

LEADING SUSTAINABILITY TODAY,

Growing Globally for Tomorrow



Canadian
Cattle
Association

2023 ANNUAL REPORT



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PRESIDENT'S MESSAGE



2023 was a year for global buzzwords like sustainability, supply chain integration and food safety & security.

While adverse weather conditions – either too much or not enough – plagued much of the country during the last growing season, producers found innovative ways to keep their herds healthy and fed - and the quality of our Canadian beef high. We've seen it all year - the world wants more of what we grow.

Keeping two-way lines of trade open with the UK is the goal of the 'Say No to A Bad Deal' campaign. We got the traction we did because our producers reached out to officials and made their voices heard. I'd like to thank producers for being so active in writing letters and talking to government – it made a difference.

Overseas markets continue to be lucrative and receptive. In 2023, our Indo-Pacific trade mission proved this. By continuing to push our market boundaries and building these relationships, we are forging new paths.

On the North American trade front, our trilateral talks with the U.S. and Mexico to strengthen our integrated beef supply chain continued to be positive. The continent leads the largest integrated live cattle supply system in the world and serves as a model for the rest. The voluntary 'Product of USA' labelling issue remains a front we are pushing back on, and we are supported by a strong science and policy-based trade base.

A positive outcome of the 2023 United Nations Climate Change Conference (COP28) was the realization that beef demand is going to increase globally. By 2050, the growing and more affluent global population is expected to drive up animal product demand by 20%, compared to 2020 levels.* As demand for our high quality beef increases, one of the challenges we face is keeping up with production.

Producers have faced many adverse issues over the past year and as we've pulled out of the pandemic, other global challenges have arisen but so have many opportunities. We are cultivating global relationships to ensure we preserve and grow our markets; we have earned our seats at the decision-making tables and we are ensuring our producers' voices are heard.

We are producers working for producers and we need to stand united in our voices and efforts. Thank you for entrusting us with this honour and I want to thank our national producers and CCA staff for their continued dedication to the industry.

**FAO. 2023. Pathways towards lower emissions A global assessment of the greenhouse gas emissions and mitigation options from livestock agrifood systems. Rome <https://doi.org/10.4060/cc9029en>*

Nathan Phinney
President
Canadian Cattle Association

EXECUTIVE VICE PRESIDENT'S MESSAGE



Our theme this year focuses on sustainability and the growing export demand for our high-quality beef.

In 2014 we set out to be a global leader in sustainably raised beef and expanded our market opportunities around the world. Today we are leaders, and we are enjoying record export values and growing demand.

The investments that our industry has made in research, adoption, quality assurance, beef safety, marketing and promotion, and market access have positioned our industry as a trusted leader and reliable producer of some of the world's finest beef. Both our national check-off and provincial checkoffs have funded this work, and our National Beef Strategy has brought us together.

Getting the product right and getting the right product to the right customer has been our strategy for years - distributing value more equally through the entire carcass. We now estimate that export sales increase the value of every fed animal we sell by over \$1,150 by getting premium prices for products that we do not value as highly in Canada.

Even with the best-laid plans, Mother Nature still rules. 2023 could have been one of our best years with strong beef demand and record export values topping \$6.7 billion. We set new record prices for calves, feeders, and fed cattle. Unfortunately, another year of drought in many parts of Western Canada and too much rain in Eastern Canada affected both pasture rates and feed availability and cost. Although the price signals were to grow our herd, drought forced further contraction.

Our export volumes were down but in direct relation to our reduced fed cattle production. When we have favorable conditions to restock and produce more cattle, we have a strong and diverse base of customers for our product. I am confident in saying our export markets are looking for more Canadian beef. In our largest market here at home, Canadians increasingly understand the nutritional benefits of Canadian beef and the environmental benefits of raising cattle in Canada.

On the policy front, our campaign to increase the recognition of our industry's great environment story and sustainability leadership is one of our growing successes. We are increasingly being viewed as an important part of the solution to climate change, preserving biodiversity, reducing food waste, managing fire risk, and feeding the world.

We are on track to meet the ambitious goals we set out in the National Beef Strategy, particularly on reducing emissions confirmed that the recently completed Sustainability Assessment shows another 15 percent since 2014 and on track to meet the 33% goal by 2030. All of our reductions to date have been achieved by increasing efficiency,

We are now part of the Canadian delegations and the narrative at global forums – the world needs more Canada when it comes to cattle and beef.

On the market access side, we see Asia as being our great opportunity of the future and fully support the "Indo-Pacific" initiative that Canada is pursuing. We did push back on allowing the United Kingdom into the Comprehensive and Progressive Trans-Pacific Partnership (TPP) until our market access issues are addressed and our food safety system is fully accepted. The TPP is built on a high level of ambition and strong science-based principles. Any new entrant must fully meet those requirements. We have more to say on this and another access discussion in our Foreign Trade report.

2023 was also the year of Private Members' bills. I have never seen so many bills receiving serious attention and potentially being passed - some are useful while others have become a platform for activists or political posturing. These will be covered in other parts of our annual report but is a concerning trend in Federal policymaking.

Overall, I remain excited about the future of our industry and optimistic about strong prices in 2024 and beyond. Hopefully, with better weather, we can restock our cow herds.

*Dennis Laycraft
Vice-President
Canadian Cattle Association*

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DIVISION REPORTS



Beef Cattle Research Council

Division Reports

The Beef Cattle Research Council's (BCRC's) mission is to lead the Canadian beef industry as the most prominent supporter of cattle, forage and beef research with a producer-led Council who invests producer funds into research and technology transfer to support growth in beef demand, increase productivity and earn public trust.

The BCRC currently funds more than 100 research and extension projects led by researchers nationwide, in partnership with more than 40 funding agencies, being conducted at more than 30 research facilities including Agriculture and Agri-Food Canada (AAFC) research stations, universities and other research institutions.

In 2022/23, the BCRC received on average \$0.67 (unaudited) of every \$2.50 of the Canadian Beef Cattle Check-Off collected by the provinces. This funding was leveraged under the Beef Science Cluster program with AAFC Canadian Agricultural Partnership funding, where industry contributed 28% (\$666,494) and AAFC contributed 72% (\$1.67 million) in 2022/23.

In addition, the BCRC leveraged the Canadian Beef Cattle Check-Off for an additional \$3.7 million in research funding and \$250,000 in-kind from government and industry partners through initiatives outside of the Beef Science Cluster.

Key Highlights - 2023

- The third Beef Science Cluster ended in 2023. In total 26 projects were funded through the third Cluster with industry and AAFC investments totalling \$21.6 million. A sample of results included:
 - Calves given an 8-hour rest during long-haul transport had higher numbers of Bovine Respiratory Disease-causing bacteria in the respiratory tract than calves that were not rested during transport indicating that rest stops might contribute to increased health and welfare risks. This research was led by AAFC Lethbridge.
 - Prevalence and impacts of a variety of health issues and management practices on commercial operations with research led by the Western College of Veterinary Medicine. Understanding how these diseases and management practices impact animal health and welfare helps prioritize Check-Off research investments, guide technology transfer and help industry stakeholders and policymakers make informed decisions.
- Several new practical online tools were developed for cattle producers on various topics. Content related to drought-related strategies and mitigation were the most popular. www.beefresearch.ca/drought
- 2023 marked 25 years as Canada's national industry-led funding agency for beef, cattle and forage research. www.beefresearch.ca/25years

Priority heading into 2024:

One of the BCRC's top priorities is managing the fourth Beef and Forage AgriScience Cluster under the Sustainable Canadian Agricultural Partnership – AgriScience Program, which totals \$21.7 million, with \$12.1 million in federal investment and industry contributing \$9.6 million primarily through the Canadian Beef Cattle Check-Off. Funding is allocated to 23 projects until March 31, 2028. Projects include a focus on:

- improved diagnostics and vaccines to manage production-limiting diseases in cattle,
- development of new forages that have the potential to thrive across Canada,
- improved food safety technologies in beef processing facilities to reduce the use of water and energy, and
- development of practical, science-based resources and economic decision-making tools to support the Canadian beef industry.

