



National Cattle Feeders' Association

Canada's New National Beef Strategy

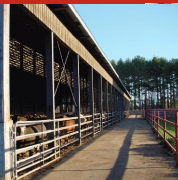
Canadian Angus Association
Lethbridge, Alberta
March 31, 2015

Presentation Outline

- 1) Introduction to NCFA
- 2) Genesis of the New National Beef Strategy
- 3) Key Pillars of the National Beef Strategy
- 4) Industry Leaders Speak
- 5) NCFA Strategic Plan and Alignment
- 6) Implementation



About NCFA



National Cattle Feeders' Association

Vision: A business-oriented organization advancing the national fed cattle value chain by focusing on growth and sustainability, competitiveness, and industry leadership.

Mandate: Established in 2007 to represent Canadian cattle feeders on national issues and collaborate with other cattle organizations across the country to strengthen the beef industry.

Scope: NCFA is truly national in scope, covering all major cattle feeding provinces and regions in Canada.



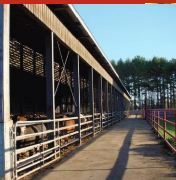
Membership and Funding

Membership is comprised of provincial beef organizations with board representation and funding based on provincial fed cattle populations.

- British Columbia Association of Cattle Feeders
- Alberta Cattle Feeders' Association
- Saskatchewan Cattlemen's Association
- Manitoba Beef Producers
- Ontario Cattle Feeders' Association
- Fédération des producteurs de bovins du Québec



Genesis of the National Beef Strategy



2012 Beef Summit

- Calgary Beef Summit held on November 27, 2012.
- Summit is co-hosted by ALMA, Cargill, and the Alberta Cattle Feeders' Association.
- Over 50 leaders across the beef supply chain met to discuss the future of Canada's beef industry.
- Three "Strawmen" were selected to compile initial thoughts for an industry strategy and bring these forward at a second summit:
 - David Andrews
 - John Kolk
 - Kim McConnell



2013 Beef Summit

- During Winter of 2013, the Strawman team developed their ideas and tested them with key beef industry leaders.
- Two special meetings were held in Spring 2013 – one in Toronto and another in Calgary. The meetings help develop the ideas further.
- A Steering Committee and four specialized Task Teams were formed during the Summer of 2013 to expand the work, identify specific opportunities, and develop initial recommendations.
- A second beef summit is held in December 2013 in Calgary. At the meeting, the Strawman team publicizes the results of their work.
- Following the summit, a report is issued.



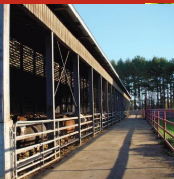
Three Strategic Priorities:

- Enhancing Profitability
- Enhancing Competitiveness
- Enhancing Industry Synergy and Alignment

Building a Stronger Canadian Beef Industry Recommendations from the 'Straw Man Process'

December 2013

Authored by
David Andrews, John Kolk and Kim McConnell

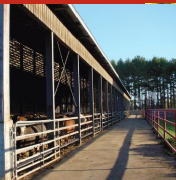


Strawman Recommendations

- A Council of Beef Leaders with an Independent Executive Chairman should be established to shepherd industry progress:
 - Canadian Beef Breeds Council (2 Reps)
 - Canada Beef Inc (2 Reps)
 - Canadian Cattlemen's Association (2 Reps)
 - National Cattle Feeders' Association (2 Reps)
 - Young Cattlemen's Council (2 Reps)
 - Beef Processors (3 Reps)
- Other recommendations speak to:
 - Actions to implement the three priorities
 - Identification of performance measures and targets
 - Information flow
 - Industry funding
 - Communications



National Beef Strategy



CANADA'S NATIONAL BEEF STRATEGY

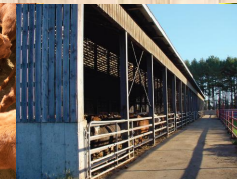
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A NEW NATIONAL BEEF STRATEGY

The increasing global demand for protein has presented Canada's beef industry with opportunity to position itself strategically and increase demand for its beef products. Seizing this opportunity in a time of tight supplies and reduced marketings is a challenge industry can overcome by working together. This spirit of collaboration is the anchoring pin of the new National Beef Strategy – developed by industry for industry. Find the National Beef Strategy [here](#).

