



Advancing the Livestock and Meat Industry in Alberta

April 30, 2015



Today's conversation...

1. Overview of Alberta's meat and livestock industry:

- Opportunities
- Challenges

2. ALMA: industry catalyst

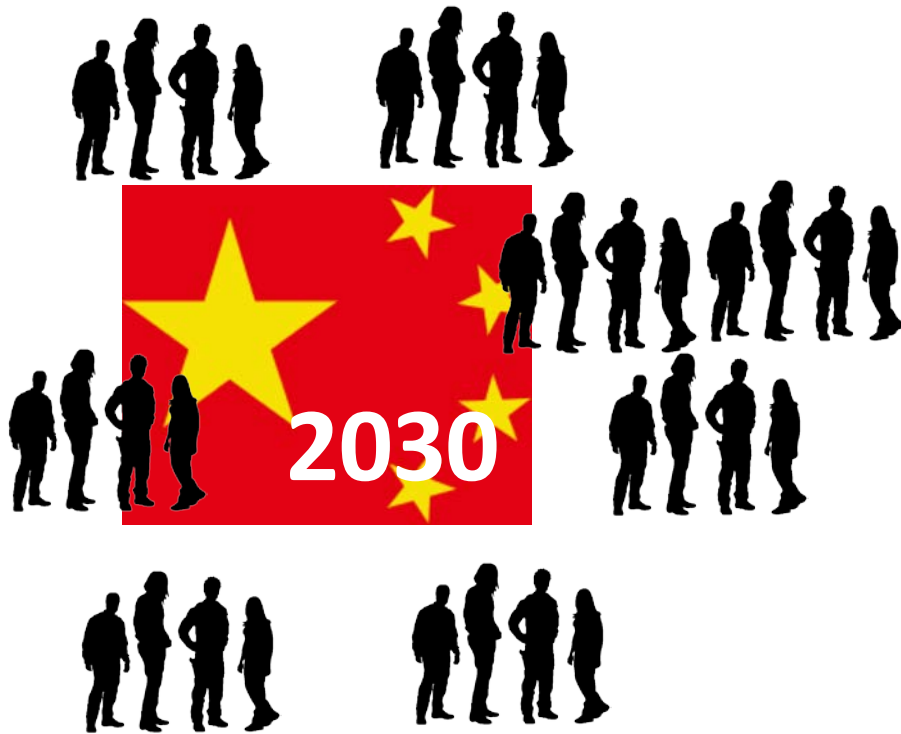
- Partnerships

3. ALMA-funded projects

Alberta's and Canada's meat and livestock industry is compelling...



OPPORTUNITIES: Export Driven



OPPORTUNITIES

High-quality
and value added



1. Coordinate opportunities



2. Deliver to demand



3. Engage with the public



OPPORTUNITIES:

Research & Innovation

**Animal
welfare**



**Genomics
research**

OPPORTUNITIES:

Productivity & Efficiency



Production – Efficiency - Differentiation



Feed efficiencies – Reduced GHG

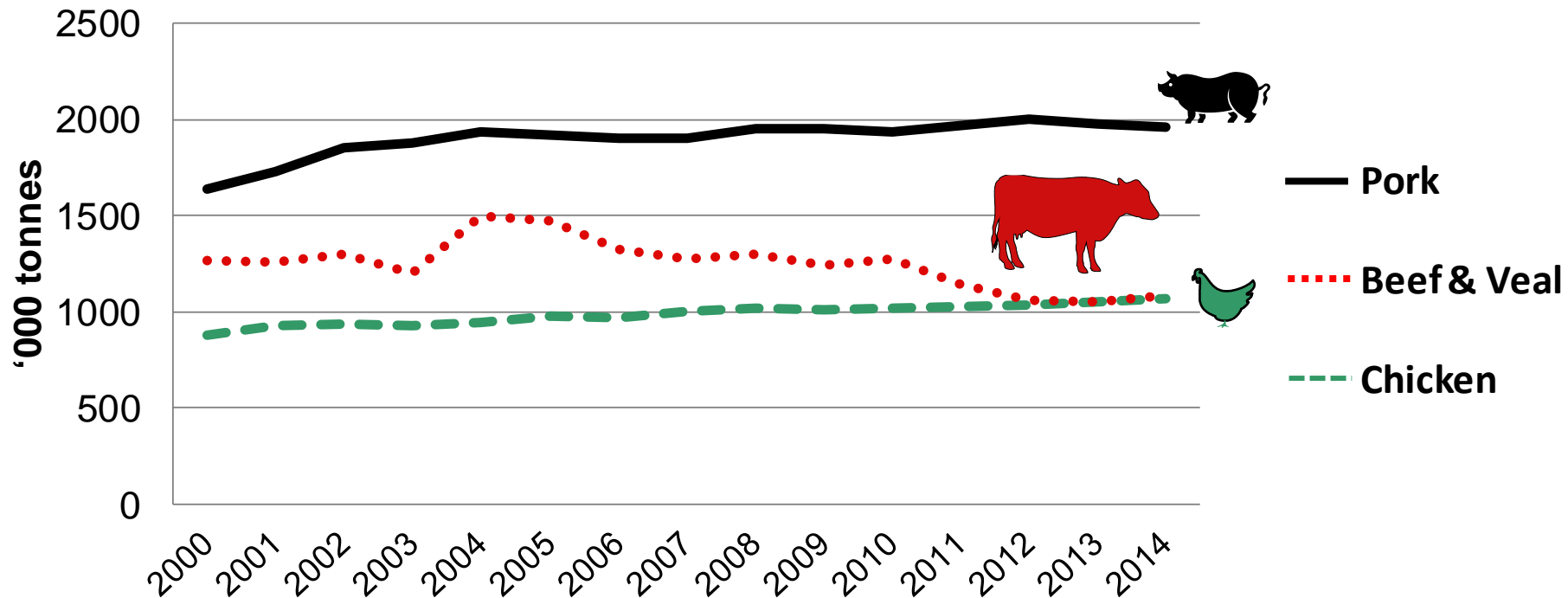
OPPORTUNITIES: Industry Engagement

Engage public



CHALLENGES

Canadian Meat Production Pork | Beef | Chicken 2000 – 2014



Source: Agriculture Canada, Statistics Canada

CHALLENGES

- **Sustainability: McDonalds, A&W**
- **Tariffs**
- **Animal Welfare**
- **Food Safety**
- **Investment**

ALMA: An Industry Catalyst

In the development of a profitable and competitive industry

- Partnerships
- Challenge industry
- Oversight & direction; policy advice

ALMA: An Industry Catalyst

Drive change:

- Increased customer access and market development
- Enabled product differentiation
- Enhanced productivity
- Sustainable development

ALMA - Funded Projects

Increased customer access and market development

Alberta Beef Producers:
local beef initiative



ALMA - Funded Projects

Increased customer access and market development

Legacy Fund

- Government of Canada
- Government of Alberta
- CCA
- ALMA administered

ALMA - Funded Projects

Increased customer access and market development

Missions:

i.e. Bison (EU)



ALMA - Funded Projects

Increased customer access and market development

Policy Work to Gain access:

i.e. Elk (Korea)