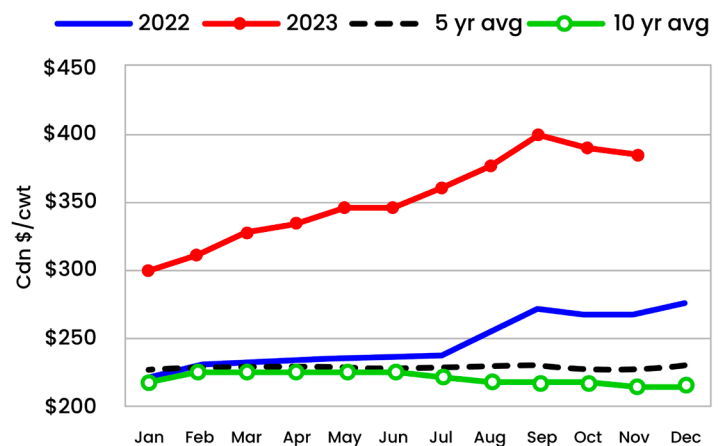
Canfax Cattle Market Update- 2023 in Review

The first half of 2023 was marked by high feed costs but also record high prices. Drought again hit a portion of the Prairies, pushing heifers into feedlots, and delaying herd expansion despite record high calf prices. Feedlots had average margins in the black on the cash market (assuming no risk management) for all weights of cattle. The Canadian dollar was relatively stable throughout the year.

Prices improved for all classes of cattle in 2023, with Alberta 5-600 lb steers averaging \$384/cwt in the fourth quarter up \$114/cwt or 42% from 2022. Record high calf prices pushed Alberta cow-calf profits to record levels in 2023, surpassing 2015. Alberta fed steer prices were up 19% from January to December, establishing new all-time highs several times this past year. An annual average price of \$225/cwt is the highest on record.

For 2023, barley is averaging around \$400/tonne, 8% lower than last year, but remains 29% higher than the five-year average. Barley prices were largely steady near \$425/tonne in the first half of 2023 but softened 12% in the second half to be closer to \$375/tonne. China opened their border to Australian barley in August after three years of trade restrictions, which reduced demand for Canadian barley, and moved prices lower. For 2023, average hay prices were a moderate 3% lower than last year but were 29% higher than the five-year average. Alberta hay prices moved opposite to barley, increasing 21% from the first half to the second half of 2023, to \$250/ton. Alberta hay prices climbed higher this summer as drought conditions once again moved into western Canada, reducing yields. A moderation in feed costs, with larger North American corn production in 2023 supported calf prices this fall.

Alberta 5-600 lb Feeder Steer Price



Source: Canfax

The U.S. cow herd peaked in 2018 and has declined 9% since. In addition, beef replacement heifers are down 700,000 head since the 2016 peak. The 2023 calf crop was 665,000 head smaller than 2022, or down 1.9%. Herd rebuilding was expected to begin this past summer, however, drought conditions which settled into many of the grazing states discouraged heifer retention this fall. Historically high calf prices should encourage herd rebuilding next year, though significant changes in inventories will be dependent on moisture and feed stocks. U.S.D.A. is projecting beef production to decline 3-5% in 2024 with a larger drop occurring in the second half. The reduction in supplies is expected to support prices in 2024.

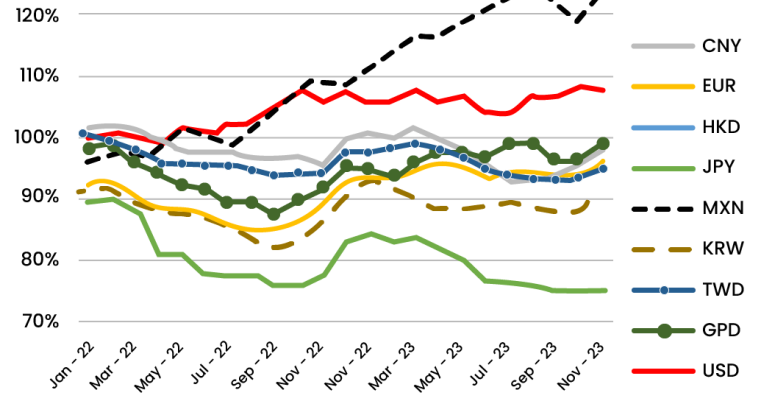
But prices are made up of both supply and demand. Nominal retail beef prices in 2023 (January to October) increased 7% from 2022. In comparison, retail chicken prices only increased 3% while retail pork prices decreased 5%. This pushed both the beef-to-pork and beef-to-chicken price ratios historically wide in 2023. Despite economic headwinds in 2023, including the threat of recession in the second half of the year, demand remained historically strong.

Factors to Watch in 2024

There are many moving parts to cattle markets. Any black swan event like a major supply chain disruption would likely trump all of the other market factors listed below.

Demand – Beef demand is expected to be under pressure in 2024 with the average Canadian family estimated to pay an additional \$700 for groceries due to sticky food price inflation. International demand has shown signs of cracking. Ample stocks in some Asian countries have kept their beef prices low, pricing North American beef out of those markets. We continue to see remarkable support in North America, particularly for high quality AAA and Prime beef. The U.S. Dollar and the Mexican Peso continue to perform well against the Canadian Dollar. A strong currency makes imports more attractive; this has shifted international trade away from Japan and towards Mexico in 2023. Exchange rates will continue to play a large role in the destination of Canadian beef in 2024.

Canadian Foreign Exchange Rates
(January 2021=100)

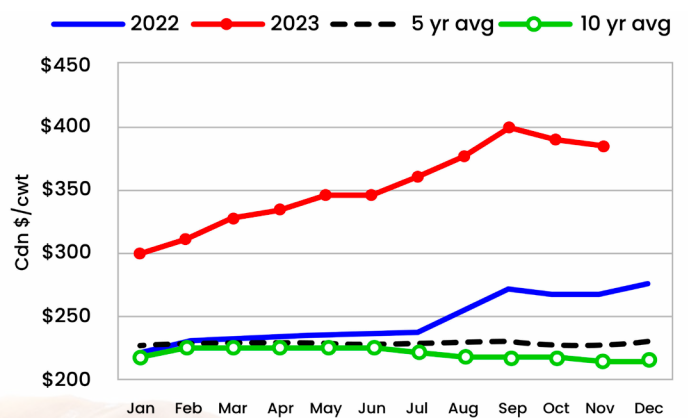


Weather – U.S. cattle marketings are projected to decline next year, which is anticipated to support higher prices. Dry conditions in the summer of 2023 pushed feeders into feedlots early which will support production in the first quarter of 2024. Moisture conditions are anticipated to improve in the first half of 2024 and may encourage heifer retention in the second half. Marketings are expected to be down in 2024 but will see a steeper drop if heifers are retained.

Feed grains – Lethbridge barley remains at a feed cost disadvantage to Ontario and Nebraska corn. There is potential for a big swing in the feeder market if the U.S. gets sufficient rain.

Canadian dollar – Except for a small spike in the summer, the Canadian dollar has been largely rangebound between \$0.73-0.75 this year and is set to average near \$0.74. A one cent change in the Canadian dollar impacts calf prices by about \$6/cwt, holding all other variables constant. The stability in the Canadian dollar allowed supply and demand fundamentals to work through the marketplace.

