



Despite What You Read, The Industry is Strong

Kevin Grier, June 2019



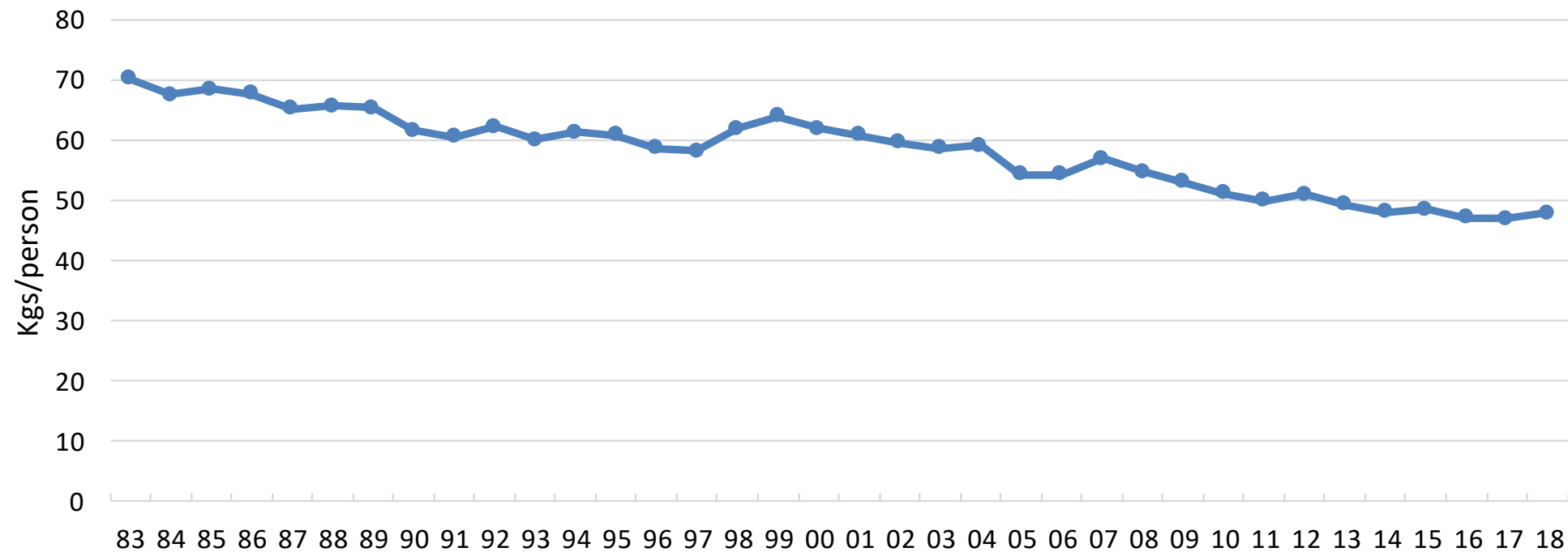
Outline

- Demand
- Competitiveness
- Threats

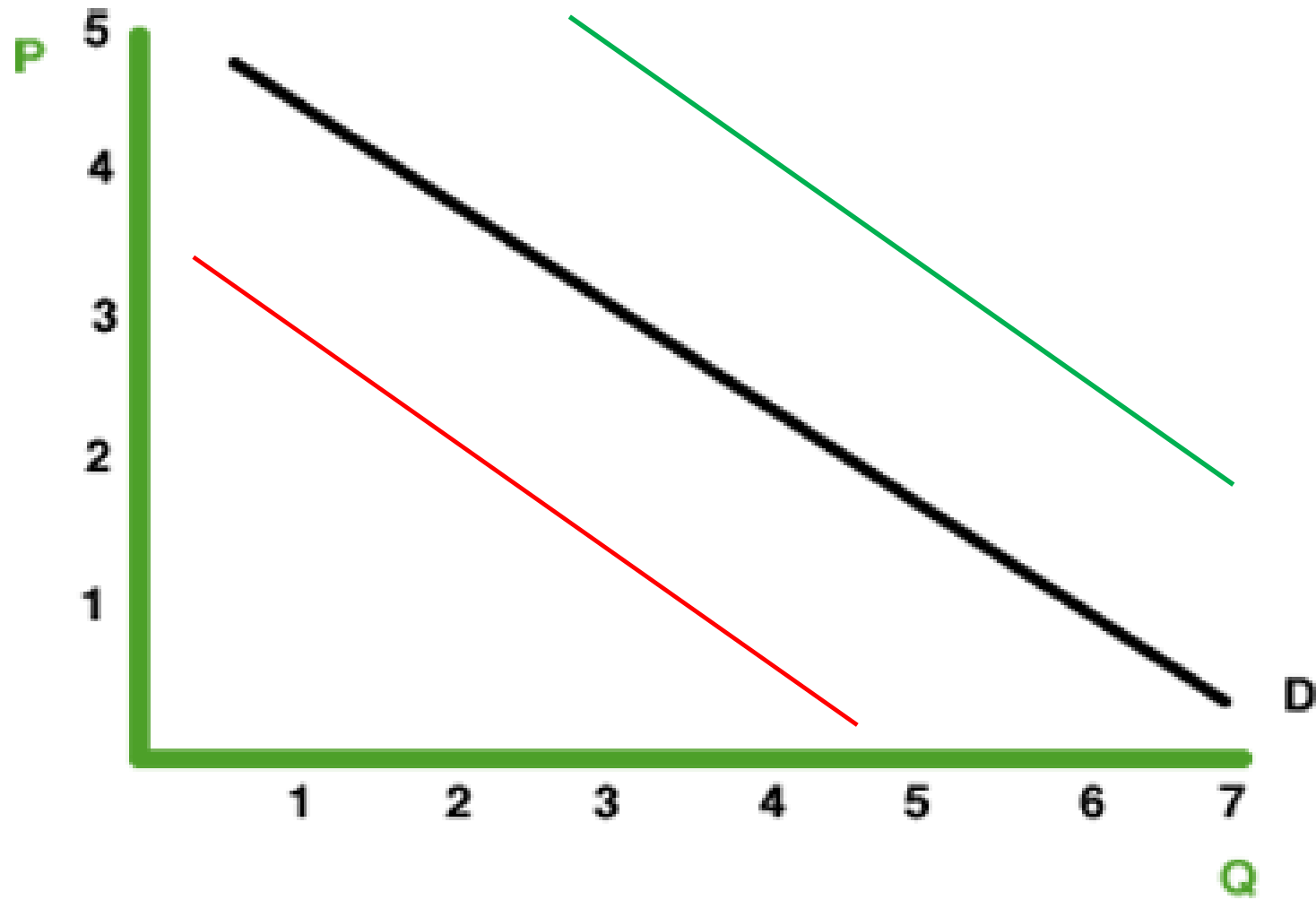
• Demand

- Competitiveness
- Threats

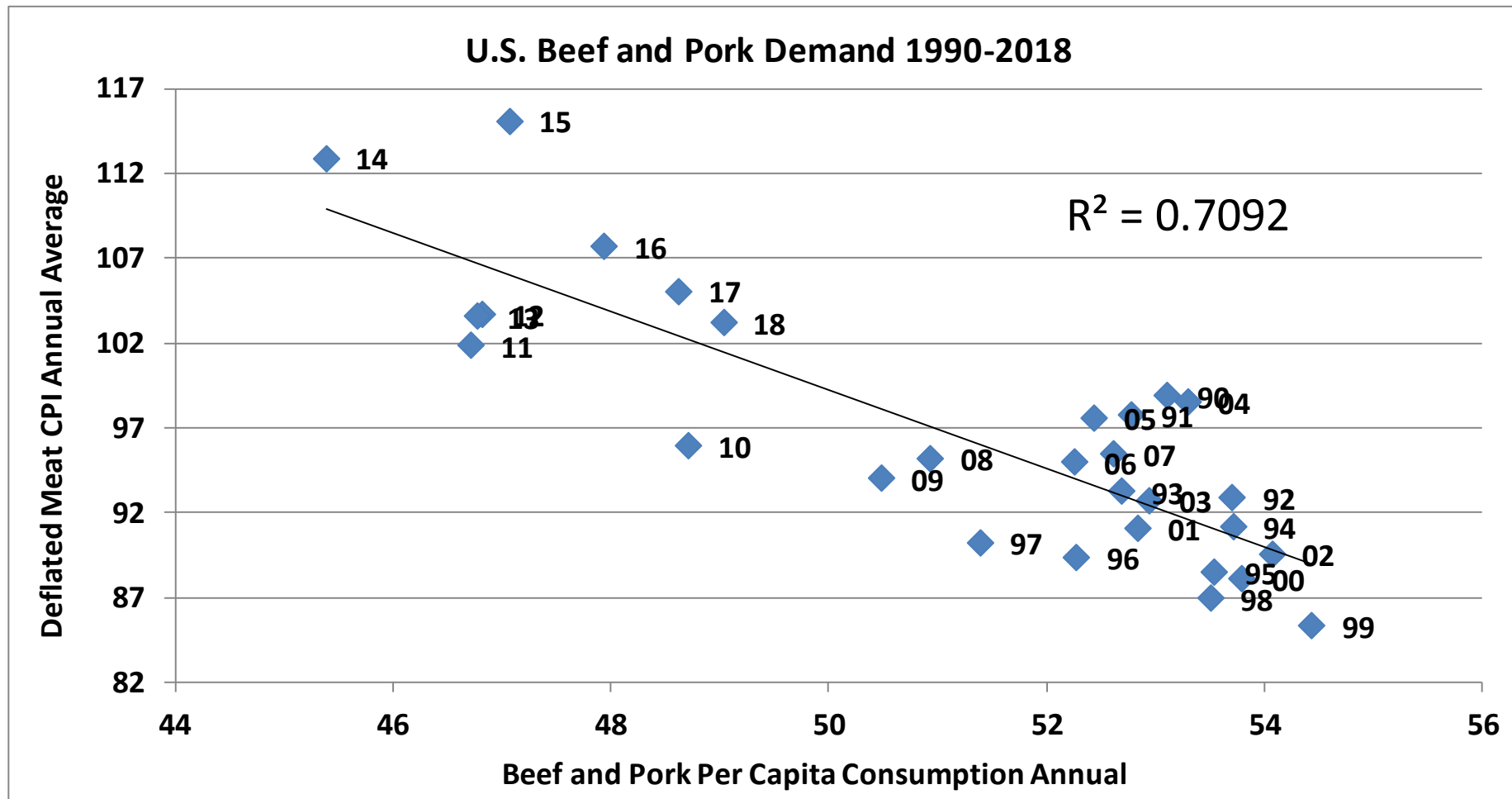
Canadian Beef and Pork Per Capita Consumption 1983-2018