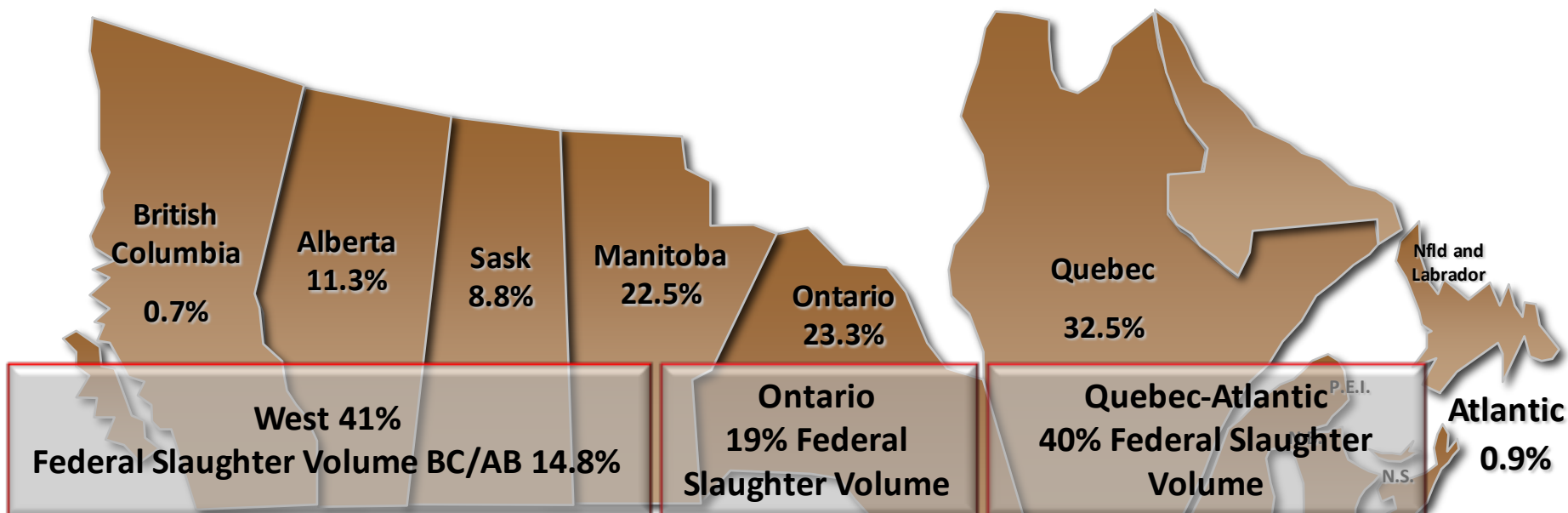
ALMA - Funded Projects

Enabled Product Differentiation and Enhanced Productivity

1. Product to demand
2. Strategic partnerships:
 - Alberta Pork
 - Alberta Beef
 - Other industry associations

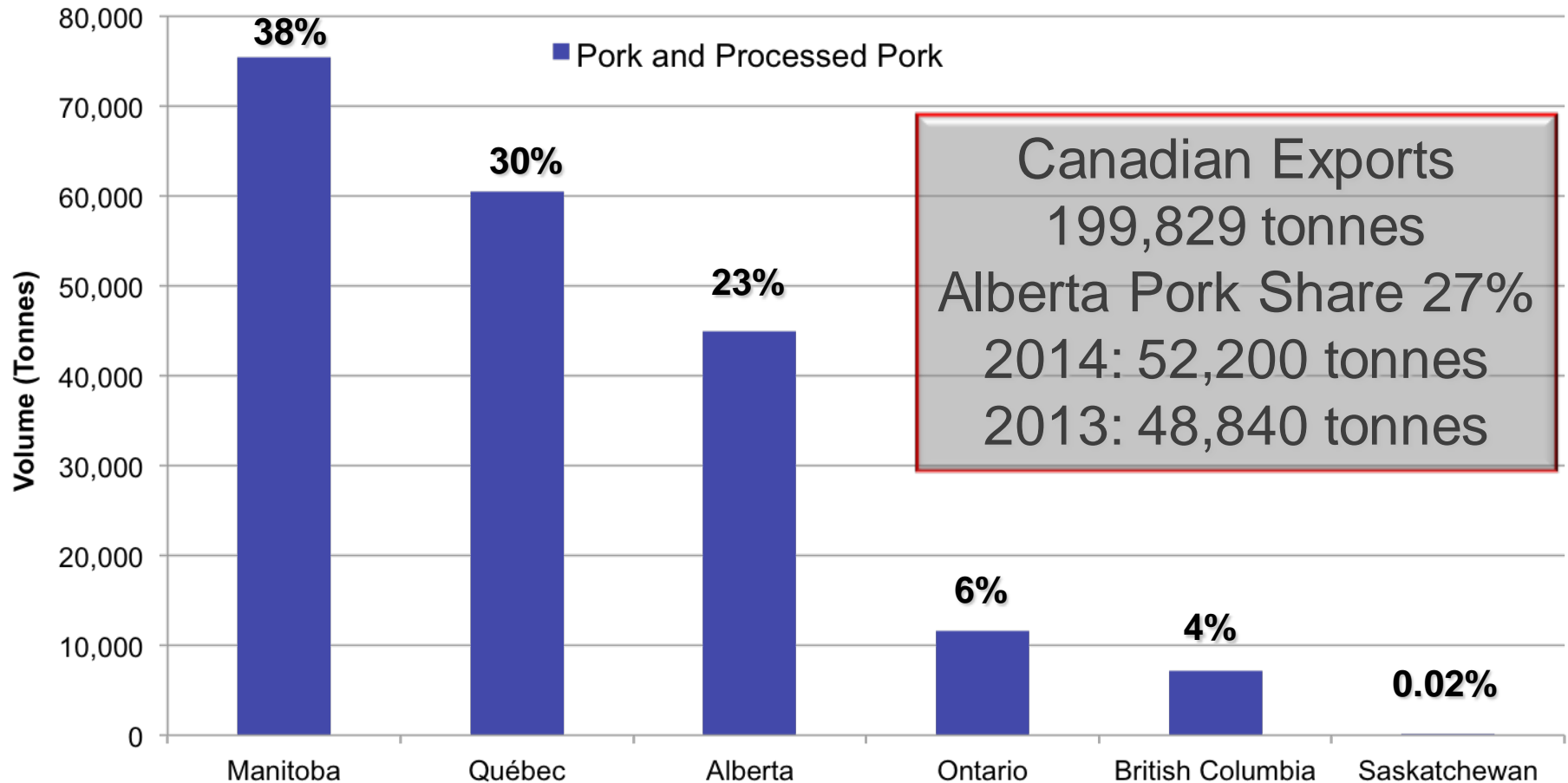
Canadian Pork Production Distribution Of Inventory 2014