Alberta 5-600 lb Feeder Steer Price



Basis levels strengthened in the fourth quarter of 2023, as the futures market dropped. December 1st 2023 Alberta and Saskatchewan cattle on feed numbers were steady with last year, and 4% larger than the five-year average. This could add basis risk for feedlots, particularly in the first quarter. The monthly Canfax Trends report estimates that all classes of feeder cattle had positive average net margins in 2023, assuming no risk management. Positive feedlot

margins encouraged feedlots to fill pens. From January to October, net feeder imports totalled 136,700 head, 106% higher than 2022 and only 2% below the five-year average. Relative supply and demand, north and south of the border is the key driver of basis levels. How many fed cattle end up going south will be an important driver for basis levels and feedlot leverage in 2024.

Canfax is Canada's go-to source for cattle market information. A division of the Canadian Cattle Association, Canfax has provided expert analysis of markets and trends in the ever changing North American beef industry for over 50 years. Cattlemen, feedlot managers and agri-business professionals rely on accurate, relevant and timely information as an essential tool for maximizing profit in today's beef sector. To learn how to become a Canfax member for ongoing daily/weekly market information visit: www.canfax.ca



Canfax Research Services

Division Reports

Canfax Research Services (CRS) provides market information and economic analysis on issues requested by national and provincial associations. New staff were brought on including: Genet Mengistu, Michael Sydora, Heidi Tymko and Nico Wong.

Canadian Cattle Association:

- Project management of the carbon tax study update with Brandon Schaufele. A final report and fact sheet were available in November 2023.
- The Sustainable Agriculture Strategy Greenhouse Gas Working Group had consultations from May to July 2023 on an agricultural goal for 2030. Discussions have turned to potential for 2040 and 2050 with modeling work underway.
- Collaboration with the Alberta Beef Producers and Alberta Cattle Feeders Association is underway around the recommendations in the 2023 Schultz and Schroeder study.
- Brenna Grant is co-chairing the **Global Roundtable for Sustainable Beef** (GRSB) Climate Working Group. The focus for 2023 was a scoping project done to understand member needs for accounting, scope 3, SBTi and other international standards for environmental reporting. A final report was presented in November 2023 with four recommendations.
- The **2021 Farm Management Survey** summary for the beef industry is on the website.
- In 2023, the **Canadian Cow-Calf Cost of Production Network** was expanded to over 225 producers contributing to over 60 benchmark farms. Several resources have been developed and are available on the Analysis page. There are fact sheets, case studies, videos and summaries of survey results, including a summary of the 2022 results.
- Canfax Research Services (CRS) is the socio-economic lead for the **Alberta AgriSystems Living Lab**, with funding for five-years (2022-27).
 - The baseline adoption rates survey was in the field from March to June 2023, with over 400 responses and 25% reporting a 4-H Club as part of the Alberta 4-H collaboration.
 - The Producer segmentation survey had 115 respondents.
 - Baseline cost of production and environmental data has been collected from 19 participants.
 - Modeling of five BMPs will be done on the benchmark farms in the COP Network. This work starts with a survey of BMPs costs and benefits going to COP Network and Living Lab participants with 88 respondents.
- Coming out of the CRSB's update of the National Beef Sustainability Assessment; two publications were submitted on the environmental and social results. A white paper is being developed for CRSB collating what is known and unknown on carbon markets and scope 3 reporting.
- Regular data services and analysis continue to be provided to Canada Beef, BCRC, and the Check-off Agency.

CRSB

Division Reports

MISSION: To advance, measure and communicate continuous improvement in sustainability of the Canadian beef value chain.

VISION: That the Canadian beef value chain is a global leader in environmental, social and economic sustainability and part of a trusted and thriving food system.



Key Highlights

- ✓ Completed the second National Beef Sustainability Assessment and Strategy
- ✓ Completed the first review of the *Certified Sustainable Beef Framework*
- ✓ Received Ducks Unlimited Canada's inaugural Conservation Award of Distinction
- ✓ Received a Canadian Agri-Food Marketers' Alliance (CAMA) award

The Canadian Roundtable for Sustainable Beef (CRSB) is led by its multi-stakeholder membership, guided by an elected council and four committees, with over 50% member organization participation. Six new members joined the CRSB in 2022-23.

Voting Members

BEEF PRODUCER ASSOCIATIONS



BEEF PROCESSORS & ASSOCIATIONS



RETAIL & FOODSERVICE SECTOR



NON-GOVERNMENTAL ORGANIZATIONS



AGRICULTURE & FOOD BUSINESS



Non-Voting Members and Supporters



Progress Overview

The National Beef Sustainability Assessment measures different environmental, social and economic indicators across the Canadian beef value chain. The second assessment was completed this year, alongside a sustainability strategy, that included a member comment period and will support the Canadian beef industry's 2030 goals. The assessment and strategy will be released in 2024.



The CRSB Certified program underwent its first review. Chain of custody and claims were the focus for this past year. The Canadian Cattle Identification Agency delivers live cattle chain of custody for the program, outside of Quebec. Producers can search the CRSB Certified status of a tag (yes or no) on the Canadian Livestock Tracking System.

Demand for CRSB Certified beef remains strong; as of June 30, 2023, there are 12 companies sourcing through the program, and three major Canadian retailers made commitments for future sourcing.

- ✓ An estimated 20% of Canadian beef cattle herd spent time under the management of CRSB Certified Operations
 - ✓ Approximately 5.7 million acres of land – 4.9 million of which are estimated to be native grazing acres – under the management of CRSB Certified Operations
-

The "Look for the Mark" digital marketing campaign raised awareness of the CRSB Certified logo, and won a Best of CAMA award. The results from the campaign will inform the development of the organization's long-term communications and marketing strategy next year.

CRSB continues to be at the forefront of beef sustainability conversations in Canada. With environmental, social and governance (ESG) factors and reporting becoming increasingly important for our members, this year was spent learning and gathering feedback, and the coming year will focus on further defining CRSB's role in the ESG space.

Please see the 2023 Annual Report for more information.



Verified Beef Production Plus

Division Reports

In 2023, VBP+ was approved for another grant through Agriculture and Agri-Food Canada's Agri-Assurance – National Industry Association Component, "Enhancing VBP+ to drive sustainability and market growth in the Canadian beef industry". The grant will cover the period April 1, 2023 to March 31, 2028 and will focus on activities related to surveillance, benchmarking and training relevant to the VBP+ standard. The total funding for the project totals \$1,337,600.00 at a 75%/25% cost share ratio.

The following activities will be completed at the conclusion of the project in 2028:

Activity 1 – Addressing Gaps through Certification, Training Data and Feedback

- Development of youthful fed beef self-assessment and quality assurance standard
- Review and modernization of the beef industry Hazard Analysis Critical Control Point (HACCP) plan.

Activity 2 – Benchmarking and Surveillance for Risk Mitigation and Equivalency for Certification

- Benchmarking of VBP+ standard/certification against self-assessed Environmental Farm Plan
- Creation of anonymous, secure, foreign object (in beef) reporting portal

Activity 3 – Training Resource Development

- Creation of new training resources
- Review/adjustment of existing training resources

Activity 4 – Development of a Canadian Agri-Assurance Service to Support the Growth of Certified Programs in the Agriculture Sector

These activities will help to strengthen the risk profiles informing the VBP+ standard and increase opportunities for VBP+ certification and training.

Producer retention and recruitment for VBP+ certification has continued to dominate priorities for VBP+ Inc. There were a large number of producers who completed VBP+ certification in 2019 and are up for renewal in 2024, consistent with the 5-year audit cycle. If these producers decline to renew their certification, there is risk to participation levels and to VBP+ Inc. financially, as it operates on a cost-recovery model.

Voluntary certification programs rely on the value, financial and/or intrinsic, producers see in participation in the program. A recent VBP+ survey found that most producers need to see some sort of financial incentive to compensate for their costs and time for participation with the remainder indicating that they see some value through overall industry growth and public trust. VBP+, and their partners, have been working hard to see operations receive some incentivization at the operation level while we continue to build on a value statement that all producers can have confidence in.