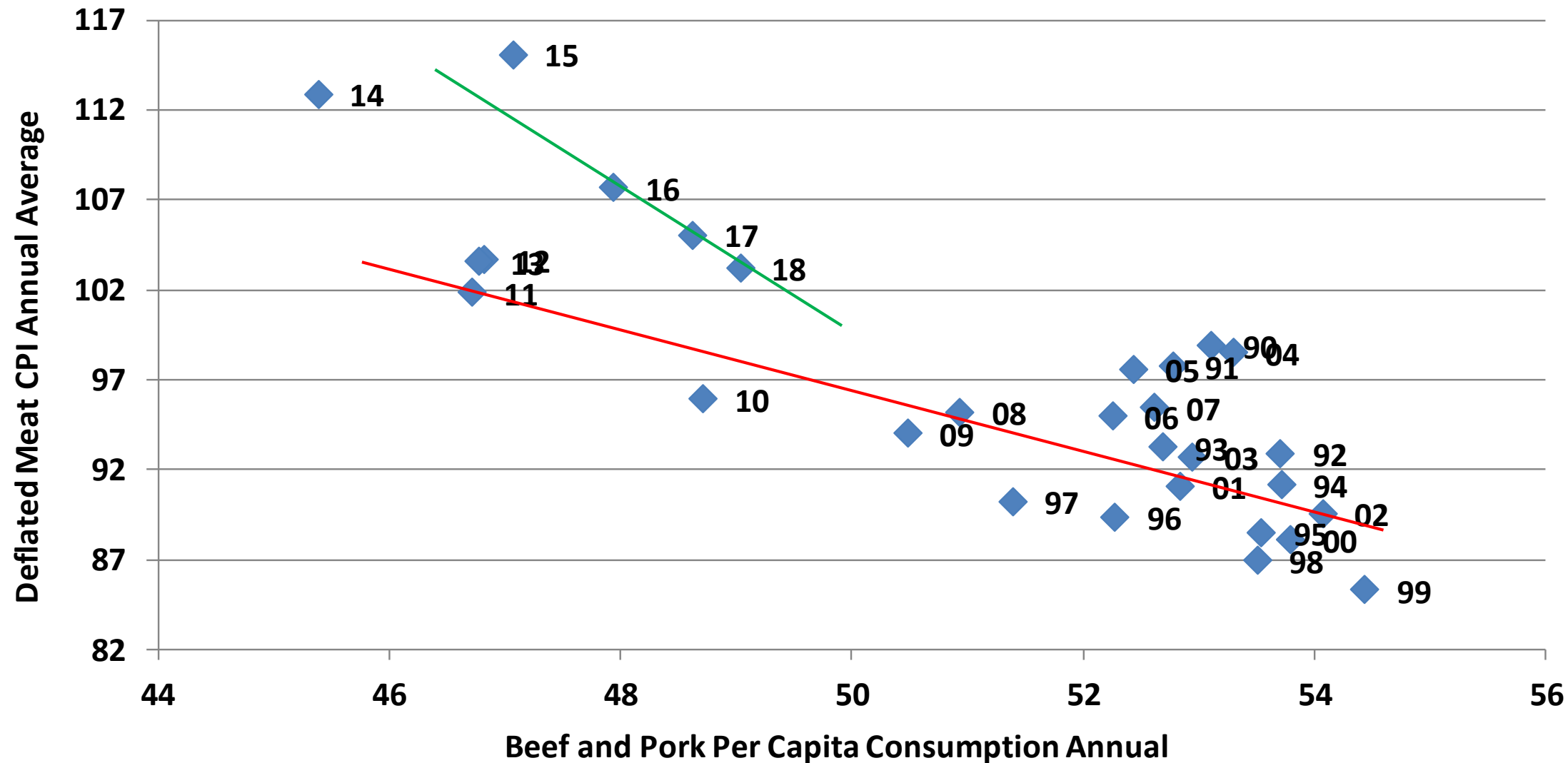
-1% CAGR



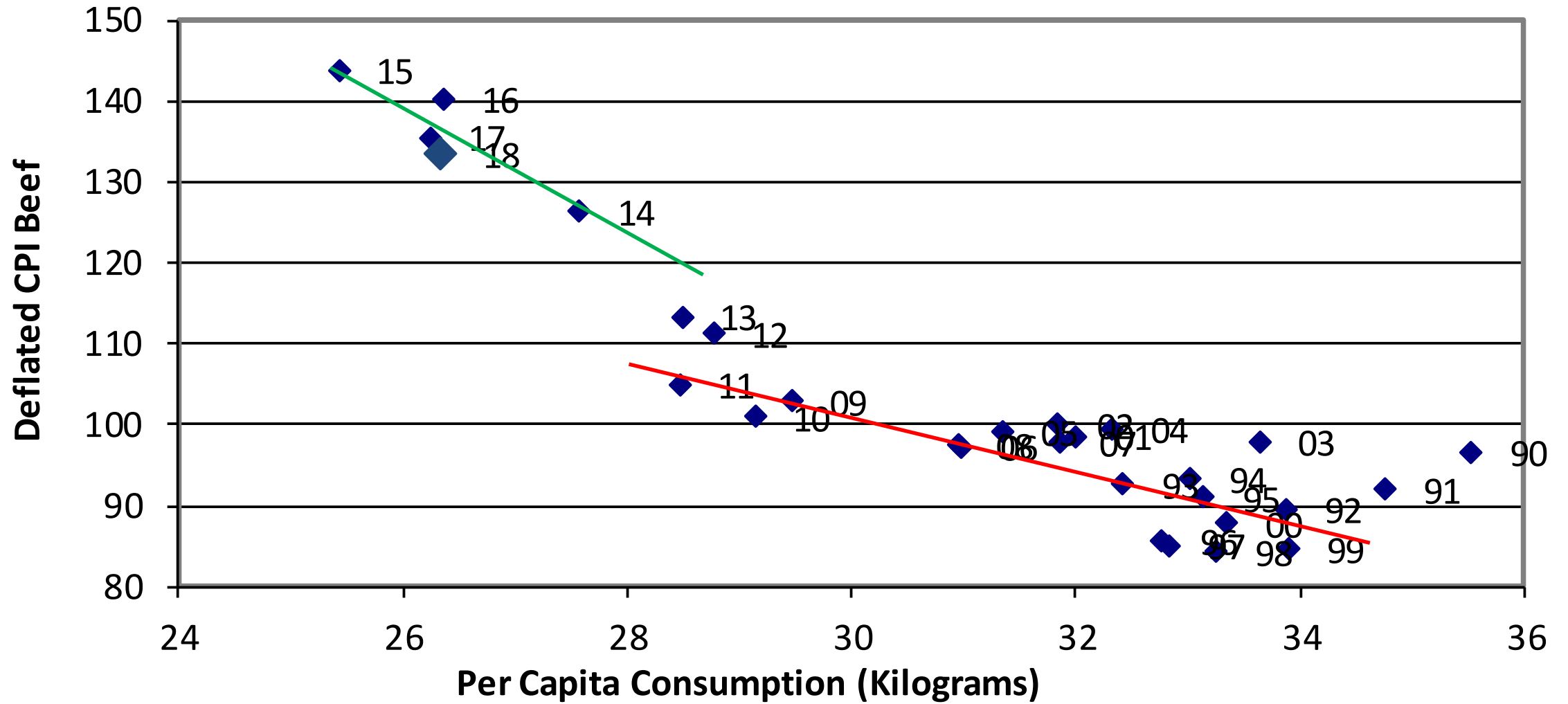
Demand
Curve



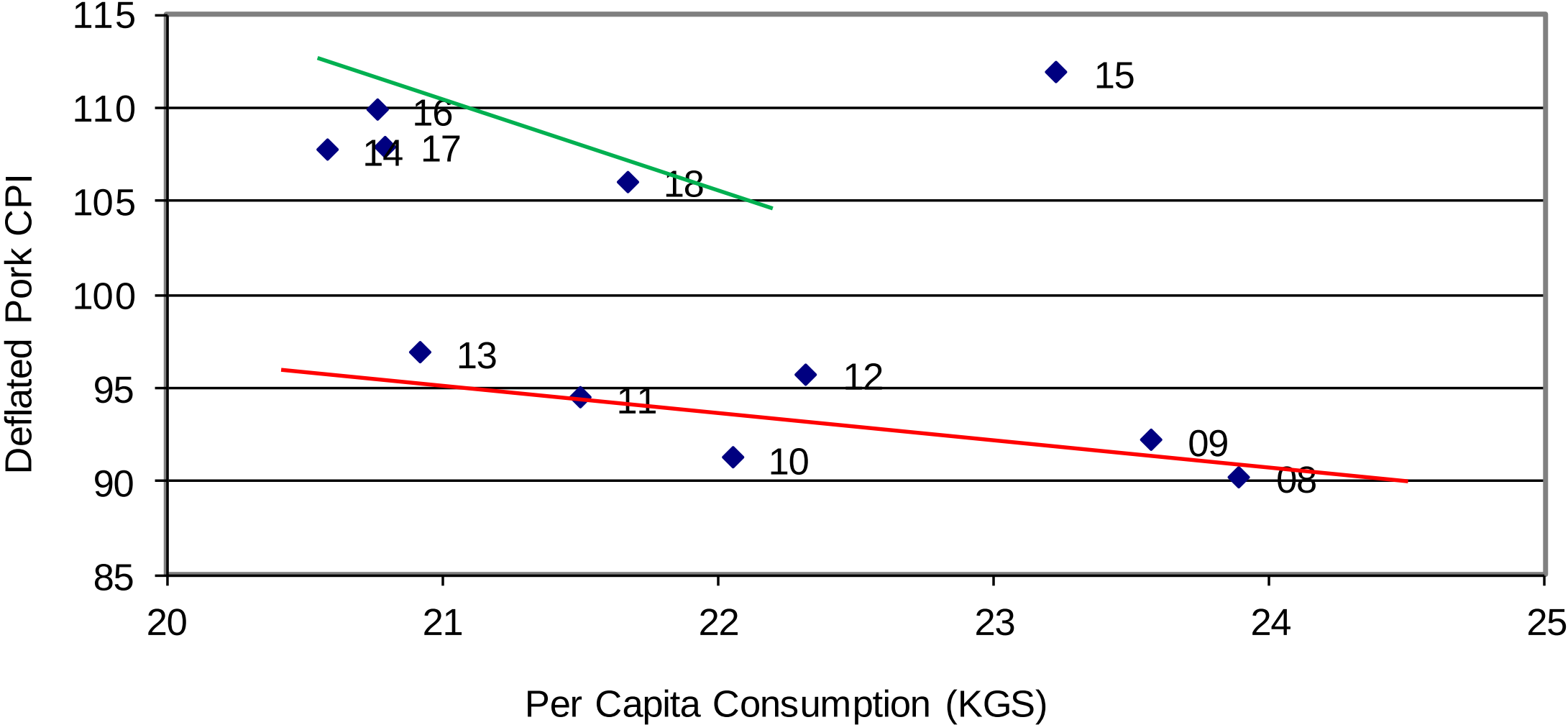
U.S. Beef and Pork Demand 1990-2018



