





CANADIAN BEEF



PREMIUM QUALITY  
GRAIN-FED  
CANADIAN BEEF

# The Canadian Beef Advantage





# HEADWINDS

*Navigating the forces shaping marketing Canadian beef*

## THE CONTEXT

- Intensifying great-power rivalry and trade volatility
- Demand remains strong at home and abroad — but prices stay elevated
- Diversification across multiple channels is now imperative
- Real vs. inflation-inflated profit — a widening gap to watch
- Input costs volatile: forage is fragile, expansion costly, land prices high
- Exchange-rate dynamics add a further layer of uncertainty

## THE PRESSURES



### TRADE & MARKETS

- Tariffs & trade agreements
- China access — for how long?
- Geopolitical arena
- Price sensitivity vs. demand



### SUPPLY & PRODUCTION

- Record-low herd size and a long rebuilding cycle.
- Supply constraints
- Succession
- **Animal health (screwworm)**
- Capital & financing constraints



### REGULATORY

- Regulatory burdens — SRM
- Maple Leaf usage
- CFIA oversight



### STRATEGIC RESPONSE

- Forging a dense web of connections
- Multi-channel diversification
- Building resilience


# MARKET SNAPSHOT

General information • Q1 update

FRESH / FROZEN  
BEEF 

**+16.2%**

Store food prices +3.8% YoY

Q1 PRODUCTION 

**-5% / -3%**

USA / Canada vs. prior year

CHINA 

**#6**

Mexico #2, surpassing Japan!

Grocery Prices 

**+30.1%**

Since February 2021

## SUPPLY & DEMAND

- Tightening supplies as summer demand ramps up
- Fed cattle and 90% lean trim already at record highs; expected to climb further
- Production trending lower across North America (USA -5%)
- Packers losing big time (USA +300/head)
- Beef imports rose by 21% in 2025.
- Beef/Pork ratio 2.76 ; Beef/Poultry ratio 2.83

## TRADE & OUTLOOK

- No new USDA news on a possible Mexican border reopening to feeder cattle
- Exports expected to decline on tightening supplies
- Risk: opens market share in Japan and Korea for Australia and Brazil