Canadian Beef Breeds Council

Division Reports

The Canadian Beef Breeds Council's (CBBC) mandate is to:

- support the Canadian seedstock sector by developing partnerships that advance genetic improvement, research extension services, information dissemination and our role in Canada's National Beef Strategy;
- promote Canadian beef cattle genetics both domestically and internationally by identifying market opportunities and facilitating market development; and
- advocate on behalf of the Canadian seedstock sector for effective policy, meaningful market access and enhanced competitiveness.

The awareness of the role that beef cattle genetics and CBBC's members play in sustainable beef production has increased substantially in recent years. Throughout 2023 CBBC continued to focus on building collaborative partnerships both within the seedstock sector and across the entire beef production chain to advance our vision of being a world leader in developing profitable and sustainable beef cattle genetics.

Market Development for Beef Cattle Genetics

Over the past year, CBBC has seen its investment in increased industry engagement, communications and market development reap tangible results for our members and the sector. There is no doubt that Canadian beef cattle genetics are recognized as the best in the world and interest in Canadian genetics from buyers around the world continues to increase as a result; but there definitely has been an increased awareness of the importance of genetic selection to beef production and interest in better understanding genetic innovations and the role of data driven genetic decisions in the success of beef businesses.

CBBC is pleased to continue to be able to provide support to our members to undertake critical market development activities through the ongoing commitment and support from Agriculture and Agri-Food Canada (AAFC) through the AgriMarketing Program (AMP). This will ensure CBBC and our members can continue to capture and build upon the aggressive goals of our members and Canadian breeders to expand critical market opportunities for Canadian beef cattle genetics around the globe through March 2026.

Canadian Beef Improvement Network

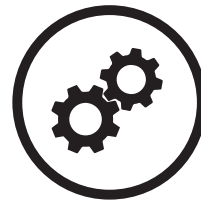
One of the foremost ways that CBBC has worked to elevate the perception of the seedstock sector is through the development of the Canadian Beef Improvement Network (CBIN). The CBIN initiative remains a top priority for CBBC and our members are steadfast in their commitment to advancing the goals and vision of CBIN which have remained consistent. When we committed to lead this initiative as an organization, we recognized that this was a transformational undertaking for the Canadian beef industry and acknowledged how challenging it would be and that it required a long-term responsibility to truly advance collaboration, data sharing and the utilization of genetic data across the entire Canadian beef production chain. CBIN has advanced collaboration and the role of genetic data further than any initiative in the past, but that being said - there have been some unpredictable challenges that have tested the fortitude of all those involved. For CBBC and our members these challenges have only strengthened our commitment to delivering value to cattle producers in Canada through access to genetic data and analytics that can inform their decision making processes.



**Build the
Genetic Data
Repository**



**Facility
Data
Linkages**



**Translate
Genetic Data
Effectively**



**Advance
Genetic
Literacy**

Through the considerable investments of our members and funding partners we have made considerable progress on the collaborative development of a “Made in Canada”, industry-owned, data registry portal which will be offered for use to members in 2024 and will connect to the larger data repository that links critical genetic data with production data to assist commercial cattle producers in their genetic selection decisions. These broader data linkages are essential to capture increased value for commercial cattle producers. Beta pilot projects are underway to demonstrate the value that can be created when access to genetic data is linked to performance information across the production chain. This is a monumental undertaking that has required steadfast commitment to the collaborative process but CBBC and our members are excited to begin to see the results of our hardwork and investments in the coming year.

Change is hard within any industry and especially so in a traditionally independent industry such as beef cattle production. The disruption that the leadership and partners of CBBC have created has not always been met with a warm reception but that has not deterred the leadership from continuing to work to achieve tangible outcomes for Canadian beef cattle breeders and producers. CBBC membership and collaborative partnerships continue to increase and we will remain focused on working with those who believe in the importance of collaboration and the value of data-driven genetic advancements in beef production to capture increased value.

The coming year represents 30 years since the creation of the Canadian Beef Breeds Council and as we enter our 30th year of operations we will not only be celebrating our past achievements but working with our members and partners to leverage collaborative resources to capture the substantial opportunities that we believe the future holds for Canadian beef cattle genetics both domestically and internationally. More than ever CBBC is looked to as a leader in the Canadian beef industry and we will continue to work to represent our members and partners as effectively and efficiently as possible to assist in securing a sustainable future for Canadian beef cattle breeders and producers.



Public and Stakeholder Engagement Program

Division Reports

A part of the Connectivity and Beef Demand Pillars in the National Beef Strategy

The Public and Stakeholder Engagement (PSE) program, jointly delivered by the Canadian Cattle Association (CCA) and Canada Beef, coordinates national public trust issue management and proactive content on the benefits of raising beef cattle in Canada.

The team worked with Beef Cattle Research Council (BCRC) and the Vaccine and Infectious Disease Organization (VIDO), to develop an article about mRNA technology for livestock vaccines. Biosecurity guidelines for international visitors were updated and shared with key stakeholders. Coverage was monitored in several food safety stories where beef was mentioned, and proactive responses were prepared.

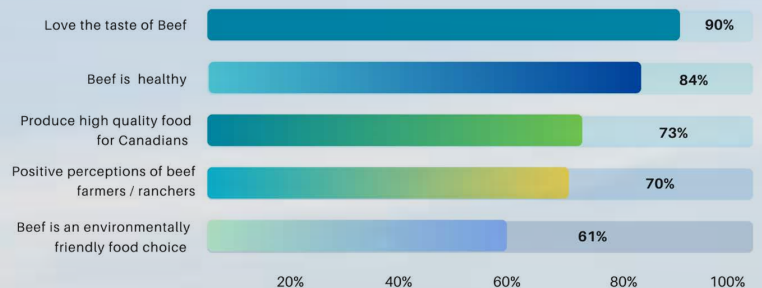
A crisis communications tabletop exercise was held with over 35 participants from both provincial and national cattle associations. The exercise reinforced relationships among industry associations, fostering trust and systems for collaboration to ensure industry preparedness in the future. We continue to actively engage in forums and channels to respond to content that contains misleading information about the impacts of beef cattle.

To equip industry advocates with public outreach tools, the team has coordinated Introduction to Media Training sessions for 20 participants this past year. The Beef Advocacy Canada program continues to offer short training modules based on tested key messages that improve public trust, with in-person training also offered to university students and producer groups. New this year, a hard copy flipbook called the Public Advocacy Guide is available for industry representatives and interested producers. In the guide are QR codes to access informational videos, short documentaries, and internal factsheets.

Regular consumer research, as part of the three-year strategy cycle, informs proactive consumer campaigns, identifying must-win audiences and ensuring key messages are resonating. Results from 2023 included an increase in the percentage of Canadians that have excellent or very good opinions of beef farmers and ranchers, from 68% to 70%. Participants also ranked beef as the healthiest source of animal protein. A full presentation on the findings can be viewed at: <https://vimeo.com/manage/videos/864152128/8c41cc0280>

Public outreach for the past year included the Guardians of the Grasslands game, which is curriculum linked in 10 provinces for students in grades 7-12. A campaign to highlight the role of cattle in upcycling food waste included screening events of the new short documentary Reduce, Reuse, Ruminare in several universities across Canada. This was combined with an influencer campaign on social media with lifestyle and food promoters visiting farms and ranches to learn how cattle transform items humans can't – or won't – eat into delicious and nutritious beef.

Consumer Research Highlights



2023 Highlights

- CTV News and CBC coverage on the Guardians of the Grasslands Game had an estimated broadcast television reach of more than 27 million Canadians, with an additional 16 million reach through the print and digital article.
- The Canadian Agri-Marketers Alliance awarded Best Exhibit to the Guardians of the Grasslands game, along with a Certificate of Merit in the website category.
- PSE received two additional Certificates of Merit in the categories of Social Media Management and Persuasive Writing.
- *Reduce, Reuse, Ruminare* was selected for the Ceres Food Film Festival in New York City and won Best Documentary at Wildsound Film Festival, while *Too Close to Home* was selected for the British Columbia Environmental Film Festival.

