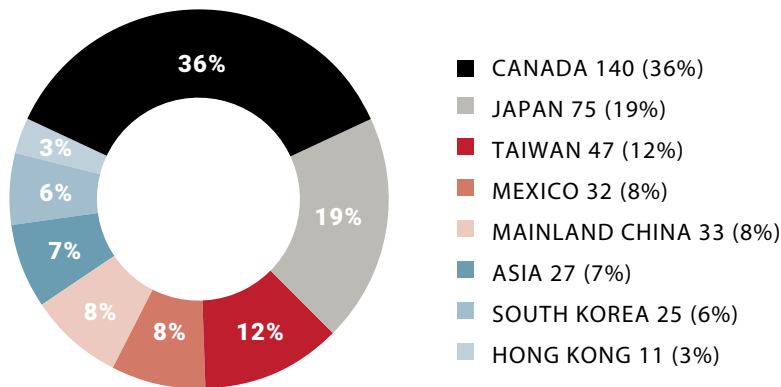
GLOBAL STAKEHOLDER SATISFACTION SURVEY

Canada Beef conducted its third annual Global Stakeholder Satisfaction Survey in February 2023. The survey is conducted to determine awareness and satisfaction levels among domestic respondents, Canadian exporters, and international clients. The results of the survey support the continued development of our initiatives to promote Canadian beef in global markets. Survey invitations were sent by email to stakeholders sourced from staff contact lists. Three separate questionnaires were developed in relation to initiatives for the domestic market, Canadian exporters and international clients respectively. Responses for key metrics were then combined across all three target populations to achieve a global measure of satisfaction with Canada Beef. Sectors represented by survey respondents were retail, foodservice, import, trading, processing, distribution, Canadian beef and veal brand owners, government, national industry and provincial producer associations. Respondents completed the survey online, and 390 responses were received during the survey period, a -2% difference from the prior year’s survey.

SURVEY RESPONDENTS BY SECTOR



RESPONDENTS BY COUNTRY



PERFORMANCE MEASURES

Respondents were asked to rate their satisfaction with Canada Beef as an organization including staff knowledge and skills, responsiveness, and overall contribution. In addition, participants were requested to rate their satisfaction with Canada Beef's initiatives. The results are shown in the table below.

The Canada Beef Global Satisfaction score was calculated by weighting the responses from the domestic, export and international client questionnaires. Feedback for domestic initiatives was given a weighting of 60% while Canadian exporters and international respondents were assigned the remaining 40% in equal proportions. This allocation considers that in recent years an average of approximately 60% of Canadian beef was consumed in the domestic market. Using this approach an overall 2023 global satisfaction score of 74% was calculated. The score was in line with the previous year's survey, which produced a result of 75%. Typically, less than 5% of stakeholders indicated that they were dissatisfied with any of the attributes surveyed. A significant minority noted they were unable to comment which reduced satisfaction scores as in 2022.

Global Satisfaction Survey	STAKEHOLDER TYPE*			
	DOMESTIC	EXPORT	INTERNATIONAL	GLOBAL
RESPONDENT ATTRIBUTES				
Stakeholder Location	Canada		International	Global
Stakeholders Responding	127	13	250	390
Global Satisfaction Score Weighting	60%	20%	20%	100%
ORGANIZATIONAL SATISFACTION MEASURES (% SATISFIED)				
Staff Knowledge and Skills	77%	69%	96%	79%
Staff Responsiveness	70%	69%	97%	75%
Overall Contribution	71%	92%	97%	80%
INITIATIVE SATISFACTION MEASURES (% SATISFIED)				
Programs and Services	59%	77%	88%	68%
Resources and Materials	65%	86%	91%	74%
Social Media, Web and Apps	54%	NA	92%	69%
Overall Satisfaction (Average)	66%	79%	94%	74%

*International clients were located in Japan, South Korea, Mexico, China, Taiwan, Hong Kong and SE Asia. Domestic stakeholders and Canadian exporters were contacted in Canada.