(% of total hogs and slaughter volume)



2014: 1.95 Million tonnes of Pork Produced, 25.3 Million Pigs.
7,020 Producers, Inventory of 13.1 Million Pigs, 1.2 Million Sows on July 1, 2014.
Manitoba, Ontario, and Quebec account for 84% of Canadian Hog Production and 85% of all federal slaughter volume

Canadian Pork Exports Made for Japan 2014



ALMA - Funded Projects

Enabled Product Differentiation and Enhanced Productivity



ALMA - Funded Projects

Enabled Product Differentiation and Enhanced Productivity

Research



Collaboration:

- University of Alberta
- University of Calgary
- Government of Canada
- Prion Research Institute
- Gentec

Innovation



ALMA - Funded Projects

Enabled Product Differentiation and Enhanced Productivity

- Reducing animal environmental impact: U of A
- Improving food safety: smart labels
- Product differentiation



Genomics

ALMA - Funded Projects

Enabled Product Differentiation and Enhanced Productivity

Champion Petfoods:

- Local
- Sources local meats
- 70 countries
- New research facility
- A local success story



Champion Petfoods®
Canada's Best Petfood

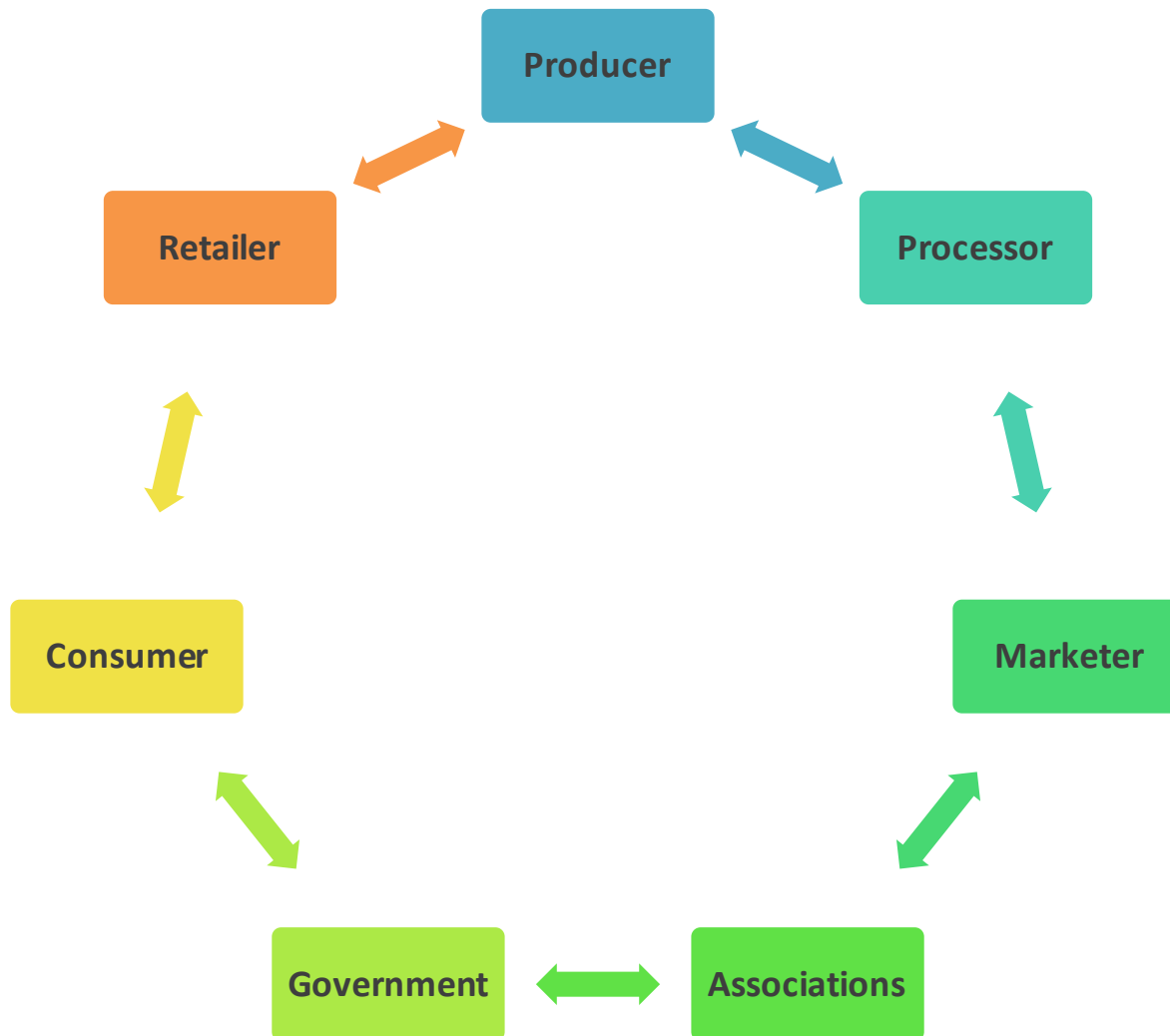
ALMA - Funded Projects

Enabled Product Differentiation and Enhanced Productivity

- **Address labour challenges**
 - Recruitment and retention real concerns
- **Affecting industry**
 - Alberta Pork
 - Alberta Lamb
 - Alberta Beef
- **GF2**
 - Helps industry improve processes and best practices

ALMA - Funded Projects

Sustainable Development



- Economic
- Social
- Environmental

ALMA - Funded Projects

Sustainable Development

Key Partners:

- Canadian Roundtable for Sustainable Beef
- Sustainability Consortium



ALMA - Funded Projects

Sustainable Development

- **2014:** \$2 million in funding grants towards targeted research
- **2015:** Cargill and McDonalds on Sustainability Beef project
- **CRSB:**
 - \$440,000 sustainability project: CRSB strategy and business plan.
 - \$250,000 lifecycle analysis: impact of production on the environment

Sustainability is here to stay

ALMA - Funded Projects



ALMA - Funded Projects

Growing Forward		
59 Products	10.4 million kg meat production	\$57 million industry revenue

Since January 2009 (inception) to March 31, 2015:

- **+ \$205 million to industry**
- **Projected value: ~ \$828 million**

Let's wrap it up...

- ✓ Seize the potential – take advantage of the opportunities
 - Productivity is imperative
- ✓ Address challenges
 - Facilitate change within the industry
 - Coordinate through the value-chain
- ✓ ALMA will continue to:
 - Partner with industry and act as a catalyst
 - Address industry opportunities and challenges
 - Make a difference to Alberta's livestock and meat sectors.