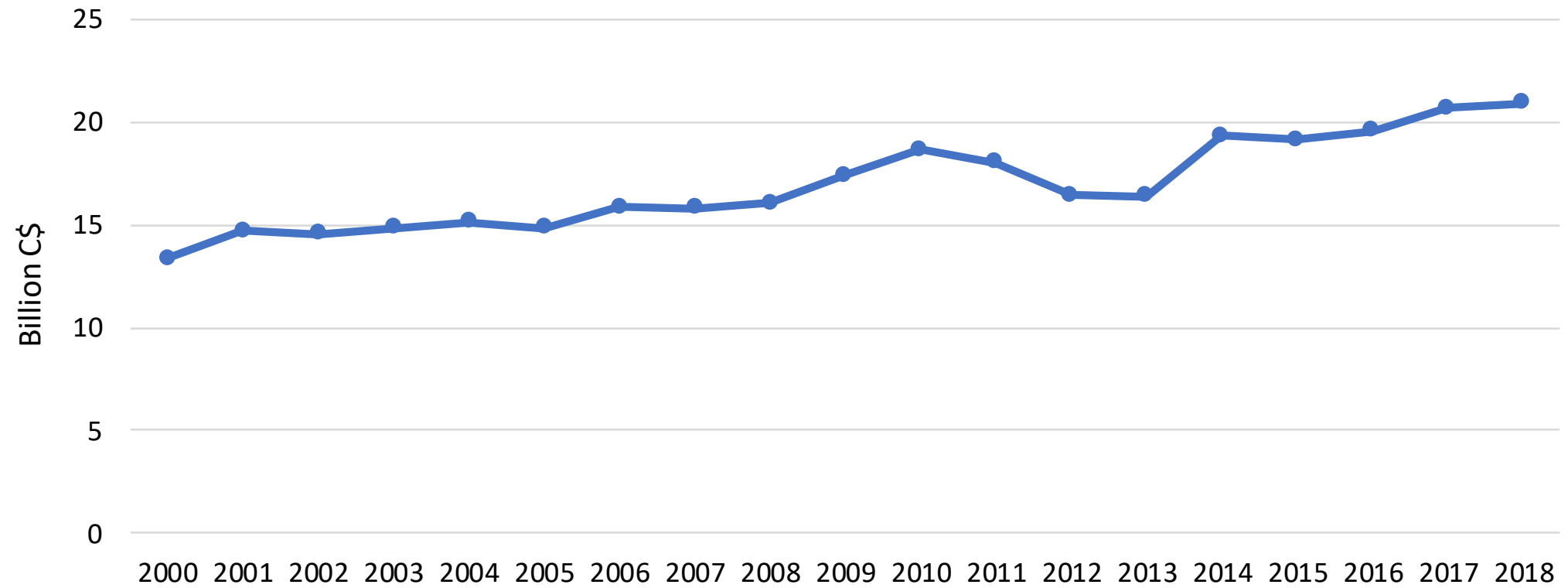
Canadian Beef Demand



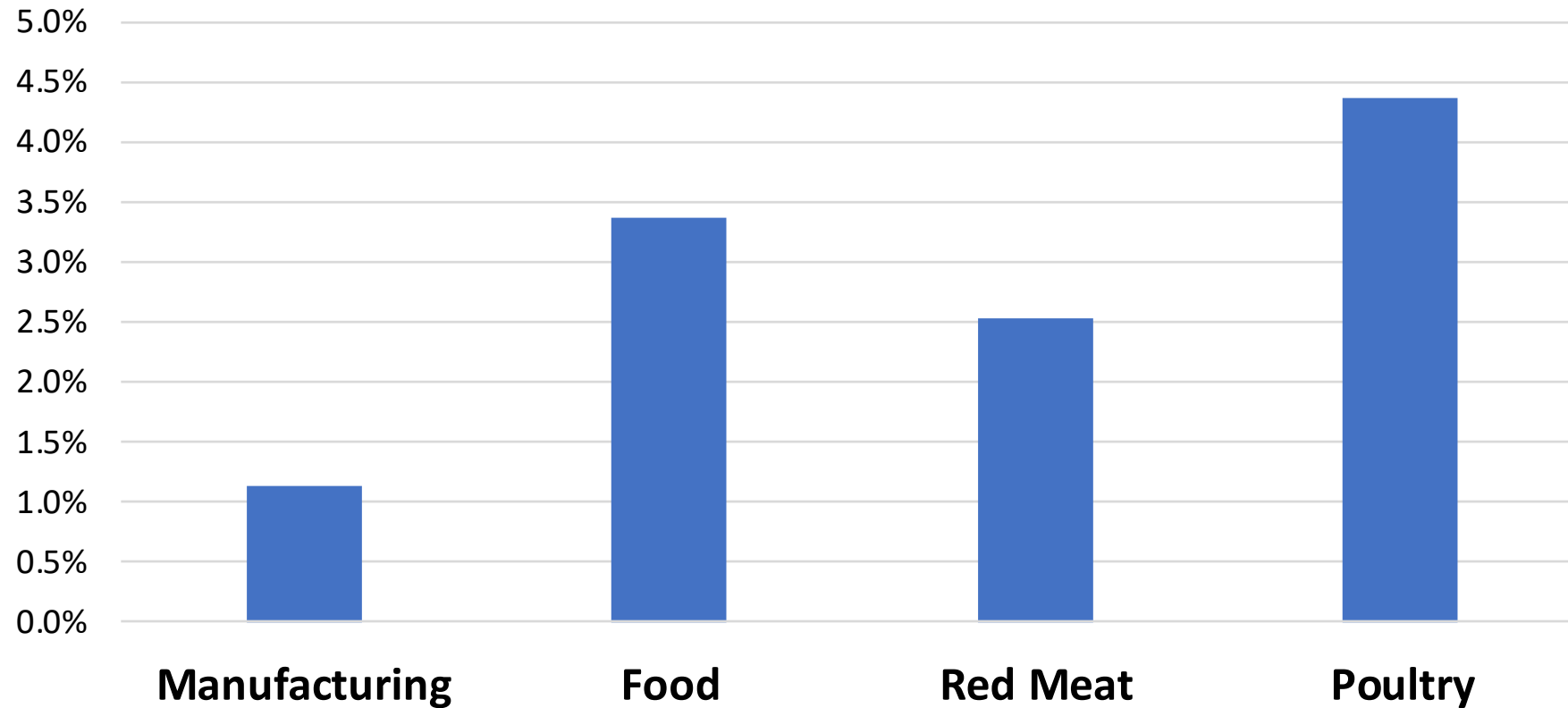
Canadian Pork Demand



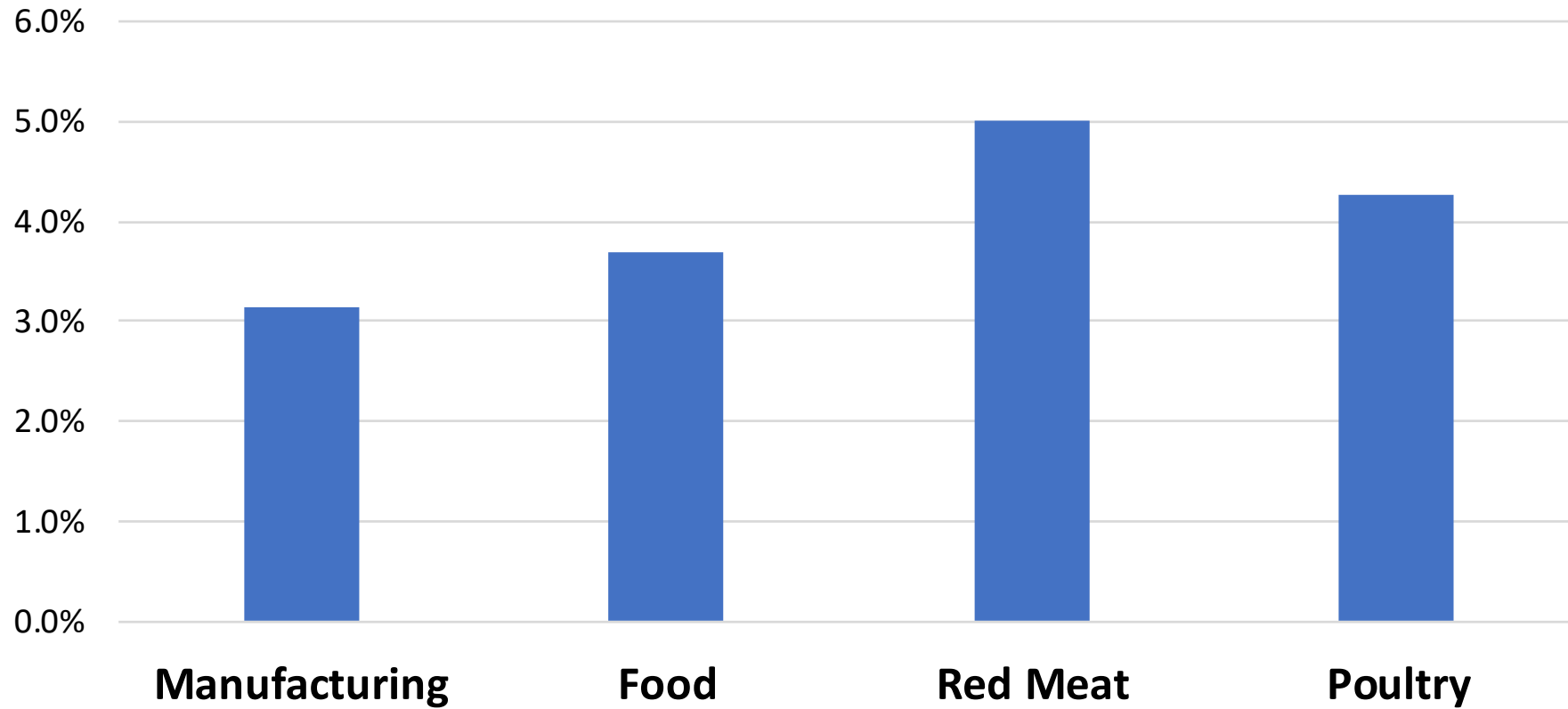
Canadian Red Meat Sales Annual 2000-2018



