

Canada Pork National Pork Marketing

Canada Pork National Pork Marketing (NPM) is a national alliance of innovative pork producers and meat processors committed to supporting end-user customers and consumers in the retail and foodservice marketplace.

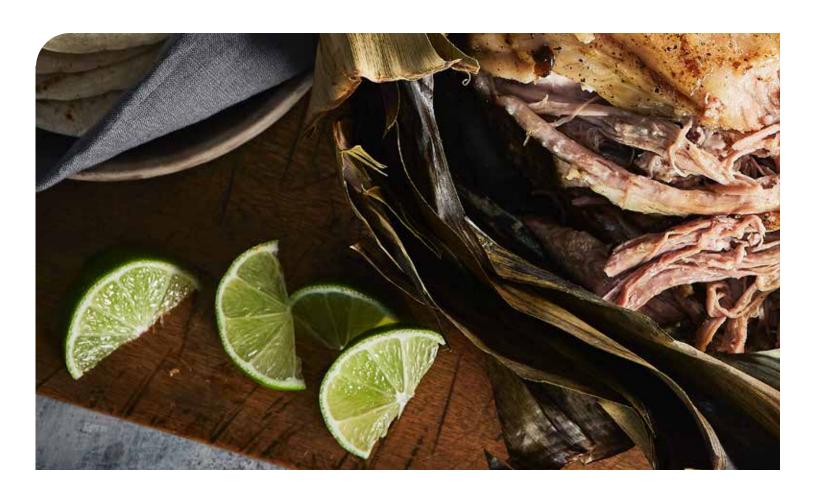
The NPM market development specialists focus on increasing demand, market share, profit potential and category growth for premium quality Canadian pork. NPM is a division of Canada Pork.

Canada Pork is the market development and promotion agency for the Canadian pork industry, representing Canadian pork producers and participating meat processing companies.

Vision: Canadian pork is recognized as the highest quality and preferred protein choice in the domestic marketplace.

Mission: Canada Pork National Pork Marketing (NPM) programs will improve competitive position, market share and the prosperity of the Canadian pork industry.







On behalf of the National Pork Marketing (NPM) Committee, I am pleased to present Canada Pork's National Pork Marketing Program Annual Report for 2021/2022.

Now in its eighth year, the National Pork Marketing program represents the vision of Canadian pork producers and processors. They understand that industry collaboration and long-term investment in market development programs are crucial for the sustainability and prosperity of the Canadian pork industry.

A cornerstone of our competitive advantage is the farm-to-table quality assurance value proposition embodied in the Verified Canadian PorkTM brand by pork producers and processors Consumers and trade partners in Canada and around the world understand that Verified Canadian PorkTM represents premium quality, produced to some of the world's highest food safety standards, delivering delicious flavour.

Canadian producers and processors are familiar with potential threats to our industry. These include a heightened risk of serious animal illness issues (including African Swine Fever), increased competition from non-meat and other

sources, shifts in lifestyles and eating patterns, and volatility in market access for Canadian pork exports. Now more than ever a robust domestic marketing program focused on solutions-based strategic alliances along with communicating points of differentiation are crucial to ensuring confidence in the Canadian supply chain.

Despite the challenges, there is reason for optimism and enthusiasm in the coming year. According to Statistics Canada, Canadians ate more pork last year than the year before. Total pork disappearance (consumption) in Canada increased by 1.66%, growing from 713,290 tonnes in 2020 to 725,150 tonnes in 2021. Canadian pork production remained strong in 2021 (2.28 million tonnes) and Canada was the largest market destination by volume for Canadian pork in 2021.

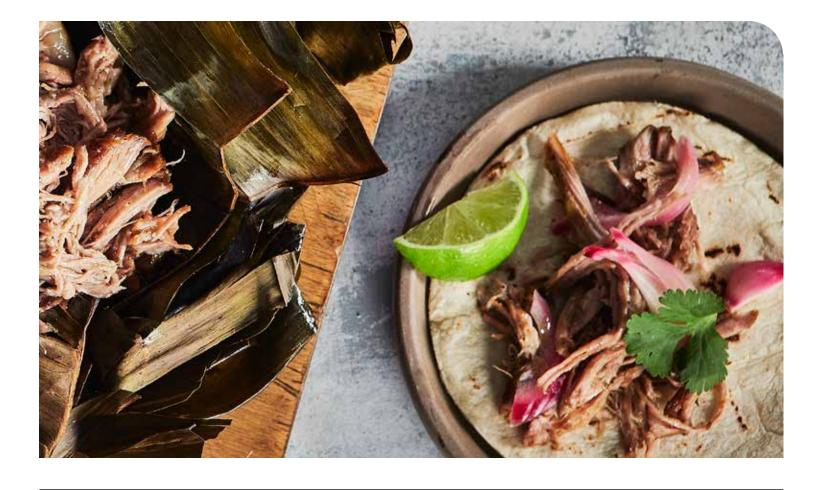
I am happy to report that the National Pork Marketing program is being managed on budget and on strategy. The annual online stakeholder satisfaction survey of members and end-user partners found that overall program evaluation remains high. The survey highlighted that Canada Pork continues to produce engaging, educational, and very attractive and effective program support