Priorities for 2024

- Screening events for *Reduce, Reuse, Ruminare* with industry partners, media, and influencers.
- Additional public outreach with the Guardians of the Grasslands game, exploring the potential for applications with other partner industries.
- Continuing to seek opportunities for improved connectivity and skill building with national and regional communications staff in public trust and issues management.
- Exploring options for qualitative based consumer research focusing on animal welfare.

In the 2023-2024 fiscal year, PSE will be operating with a \$849,000 budget, of which \$212,000 is allocated to Canada Beef and the remaining \$637,000 is administered through CCA.



COMMITTEE REPORTS



Animal Health and Care Committee Reports

The Animal Health and Care Committee promotes policies that mitigate the threat of foreign animal diseases, protect the health of our domestic herd, and build confidence that our production practices promote and protect the welfare of our stock.

CCA is engaged in preparedness work to bolster ourselves against the threat of Foot and Mouth Disease (FMD) virus. Our industry is reliant on market access and international trade and any incursion of FMD would close borders to live animal and meat trade until freedom from the virus was demonstrated. In 2023, CCA lobbied for a Canadian FMD Vaccine Bank came to fruition. Importantly, this included a substantial investment for preparedness work. We are working with government and other at-risk industries to operationalize vaccine delivery plans should 'The Bank' ever be needed. This is the first step in a vision to modernize the beef sector's FMD plans and ensure every operation is informed and has access to the necessary tools to prepare.

The 3 pillars of disease prevention & preparedness are biosecurity, surveillance, and traceability. In 2023, the proposed

revisions to the Health of Animals Act Traceability Regulations were published in Canada Gazette 1. This milestone was achieved after a decade of collaborative work between the beef sector and the Canadian Food Inspection Agency (CFIA). Our efforts resulted in revisions that closely followed the Cattle Implementation Plan which is our roadmap to a sustainable, effective and efficient traceability system. We will continue to advocate for a system that is feasible to comply with, affordable, and benefits our sector. CCA is convening stakeholders to ensure technology is available that enables participation and provides value to producers.

Animal welfare includes, but goes beyond, animal health. While CCA works to prevent the one-off catastrophes such as FMD, we must also strive to deliver excellence in animal welfare and tell our story. The Codes of Practice provide a standard for welfare practices. CCA will be leading a revision and update to the Beef Codes of Practice, beginning in 2024. An updated Code of Practice will continue to build the confidence of consumers, retailers, and regulators while demonstrating our commitment to continuous improvement.

Domestic Agriculture

Committee Reports

Every year is a busy year for the Domestic Agriculture file, and this year is no different. From substantive discussions around BRM programming, to frequent government consultations, to improving Canada's regulatory regime to make our sector more economically competitive, 2023 has been a productive year for our advocacy and policy work.

As we move towards the second half of the Sustainable Canadian Agricultural Partnership (SCAP), we want to make sure that Business Risk Management (BRM) programs are flexible, timely, and relevant to our producers. CCA has been engaged in numerous discussions around modifying programs like AgriRecovery and AgriStability to make them more responsive for producers. We are also looking towards the next federal budget to maintain the increase to the interest-free portion of loans under the Advance Payments Program at \$350,000, which will help keep producers afloat during high inflationary times.

Outside of BRM discussions, CCA is also engaged with the federal government on issues such as regulatory reform, internal trade, and sustainability reporting. We look forward to another productive year in 2024 as we move these conversations forward.

Key accomplishments/milestones (2023)

- Securing AgriRecovery and AgriStability responses from the federal and provincial governments in Western Canada in response to extreme weather conditions.
- Moving discussions towards expanding Livestock Price Insurance in Maritime provinces.
- Active participation with the Canadian Sustainability Standards Board and Finance Canada in sustainability reporting while reducing any administrative burdens on producers.
- Working with Agriculture Canada and other government departments on declaring regions eligible for Livestock Tax Deferral provisions.
- Close collaboration with provincial and federal governments on continued improvement of forage insurance programming through the Industry Government Forage Insurance Task Team.

2024 Priorities

- Advocating for the interest-free portion of the loans under the Advance Payments Program to be kept at \$350,000.
- Amending the Livestock Tax Deferral (LTD) provision in the Income Tax Act to better support producers in climate adaptation by giving them the ability to self-elect while including all classes of cattle, not just breeding herd.
- Continuing to lead discussions on using perennial forage insurance as a tool for producers in mitigating the impacts of extreme weather events.
- Working towards creating a level playing field for cattle producers against other agricultural producers in Canada and those in other countries.
- Ensuring industry-led environmental assessments, such as through VBP+ or CRSB, are accepted under AgriInvest criteria.

Environment

Committee Reports

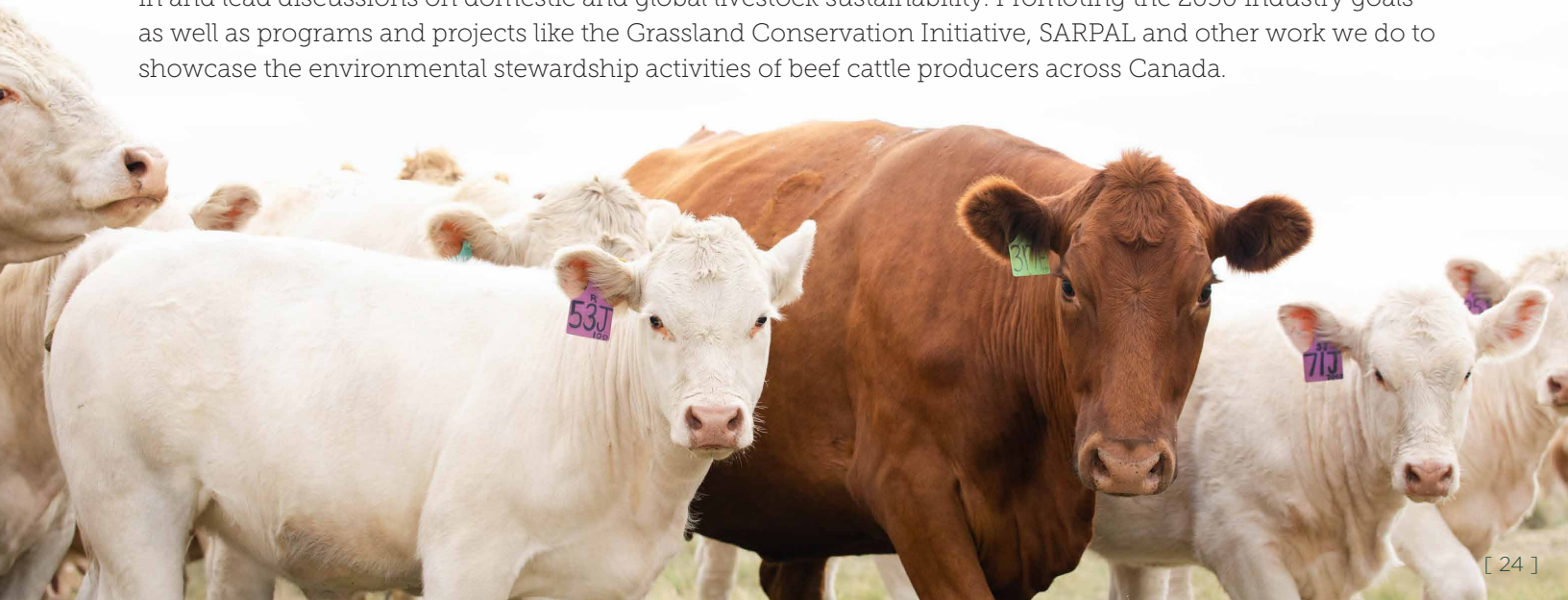
Consultations, as well as international and domestic meetings dominated the CCA's environment & climate file in 2023. CCA submissions on important domestic policy such as the Sustainable Canadian Agricultural Partnership, the Sustainable Agriculture Strategy, the National Biodiversity Strategy, and a new legally binding global agreement on plastics allowed the voices Canadian farmers and ranchers to be heard and emphasized the importance of beef production to the economy, to the environment, and to society.