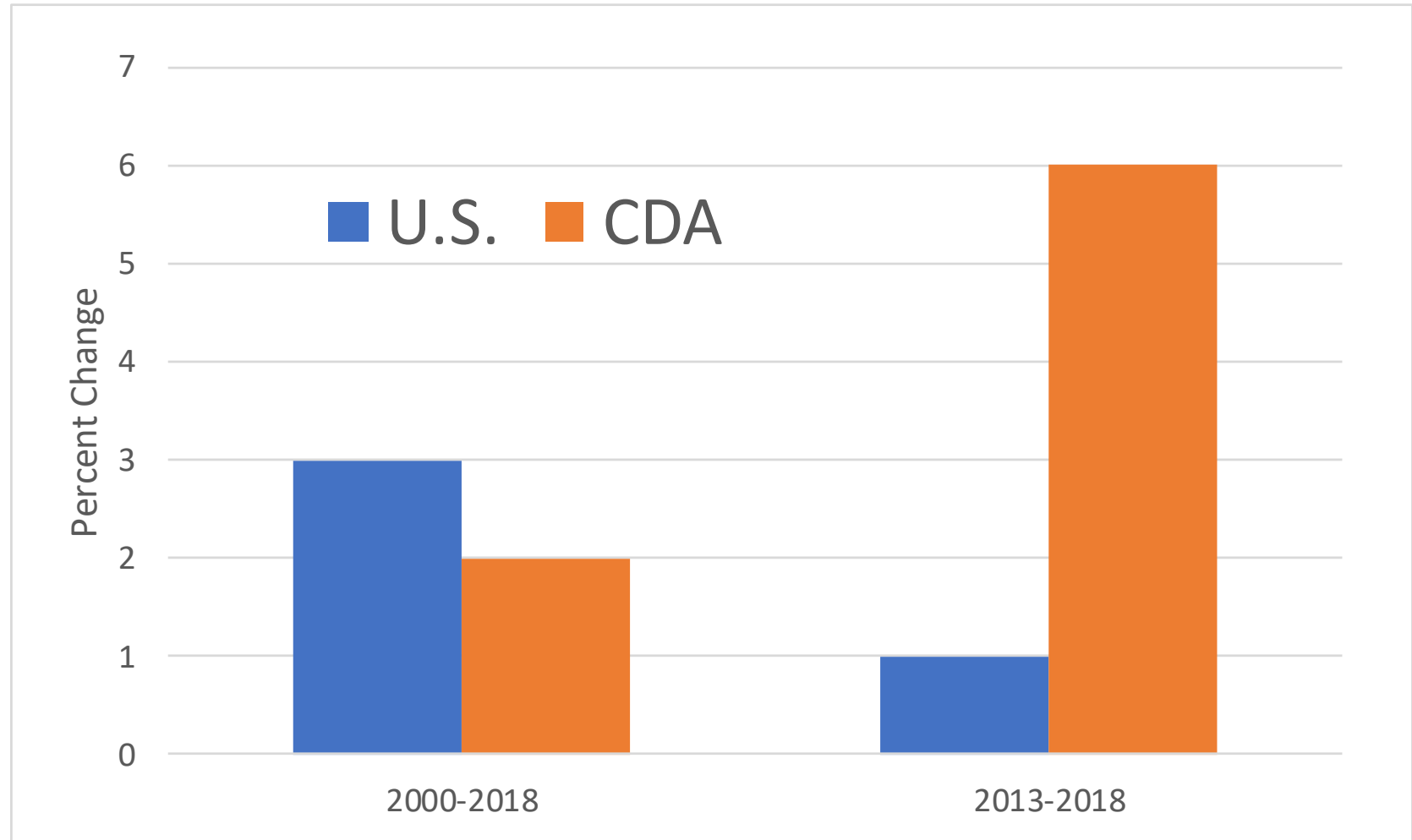
Annual Growth Rates 2000-2018



Annual Growth Rates 2013-2018

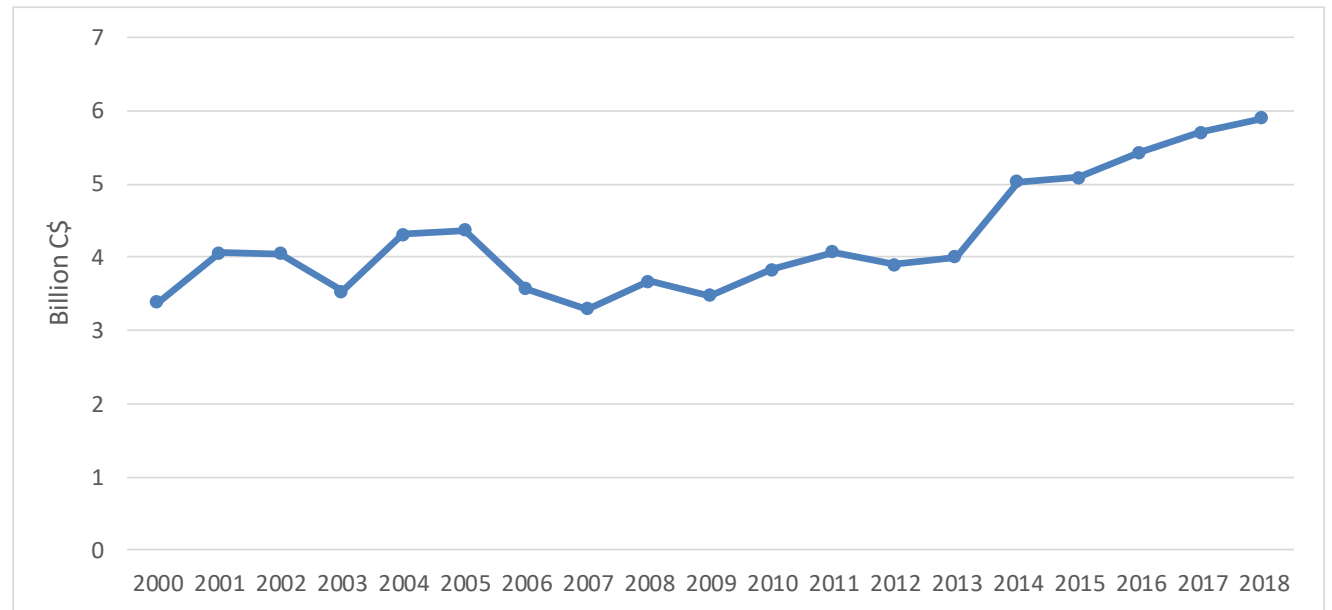


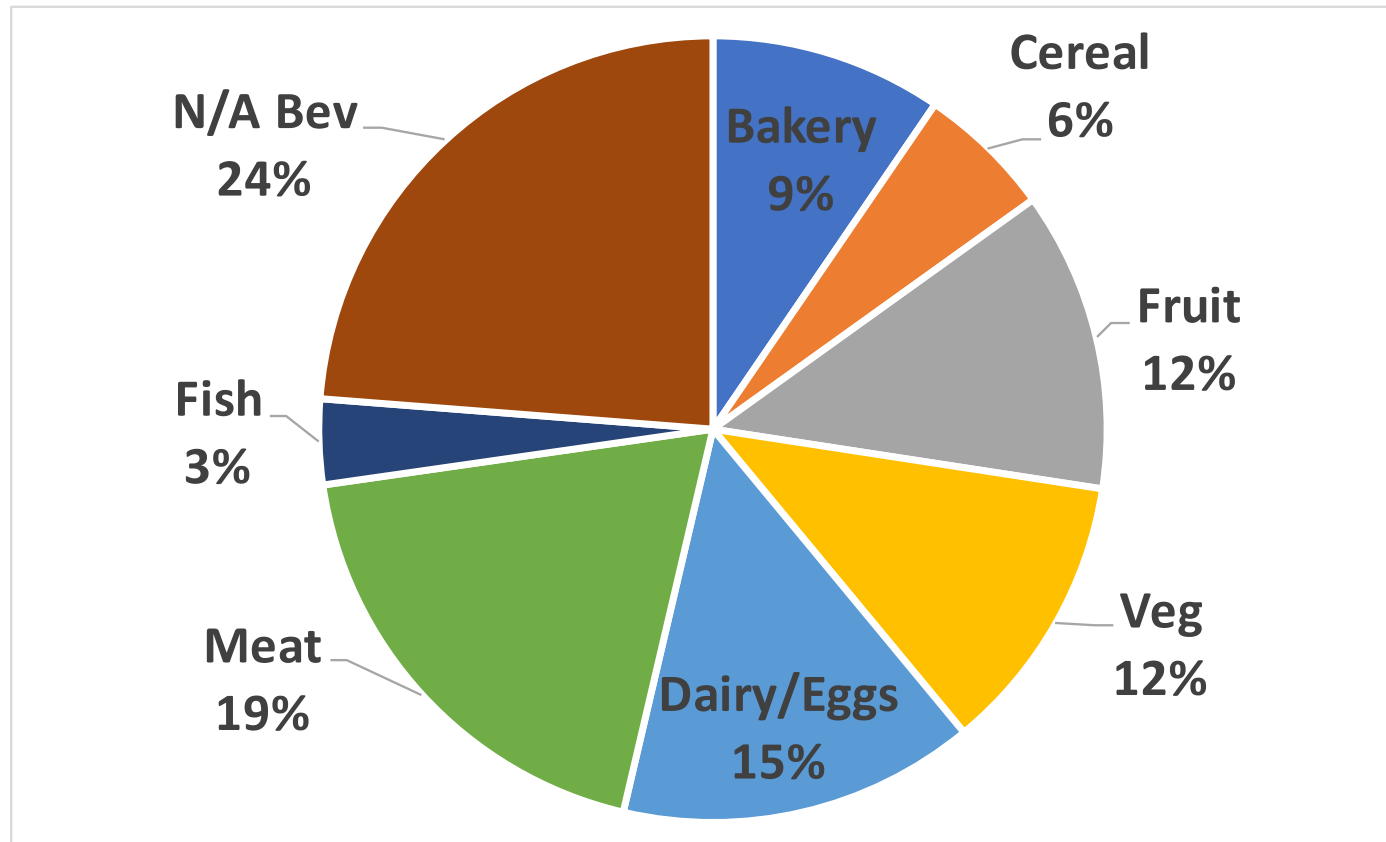
Meat & Seafood Manufacturer Growth Rates



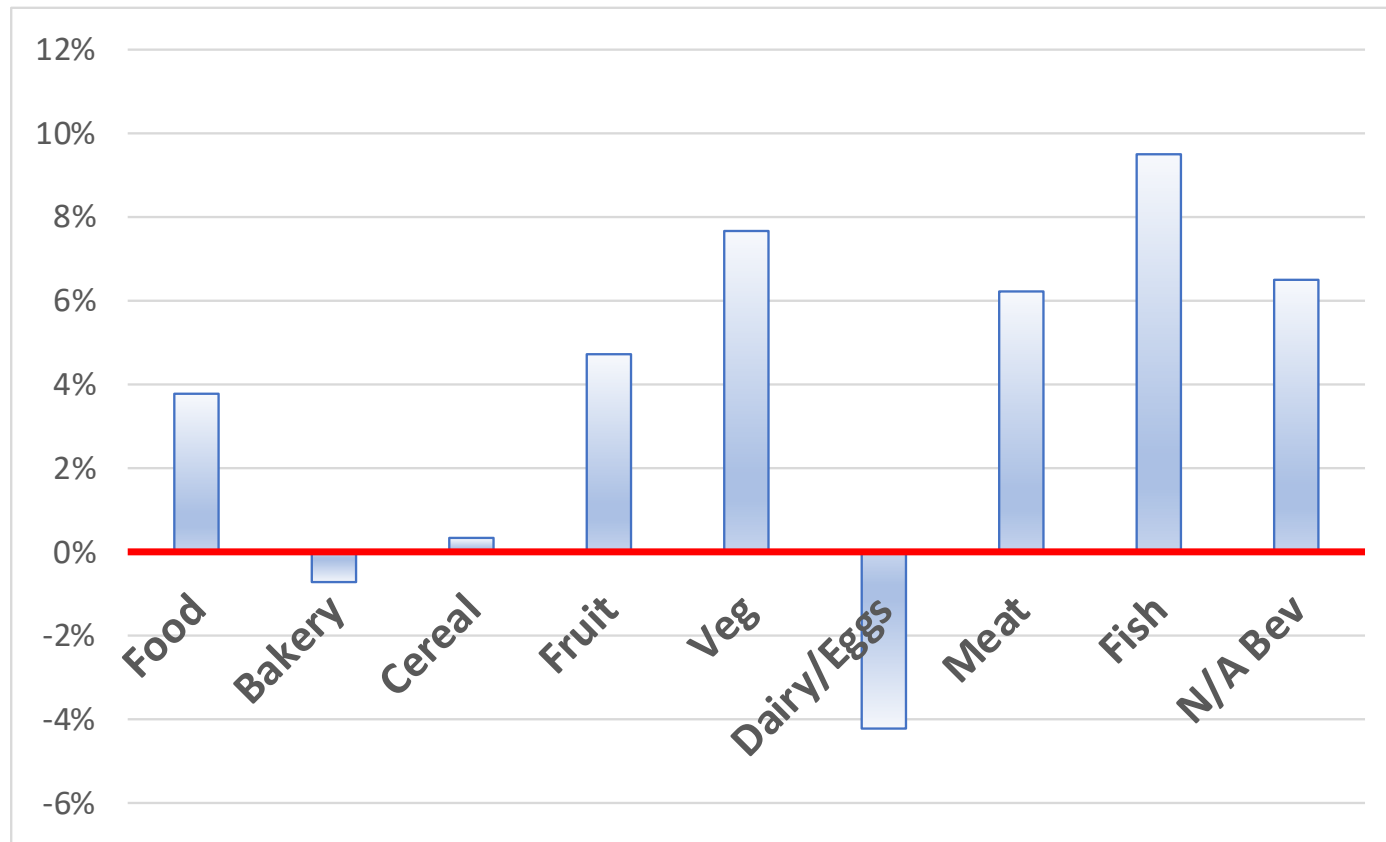
Canadian Beef and Pork Export Value

- 3% annual 2000-2018
- 8% annual 2013-2018





Food from Stores Spending



2013-2017 Growth Rates

Supercentre
Walmart



À vos marques, prêts,
économisez! Aubaines pour
LA LONGUE FIN DE SEMAINE
Ready, set, save!
LONG WEEKEND
deals ahead

Promotion
en vigueur jusqu'au
22 mai 2019/Promotion
available until May 22nd
Limite de
2
Limit

COUPES DE CHOIX DE
BOEUF ANGUS AAA
CANADIEN À 100 %

✓ Qualité
supérieure
canadienne

✓ Tendres

✓ Savoureuses

PREMIUM CUTS OF 100% CANADIAN
AAA ANGUS BEEF

✓ Canadian
High Quality

✓ Tender

✓ Juicy



Biftecks de haut
de surlonge de boeuf
Angus canadien à 100 %
Mon marché fraîcheur^{MC}
Coupe de catégorie Canada AAA.
N° 31693217.
Your Fresh MarketTM
100% Canadian Beef
Top Sirloin Cap Steak
Cut from Canada AAA Angus.
#31693217.
10,52/kg, économisez/
Save 9,45/kg,
coûtait/Was 19,97/kg.