# VOLUMES

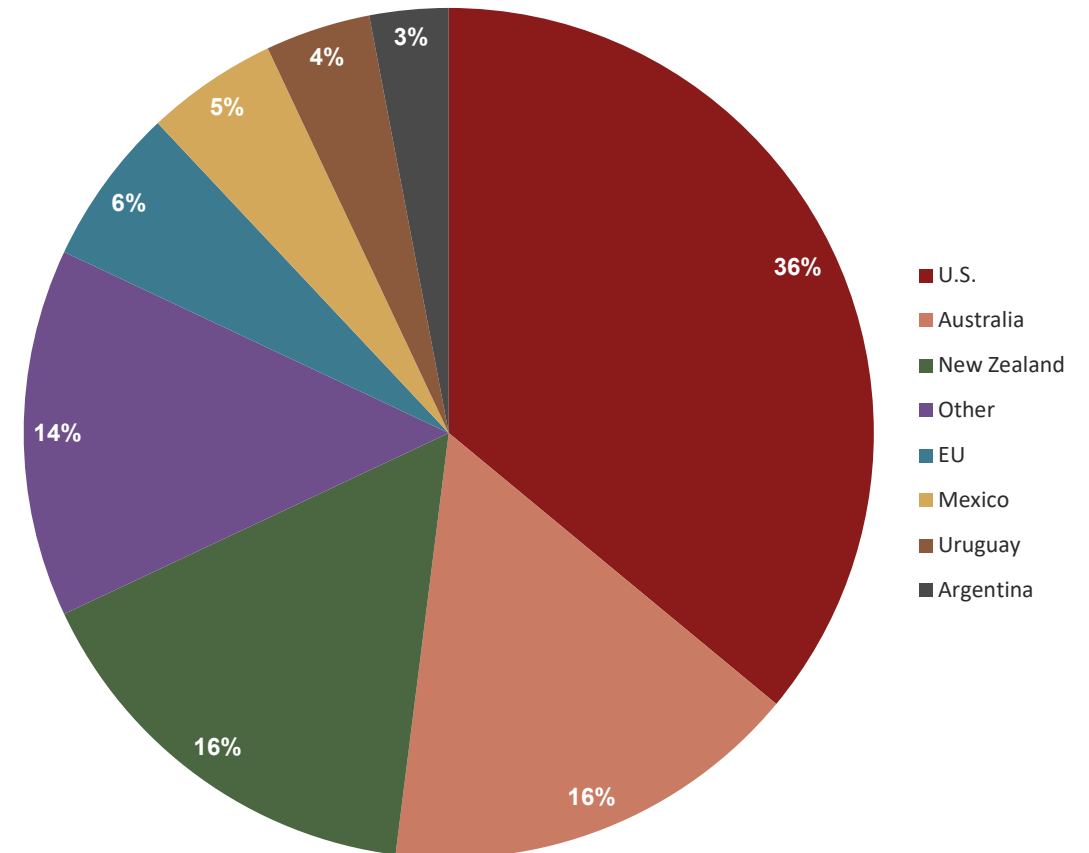
2026 YTD vs. 2025 •

## DOMESTIC FLOWS



## IMPORTS BY SOURCE

2025 YTD share of imports



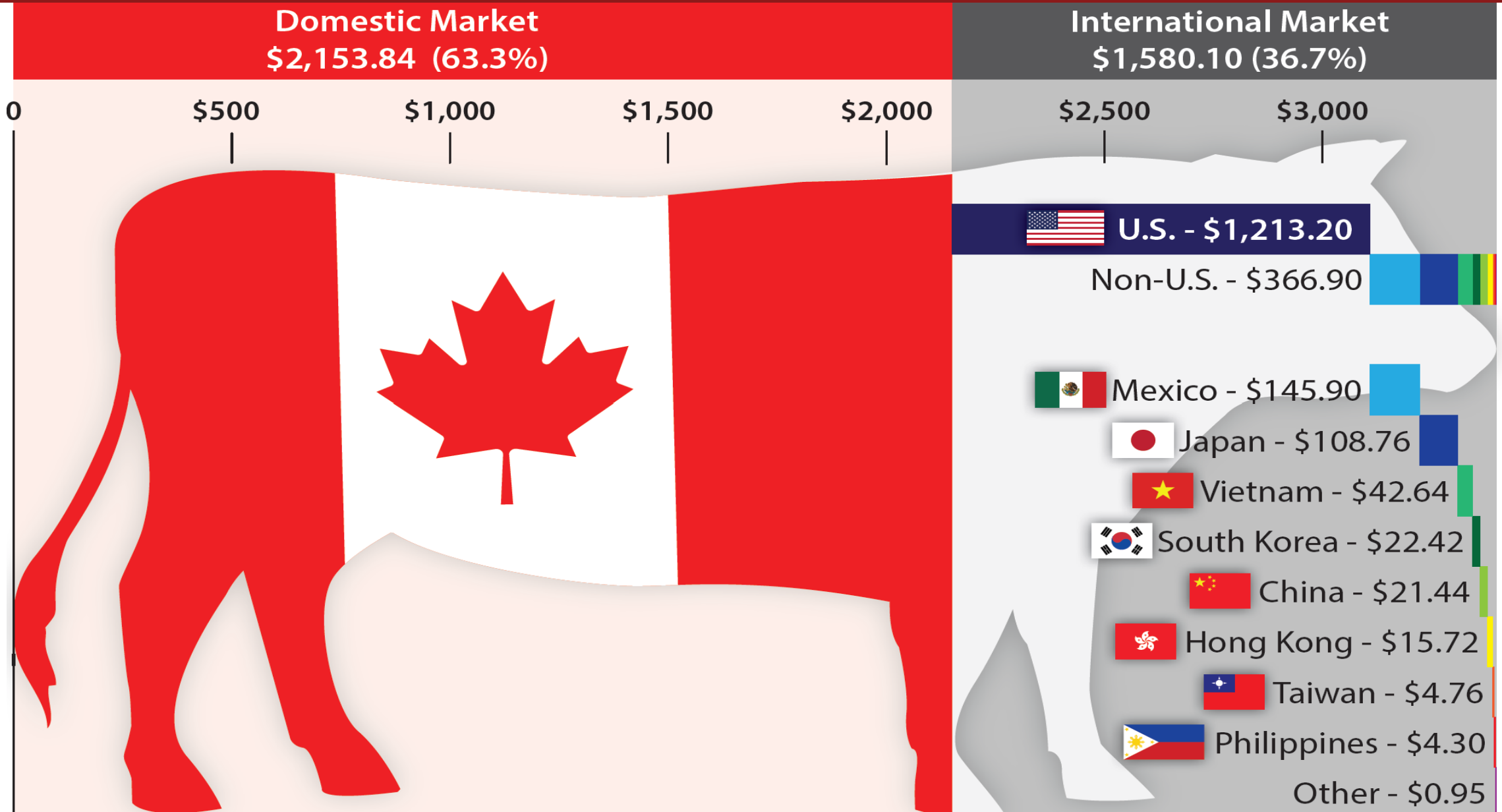
Source: Statistics Canada

# Canadian Exports of Beef and Veal Products

## March 2026

Country	Year \$	Canadian \$ (000)		Rank	Year MT	Volume (MT)		Rank	Year \$/kg	Price (\$/kg)		Rank
	Change	2025	2026		Change	2025	2026		Change	2025	2026	
United States of America	-1.4%	1,059,411	1,044,754	1	-7.1%	93,082	86,475	1	6.2%	\$11.38	\$12.08	6
Mexico	37.0%	91,716	125,643	2	26.1%	9,071	11,442	2	8.6%	\$10.11	\$10.98	7
Japan	-4.4%	98,015	93,658	3	-19.1%	11,342	9,175	3	18.1%	\$8.64	\$10.21	10
Vietnam	106.0%	17,827	36,724	4	146.1%	1,841	4,532	4	-16.3%	\$9.68	\$8.10	11
Korea, South	-59.8%	48,067	19,307	5	-59.3%	4,647	1,890	5	-1.2%	\$10.34	\$10.22	9
China	41133.9%	45	18,460	6	31284.1%	4	1,254	6	31.4%	\$11.20	\$14.72	2
Hong Kong	15.7%	11,702	13,535	7	42.8%	754	1,076	8	-19.0%	\$15.52	\$12.57	5
Taiwan	-18.0%	5,000	4,100	8	-4.3%	410	392	11	-14.3%	\$12.20	\$10.45	8
Saudi Arabia	13.0%	3,605	4,074	9	-16.6%	278	232	12	35.5%	\$12.98	\$17.59	1
Philippines	10.4%	3,355	3,706	10	163.1%	339	893	9	-58.0%	\$9.89	\$4.15	13
Colombia	9.3%	2,907	3,177	11	-8.2%	646	593	10	19.0%	\$4.50	\$5.36	12
Netherlands	97.9%	1,083	2,142	12	119.0%	72	158	14	-9.7%	\$14.98	\$13.53	3
Italy	-24.2%	2,583	1,957	13	8.2%	140	152	15	-30.0%	\$18.41	\$12.89	4
Peru	126.9%	804	1,824	14	234.1%	334	1,117	7	-32.1%	\$2.40	\$1.63	15
Suriname	30.6%	636	831	15	31.6%	161	212	13	-0.8%	\$3.95	\$3.92	14
Other	-22.5%	5,934	4,602		-29.4%	364	257		9.8%	\$16.30	\$17.90	
<b>Grand Total</b>	<b>1.9%</b>	<b>1,352,690</b>	<b>1,378,493</b>		<b>-2.9%</b>	<b>124,272</b>	<b>120,644</b>		<b>5.0%</b>	<b>\$10.88</b>	<b>\$11.43</b>	