Beyond domestic consultation, CCA was actively engaged at various international agricultural events. AIM4Climate in Washington DC brought numerous stakeholders together to catalyze and increase investment in climate smart agriculture. The Food and Agriculture Organization of the United Nations (UN FAO) hosted the first ever global conference on sustainable livestock transformation and simultaneously held a global youth dialogue on sustainable livestock transformation. The United Nations Climate Change conference had, for the first time, a thematic day dedicated to Food, Agriculture, and Water.

- CCA staff attended the first ever UN FAO global conference on sustainable livestock transformation and the global youth dialogue. CCA's participation helped influence the text of the global youth statement, avoiding terminology such as "food sovereignty," and eliminating text blaming livestock for climate change. CCA pushed instead to focus on the positive aspects of livestock to climate and biodiversity and had support to include a statement on "recognizing the contribution of livestock to ecosystem services and the environment."
- The UN Climate Change conference had a dedicated day for Food, Agriculture, and Water. On December 8, CCA co-hosted and participated in an official UNFCCC side event with the Global Roundtable for Sustainable Beef. On December 10, CCA co-hosted an event at the Canada pavilion about livestock as a nature-based solution and the contribution of grasslands to climate and biodiversity.
- CCA environment staff were on the Canadian Delegation to the UN Global Biodiversity Framework COP 15 sessions in Montreal and had the opportunity to communicate directly with Canadian negotiators on targets of concern for the beef industry. In the end we were successful in getting the appropriate text included in certain targets of concern.

Looking forward:

- CCA will remain engaged on domestic policy, programs, and consultations, including the Sustainable Agriculture Strategy development and the recently announced draft Reducing Enteric Methane Emissions from Beef Cattle Federal offset protocol and the draft National Biodiversity Strategy. CCA will continue to participate in and lead discussions on domestic and global livestock sustainability. Promoting the 2030 industry goals as well as programs and projects like the Grassland Conservation Initiative, SARPAL and other work we do to showcase the environmental stewardship activities of beef cattle producers across Canada.



Foreign Trade

Committee Reports

In 2023 Canada reached C\$6.7 billion in beef and live cattle exports. Our exports to Japan reached half a billion dollars in 2023, a new record thanks in great part to the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) trade agreement. In 2023, all remaining BSE restrictions in Japan and Taiwan were lifted. This increased market access will continue to support our export growth in the Indo-Pacific region.

In March, the Canadian Government welcomed the United Kingdom (UK) into the CPTPP against our opposition. Unlike other CPTPP Members, Canada was unable to secure reciprocal beef access into the UK. More importantly, our long-standing non-tariff barriers that prevent us from exporting beef into the UK were not resolved. Since 2022, Canada has exported zero beef to the UK. The CPTPP has, until now, provided a high standard of trade, but this new agreement with the UK leaves a significant trade barrier in place and it undermines the ambition of future entrants. The beef and pork sectors are calling on Parliamentarians to reject this deal when it comes to a vote in Parliament until these barriers are addressed.

Over the course of 2023, CCA has been monitoring the United States Department of Agriculture (USDA) proposed changes to the 'Product of the USA' voluntary label requirements. The proposed limiting the claims of this label to livestock born, raised, slaughtered, and processed in the U.S.. These changes could create segregation of cattle along the supply chain creating a potentially more restrictive version of the Mandatory Country of Origin Labeling (MCOOL) statute, which was deemed by the World Trade Organization (WTO) to violate Canada and Mexico's WTO rights. CCA has been meeting with U.S. counterparts, government officials and key stakeholders to discuss the ramifications of the proposal.

Another important development was the passage of Bill C-282: *An Act to amend the Department of Foreign Affairs, Trade and Development Act (supply management)* from the House of Commons to the Senate. This Private Member's Bill aims to take supply management sectors off trade negotiations. This will hurt Canada's ability to launch, negotiate, and renegotiate the best trade deals. With the Canada-U.S.-Mexico Agreement (CUSMA) up for renegotiation in 2026, this Bill will put Canada's trade position at a disadvantage. Bill C-282 will not only affect agricultural sectors, but any other sector that depends on trade.



Key Milestones

- Led the “Say No to a Bad Deal” campaign to oppose the UK’s accession to the CPTPP until the non-tariff trade barriers beef producers face are resolved.
- Attended trade missions in Japan and South Korea to support Canadian beef exports.
- Submitted comments on the ‘Product of USA’ proposed changes outlining the potential negative consequences it could have in the North American beef supply chain.
- Advocated against Bill C-282 by appearing at committees, meeting with Parliamentarians, sending letters and creating social media content.

Priorities for 2024

- Continue the ‘Say No to a Bad Deal Campaign’ and intensify efforts once the government introduces the accession of the UK to the CPTPP in Parliament.
- Advocate against Bill C-282 in the Senate
- Oppose the ‘Product of USA’ proposed rule.
- Seek elimination of the 100-day rule in the U.S.A for exports to Korea.



Food Policy

Committee Reports

Food policy at CCA continues to follow two components on the domestic side, and a third internationally.

Domestically, we lead advocacy efforts with other meat stakeholders such as the Canadian Meat Council, Canadian Pork Council, National Cattle Feeder's Association, and Canada Beef to keep red meat on the menu in Canada's National School Food Policy program. We're also engaged in discussions surrounding alternative proteins such as plant-based and cell-cultivated protein. As Health Canada and the Canadian Food Inspection Agency (CFIA) complete their review of the Safe Food for Canadians Act, which sets out the regulations governing novel foods and other products, we will make sure beef and red meat are considered throughout the process.

Particularly, we are closely watching how cell-cultivated protein is reviewed for domestic regulations as well as engaging internationally to watch how other jurisdictions regulate the new product. Additionally, through the Public Stakeholder and Engagement team, CCA is closely monitoring any global trends regarding cell-cultivated proteins.

Internationally, we are working with the Private Sector Mechanism and International Agri-food Network monitoring work of the United Nations Food and Agriculture Organization. Through this partnership, CCA staff attended the inaugural Global Conference on Sustainable Livestock Transformation in Rome. The conference recognized the positive contribution of livestock production systems and urged meaningful engagement of young producers in cross-sectoral partnerships.

Key Accomplishments - 2023

- Attendance and leadership at the first-ever Global Conference on Sustainable Livestock Transformation where our involvement ensured livestock was given recognition for its environmental benefits.
- Ongoing engagement with officials at Health Canada and CFIA on novel foods and alternative proteins.

2024 Priorities

- Ensure our sector's voice is heard and science-based outcomes are recognized in consultations regarding CFIA's review of the Safe Food for Canadians Act.
- Continuing to monitor the development of cell-cultivated proteins and other alternative products through discussions with other livestock groups and government stakeholders both domestically and internationally.
- Encouraging the federal government to move forward with its School Food Policy program, ensuring that beef is on the menu in schools.

Sustainable Cattle Campaign

CCA's Sustainability Campaign, focusing on highlighting the environmental benefits of beef producers, continued to build momentum and see success in 2023.