ORGANIZATIONAL SATISFACTION MEASURE

International stakeholders reported the highest level of satisfaction across this category. Staff Responsiveness (97%) and Overall Contribution (97%) ranked highest, followed by Staff Knowledge and Skills (96%). Domestic stakeholders rated Staff Knowledge and Skills at 77% followed by Overall Contribution (71%) and Staff Responsiveness (70%). Export stakeholders rated Overall Contribution highest (92%) and 69% to each of Staff Responsiveness and Staff Knowledge and Skills.

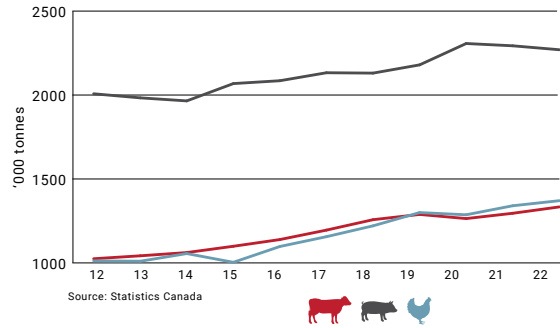
INITIATIVE SATISFACTION MEASURE

International stakeholders had the highest satisfaction with Canada Beef initiatives across this category, with Social Media, Web and Apps ranked highest (92%), followed by Resources and Materials (91%) and Programs and Services (88%). Domestic stakeholders rated Resources and Materials highest (65%) followed by Programs and Services (59%) and Social Media, Web and Apps (54%). Export stakeholders rated Resources and Materials at 86%, and Programs and Services at 77%.

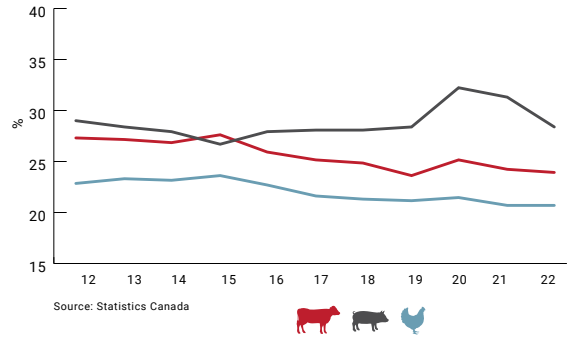
The score was in line with the previous year's survey, which produced a result of 75%. Typically, less than 5% of stakeholders indicated that they were dissatisfied with any of the attributes surveyed.

MARKET PERFORMANCE INDICATORS

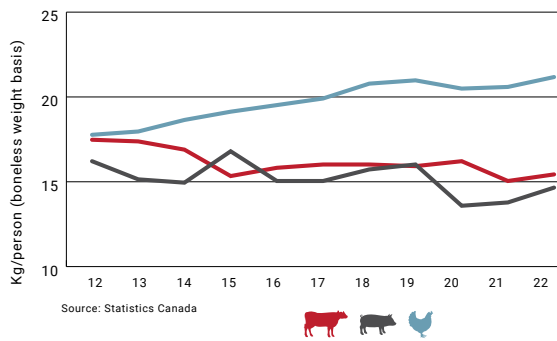
CANADIAN MEAT PRODUCTION



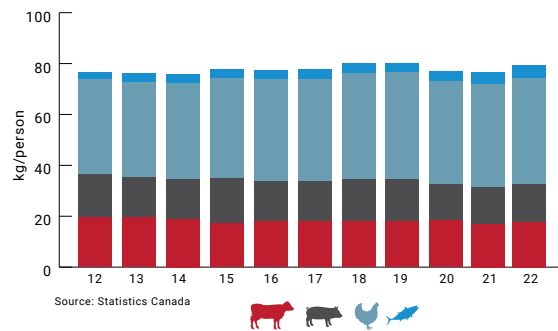
MEAT IMPORTS AS % OF DOMESTIC DISAPPEARANCE