materials. In the coming year, staff has made it a priority to engage with member processors and provincial pork producer partners to understand their needs and provide opportunities for members to access programs that provide a return on investment.

I'm also excited to announce that a new Verified Canadian Pork™ website was launched this year. The new website offers a sleek, modern look with an optimized user-friendly experience. The new website features key information, highlights effective resources and is updated frequently. I encourage you to visit verifiedcanadianpork.com.

Finally, I'd like to acknowledge the hard work and dedication of Canada Pork staff, the National Pork Marketing Committee, member producers and processors, Canada Pork's board of directors, along with all industry participants who make this program possible. I'm also thankful to our end-user customers in retail, foodservice, further processing and all segments who recognize and appreciate the Canadian pork industry's commitments to food safety, animal care, and quality assurance.

Scott Peters



Canada Pork Committee Members

CHAIR

Scott Peters

Owner, Herbsigwil Ltd. Executive Member, Manitoba Pork Council Board of Directors, Canadian Pork Council for Manitoba

MEMBERS

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Vice Chair, Manitoba Pork Council Chair, Canadian Pork Council President, Buckingham Ag. Inc.

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Manager, Nutrition &
Food Industry Relations,
Canadian Pork Council

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Industry Relations Manager,
Donald's Fine Foods

Hans Kristensen

Pork Producer, Board of Directors, Canadian Pork Council for Maritimes Chair. Canada Pork

Trevor Lizotte

Vice President, Domestic & International Sales, Hylife Foods LP

Susan Riese

Manager, Public Relations and Consumer Marketing Programs, Manitoba Pork Council

Eric Schwindt

Director, Ontario Pork
Director, Canadian Pork
Council for Ontario

David Thompson

Vice President, Sales and Business Development, Conestoga Meat Packers Ltd.

Mathieu Turcotte

Director commercial strategy pork – Directeur stratégie commerciale porc OLYMEL S.E.C./L.P.

Craig Valiquette

Director, Pork Sales, Sofina Foods Inc.

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verifiedcanadianpork.com

Canada Pork Programs

Canadian Pork National Branding Strategy

The Verified Canadian Pork™ (VCP) brand represents a farm-to-table quality assurance proposition for end-user customers and consumers based on Canadian Pork Excellence (PigCARE, PigSAFE, PigTRACE and a world-renowned meat inspection system).

Verified Canadian Pork™ **Partner Program**

Verified Canadian Pork™ (VCP) partner programs provide marketing resources, funding and support programs for licensed end-user customers to differentiate VCP brands and co-brands in the marketplace. VCP-branded programs increase awareness and confidence in Canadian pork and the food safety and quality assurance systems that stand behind every kilogram of Verified Canadian Pork.

Branding Categories

- 1) Generic retail or foodservice VCP program (single or multiple VCP supply partners)
- Co-branded products owned by National Pork Marketing (NPM) processors
- 3) Co-branded products owned by customers of NPM processors
- 4) Further processed co-branded products owned by NPM processors
- 5) Further processed co-branded products owned by NPM customers

Verified Canadian Pork™ **Retail Program**

Verified Canadian Pork™ (VCP) partner programs provide marketing resources, funding and support programs for licensed end-user customers to differentiate VCP brands and co-brands in the marketplace. VCP-branded programs increase awareness and confidence in Canadian pork and the food safety and quality assurance systems that stand behind every kilogram of Verified Canadian Pork.

Participation in the VCP program requires a no-charge licensing agreement between Canada Pork, the retail partner, participating supply partners and distributors if applicable.

The VCP program can be utilized as a stand-alone brand or integrated into a co-brand or private label branding strategy.

Retail Programs and Services

- Branded and co-branded support
- Point of sale material development
- Recipe development
- Consumer marketing support
- Supply chain development
- Education and training seminars
- Verified Canadian Pork™ brand promotion support
- Merchandising ideas to increase carcass utilization and value optimization

Objectives:

- 1) Increase customer and consumer confidence and awareness of Canadian pork in the marketplace.
- 2) Differentiate from commodities, competitors and other protein choices.
- 3) Provide a credible national platform for generic and premium brand building opportunities in domestic and export marketplaces.
- 4) Support National Pork Marketing (NPM) processor partners and provincial organizations in all markets.