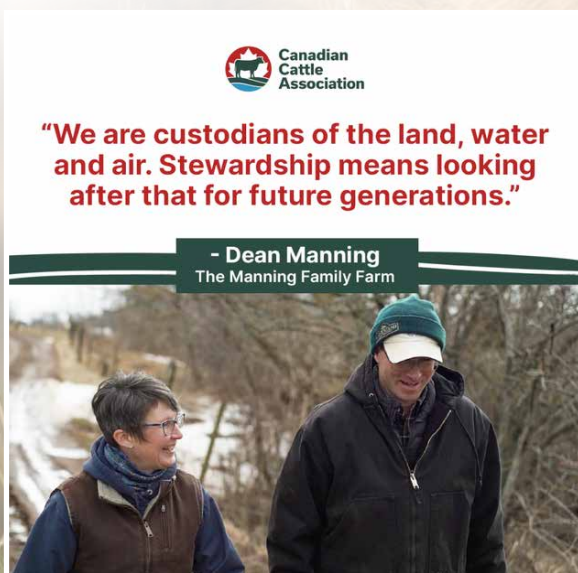
The purpose of the campaign is to share the positive role that beef cattle have on the environment, and to share that message with federal decision makers, including politicians, officials, and policymakers in Canada.

The campaign is a key element of our environmental advocacy and is a supplemental tool that helps get our message out, in between our meetings, events, and other communications materials.

To date, CCA's sustainability campaign has taken varied approaches to engage audiences. It spotlighted essential facts and showcased our environmental stewardship efforts. It also emphasized our commitment to the Canadian Beef Industry's 2030 Goals. To humanize the campaign, it highlighted personal stories from farmers. Moving forward, third party credible experts including scientists who can speak to the same messaging as producers, from another perspective – will also be included. These multifaceted strategies effectively communicate our commitment to transparency, sustainability, and the Canadian beef industry's shared vision.

How are we seeing the momentum build?

- CCA was invited to participate in Canada's pavilion during COP28, alongside our ENGO partners. For the second year, we were part of the Government of Canada's delegation contributing to the dialogue as credible participants in Team Canada. To date, we've seen the Government's environmental priorities target in on greenhouse gas emissions, focusing in on methane when discussing our sector. However, due to our engagement, we've seen a shift towards understanding a holistic approach, discussing "nature-based solutions" and how beef cattle are a part of the solution, and a key partner discussing biodiversity outcomes.
- Having fresh video footage and photos that highlight the diverse nature of our sector is always helpful and we have a standing call out to producers to reach out if you have imagery that speaks to the environmental benefits of beef cattle on our landscapes across the country.
- In Spring 2024 we will continue to build on the campaign's momentum, adapting ad-spends and messaging to ensure we're focused in with our target audience.



LEADERSHIP PROGRAM REPORTS



Youth Council

Report

2023 marked the 10th anniversary of the Canadian Cattle Youth Council, which was created to give young beef producers an opportunity to learn industry leadership skills while bringing the viewpoints of the next generation to the table. Over 50 young beef producers from across Canada have held a seat on the council board since 2013.

The Youth Council played an active role in the Canadian Cattle Association's (CCA) advocacy efforts in 2023. In March, the Council attended the CCA Annual General Meeting (AGM) in Ottawa and participated in the annual youth fly-in day involving 13 meetings with MPs, senators and government officials. Highlights included meeting with staff of the Minister for Women and Gender Equality and Youth, and a special opportunity to meet with members of the Prime Minister's Youth Council.

Youth Council delegates also attended events in Ottawa alongside CCA, such as the Future of Food Conference to Celebrate Canada's Ag Day in February 2023, and the annual CCA Fall BBQ on the Hill. The Youth Council also submitted a letter to the Deputy Prime Minister and Minister of Finance, Chrystia Freeland, to emphasize the Federal Budget 2024 priorities for young beef producers.

The Council had great success connecting with the Canadian Agricultural Youth Council, established by the Minister of Agriculture and Agri-Food. The Youth Council was invited to engage in two different youth-focused consultation sessions hosted by the Canadian Agricultural Youth Council in 2023. Discussion topics included youth development in ag, the Sustainable Agriculture Strategy, and business risk management programs.

While these conversations have been well-received domestically, delegates have also been active on the world stage sharing the message that Canadian cattle producers sustainably raise a high-quality, nutrient rich protein. Youth Council Past President, Charlene Yungblut, attended the Global Agenda for Sustainable Livestock (GASL) alongside CCA and participants of the Canadian Cattle Young Leaders Program in the fall of 2023. The Youth Council was pleased to see previous Ontario Delegate, Evan Chaffe, named as Chair of the new GASL Youth Advisory Group, serving alongside fellow Canadian, Sydney Fortier with the Beef Cattle Research Council who was also appointed to the advisory group. In January 2023, delegates Scott Gerbrandt (SK) and Charlene Yungblut (ON) also participated in the CCA annual youth programs trip to the National Western Stock Show in Denver to build strong relationships with our U.S. counterparts through various meetings and tours. A special thanks to the Consulate General of Canada in Denver for providing funding to support our travel to the U.S.. Special thanks to the Consulate General of Canada in Denver for providing funding to support our travel to the U.S., and GASL for covering our youth participants' travel costs.

The Youth Council hosted a successful AGM at the Canadian Beef Industry Conference in Calgary, AB in August 2023. Guest speakers included Canfax's Brenna Grant sharing the results of their Cow-Calf Cost of Production Network findings of significance to young beef producers, and Senator Paula Simons, who also was in attendance.

Funding for the Canadian Cattle Youth Council is made available through the generous support from Platinum Partner New Holland and the following associations: British Columbia Cattlemen's Association, Alberta Beef Producers, Saskatchewan Cattlemens Association, Manitoba Beef Producers, Beef Farmers of Ontario, Les Producteurs de bovins du Quebec, Nova Scotia Cattle Producers, New Brunswick Cattle Producers, Prince Edward Island Cattle Producers and the Canadian Cattle Association.

<i>2022-23 Canadian Cattle Youth Council Delegates</i>	<i>2023-24 Canadian Cattle Youth Council Delegates</i>
<i>BC Delegate: Andrea van Iterson</i>	<i>BC Delegate: Rylonn Elliot</i>
<i>AB Delegate: Kaylee Chizawsky</i>	<i>AB Delegate: Kaylee Chizawsky</i>
<i>SK Delegate: Scott Gerbrandt (Vice President)</i>	<i>SK Delegate: (President)</i>
<i>MB Delegate: Leah Rodvang</i>	<i>MB Delegate: Marc Vachon</i>
<i>ON Delegate: Charlene Yungblut (President)</i>	<i>ON Delegate: Emily Bromley</i>
<i>QC Delegate: Victor Drury</i>	<i>QC Delegate: Syméon Couture</i>
<i>Atlantic Delegate: Jacob McAfee</i>	<i>Atlantic Delegate: Jacob McAfee</i>
<i>Member at Large: Carley Stewart, BC (Past President)</i>	<i>Member at Large: Charlene Yungblut, ON (Past President)</i>
<i>Member at Large: Laura Plett, MB</i>	<i>Member at Large: Danika Mayer, ON</i>
<i>Member at Large: Kimberly Lansdall, SK</i>	<i>Member at Large: Kimberly Lansdall, SK (Vice-President)</i>
<i>Check-Off Agency Youth Member: Julie Mortenson</i>	<i>Check-Off Agency Youth Member: Julie Mortenson</i>



Canadian Cattle Young Leaders Report



The Canadian Cattle Young Leaders Program had another strong year of delivering unique leadership and mentorship opportunities to the next generation of the cattle industry. Since established in 2010, the program has now seen over 180 graduates.

Highlights from the program year included the annual Spring Forum event. This three-day event held May 30 to June 1, 2023 in Calgary, AB and the surrounding area, offered the 16 program participants a range of industry tours and training designed to enhance their knowledge and connections in the Canadian beef industry. Tours included local feedlot and cow-calf operations, as well as the High River Cargill processing facility. The program also collaborated with MNP to host an interactive succession planning case study competition.