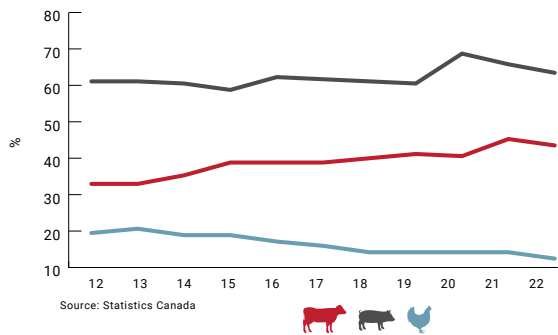
CANADIAN MEAT DISAPPEARANCE



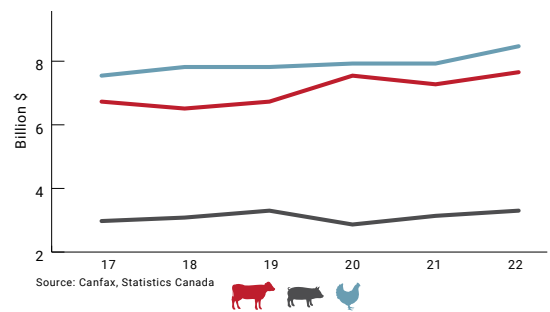
MEAT CONSUMPTION SHARE IN CANADA



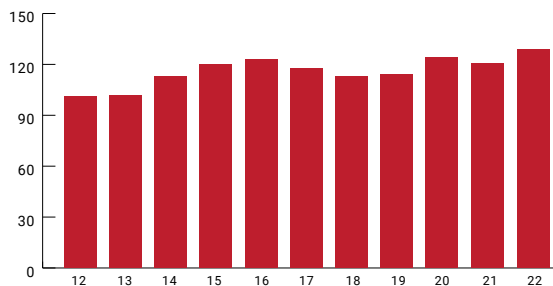
CANADIAN EXPORTS AS % OF PRODUCTION



REAL CANADIAN MEAT EXPENDITURES



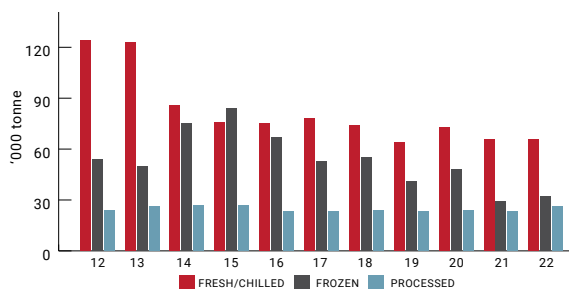
**CANADIAN RETAIL BEEF DEMAND INDEX
(INDEX 2000=100)**