Verified Canadian Pork™ Foodservice Program

The Verified Canadian Pork™ (VCP) brand is a unique partnership opportunity between Canadian farmers, processors and foodservice end-user customers seeking to differentiate themselves in the Canadian marketplace with a truly exceptional program.

Participation in the VCP program requires a no-charge licensing agreement between Canada Pork, the foodservice partner, participating supply partners and further processors if applicable.

The VCP program can be utilized as a stand-alone brand or integrated into a co-brand or private label branding strategy.

Foodservice Programs and Services

- Menu development
- Recipe development
- New product development
- Supply chain development
- Education and training seminars (front and back of house)
- Verified Canadian Pork[™] brand promotion support

Distributor Education Program (DEP)Processor, Retail and Foodservice Distributor Education Programs (DEP)

The Canada Pork team works with provincial stakeholder groups, retail, foodservice and processor partners to conduct educational and training seminars. DEP sessions focus on meat quality, yield performance and the hidden profit potential of expanding Canadian pork assortments. DEP seminars and training sessions also focus on Canadian pork on-farm and in-plant food safety and quality assurance systems and how Canada Pork programs and services can help build the pork category into a profit and sales growth centre in the meat case and on the menu.

The Canada Pork team works with industry to provide educational workshops, training seminars, and product development events to increase carcass utilization and value optimization.

- 1) Retail merchandising demonstrations
- 2) Foodservice portion cutting demos
- 3) Carcass and sub-primal cutting
- 4) New and underutilized cuts
- 5) Preparation and cooking seminars
- 6) Benchmarking yield/financial performance

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Licensed VCP Programs

Verified Canadian Pork™ (VCP) co-branded programs support licensed end-user customers to differentiate their products in the marketplace through their association with VCP.

These co-branded programs increase awareness and confidence in Canadian pork and the food safety and quality assurance systems that stand behind every kilogram of Verified Canadian Pork™.





PORK BELLY



Fresh Pork Side Ril



















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Demand-Building Programs

Demand-building programs focus on opportunities at retail and foodservice to position Canadian pork as the protein of choice and a versatile meal solution.

These programs promote seasonal cooking methods and themes as well as highlighting optimal doneness temperatures, all of which lead to increased consumer confidence and satisfaction. These demand-building strategies offer innovative merchandising ideas, marketing resources and attractive point-of-sale materials that add "sizzle" to the meat case or the menu to achieve incremental sales and unlock profit potential.

The strategic seasonal marketing themes include Spring/Summer Grilling, Fall/Winter Roasting and Slow Cooking. There are also year-round programs featuring Asian Flavours and Stir Fry along with Slice & Save Value themes. Licensed Canada Pork member organizations as well as retail and foodservice end-user partners are invited to customize the demand-building programs for their own target markets.

Verified Canadian Pork™

Demand-Building Programs in the Marketplace

Fall & Winter Roasting Theme







e**r Fa**l Slo

Fall & Winter Asian Flavours
Slow-Cooking Theme Year-Round Theme







Canada Pork "Sizzling" Stir Fry Retail Demand-Building Program

Canada Pork's National Pork Marketing team introduced a sizzling stir fry demand-building program this year to promote opportunities for innovative pork stir fry applications beyond table trim utilization. The goal of the program is to provide options to expand the stir fry category at retail and foodservice in Canada by increasing product assortment, driving sales and boosting margins.

Shredded pork stir fry strips, pork stir fry slices and ground pork for stir fry are three authentic stir fry options that provide an opportunity to diversify the meat counter or the menu with innovative options.

The program features a merchandising guide that presents new product opportunities.

The guide aims to increase carcass utilization

and deliver a wide variety of unique flavour profile choices at different price points to fit the needs of any end-user or customer.

Traditional stir fry styles sliced extra-thin are promoted to ensure consumer satisfaction and enhance their eating experience.

es. Several other merchandising pieces are ilization offered to enhance the program.









The quick-and-easy meal solutions label features a '1-2-3 easy steps' illustration to highlight that stir fry is a quick meal solution.

Designed to be placed in the meat case, the stir fry danglers feature an image of a delicious stir fry meal alongside the step-by-step directions. The QR code links to a professional video that demonstrates three authentic cooking techniques to inspire consumer purchase.

