



ALMA
Alberta Livestock & Meat Agency Ltd.



 Agriculture and
Agri-Food Canada

Agriculture et
Agroalimentaire Canada




Government of Alberta 

Canadian Bovine Genomics Workshop

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How do we ensure that breed specific genomic and economic priorities are addressed and research/commercialization opportunities are aligned?

- Alignment requires agreement at the most fundamental level on basic strategy. Today the industry is struggling with at least 3 broad competing strategies which are not entirely compatible and hence traction has been difficult. Our target must be focus strategy on issues that face all breeds
 - 1) Harmonize with the U.S. on all major issues. Align our policies, and practice with the U.S. and let the U.S. open markets for us. – **Died with COOL** 
 - 2) Focus on the Canadian market. Minimize differentiation and focus on soft attributes such as Canadian origin, local content etc. – **Requires a much smaller industry** 
 - 3) Leverage our strong Canadian platform of animal health, meat safety and breed excellence using information and knowledge exchange to gain beneficial access, differentiation for private standards and productivity improvements 

3) Leverage our strong Canadian platform of animal health, meat safety and breed excellence using information exchange and knowledge to gain beneficial access, differentiation for private standards and productivity improvements

- **Assets the industry has already paid for that can form distinctive elements of the Canadian platform:**
 - Mandatory premise registration, animal I.D. – cornerstone of traceability
 - Mandatory age verification by birth record– Alberta
 - Long list SRM removal
 - Enhanced feed ban
 - Effective surveillance and reporting system and world class research and laboratory facilities for infectious disease. Leader in prion research.
 - Canadian breeding stock world leading reputation backed by pedigree act.
 - High sustainability indexes for livestock raising relative to most countries
 - Voluntary verified beef production
 - Except for BSE Canadian cattle and meat meet health requirements for all key markets

Funding/Resources: International, National, Provincial and Private

- ALMA is funding projects which strengthen the Alberta/Canada platform and leverage the assets currently in place or under development.
- It has a bias for action and looks for opportunities to seize competitive advantage that can be leveraged for the whole industry
- It is looking for transformative change and therefore prioritizes projects that are strategic. Sometimes this will be by partnering with industry funding and sometimes it will be as a single funder catalyst

What is the value of our brand 'Canadian Beef', and how can genomic tools/bioinformatics help us to be more competitive in the products we have to trade (i.e., genetics, live cattle, meat, processed foods and by-products)?

- The Canada brand has been shown to positively affect sales however it lacks a clear U.S.P. that drives a “must have” with consumers
- Today we continue to suffer under the BSE stigma. The industry has not recovered from BSE. Efforts to “Market” our way out of it have largely fallen short and we are best to assume the U.S. may achieve “negligible risk” status in the future.
- The Canadian and U.S. market for beef will continue to decline on a per capita basis. The market in developing Asia and particularly China is likely to achieve double digit growth for beef over the next 10 years. A substantial segment of that market is going to be private standard driven very high quality beef with health and safety guarantees.
- Therefore we must resolve BSE sooner than later and we must develop a clear U.S.P. for the Canadian platform.

Unique Selling Proposition (U.S.P.)

- A work in progress but it is important as it helps line up strategy and therefore prioritizes investment.
- Looking for input!
- Straw dog so far focuses on a collection of attributes which when taken together help define the Canadian advantage
 - “Alberta/Canada is a “premium, grain-fed, traceable, beef product that is raised from the best genetics under Canadian environmental and regulatory conditions”
 - Assets to be leveraged:
 - Mandatory premise registration, animal I.D. – cornerstone of traceability
 - Mandatory age verification by birth record– Alberta
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 - Effective surveillance and reporting system and world class research and laboratory facilities for infectious disease. Leader in prion research.
 - Canadian breeding stock world leading reputation backed by pedigree act.
 - High sustainability indexes for livestock raising relative to most countries
 - Voluntary verified beef production
 - Except for BSE Canadian meat meets health requirements for all key markets
- I tend to sum this up as ***“The more you know, the better you eat”***

Solving for BSE could be a quantum move for Canadian industry recovery as a step toward healthy animals and healthy people

- We have two promising ante mortem tests under development in Canada all of which appear to potentially meet the hurdle of high sensitivity and specificity. All of which are useless without traceability.
 - Christoph Sensen Faculty of Medicine U.of C. has published a peer reviewed article using circulating nucleic acids (CNAs) as a biomarker for CWD and bovine spongiform encephalopathy. The technique may lend itself to detection of a wide variety of chronic diseases.
 - David Wishart at U.A. with a metabolomic approach also would reach well beyond B.S.E. to other disease.
- As the core of our strategy is based on healthy animals and meat safety Genomic work needs to bring forward solutions or supporting research that will lead to healthy animals, meat safety and ultimately healthy people.
- The shortest way to restore industry profitability is to satisfy consumer latent demand for animal health and beef safety summed up as: ***the more you know the better you eat***