# EXPORT VALUE CONTRIBUTION (YTD 2026)



# EXPORT VALUE CONTRIBUTION (2025) Statistics Canada, CBGA

TOTAL VALUE PER ANIMAL

**\$3,375**

*Domestic + international, CDN \$/head (2025)*

EXPORT VALUE PER HEAD

**\$1,850**

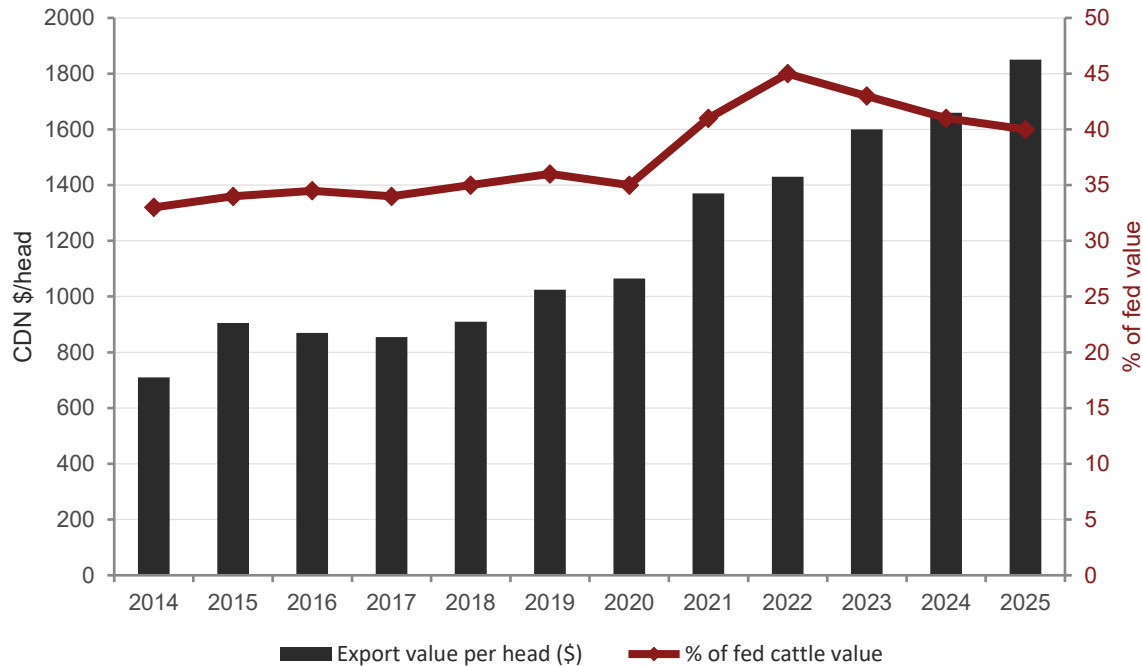
*2025 • up from \$710*

EXPORT SHARE OF FED VALUE

**~40%**

*2025 • peaked ~45% in 2022*

## EXPORT VALUE TREND (2014-2025)



## WHERE THE VALUE GOES

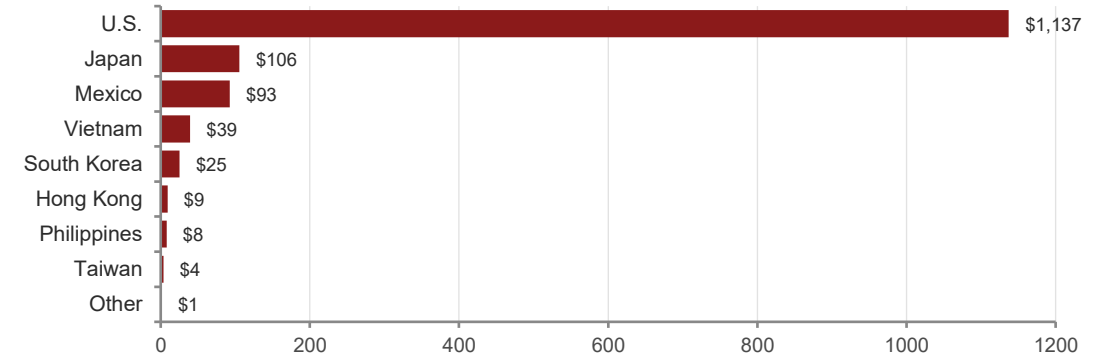
**DOMESTIC**  
**\$1,954**

*57.9% of total*

**INTERNATIONAL**  
**\$1,421**

*42.1% of total*

*International value by destination (\$/head)*



# DOMESTIC DATA

Nielsen-Canfax • March 28, 2026

## GROUND BEEF

**\$15.57** /kg

vs. \$13.85 **+12% YoY**

## RIB CUTS

**\$35.69** /kg

vs. \$39.01 **-9% YoY**

## STRIPLOIN

**\$40.09** /kg

vs. \$35.00 **+15% YoY**

## BEEF EXPENDITURES

**+17%**

\$320 → \$374 per capita

## VOLUME PICTURE

Per capita Beef Consumption 2025 : +3.4% (16kg), Pork 14.6kg (=), Poultry 42.4kg (+4%). Forecast 2026 (17.87, +11%)

Retail Beef Index : +10% (159 vs 144)

Protein Spending Share: Beef 43.5% • Chicken 41.3% • Pork 15.2%

Substitution: Ground chicken **+10%**, ground pork **+2%**

**Canadian Beef Grading : +83% Prime and AAA!!!!**

## REGIONAL DIVERGENCE

### EAST

Volume -6% • Avg price \$18.99/kg

Expenditures +10% (52w) / +6% (12w)