**ÉCONOMISEZ MAINTENANT!
SAVE NOW!**
Économisez/Save 4,29/lb
4⁷⁷
lb
Coûtait/Was 9,06/lb



**Food
lovers
unite**

optimum

**MEMBERS
ONLY**

**Incredible offer for members only!
May 16 - 22**



**Listerine ultra clean, Total Care
946 mL/1 L rinse or Listerine Classic
1 L/Kids 500 mL rinse**

3.99

4.99**

**Member Price
May 16-22**

**This offer is valid at participating Loblaws and Fortinos stores only. Offer is not valid on Loblaws and Fortinos gift cards. Offer is not valid on Loblaws and Fortinos loyalty cards. Offer is not valid on Loblaws and Fortinos gift cards. Offer is not valid on Loblaws and Fortinos loyalty cards. Offer is not valid on Loblaws and Fortinos gift cards. Offer is not valid on Loblaws and Fortinos loyalty cards.

**Must Buy
Thurs/Fri/Sat/Sun only!**



beef striploin steak
family size, bone-in,
cut from Canada AAA or USDA
Choice grade beef or higher
12.72/kg
2067963

5⁷⁷lb



blueberries 314-340 g product of
U.S.A. no. 1 grade, Farmer's Market
greenhouse extra large sweet
peppers 3's product of Ontario
Canada no. 1 grade or strawberries
454 g product of U.S.A. no. 1 grade
206813701/2068583101

2⁹⁹



chicken breasts or thighs
family size, fresh,
boneless, skinless
8.80/kg
2107153/2107295

3⁹⁹lb



corn
product of U.S.A.
no. 1 grade
each
201311701

37¢



asparagus 6.99/kg
product of Ontario
or Romaine hearts 3's
product of U.S.A.
2017408101/206738001

2⁴⁹lb/ea.



smartcabbages



**PRIME RIB
CÔTE DE BŒUF**

Sobeys

happy
Victoria Day
long weekend

SUMMER'S
ON!

How to Carve

Learn to trim and
portion a whole
Beef Tenderloin.
See page 3.

9⁹⁹
/lb

Beef Tenderloin whole cut from Canada AA grade beef
or USDA select grade beef 22.02/kg

BEYOND
BURGER™
IN STORE
NOW

20g PLANT PROTEIN
NO GMOs
NO SOY OR GLUTEN



New

Beyond Burger
226 g

FIRST
OF THE
SEASON

10⁹⁹
/lb

Live Hard Shell
Market Lobsters
product of Canada
1-1.25 lb subject
to availability
24.23/kg

Ontario
grown

FAMILY
SIZE

1⁹⁹

2⁹⁹

2⁹⁹
/lb, ea.



TM/MC

ZONE 4



FAMILY
SIZE

4⁹⁹
/lb

Top Sirloin Steaks
or Roast cut from
Canada AA grade
beef 11.00/kg



BEYOND MEAT
Burger 226 g



New



MAPLE LEAF or
COMPLIMENTS
Wiens 375 g
or SCHNEIDERS
Lunch Mate
Stackers or Kits
75-132 g selected

1⁹⁹
ea



2⁴⁹
ea

Demand Summary

- Demand

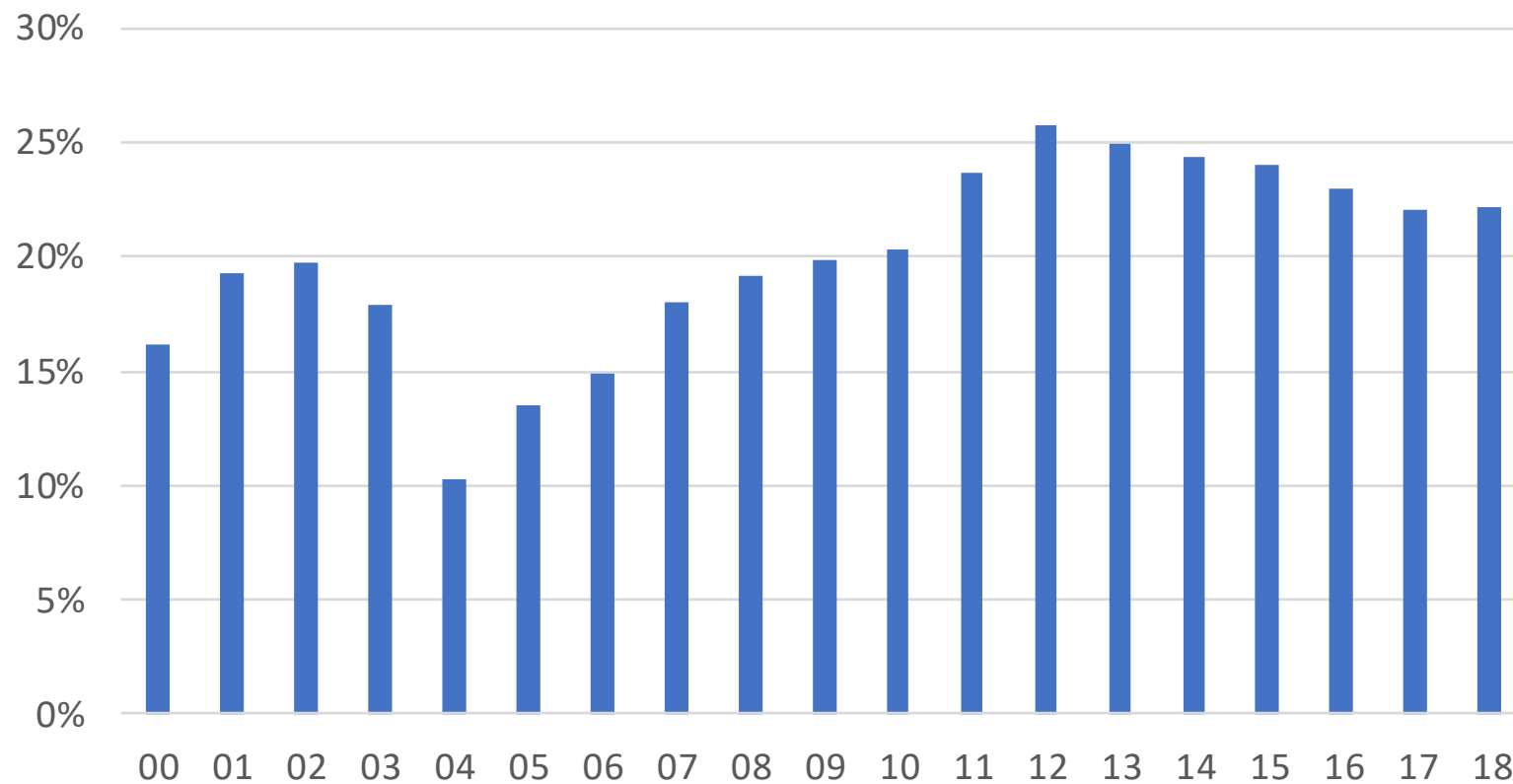
- **Competitiveness**

- Threats

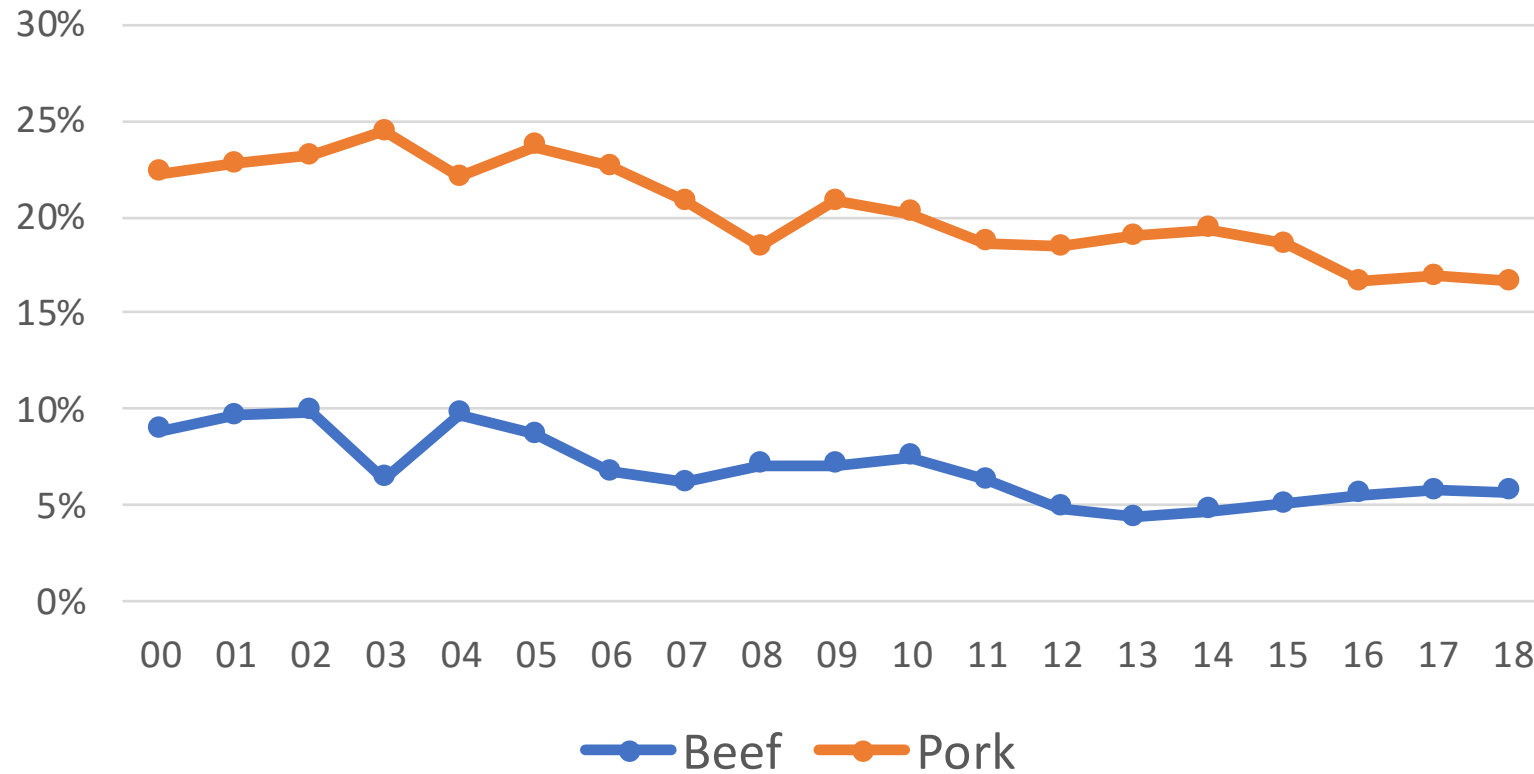
Competitiveness:

the ability to profitably maintain or
enhance market share

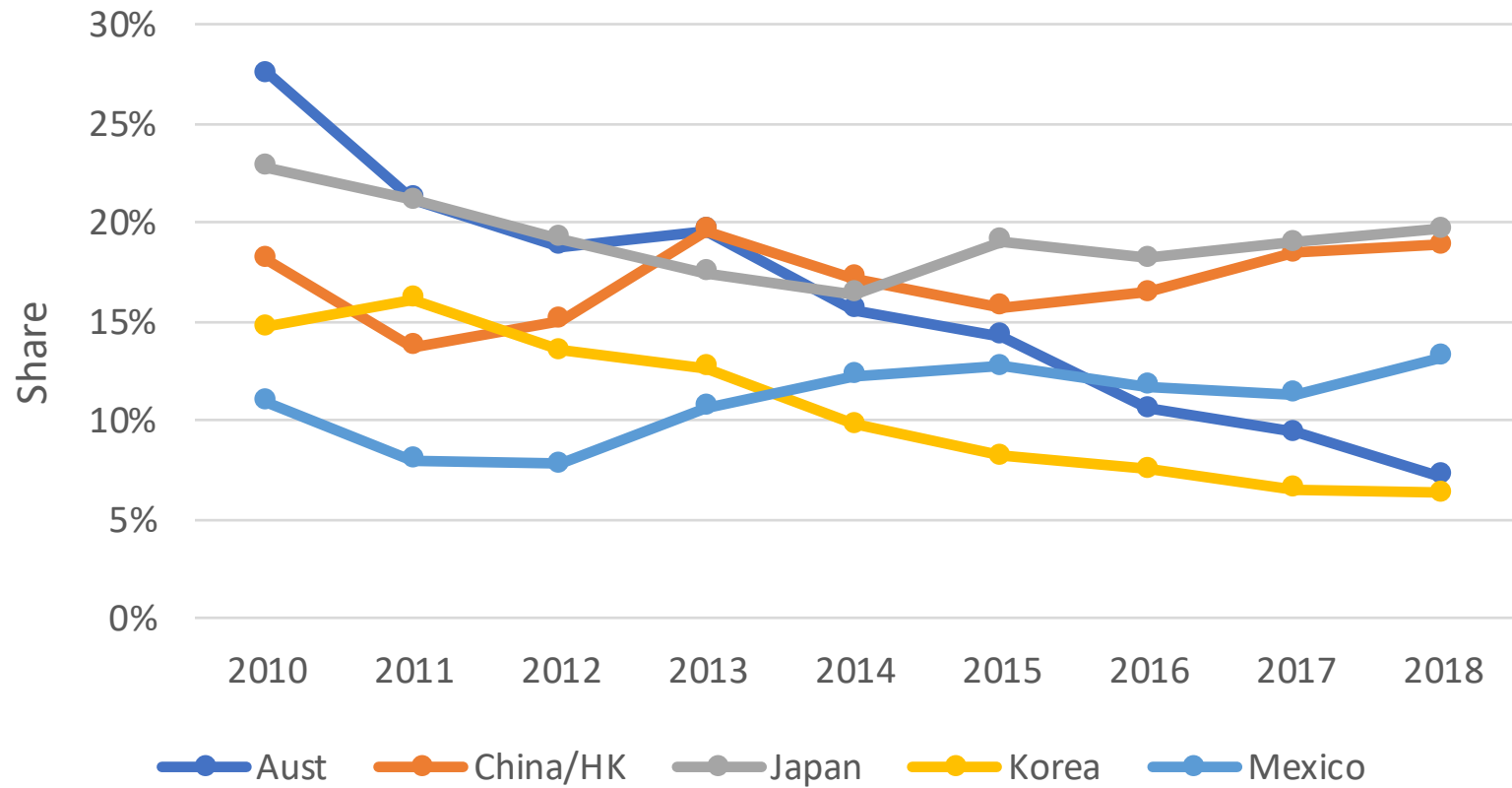
Import Share of Red Meat Consumption



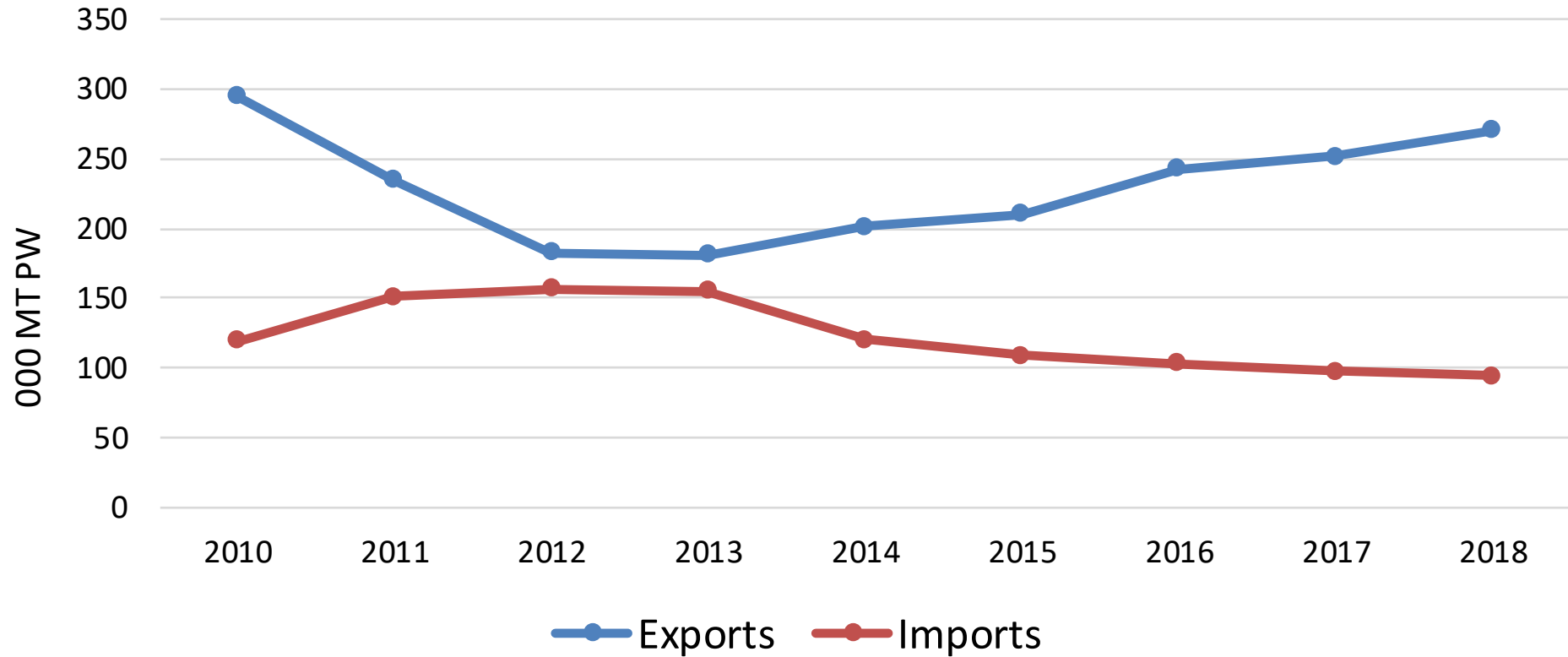
Canadian Export Share of Global Imports



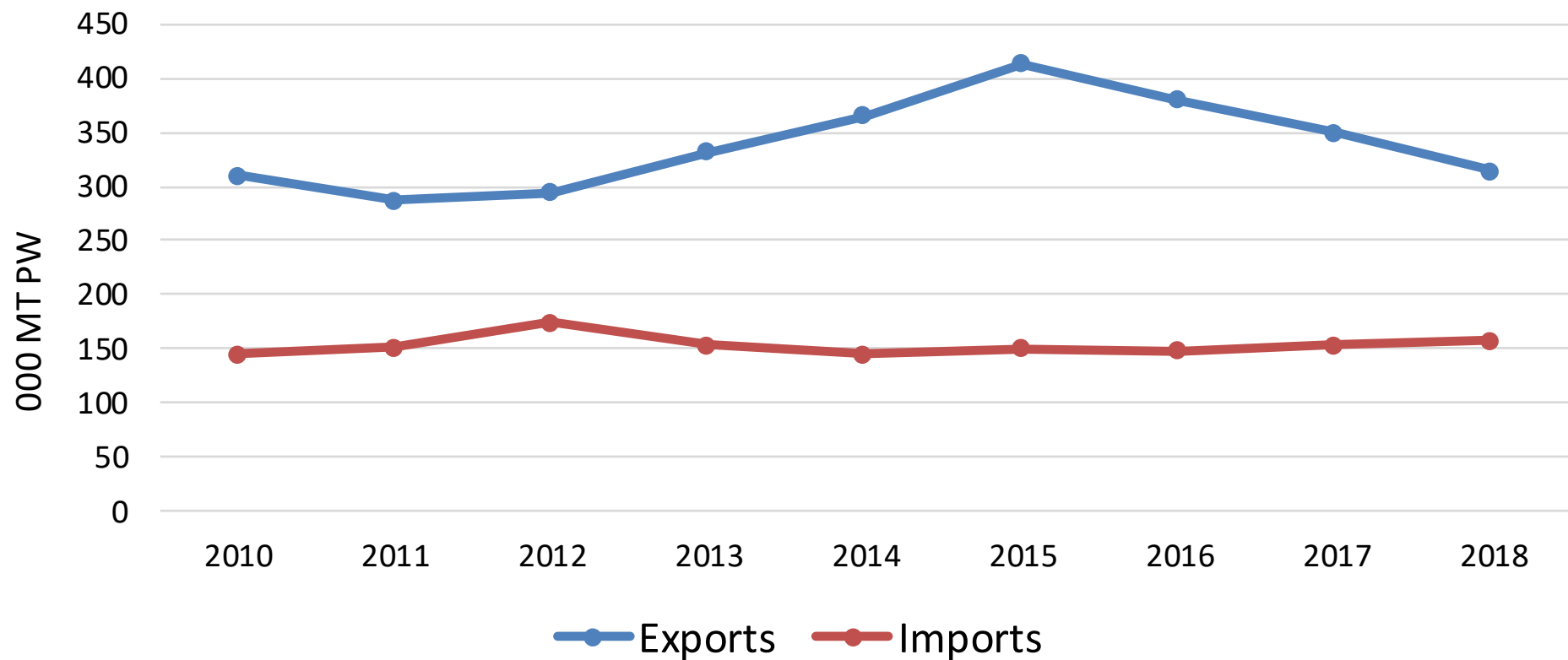
Canadian Pork Share of Large Importers