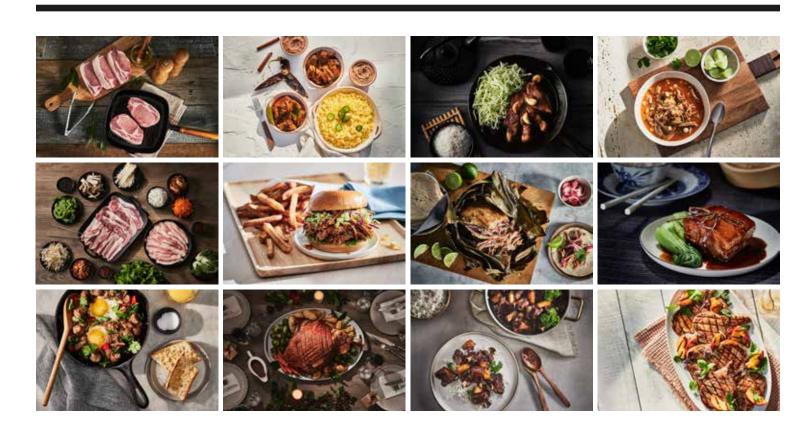


The on-pack label has stepby-step instructions to give consumers the info they need to prepare a delicious stir fry at home.

Education and **Promotion**

Education and promotion are the cornerstones of the value proposition the National Pork Marketing (NPM) team brings to the table. NPM programs focus on the following categories.

- 1. Distributor education programs (DEP) focusing on live-action presentations and demonstrations based on end-user-specific content delivered in-person or in a webinar format.
- 2. YouTube-style "how-to" videos demonstrating how to cut and prepare Canadian pork.
- 3. Technical and promotional resources and materials including custom and generic point-of-sale materials, cutting charts, product handbooks and merchandising guides; these resources are also produced in French.
- 4. Verified Canadian Pork™ website in English and French.



Canada Pork Photography

The Canada Pork team produces new food photography annually. These beauty shots feature trade show displays and to support Canada Pork and ethnic foods. demand-building programs. The images are also available for use by Canada Pork members and are featured in many different projects.

The themes used to create these images were inspired by current and emerging food different images for use in promotional materials, trends worldwide including culturally diverse

> The images support priority markets as well as Canada Pork's commitment to increasing

carcass utilization by promoting under-utilized

Working alongside chefs, butchers, food stylists, photographers and photo editors, the Canada Pork team produced more than 29 inspiring photos to add to the collection.

Webinar and DEP Sessions

The NPM team invited industry professionals to attend "The Power of Meat" webinar which offered an overview of the current state

of the meat industry. More than 50 guests attended the live-stream webinar.

The team also delivered three DEP sessions this year, one was online and two were delivered in person.



















Home Chef and Home Butcher Videos

NPM maintains a library of professionallyproduced pork videos that can be found on the VCP website. The collection includes educational pork videos designed to teach fundamental butchering techniques, demonstrate cooking methods and provide innovative merchandising ideas.

New videos were created this year including cooking thick-cut chops in a cast iron pan, five new-style German cuts, three authentic stir fry recipes, pork recipes featuring three Spanish-inspired cuts and different options to cook a whole leg.

These videos are available in English and French to all Canada Pork members and stakeholders to use in their marketing materials and social media platforms, sales programs and to support Canada Pork demand-building programs.

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Market Development Resources

The NPM team identifies opportunities in the marketplace and creates generic resources to take advantage of them.

These resources are available for retailers and can be customized for clients.
With QR codes now commonly accepted, most promotional materials feature QR codes that link to the VCP website and/or professional cooking or cutting videos.

Two slice and save tear sheet booklets were produced using the slice and save labels for the pork loin and the side rib. These tear sheet booklets are designed for display at the meat case to entice purchase.

Customers can take one with them so they know how to slice these products at home.

The QR codes on the coupons link to cutting instructions and recipe demonstration videos.

Consumers are interested in smoking pork

products at home so the NPM team created a label (available in two sizes) that outlines temperatures and timing for best results. As an added bonus, instructions to create a smoker at home were included on the label.

Eye-catching materials at the meat case is an effective way to increase sales.

Danglers were created featuring QR codes linked to VCP technique videos. They are also available for partner branding.

The NPM team creates technical resources including the Canadian Pork Handbook, cut charts and other technical materials to support customers and partners. This year, several resources were translated into French including the Canadian Pork Handbook and the retail and foodservice brochures.

NEW Verified Canadian Pork™ Website

The NPM team launched a new, state-of-the-art Verified Canadian Pork™ (VCP) website this year. With a sleek modern look, it offers an optimized user-friendly experience. The website is fully responsive so users have the same experience whether viewing on a desktop computer, an iPad or a phone.

The new website, available in English and French, offers detailed information about VCP attributes along with links to relevant websites. VCP marketing and demand-building programs are highlighted on the home page along with a "What's New" section.