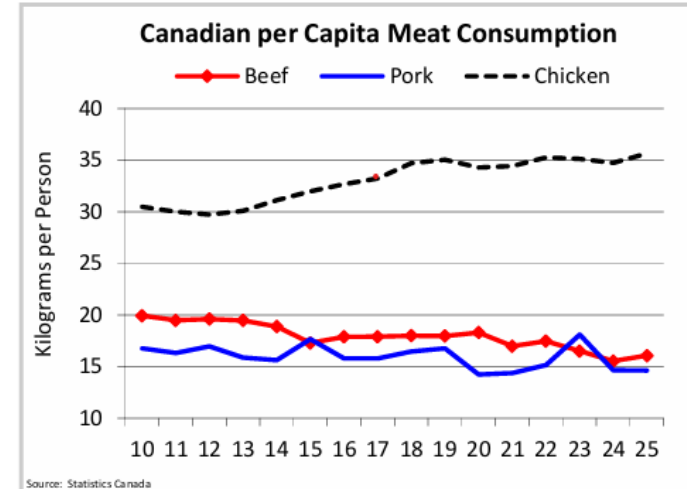
Steak \$29.94/kg • Shift to pork roasts & chicken

### WEST

Volume -9% • Avg price \$21.51/kg

Expenditures +9% (52w) / +6% (12w)

Steak \$36.56/kg • Shift to ground chicken



**STRATEGIC TAKEAWAY:** Beef demand is strong in dollars but weakening in behaviour — that gap is where long-term risk sits.

# OUR ACTIVITIES

Four pillars of our work



01

## PUBLIC STAKEHOLDER ENGAGEMENT & COMMUNICATION

*Building trust with consumers, media, government, and industry partners.*



02

## INTERNATIONAL ACTIVITIES

*Growing global demand and diversifying export markets.*



03

## DOMESTIC ACTIVITIES

*Strengthening the Canadian market and consumer connection.*



04

## PHILANTHROPIC ACTIVITY

*Giving back to communities and supporting industry causes.*

# 01 PSE ACTIVITIES

Public Stakeholder Engagement

Canada Beef PSE works across industry, consumer, and academic channels

## INDUSTRY & PRODUCER



**Feedlots (Feedlots .... feed lots)**  
with ACFA



**Agribition**  
national showcase



**Calgary Stampede Cattle Trail**  
supporting Alberta Beef Producers' consumer outreach

## CONSUMER & DIGITAL



**Canadian Food Focus**  
through AI-powered search platforms



**Food Day Canada**  
celebrating Canadian beef & agriculture (August 1)



## ACADEMIC & NUTRITION



**CCUFSA**  
advertorial in the Canadian College & University Food Service Association



**Canadian Nutrition Society**  
conference participation

**Our environmental hoofprint keeps on shrinking**  
Compared to 2014, the Canadian beef industry has improved its carbon footprint.

- 15% LESS** greenhouse gases. Producing 1 kg of beef now creates 15% less greenhouse gases. That is putting us on track to reach the 2030 Canadian beef industry goal of a 30% emissions intensity reduction. \*baseline and converted
- 1.9 BILLION TONNES** of soil organic carbon. Land used for raising beef cattle is estimated to hold 1.9 billion tonnes of soil organic carbon. That is equivalent to the CO<sub>2</sub> emissions of over two billion passenger vehicles (over an entire year) — that's emissions from 16 vehicles per Canadian!
- Wildlife habitat capacity has increased within land used for raising beef cattle.** Land used for raising cattle provides the majority of critical habitat that wildlife needs for both reproduction (74%) and to find food (55%) when all of Canada's crop and pastureland is considered.

Source: CRAB Beef Performance Report, 2024  
© 2024 CRAB. All rights reserved.  
cra-beef-performance.ca | crab.ca/nbsa

# COMMS ACTIVITIES

Publications • Digital • Partnerships

## PUBLICATIONS & VIDEO



### Annual Report 2025–26

Digital publication, English + French, for August delivery



### Annual Report Overview Video

Key highlights, English only, production begins late summer



### Industry Content Generation

~4 columns/month for QBP newsletter, La Minute Bovine, Cattlemen, and CBP updates

## DIGITAL & SOCIAL



### AI Girl Next Door

**NEW**

Devised and oversaw development as an AI counterpart to BBQ Hero, for CBP and stakeholder materials. First deployment pending.



### Producer Social Media

Up to 6 posts/month: #FarmingFriday, CBP promos, Meet the Farmer campaign, steer emoji project



## ENGAGEMENT & SUPPORT



### Industry Engagement

Sponsorships, appearances, trade-show presence — CBIC Winnipeg (Aug), producer AGMs, industry conferences



### Cross-Team Comms Support

Collaboration with Consumer Marketing, Global Marketing, CBCE and other Canada Beef departments

SECTION

# 02

## INTERNATIONAL MARKET DEVELOPMENT & PROMOTION

*Building demand and connection in the World*

CANADA BEEF

WHAT WE COVER



RETAIL



FOODSERVICE



CONSUMER



BRAND

• Presentation 2026

# 02 INTERNATIONAL PROMOTION & MARKETING SUPPORT

Canadian Beef in-market activation

## FIVE PILLARS



### Digital Marketing

*Influencer content, social, AI-powered platforms*



### Demand-Building Events

*Pop-ups, food trucks, in-store sampling*



### Distributor Education

*Chef training & culinary academies*



### Government Trade Commission

*Official trade missions & diplomatic events*



### Event Marketing

*Conferences, expos, brand activations*

All promotions are *developed in collaboration with suppliers and in-market partners.*

## IN MARKET



Chef training & culinary education



Canada Beef food truck — Japan



Distributor partner activations



Industry conference presence

# GREATER CHINA REGION

China • Taiwan • Hong Kong

## CHINA

*Largest market presence*

### RETAIL & FOODSERVICE

- Costco China & Sam's Club

### INCOMING MISSIONS (EMD)

- Chinese importers — April, May, June, July (7)

### TRADE SHOWS

- ANUGA Shenzhen
- SIAL China

### DEMAND BUILDING

- Promotion events (Ministers), market dev missions in Beijing, Shanghai and Shenzhen