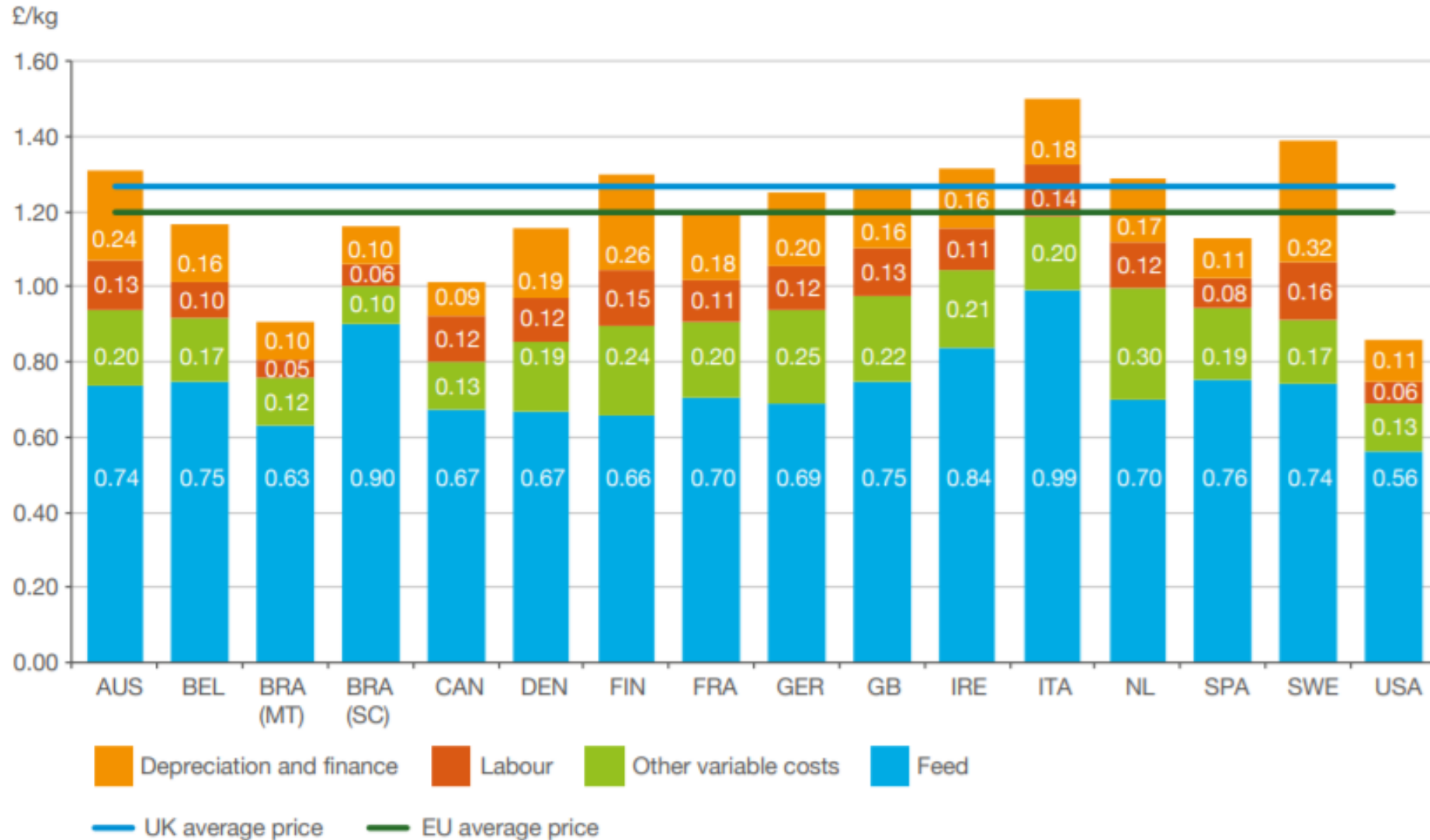
Canada-U.S. Beef Trade



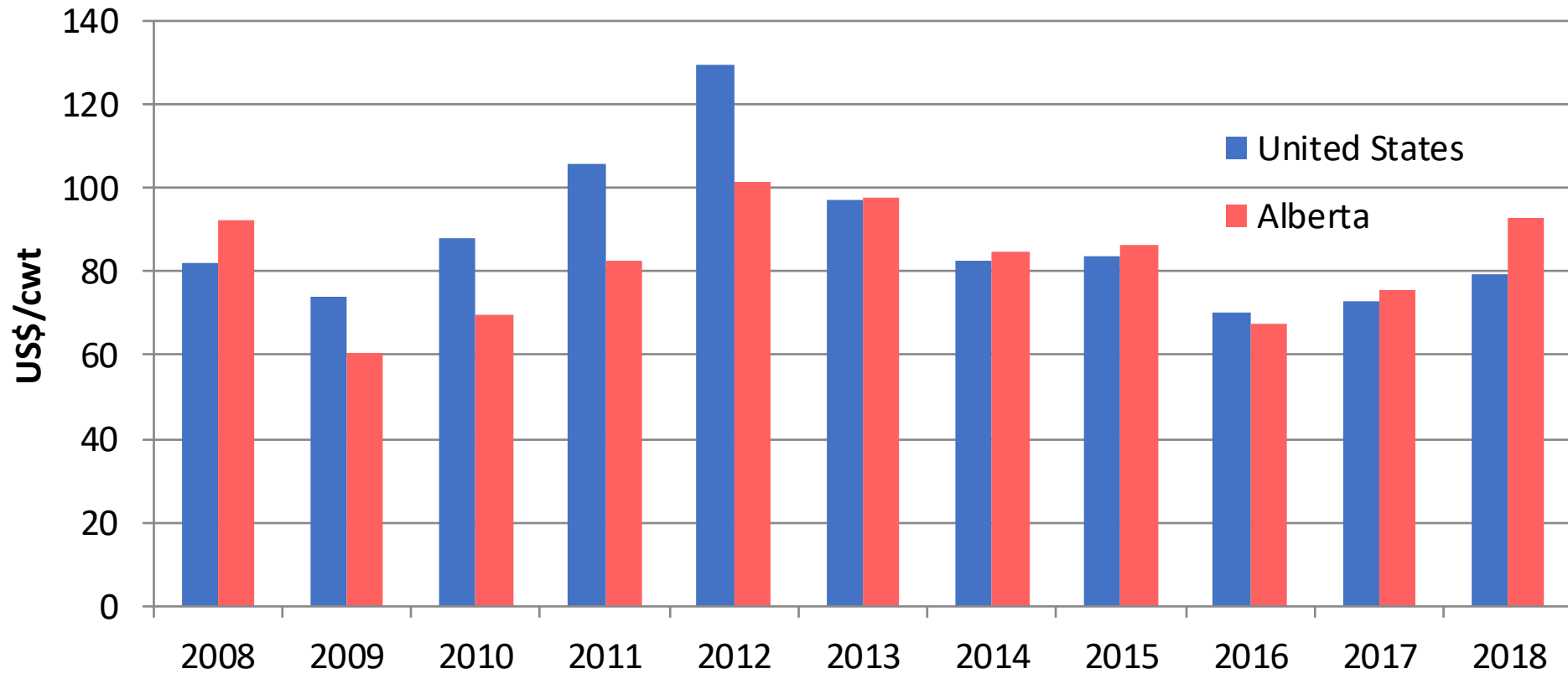
Canada-U.S. Pork Trade



International Hog COP 2016



Alberta-U.S. Feeding Cost of Gain 2008-2018



Pork packing: Cda vs U.S.

- Muscle Revenue realization 
- Inedibles 
- Plant costs 



Beef Packing: Cda vs U.S.