While primarily designed as an industry-focused website, there is a robust section under the resources tab that provides links to the extensive library of VCP home chef and home butcher videos; a recipe section that links to recipes on Provincial Producer Group and Processing partner websites and nutritional information, all of which will be of interest to consumers. These resources are available for partners to use in their own promotional efforts.

The previous website was in place for most of the fiscal year. Tracking usage showed that the website experienced 24,725 page views

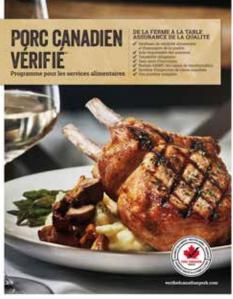
generated from over 6,141 unique users. This represents an increase of approximately 35% for page views and 9% for users over last year.

The average session time per user was 1.5 minutes (90 seconds) with 2.69 pages visited per session. Most visitors to the website were from Canada (47.6%), followed by the United States (28.6%) and China (5.0%). The homepage received the largest number of total page views, with the Canada Pork Home Chef Video page receiving the second most requests.



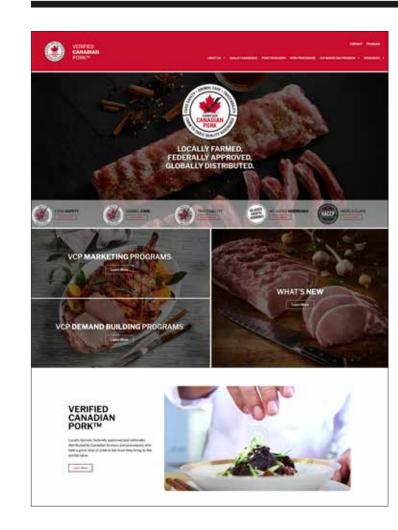


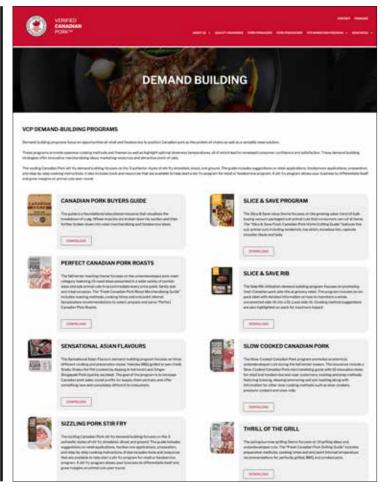












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Trade Advertising

Canada Pork's National Pork Marketing program supported the Verified Canadian Pork™ (VCP) brand in the domestic marketplace with a national trade advertising campaign.

There were two objectives for this year's ad campaign. The first was to promote the new stir fry demand-building program at retail and foodservice. The second objective was to promote the Verified Canadian Pork™ (VCP) brand and what it means. All ads were designed as double-page spreads for maximum impact.

Foodservice

The stir fry ad was featured in Foodservice and Hospitality magazine in the January/ February issue. Foodservice and Hospitality magazine is the number one national foodservice publication with a circulation of 19,955 and readership of 120,000.

The ad featured images from the demand planner along with messaging that Canadian pork is a great option to include on the menu and pork stir fry keeps protein the star of the dish while providing a cost-effective option.

The campaign was enhanced with a bonus digital banner ad on the Foodservice and Hospitality e-newsletter blast reaching their 13,000 digital subscribers.







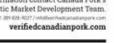












The Verified Canadian Pork™ Brand Tells the Whole Story

The Verified Canadian Pork" brand is built on a foundation of on-farm food safety, responsible animal care and mandatory traceability. It's raised without the use of growth hormones (like all pork produced in Canada) and is processed at participating federally approved HACCP plants across Canada.



brochuse to see how Canada Pork can help build your fresh pork and value-added pork products selection

Retail

build your

The ad campaign for retailers focused on Canadian Grocer, the number one national publication for the grocery industry with a circulation of 17,500 and reach of 219,254.

The first ad ran in the January/February issue of Canadian Grocer and focused on the stir fry demand planner. The ad featured images from the planner including the dangler and label resources.

The ad promoted pork stir fry to diversify the meat counter with innovative retail options.

The second ad ran in the March issue of Canadian Grocer and focused on the VCP brand and its attributes. It highlighted the logo and the powerful story behind it. The ad included a QR code that linked to the retail services brochure and encouraged readers to download the brochure for more information and resources. This ad also featured Canada Pork supplier logos.