NATIONAL BEEF STRATEGY PARTNERS



2014 Beef Strategy Development

With the conclusion of the Strawman process, beef industry organizations begin meeting in 2014 to finalize a strategy:

National

Beef Cattle Research Council
Canadian Beef Breeds Council
Canada Beef Inc.
Canadian Cattlemen's Association
National Cattle Feeders' Association

Provincial

British Columbia Cattlemen's Association
Alberta Beef Producers
Saskatchewan Cattlemen's Association
Manitoba Beef Producers
Beef Farmers of Ontario
New Brunswick Cattle Producers
Nova Scotia Cattle Producers
Prince Edward Island Cattle Producers



Beef Strategy Vision and Mission

Vision: A dynamic profitable Canadian cattle and beef industry.

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

Strategic Pillars:

- Beef Demand
- Competitiveness
- Productivity
- Connectivity

Leadership: Establishment of the Canadian Beef Advisors (CBA). The CBA includes representation from all national beef industry organizations with a rotating chair.



Beef Strategy Pillars

Pillar #1: Beef Demand

Increase carcass cutout values by 15% by 2020.

Pillar #2: Competitiveness

Reduce cost disadvantages by 7% by 2020.

Pillar #3: Productivity

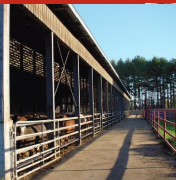
Increase production efficiency by 15% by 2020.

Pillar #4: Connectivity

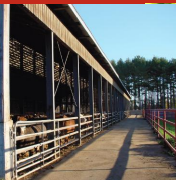
Enhance industry synergy and connect positively with our consumers, the public, government, and partner industries.



A Word from the Industry Leaders...



NCFA Strategic Plan



NCFA Strategic Plan

Pillar #1: Growth and Sustainability

Create a business and trade environment conducive to the growth and sustainability of the cattle feeding sector.

Pillar #2: Competitiveness

Influence the regulatory and policy regimes to improve the competitiveness of the cattle feeding sector.

Pillar #3: Industry Leadership

Establish NCFA as a recognized, credible, reputable, and solutions-oriented expert on Canada's cattle feeding sector.



Alignment

There are a number of key areas where the National Beef Strategy and NCFA's own Strategic Plan are in alignment. NCFA is prepared to take ownership and contribute to achieving the larger vision:

- Regulatory Reform Initiative
- Industry Awareness and Communication Project
- Promoting our Social License to Operate
- Labour Recruitment and Retention
- Supporting Production and Feed Grains Research
- Active participation on the Canadian Beef Advisors
- Engaging with the National Strategic Plan Working Group

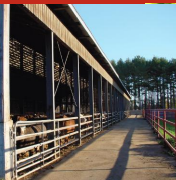


Examples of NCFA Projects

- Feedlot Animal Care Assessment Tool
 - A single feedlot animal care protocol
 - \$35,000 NCFA investment levered an additional \$290,000
- Feedlot Emergency Preparedness Plan
 - Development and piloting in Alberta
 - Plan can be modified and applied in other provinces
 - Total investment of \$293,000
- Research Projects
 - \$20,000 NCFA investment in CBGA modernization initiative
 - Support for the development of a new *Histophilus Somni* vaccine
- Regulatory Reform Initiative
 - New NCFA project just approved
 - Initial investment of \$100,000



A Question of Implementation



Implementation

The new National Beef Strategy is bold and ambitious, but also includes specific performance targets and a timeline for completion. Successful implementation will require:

- Active engagement of all national and provincial beef industry organizations and stakeholders.
- Participation and support from cattle producers across the country.
- A successful conclusion to the question of industry funding, including a potential increase in the national check-off.





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