### GOVERNMENT TRADE

- Cooking demo & reception, Haikou

## TAIWAN

*Importer engagement focus*

### INCOMING MISSIONS (EMD)

- 1 importer in May
- 3 importers in June

### DIGITAL MARKETING

- @canadabeefTW Instagram campaign

### TRADE SHOWS

- Taipei Food Show (EMD) — June



## HONG KONG

*Retail + brand celebration*

### RETAIL & FOODSERVICE

- 7 retail promotions : YATA, APITA supermarkets promotion

### DIGITAL MARKETING

- @canadabeefhk Instagram campaign

### GOVERNMENT TRADE

- Canada Day celebration — July



China — facility opening



China — Sam's Club retail



China — partner mission



China — President address



Premium AAA branding



<https://xhnewsapi.xinhua.com/share/news?id=1215009466667008&showType=3008&utdid=485619ddda484295879040466bb698f0&version=5.3.1>

## INDONESIA

*Building retail & restaurant footprint*

### RETAIL & FOODSERVICE

- Ranch Supermarket promotion
- Jaddi Group restaurant promo
- The Coach restaurant promo

### DIGITAL MARKETING

- @canadabeefid Instagram launch

**NEW**



## VIETNAM

*Education + first retail wins*

### DEMAND BUILDING

- B2B Seminar, Ho Chi Minh City

### DISTRIBUTOR EDUCATION

- Canadian beef training — July

### RETAIL & FOODSERVICE

- BIG C supermarkets launch
- 5 food service promotions

### DIGITAL MARKETING

- @canadabeefvn Instagram (ongoing)



## PHILIPPINES

*Multi-channel expansion*

### RETAIL & FOODSERVICE

- Robinsons Group: Marketplace, Shopwise, Robinsons — June
- One World Deli restaurant promo — July

### INCOMING MISSIONS (EMD)

- Philippines importer — July

### TRADE SHOWS

- Canadian beef pavilion at WOFEX — July

### DIGITAL MARKETING

- @canadabeefasia Instagram (ongoing)



# LATIN AMERICA

Mexico • Colombia • Guatemala

COSTCO BRANDING

MX

**42** stores

April rollout

LA COMER  
BRANDING

MX

**80** stores

April & July

COLOMBIA  
ACTIVATIONS

CO

**21** retail locations

Plus 1 hotel client — June

DISTRIBUTOR  
TRAININGS

MX

**34** sessions

By Chef Jaime Cavazos

## MEXICO

Largest Latin presence

### RETAIL & FOODSERVICE

- Costco (42 stores) & La Comer (80 stores) branding — Spring and Summer
- El Remolkito / Maison Kayser — 6 locations
- Sigma restaurant promo — July
- 2025 : Wildfork (37 stores, Heb 87 stores, Michelin Satr Restaurants

### EVENTS & EDUCATION

- ANTAD Retail Show + reception, Guadalajara
- 5 distributor trainings (Chef Cavazos) — May–July
- Canada Day, 3 cities + importer visits — June/July
- Two trade shows

## COLOMBIA

Multi-location retail push

### RETAIL & FOODSERVICE

- Promotional activations at 21 retail locations + 1 hotel client — June

### TRADE SHOWS

- ALIMENTEC Food Show, Bogotá — June 9–12

## GUATEMALA

NEW

First retail beachhead

### RETAIL & FOODSERVICE

- Retail branding program with Procasa meat shops — July



In-store premium display



Distributor training event  
ANTAD trade show — Guadalajara



AAA branding + digital

INAGEYA  
SUPERMARKETS

JP

**48** demo days

April → July

LOTTE MART

KR

**40** demo days

June / July

7-ELEVEN PROMO

JP

**30K+** stores

End of Summer

NEW RECIPES

KR

**20** developed

April

## JAPAN

Retail saturation + digital growth

### RETAIL & FOODSERVICE - UPCOMING

- Kanehide Supermarkets — 12 demo days
- Inageya Supermarkets — 48 demo days
- 7-Eleven 30K+ stores — End summer
- 2025 : 27 retail and foodservice promotions, 690 instore sampling events, 2 tradeshow (=80 eads)

### INCOMING MISSIONS NEXT 2 MONTHS (EMD)

- Japanese importer — (4)

### DIGITAL MARKETING

- New social media specialist partnership
- @canadabeefjp Instagram (ongoing)



## SOUTH KOREA

Premium positioning + scale

### RETAIL & FOODSERVICE

- Lotte Mart — 40 demo days (June/July)
- Lotte Busan / Signiel Busan Hotel promo (1–2 months) — June
- 2025 : 13 retail promotions, 606 instore sampling events, 66 restaurants and 5 food service promotions (41 leads)

### TRADE SHOWS

- Canadian pavilion, Korea Meat Expo — June
- Korea importer at Korea Import Fair (EMD) — June

### CONSUMER MARKETING

- 20 new Canadian beef recipes developed — In progress

### MISSIONS & DIGITAL

- Korea retailer (EMD) — June
- @canadabeefkr Instagram (ongoing)



# MIDDLE EAST & EUROPE

*Emerging + established markets*

## MIDDLE EAST

*Market entry + regional build-out*

### DIGITAL MARKETING

- Canada Beef Middle East Instagram launch — May

**NEW**

### INCOMING MISSIONS (EMD)

- Middle East importer clients — date TBC

### TRADE SHOWS

- Visit to Saudi Food Expo — June

### GOVERNMENT TRADE

- Taste of Canada Initiative — June

### DEMAND BUILDING

- Canadian Beef launch & seminar, Jordan — July

### MARKETING MATERIALS

- Region-specific content and resources — April to July



**NEW**



## EUROPE

*Importer relationships + premium positioning*

### INCOMING MISSIONS (EMD)

- European importer clients — May

### TRADE SHOWS

- Spanish importer at Gourmets Madrid (EMD) — April
- Italian importer at Tuttofood Milano (EMD) — May
- German distributor Canadian beef promo (EMD) — May

### CONSUMER MARKETING

- Napoleon Grills cross-promotion: distributor seminars & shows featuring Canadian beef demos — April to July
- World Steak Challenge Competition