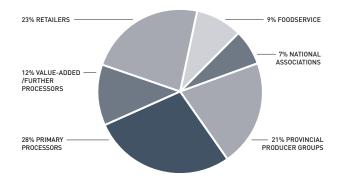
The campaign was enhanced with bonus digital ads across the Canadian Grocer website for several weeks.



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Canada Pork Survey 2022

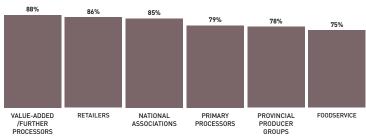
Each year Canada Pork conducts an online satisfaction survey with stakeholders and end-user partners to evaluate the programs and services offered by the National Pork Marketing (NPM) Program.



Response by Seament

60 stakeholders were sent the online survey. 43 stakeholders in 6 categories responded. This is 72% response rate.

The survey consists of five key questions representing a cross section of strategic priorities and activities based on the annual marketing plan. Respondents are asked to rank each area based on a scale of 1-10 with 10 being the highest rating. The results provide a satisfaction index percentage for each program and service area by stakeholder and end-user group. Satisfaction index scores are key performance measures and provide Canada Pork staff and NPM committee with valuable insights and direct feedback for improvements. This year, the aggregate rating for the five key questions was 86%.



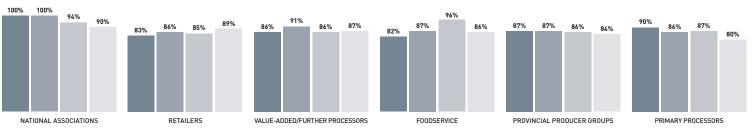
RETAILERS **FOODSERVICE** VALUE-ADDED NATIONAL PROVINCIAL PRIMARY **ASSOCIATIONS** PRODUCER PROCESSORS

Evaluation of the VCP Website

VALUE-ADDED

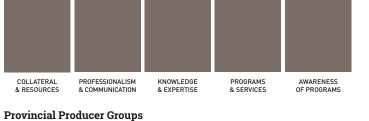
COVID-19 Response

Evaluation of VCP Brand in the Marketplace



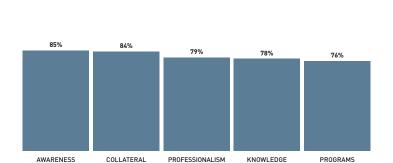
Approval Rating Industry Segment Comparison

Combining five strategic categories provides an aggregate score by industry segment: Awareness of Canada Pork | Evaluation of technical expertise and knowledge | Evaluation of programs and services | Evaluation of presentations and communication | Evaluation of promotional materials and resources



TOP THREE PROGRAMS OF INTEREST TO PROVINCIAL PRODUCER GROUPS

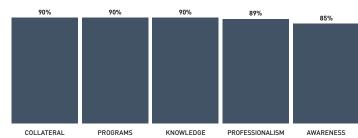
- 1. Activities focusing on correct cooking temperatures.
- 2. Activities focusing on introducing new cuts and merchandising ideas.
- 3. Activities and resources focusing on meat quality attributes.

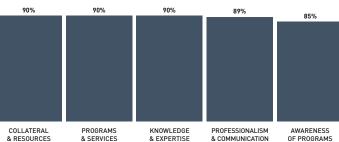


Primary Processors

TOP THREE PROGRAMS OF INTEREST TO PRIMARY PROCESSORS

- 1. Pork production and product knowledge information & training sessions; collateral
- 2. Merchandising seminars, and collateral for new, value-added and under-utilized cuts. 3. Activities focused on promoting correct cooking temperatures.

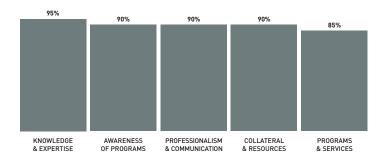




2022

TOP THREE PROGRAMS OF INTEREST TO RETAILERS

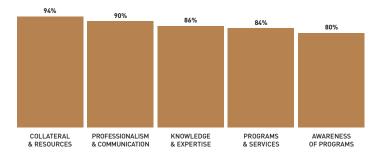
- 1. Verified Canadian Pork™ POS materials.
- 2. Activities focused on promoting correct cooking temperatures.
- 3. Activities focused on introducing new cuts and merchandising ideas.



National Associations

TOP THREE PROGRAMS OF INTEREST TO NATIONAL ASSOCIATIONS

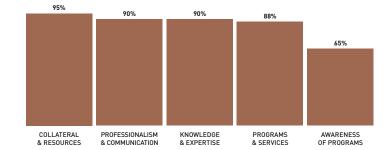
- 1. Activities focusing on traceability in Canada
- 2. Activities focusing on on-farm food safety and quality assurance systems.
- 3. Activities focusing on responsible animal care.