- Muscle Revenue realization 
- Inedibles 
- Plant costs 



CANADA 

BROOKS, ALBERTA

Competitiveness Summary

- Demand
- Competitiveness

•Threats

Picture source: Winnipeg Free Press

Labour



Ranked Priorities

**Highest
Priority**

- 1. Food Safety
- 2. Product Quality
- 3. Price

**Middle
Priority**

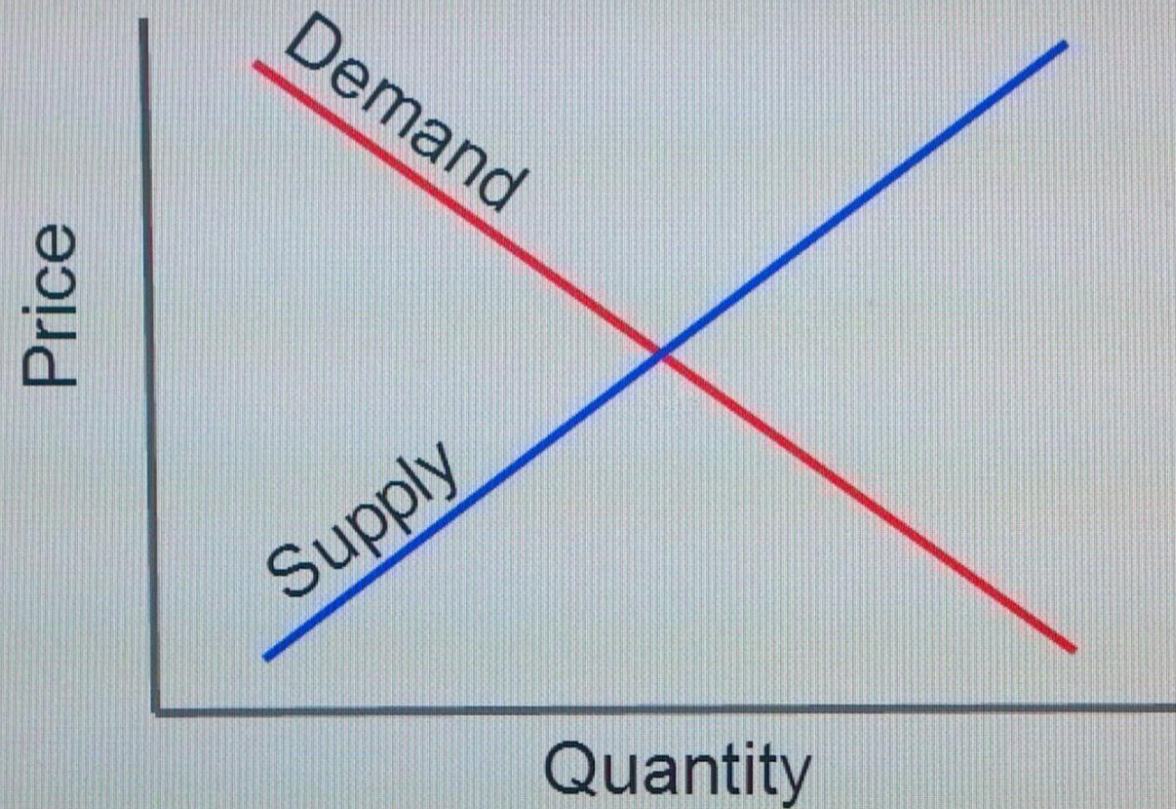
- 4. Nutrition
- 5. Health

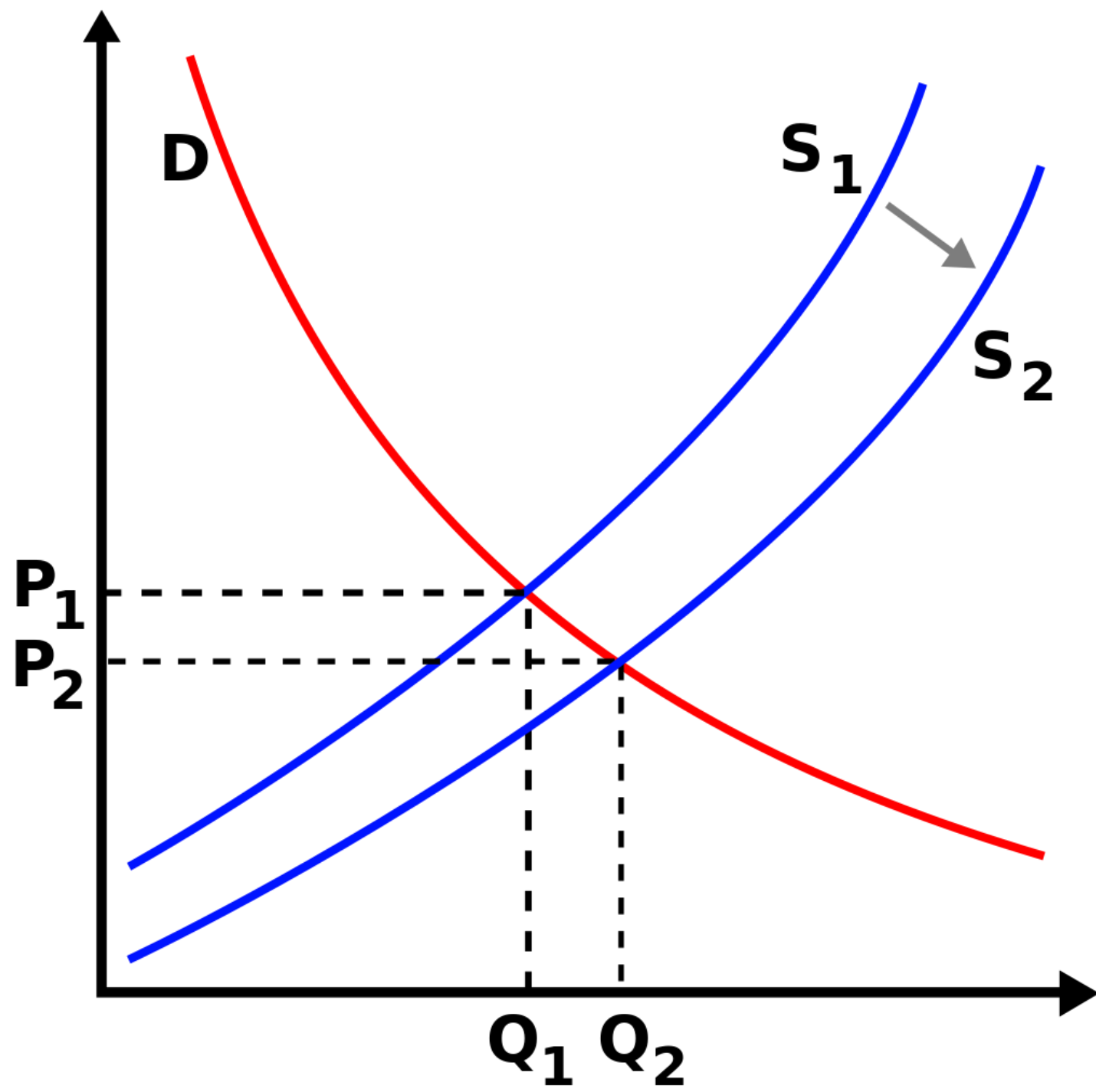
**Lower
Priority**

- 6. Social Aspects
- 7. Sustainability Dimensions



Economics





[illegible]

Western Feed Grain Competitiveness



Lack of herd
growth

Picture source: pork.org and beef2live.com

AFRICAN SWINE FEVER



Keeping African swine fever out of Canada

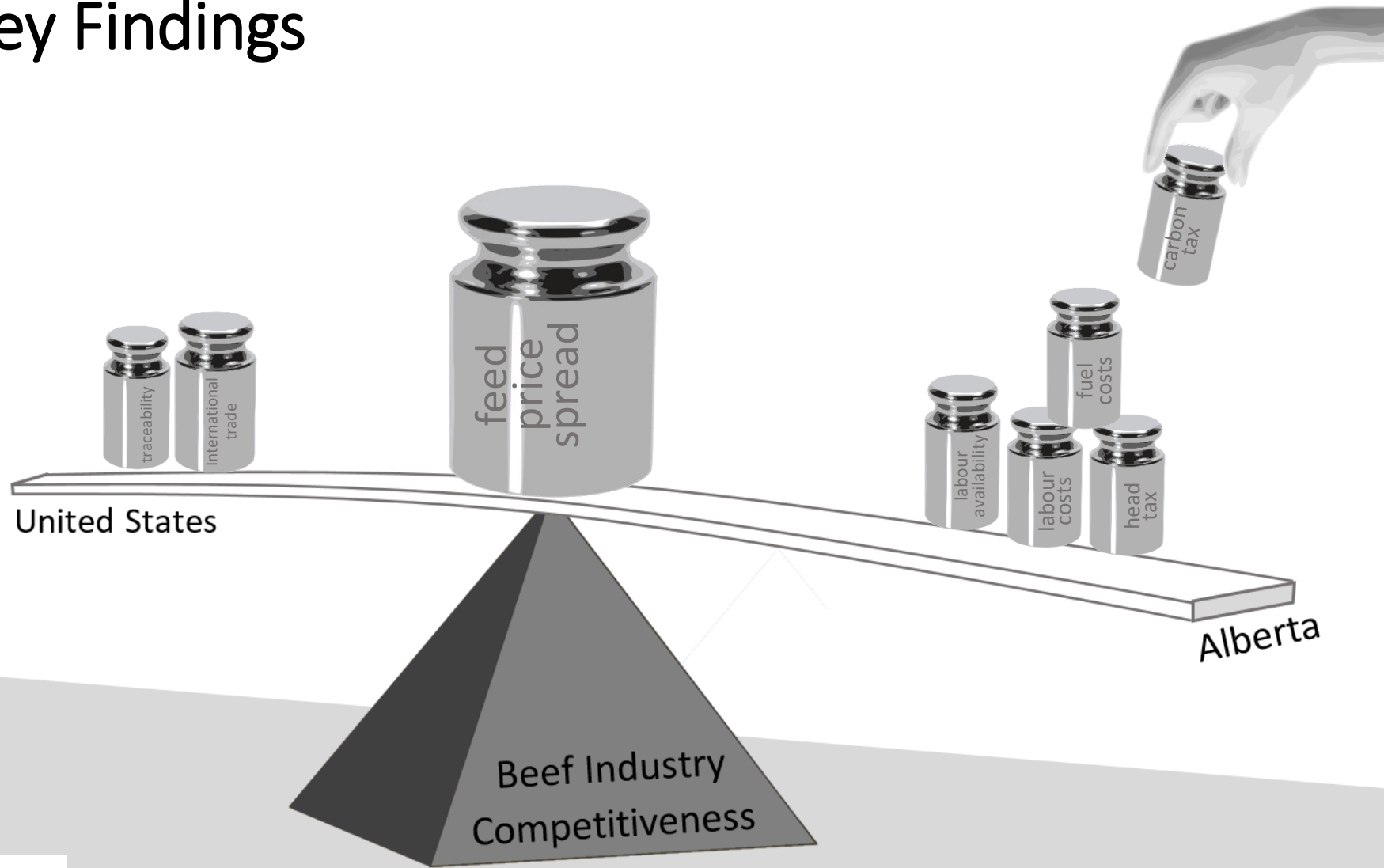


Canadian Food
Inspection Agency

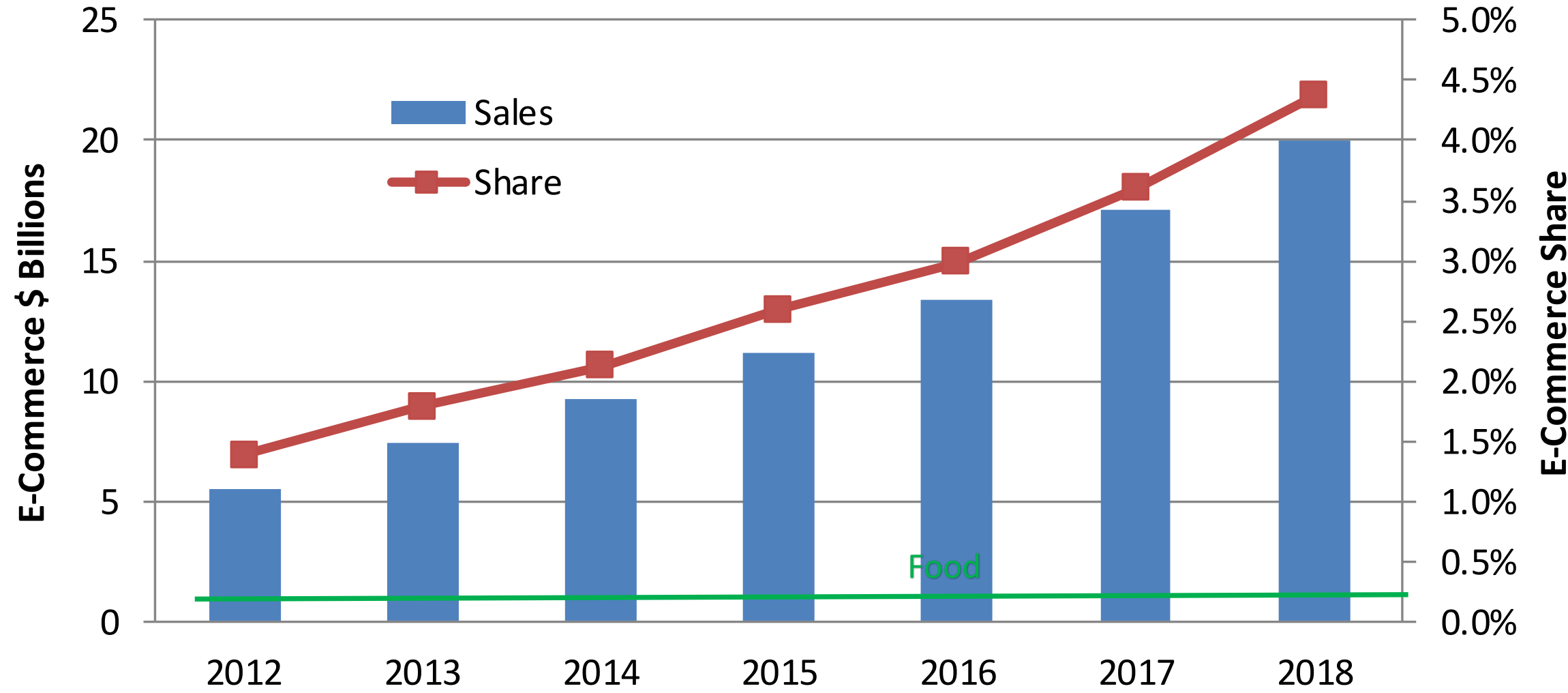
Agence canadienne
d'inspection des aliments

Canada 

Key Findings



E-Commerce Non-Motor Vehicle Sales and Share 2012-2018





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Canadian Cattle Market



Canadian Pork Market Report



Canadian Chicken



Canadian Boxed Beef



Grocery Trade Report

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