### GOVERNMENT TRADE

- Canadian beef sponsorship at Canada Day events, various locations — June/July



# EXPORT MARKET DEVELOPMENT PARTNER PROGRAM 2025-2026

## 64 Total Projects Supported

- 38 unique applicants
- 8 Canadian beef packers benefitting
- 10 countries/regions targeted
- 1,427 new buyer introductions
- 153 individuals receiving training
- 8.063 million individuals reached
- 418,743 resources created
- 204 beef sampling days completed
- 12,055 MT estimated new sales volume
- \$103.7 million CAD estimated new sales value



SECTION

# 03

## DOMESTIC MARKET DEVELOPMENT & PROMOTION

*Building demand and connection in the Canadian market*

CANADA BEEF

WHAT WE COVER



RETAIL



FOODSERVICE



CONSUMER



BRAND

• Presentation 2026

# PICK THE BEEF WITH THE LEAF

Consumer campaign • [canadabeef.ca/beefwiththeleaf](http://canadabeef.ca/beefwiththeleaf)

THE CAMPAIGN

## Pick the beef with the leaf.



A national consumer campaign that helps Canadians identify and choose authentic Canadian beef — from family farm to dinner table. 12 million impressions on social media.

VISIT  
[canadabeef.ca/beefwiththeleaf](http://canadabeef.ca/beefwiththeleaf)

## FROM FARM TO TABLE



FAMILY FARMS



GRADED IN CANADA



INDUSTRY-WIDE  
STANDARDS



ON YOUR TABLE

## WHAT YOU GET WITH CANADIAN BEEF



Family farms



Nutritious



Sustainable



Graded  
quality

# TEAM TAYLOR AUSTIN — BOBSLEIGH

FUELLED BY CANADIAN BEEF CAMPAIGN

## *Fuelled by Canadian Beef*



### The Campaign

A season-long story following Taylor Austin's team as they compete on the world stage (Olympics) — powered by Canadian Beef.



### The Message

Content spotlights how the nutrition and performance benefits of beef fuel elite athletes.



### The Reach

Digital ads, social posts, and a TV spot during the Winter Olympics — reaching parents, beef lovers, foodies, and sport fans. 25 million impressions.



TEAM AUSTIN • CANADA

[#fuelledbycdnbeef](#) [#lovecdnbeef](#) [#beefbelongs](#)

# FIVE REASONS TO BUY CANADIAN BEEF : PWHL CAMPAIGN

ELLA SHELTON & EMERANCE MASCHMEYER

## *Farm raised. Beef fuelled.*



### The Athletes

Two Canadian PWHL stars — Ella Shelton and Emerance Maschmeyer — both raised on family farms.



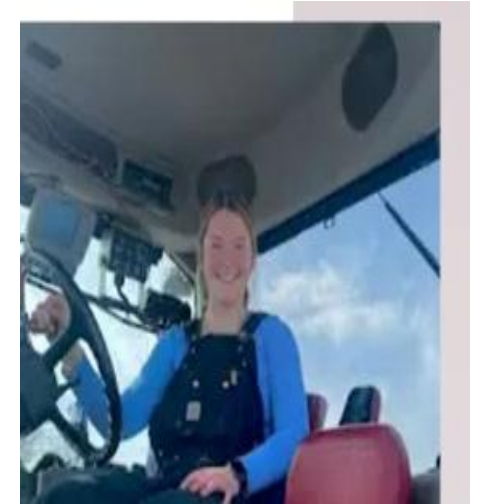
### The Message

A multi-channel campaign featuring the players sharing the 5 reasons to choose Canadian beef.



### The Reach

Digital, print, TV commercials, and partnerships — reaching parents, beef lovers, foodies, and sport fans.



F A R M • K I T C H E N • I C E

# MARKET ALLIANCE: RETAILERS

CANADA BEEF x WALMART AND OTHER PARTNERSHIPS

## Supporting *Canadian farmers*



**Supporting Canadian farmers** **ALBERTA**



**Alberta Vee Tee Feeders Ltd.**  
A third-generation family business that has been feeding cattle since 1973. The business is co-owned by Don and his brother and sister, Northwest of Lloydminster, Alberta.



**AAA eye of round beef roast**  
Cut from 100% Canada AAA beef #50871780.  
\$25.78/kg.

**\$11.69 lb**



### Producer spotlight

Canada Beef partnered with Walmart to feature producers directly in their regional flyers.



### Coast-to-coast reach

Producers from Ontario, Québec, and the West showcased in Walmart's Week 39 flyer. Labels on beef packages at Loblaws banners, Walmart, and other banners.



### Scaling the program

Walmart collaboration is expanding through the CBA Marketing Tool Kit.



### What's next

An additional Canadian beef producer flyer tribute is set to run in the coming months.



**So-tender**  
HAND-SELECTED AAA BEEF  
\$20.99

**So Canadian Fresh Beef**  
\$12.99

**Soutenons les producteurs canadiens** **QUÉBEC**  
**Supporting Canadian farmers**



**MBM Daigle**  
Nous élevons des bovins pour leur viande depuis 1979 dans la région de la Montérégie, au Québec.

**MBM Daigle**  
We have been raising cattle for beef since 1979. Montérégie region, Québec.



**Rosbif de noix de ronde AAA**  
Boeuf Canada AAA à 100 %.  
**AAA eye of round beef roast**  
Cut from 100% Canada AAA beef.  
N°50871776. 26.78 \$/kg.