Value-Added/Further Processors

TOP THREE PROGRAMS OF INTEREST TO VALUE-ADDED/FURTHER PROCESSORS

- 1. Verified Canadian Pork™ branded programs
- 2. Verified Canadian Pork™ partner programs
- 3. Activities and resources focusing on meat quality attributes.



Foodservice

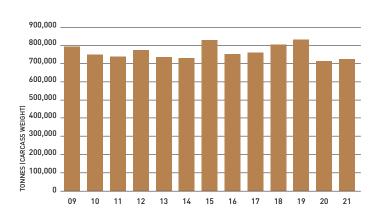
TOP THREE PROGRAMS OF INTEREST TO FOODSERVICE

- 1. Verified Canadian Pork™ branded programs.
- 2. Verified Canadian Pork™ partner programs.
- 3. Activities and resources focusing on responsible animal care.

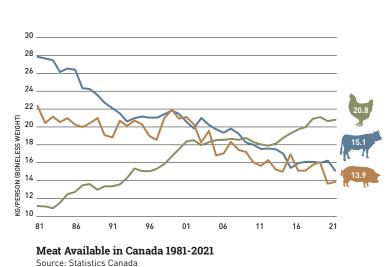
The aggregate score of five key survey questions rated respondent satisfaction at 8.6 out of 10.

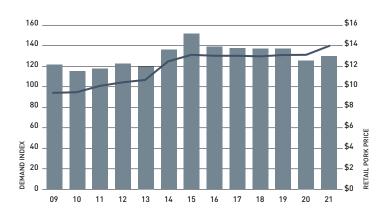
Market Performance Indicators

Canadians ate more pork last year than the year before. Total pork disappearance (consumption) in Canada increased by 1.66%, growing from 713,290 tonnes in 2020 to 725,150 tonnes in 2021.



Pork Disappearance in Canada 2009-2021
Source: Statistics Canada

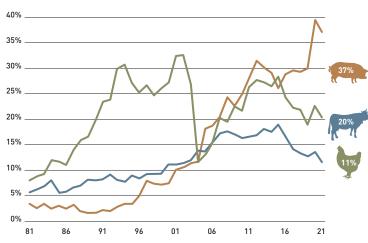




Demand for Pork in Canada 2009-2021

Source: Statistics Canada, Agriculture and Agri-Food Canada
*Average of 1 kg of pork chops and 1 kg of bacon 2005 = 100

Demand Index — Retail Pork Price



Meat Imports as % of Domestic Disappearance 1981-2021
Source: Statistics Canada
— CHICKEN — PORK — BEEF

Key Findings

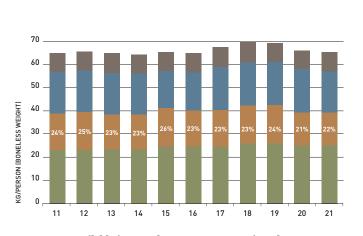
Canadians ate more pork last year than the year before. Total pork disappearance (consumption) in Canada increased by 1.66%, growing from 713,290 tonnes in 2020 to 725,150 tonnes in 2021.

Pork consumption per capita in Canada (a representation of domestic pork disappearance divided by Canadian population) increased from 13.69kgs per person in 2020 to 13.86kgs in 2021 (boneless weight), an increase of 1.24%.

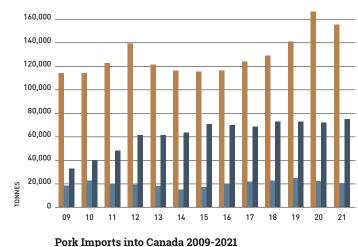
Canadians ate more Canadian-raised pork in 2021 than the year before. The imports share of domestic pork disappearance decreased from 39% in 2020 to 37% in 2021.

Canadian pork production and pork exports remained strong in 2021. Canada produced 2.28 million tonnes of pork in 2021 and exported 69% of its production.

Canada was the largest market destination by volume for Canadian Pork in 2021, followed by the United States, China, Japan, Mexico, the Philippines, and 70+ other countries.