The Canadian Beef Industry Conference (CBIC) was the home of many key program activities in August 2023 in Calgary, AB. 24 semi-finalists from across Canada were invited to participate in the annual CYL Selections Competition hosted during the conference. These impressive candidates were selected from 70 written applications; a significant increase in volume when compared to recent years. Semi-finalists competed in roundtable discussions with their peers on timely topics in the beef industry. The 16 finalists selected to participate in the upcoming program year are highlighted in the table below.

The 2023-2024 young leaders are another exceptional group, who are off to a strong start thanks to the help of their industry leading mentors through the program listed below. We look forward to watching their continued growth into 2024.

The CYL Graduation celebration was also hosted at the CBIC, where industry gathered to celebrate the accomplishments of the outgoing young leaders that would not be possible without the support of their mentors.

This year's graduation also honoured late CCA President, Reg Schellenberg, who suddenly passed away in December 2022. In lieu of flowers, the Schellenberg family requested that donations be made through the Canadian Cattle Foundation to support the Canadian CYL Program. Through this fund, each year, a CYL graduate will be selected to receive the Reg Schellenberg Next Generation Legacy Award. The first recipient of this award is Carling Matejka from Ponoka, AB. Carling was presented the award by members of the Schellenberg family, the Foundation and the Saskatchewan Beef Industry Conference at this year's CYL graduation.



2023 also marked a strong year for program sponsorship, welcoming McDonald's Canada as the very first Platinum Partner of the program, a new additional top tier sponsorship package to elevate their existing support since 2017. The program celebrated Elanco increasing their investment to become a program Foundation Partner. New in 2023, the program welcomed event sponsors including Spring Forum Prime Sponsor, Telus Agriculture & Consumer Goods; Spring Forum AAA Sponsor, Utensil.ca; Spring Forum Professional Headshot Sponsor, RBC Future Launch; and our Spring Forum Friends of the CYL Sponsors, Cattle Health Management and Friends of the Bar U Historic Ranch Association.

Thank you to our program Platinum Partner, McDonald's Canada, Foundation Partners, Cargill, MNP, New Holland, Elanco, and Gold Partners, Farm Credit Canada, RBC Future Launch and Alltech for making these opportunities available to the next generation in the Canadian beef industry possible.

2023-24 Program Pairings	
Canadian Cattle Young Leaders (CYL)	Mentors
Adeleen Bolduc (Alberta)	Glenn Brand (Alberta)
Ashley Nicholls (Alberta)	Michelle Calvo-Lorenzo (Ohio, U.S.)
Brayden Schmidt (Alberta)	TJ Larson (Alberta)
Brett Squair (British Columbia)	Trevor MacLean (Alberta)
Brooke Martin (Saskatchewan)	Randy Stokke (Saskatchewan)
Cassie Marchand (British Columbia)	Sarah Wray (Alberta)
Coleman Nixdorff (Alberta)	Jacob Bueckert (Alberta)
Kaley Mackie Rodman (Ontario)	Tracy Herbert (Alberta)
Karlene Yakemchuk (Alberta)	Mabel Hamilton (Alberta)
Kayla Shallard (British Columbia)	Sheila Hillmer (Alberta)
Kristelle Harper (Manitoba)	Catherine Manning (Nova Scotia)
Laurie Côté-Sarrazin (Quebec)	Michelle Ball (Alberta)
Marianne Sytnyk (Saskatchewan)	Kristen Ritson-Bennett (Alberta)
Patrick Sullivan (Quebec)	Ken Schaus (Ontario)
Rob Ziegler (Alberta)	James Bekkering (Alberta)
Zoe Gould (Alberta)	Arno Doerksen (Alberta)

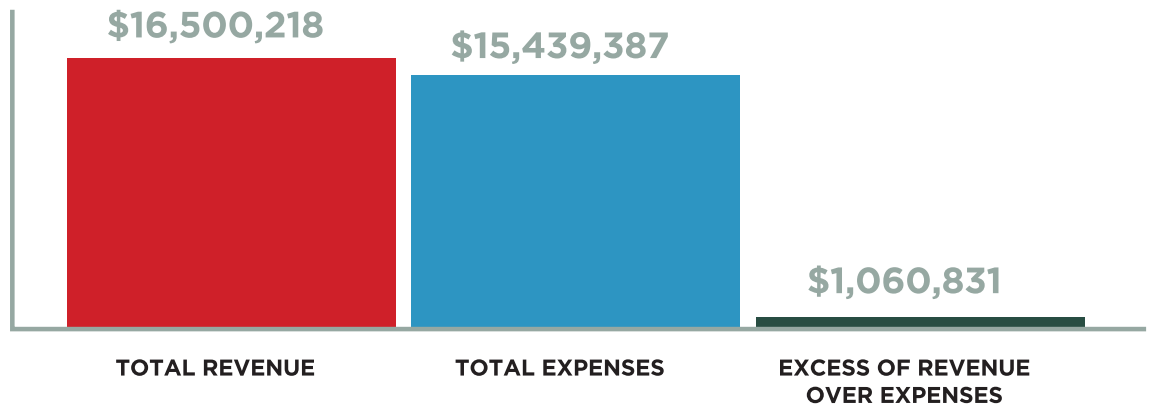


Financial Summary

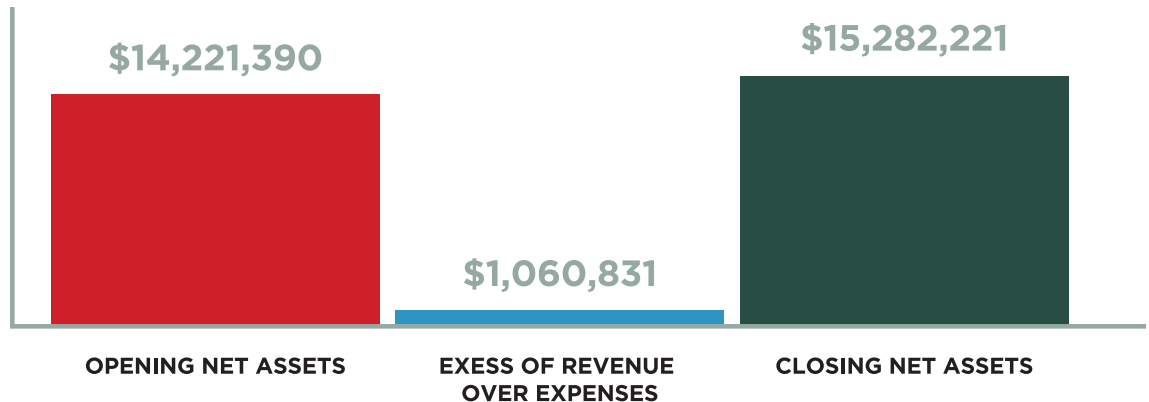
Full financial statements available at www.cattle.ca/2023-annual-report

**Financial summary presented includes CCA and its Divisions*

Profit & Loss Summary



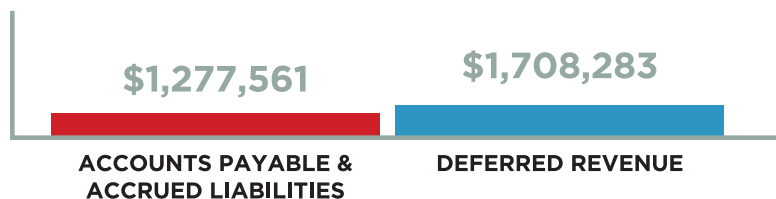
Net Asset Summary



Net Asset Summary



Liability Summary



Industry Partners & Sponsors

Provincial Members



Industry Partners

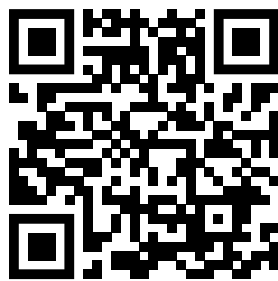


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Cattle
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