**12.15 \$ lb**

**Supporting Canadian farmers** **ONTARIO**



**Ontario Sandy Ridge Ranch:**  
Kevin has been raising cattle for 50 years. North of Walkerton, Ontario.



**AAA eye of round beef roast**  
Cut from 100% Canada AAA beef #50871772.

**\$12.15 lb**

# 2026 NUTRITION, HEALTH AND WELLNESS



CONFERENCE EXHIBITS

## Exhibiting at 4 conferences

- 1 Rural & Remote Medicine
- 2 PriMed
- 3 Canadian Nutrition Society
- 4 Canadian College & University Food Service Association (CCUFSA)



**~5,000**

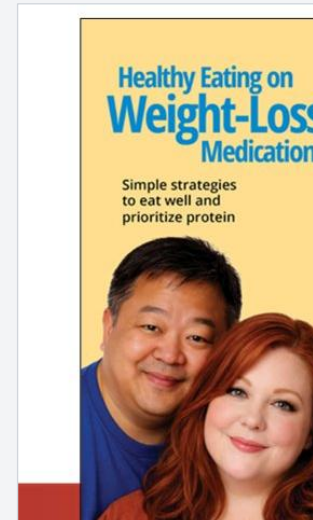
HEALTH PROFESSIONALS and  
Doctors

750,000 education materials given – new record!



First to Market - NEW EDUCATIONAL  
RESOURCE

## GLP-1 brochure launch



### *Healthy Eating on Weight-Loss Medication*

Simple strategies to eat well and prioritize protein  
— a practical resource for patients on GLP-1  
medications.

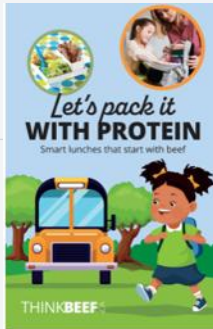
**JULY  
2026**

**DISTRIBUTION BEGINS**

Rolling out to doctors' offices

## RECIPE & NUTRITION BOOKLETS

### *Booklets info. Different audiences.*



FOR ACTIVE FAMILIES

### Fuel Up for Fun!

Updated recipe & nutrition booklet for families with active kids — practical ways to fuel sports, play, and everyday activity. We reach 5 million impressions in Canada (schools).

AUDIENCE • PARENTS & KIDS



PROTEIN + FIBRE = FLAVOURS

### Perfect Partners

Showcasing protein and fibre as a powerful culinary and nutrition combination — for everyone, including GLP-1 users and people managing diabetes. Around the World with Beef (6.1 million impression while driving a 198% increase in Thinkbeef.ca). On Apple News worldwide.

AUDIENCE • HEALTH-FOCUSED ADULTS



## OUTREACH

17 CULINARY AND BUTCHERY SCHOOLS



### PROGRAM HIGHLIGHTS



CCBTP promotion & cuts workshops. 32 new commercial recipes for food services.



Young Chef competition



Farm tour with OCFB



## YOUTH PARTNERSHIP

# Calgary Stampede

JUNE 13-14, 2026

Partnering with the *Calgary Stampede* to engage the next generation of beef professionals.



## RECOGNITION

EDUCATOR OF THE YEAR AWARD – Culinary Federation



## CERTIFIED CANADIAN BEEF

Training Program for the next generation



# CHANNEL — FOODSERVICE & RETAIL



FOODSERVICE — CANADA PRIME GRADE

## Steakhouse promotion



### ACTIVATION ELEMENTS



Plaque & lapel pin



Social media activation



Staff training program



PROUDLY SERVING  
*Canada Prime Grade Beef*



RETAIL — TRAINING PROGRAM

## CCBTP rollout



### C&C Packing

BRANDED • COMPLETE



### Engaged with 80 major retail and foodservice

TRAINING • Q1 2026



### Culinary and Technical schools

Part of their curriculum • Q1 2026



BRANDED RETAIL

*100% Canadian beef — in market*

# CONSUMER MARKETING



MAKE IT BEEF (MIB) ADVISORY PANEL

## Q1 Panel Surveys

~600

ENGAGED CANADIANS

Insights on how we shop, cook & enjoy beef

### Q1 SURVEY TOPICS

Virtual Assistant

GLP-1 Medications



NEW CONTEST LAUNCH IN MARCH

## Restaurant Gateway



Encouraging diners to **share their Canadian beef story** across all the occasions they enjoy it. Received 1,300 nominations so far!



ALL DINING OCCASIONS



INCENTIVES INCLUDED

LAUNCH → END OF FISCAL

CAMPAIGN WINDOW

Running through end of fiscal year

# HALAL AND KOSHER

## UPCOMING EVENTS & RESOURCES

### *Serving every community*



JUNE → AUG 2026

#### Mosque Tour

Reaching communities directly with a tour of 70 mosques across Alberta and Ontario.



INDUSTRY TOOLKIT

#### Halal & Kosher Marketing Resource

Photos, video, brochure templates, and wordmarks with certifier logos — for industry partners to use.



CONSUMER RESEARCH

#### Focus Groups

Halal and Kosher consumer research to deepen understanding of community needs.



FAMILIES • AT THE HEART OF EVERY MEAL



# TV ADS ANALYSIS

	Total TV Buy	Creative costs	Impressions	Impressions CPM (\$/1000)
Phase I Feb to March 2025 (8 weeks) We Love What We Do	\$236,000.00	\$10,000	40,800,000	\$5.15
Phase II May to July 2025 (8 weeks) Buy Local (scale)	\$199,998.65	\$16,000	65,000,000	\$4.20
Phase III Oct to November 2025 (8 weeks) Thank-You (CR) Joy (Family)	\$250,046.66	\$20,000	41,000,000	\$6.64
Phase 4 – February 2026 (4 weeks) Bob Sled Nutrition	\$125,031.60	20,000 Contract + \$10,000 Ad	26,313,300	\$5.89
Phase 5 (Hockey April - 8 weeks estimated) 2026 Beef Up Your Game	\$249,999.50	\$100,000 contract + \$32,000 Ad	Approx impression 50,000,000	\$7.64
<b>TOTAL = \$1,269,076.41</b>	\$1,061,076.41	208,000.00	223M	





SOCIAL MEDIA CAMPAIGN

## 5 Reasons to Buy Canadian Beef



FEATURING

**Ella Shelton**

**Emerance Maschmeyer**

*PWHL athletes. 7m impressions,  
170k clicks.*



DAILY POSTS

Facebook • Instagram • Pinterest • X • LinkedIn and more!