Source: Canfax

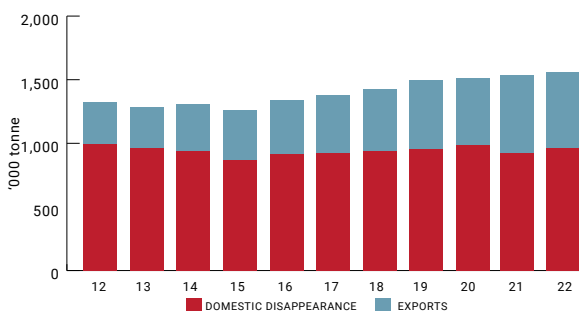


**BEEF AND VEAL IMPORTS
INTO CANADA BY VOLUME**



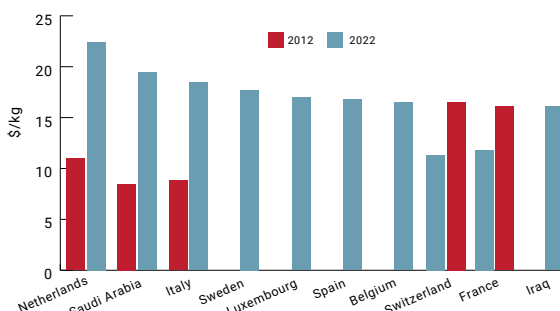
Source: Statistics Canada, AAFC

**CANADIAN BEEF & VEAL DOMESTIC
DISAPPEARANCE VS EXPORT**



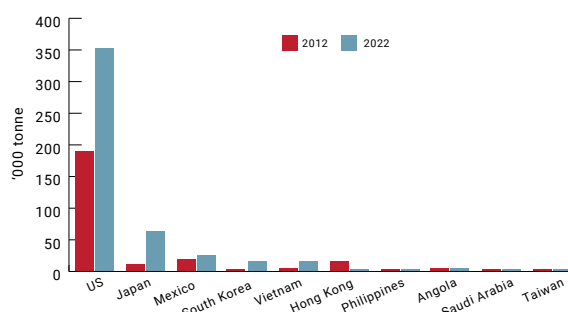
Source: Statistics Canada

**CANADIAN BEEF & VEAL EXPORTS,
TOP TEN UNIT VALUE MARKETS 2012 vs 2022**



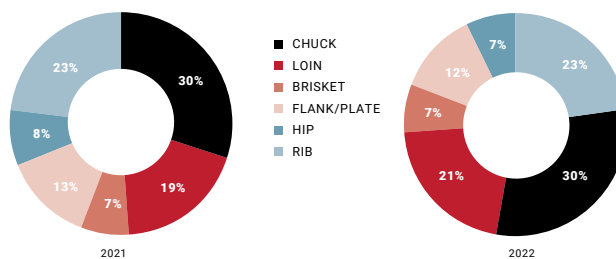
Source: Statistics Canada

**CANADIAN BEEF & VEAL EXPORTS,
TOP TEN MARKETS BY VOLUME 2012 vs 2022**



Source: Statistics Canada

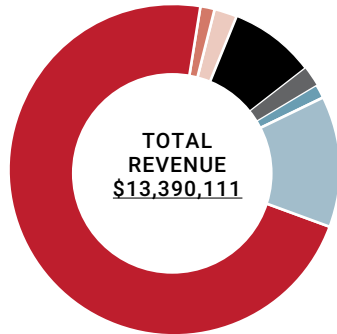
**EXPORTS BY PRIMAL CUTS BASED
ON VALUE, TOP 10 MARKETS 2011 vs 2022**



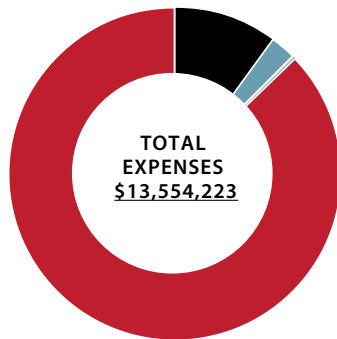
Source: Statistics Canada, AAFC



Michael Shittu
Vice President,
Finance and
Operations



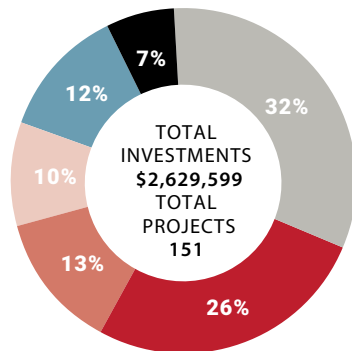
- TOTAL REVENUE \$13,390,111**
- GOVERNMENT OF CANADA CAP \$1,714,665
 - DOMESTIC BEEF CHECK-OFF: TRANSFERS FROM AGENCY MARKETING \$9,648,412
 - AMORTIZATION OF DCC \$203,657
 - GOVERNMENT OF ALBERTA EMD \$275,577
 - IMPORT LEVIES \$1,127,288
 - PUBLIC AND STAKEHOLDER ENGAGEMENT \$248,920
 - OTHER INCOME: \$171,592



- TOTAL EXPENSES \$13,554,223**
- MARKETING: GENERIC BEEF \$1,370,223
 - PUBLIC AND STAKEHOLDER ENGAGEMENT \$335,704
 - BEEF CHECK-OFF BOARD OF DIRECTORS (MARKETING COMMITTEE) \$28,348
 - MARKETING: BRANDED BEEF \$11,819,948

These charts represent information from the 2022/2023 audited financial statement of the Canadian Beef Cattle Research, Market Development and Promotion Agency.