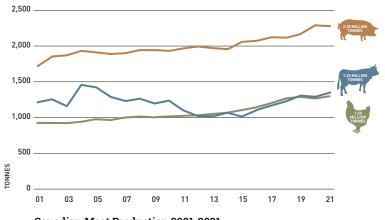


Meat Available in Canada / Meat Consumption Share 2011-2021
Source: Statistics Canada
— POULTRY — PORK — BEEF & VEAL — FISH & SHELLFISH

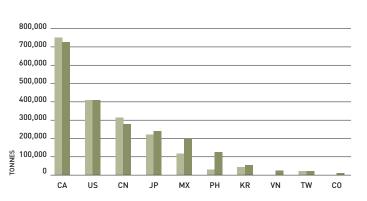


Source: Statistics Canada

— FRESH AND FROZEN — OFFAL — PROCESSED



Canadian Meat Production 2001-2021
Source: Statistics Canada
— CHICKEN — PORK — BEEF



Canada's Top Ten Pork Markets Including Imports 2016 vs 2021
Source: Statistics Canada
— 2016 — 2021

- CHICKEN - PORK - BEEF

2021-2022 Financial Report

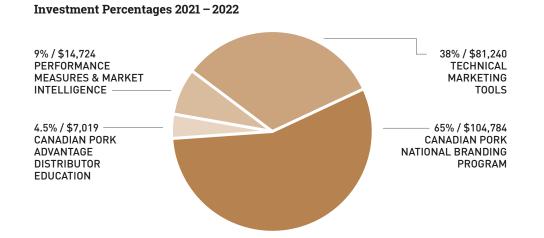
Canada Pork

Income and Expense Statement

For the year ended March 31, 2022

		2021
Revenue		
Contributions – CPC Members	137,987	98,725
Contributions – Processors	137,987	98,725
Management Fees	417	380
AgriMarketing Contribution	_163,162	176,136
Total Revenue	439,553	373,966
Expenses		
Administration	225,950	212,147
Performance Measures & Market Intelligence	16,227	14,724
Canadian Pork National Branding Program	110,446	104,784
Canadian Pork Advantage Distributor Education	5,273	7,019
Technical Marketing Tools	81,240	34,912
Total Expenses	426,136	373,586
Surplus of Revenue over Expenses	417	380

National Pork Marketing Programs and Services



Market Development Investments 2021 – 2022

2022

2021

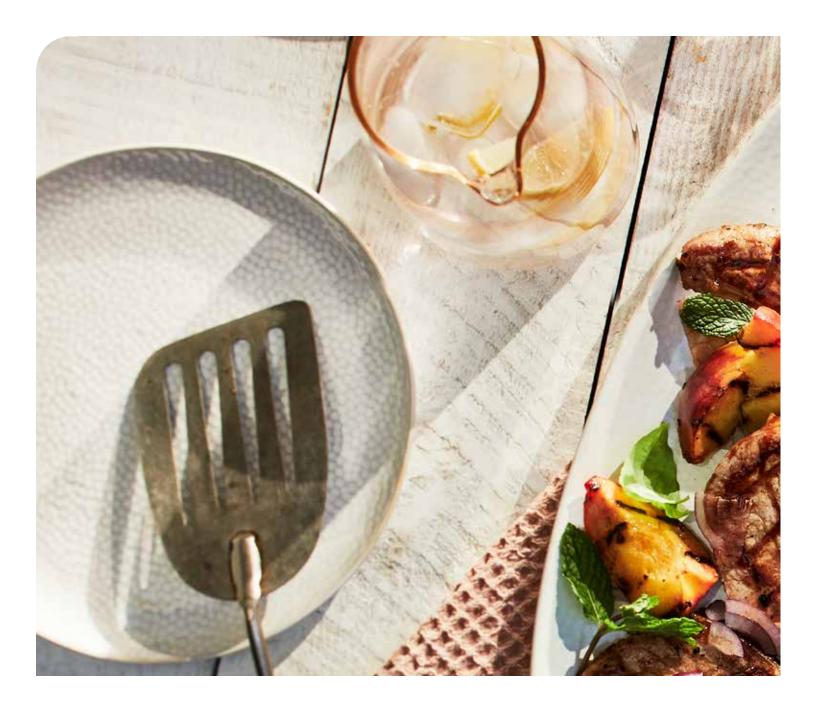
Canadian Pork National Branding Program \$104,784 / 65%

Technical Marketing Tools \$81,240 / 38%

Performance Measures & Market Intelligence \$14,724 / 9%

Canadian Pork Advantage Distributor Education \$7,019 / 4.5%





FOR MORE INFORMATION ABOUT CANADA PORK PROGRAMS AND SERVICES CONTACT:

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PROUD SUPPLIERS OF VERIFIED CANADIAN PORK™:

























NATIONAL PORK MARKETING PROVINCIAL PRODUCER ORGANIZATIONS: BC PORK PRODUCERS, ALBERTA PORK, SASKATCHEWAN PORK DEVELOPMENT BOARD, MANITOBA PORK COUNCIL, ONTARIO PORK PRODUCERS MARKETING BOARD, PORC NB PORK, PORK NOVA SCOTIA, PEI HOG COMMODITY MARKETING BOARD.