ACTIVE CHANNELS



Facebook



Instagram



PARTNER RESOURCE HUB

## Marketing Library

*Creation of **CBA folders** – a centralized library for partners to access marketing resources, Carcass Value Report, Ethnic Merchandising, AI Chatbox.*



*CBA Dashboard interface*

WHAT PARTNERS GET



Templates



Assets



Support

# DIGITAL — SOCIAL MEDIA STATS



## PERFORMANCE METRICS

### Year over year

METRIC	2024	2025	Q1 '26	TREND
Impressions	6.2M	6.26M	2.05M	=
Engagement Rate	6.15%	5.46%	4.92%	↓
Posts	1,300	1,310	314	=
Followers	48.5K	57.5K	59.8K	↑
Comments	8.8K	10.5K	397	↑
Video Views	599K	1.26M	1.35M	↑



## KEY TAKEAWAYS

### What the data says



Audience growth



Video accelerating



Reach stable



Engagement still above industry average (2.5%)

*Possible causes: audience size, new follower mix, algorithm changes, economic pressure.*



#### TOP POSITIVE COMMENTS

- Thanking beef farmers
- Love of recipes & flavours
- Learning about beef cuts



#### KEY NEGATIVE COMMENTS

- **CAN'T AFFORD** beef prices
- **IMPORTED BEEF** — why is Mexican / Australian cheaper?

# GLOBAL — AI INITIATIVES

## BUILDING THE AI TOOLKIT

Powered by **AI**



**LIVE — IN MARKET**

### Canadian Beef Virtual Assistant

AI chatbot launched. Final name and visual identity to be determined through consumer research with the MIB advisory panel.



**LAUNCHING SOON**

### Street Team AI App

Tracks pricing and label claims — Canadian origin, grade, and other identifiers — in retail environments.



**IN DEVELOPMENT**

### Chef & Butcher AI

Specialized AI tool in development to support professional chefs and butchers with cut knowledge and preparation.

LIVE NOW

## Your Personal Beef Expert

The screenshot shows a web browser window with the address bar displaying "askcanadianbeef.ai". The page features the Canadian Beef logo (a red maple leaf with a black silhouette of a cow) and the text "CANADIAN BEEF". Below the logo, it says "FOR ALL THINGS BEEF". The main headline reads "INTRODUCING YOUR PERSONAL BEEF EXPERT". Underneath, there is a sub-headline: "Discover recipes, master every cut, find the perfect fit for your diet, and locate top Canadian beef near you — powered by the Canada Beef Information Gateway." A red starburst graphic with the text "TRY IT!" is positioned in the bottom right corner. At the bottom of the browser window, there is a dark blue banner with a yellow box containing the word "BETA" and the text "ASK ME ANYTHING ABOUT BEEF" followed by "Recipes • Cuts • Diet fit • Local availability".

SECTION

# 04

## PHILANTHROPIC INITIATIVE

*Building connection in the Canadian market*

CANADA BEEF

WHAT WE DO

**Burger it  
Forward**

**Ronald  
McDonald's  
House**

• Presentation 2026

CAMPAIGN FEATURE

# *Burger It Forward*

**2026** Campaign Highlights

● ● ● *A proudly Canadian initiative*



# DONATION OVERVIEW

## RESTAURANT PARTICIPATION

Rose by nearly **37%** compared to 2025



# 37%



### CORPORATE PARTNER

**Irving Corporate + Big Stop Franchises**

# \$20,636

## TOP INDIVIDUAL RESTAURANT DONATIONS



### TOP DONATION

#1

## The Chop

Steakhouse Bar • Winnipeg, MB

# \$2,779



### RUNNER-UP

#2

## 100 Mile Grille

Locally sourced • Guelph, ON

# \$544

## BURGER IT FORWARD · NATIONAL RESULTS

### CAMPAIGN REACH

111,525

#### BURGERS SOLD

Reported & estimated total

360

#### RESTAURANT LOCATIONS

Across Canada participating

291

#### AVG BURGERS PER LOCATION

Strong per-venue engagement

13

#### PARTNER ORGANIZATIONS

10 beef + 1 processor + 2 dairy farmer associations

### BURGER CHAMPIONS

1	<b>BNA Brewing</b> Kelowna, BC	2,582
2	<b>Fuddruckers</b> Saskatoon, SK	2,416
3	<b>Fearless Meat</b> Toronto, ON	1,816
★	<b>Irving Big Stop</b> NF / NS / NB Region	9,959

**REGIONAL HONOUR** Featured all burgers across the Atlantic region

### PARTNER ASSOCIATIONS

BCCA · ALBERTA BEEF · SCA · MANITOBA BEEF · ONTARIO BEEF · LES PRODUCTEURS DE BOVINS DU QUÉBEC · PEI · NS · NB · ATLANTIC BEEF

# THANK YOU

For your support & leadership

## STAY CONNECTED · RESOURCES & PLATFORMS

### 01

CONSUMER & STAKEHOLDER

[www.canadabeef.ca](http://www.canadabeef.ca)

- Consumer & stakeholder hub
- Annual report
- Year-in-review (5-min video)
- Canada Beef Performs monthly e-newsletter

### 02

CULINARY & NUTRITION

[www.thinkbeef.ca](http://www.thinkbeef.ca)

- Recipes & meal inspiration
- Nutrition science & guidance
- Cooking techniques
- Educational consumer content

### 03

TRADE & INDUSTRY

[www.cdnbeefperforms.ca](http://www.cdnbeefperforms.ca)

- Trade resources
- Industry gateway
- Monthly trade reports
- News headlines

## FOLLOW US

Connect with Canada Beef across social platforms

Facebook

Instagram

LinkedIn

YouTube

Pinterest

X

PROUDLY SUPPORTED BY



**Sustainable Canadian  
Agricultural Partnership**  
Competitive. Innovative. Resilient.



CANADA BEEF

Presentation 2026