GENERIC EXPORT PROGRAM INVESTMENT BY MARKET



- EMERGING MARKETS \$171,619 (PROJECTS 11)
- JAPAN \$849,691 (PROJECTS 37)
- MEXICO & LATIN AMERICA \$695,208 (PROJECTS 43)
- SOUTH KOREA \$341,169 (PROJECTS 18)
- CHINA & HONG KONG \$254,882 (PROJECTS 25)
- TAIWAN & SOUTHEAST ASIA \$317,030 (PROJECTS 17)

STAY CONNECTED WITH CANADA BEEF

Canada Beef is committed to keeping producers and stakeholders informed about the domestic and international market development and promotion activities undertaken to increase demand for Canadian beef while ensuring the maximum value for producer dollars.

Here are two ways to help you stay connected:

CANADA BEEF PERFORMS

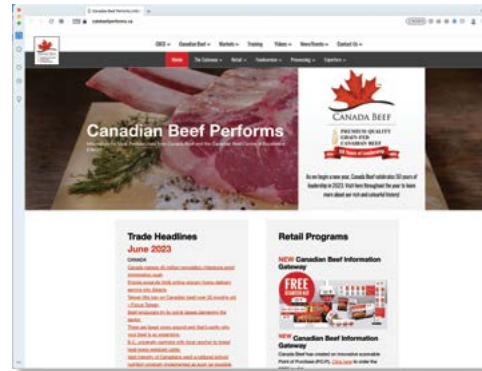
Subscribe to our free monthly e-newsletter delivered directly to your inbox. You'll learn about:

- International market statistics, and updates and information on tradeshows, promotions and events
- Domestic market updates including activities and resources
- Canadian Beef Centre of Excellence news and developments
- Digital and Consumer marketing team project updates and information
- Health and Nutrition team news and developments

Subscribe today at www.canadabeef.ca/canadabeefperforms

CDNBEEFPERFORMS.CA

The Canadian Beef Performs website provides information for meat professionals in the retail, foodservice and processing sectors. Check out Canadian Beef Information Gateway updates, industry statistics, and cooking and cutting videos for home and professional chefs and butchers, courtesy of Canada Beef and the Canadian Beef Centre of Excellence.



Gateway program coming to a local meat case near you
Canada Beef's innovative point of purchase (POP) toolkits are rolling out to small or independent retailers implementing the first phase of the Canadian Beef Information Gateway (Gateway) in their meat cases. [Read More](#)

Mexico and Latin America Update
Canada Beef partnered with Carnes Premium MX to target the B2B trade market in the city of Saitito (Coahuila State) to offer an educational presentation and beef cutting/sampling workshop. [Read More](#)

Japan and Korea Update
In the middle of downtown Seoul is a unique restaurant and retail shop called LONG WEEKEND which opened in January 2022. [Read More](#)

Consumer Marketing Update
Costco is well known for its Canadian beef selection, and for offering large primal pieces to its customers as a cost-saving option. Canada Beef has worked with Costco for over a decade to provide a helpful guide to show their customers how to cut these large primals into portion sizes to fit their family needs. [Read More](#)

Export Market Development
One of the tactics of Canada Beef's export market development strategy is to invest in trade advertising to promote and highlight Canadian beef qualities and attributes to beef buyers in primary and emerging export markets. [Read More](#)

Canadian Beef Centre of Excellence
Ronald McDonald House Charities® Alberta (RMHC) provides a home-away-from-home for out-of-town families with children receiving care in a local hospital. [Read More](#)

stay connected on social media

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

Canadianbeef
 LoveCDNBeef and CanadaBeefInc
 @loveCDNBeef and @CanadianBeef

lovecdnbeef
 Love Canadian Beef
 Canada Beef
 @lovecdnbeef



NO. 1 RECIPE FOR SITE SEARCHES ON CANADABEEF.CA IN FQ4;

This recipe for Beef Bulgogi Dumplings (3 ways) topped the list at #1



THE TOP SIX SEARCH TERMS ALL WERE RELATED TO CUTS OF BEEF.

SIRLOIN TIP ROAST, INSIDE ROUND, PRIME RIB, BRISKET, BEEF STEW, BLADE ROASTS.

