



CANADIAN MEAT COUNCIL
CONSEIL DES VIANDES DU CANADA



Navigating the Trade Challenges of the Canadian Pork Industry

Jorge Correa, M.Sc., Ph.D.
VP Market Access and Technical Affairs

January 9, 2025

About the Canadian Meat Council (CMC)

- We are Canada's oldest national trade association that has represented federally licensed meat processors for over 100 years.
- We represent the Canadian meat industry including slaughter, cutting and processing plants, storage refrigerators and those companies that provide all kinds of supplies and services necessary for meat production

REGULAR MEMBERS



ASSOCIATE MEMBERS



About the Canadian Meat Council (CMC)

CMC's mission is to advocate for a competitive domestic and global market that enables the meat sector to grow.

Organizations Representing the red meat industry in Canada



Canadian Cattle Association



CANADIAN BISON ASSOCIATION



CANADIAN BISON



NATIONAL CATTLE FEEDERS' ASSOCIATION
ASSOCIATION NATIONALE DES ENGRAISSEURS DE BOVINS



Canadian Pork Council
Conseil canadien du porc



CANADIAN MEAT COUNCIL
CONSEIL DES VIANDES DU CANADA



Canadian Veal Association



Association canadienne du veau



Canadian Sheep Federation • Fédération canadienne du mouton

CSF•FCM



CANADA BEEF



PREMIUM QUALITY GRAIN-FED CANADIAN BEEF

- ✓ Advocacy for the sector with Government
- ✓ Trade
 - Trade agreements
 - Market Access
- ✓ Regulatory affairs
- ✓ Sustainability

- ✓ Market development
- ✓ Product positioning and marketing activities
- ✓ Market intelligence



THE RED MEAT INDUSTRY IN CANADA



Registers annual sales surpassing \$28 billion.



Canada has exported more than \$9.6 billion of red meat (pork, beef, veal, horsemeat and lamb).



Meat packers employ around 66,000 people.



Promote other 288,000 jobs in urban and rural communities across Canada.



Has around 900 establishments federally licenced in meat & poultry production (slaughter, processing, cold storage).



It is the 11th most important manufacturing industry (after automotive, aviation, petroleum, mining, financial services and forest products).



It is the largest component of Canada's food processing sector.



Canada is one of the major agri-food producers thanks to its natural resources, becoming the 5th exporter of agri-food products.



What are our customers and consumers requirements in the meat sector?

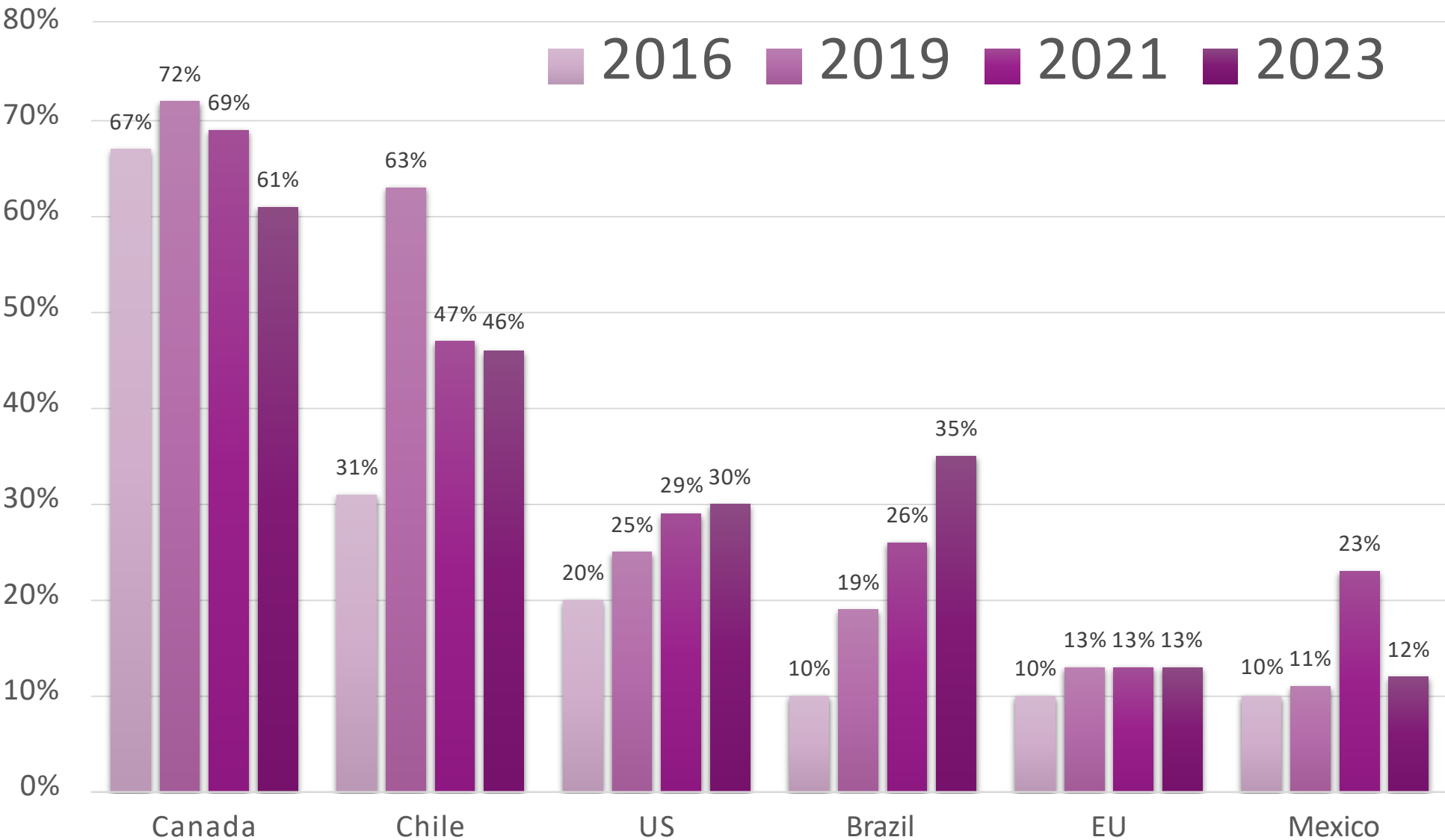
- Food safety– Canada has a high standard/modernized outcome-based inspection system and industry excels regulatory requirements - Industry and government are responsible for food safety!
- Animal disease strategies and controls
- Biosecurity and on-farm food safety programs in primary production to avoid disease and contaminated meat
- Traceability from final product to the farm
- Animal welfare from farm to slaughter
- Carcass and meat quality





CANADIAN TRADE

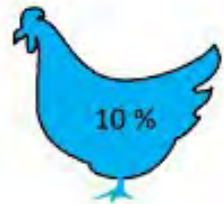
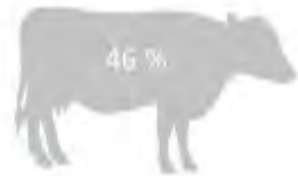
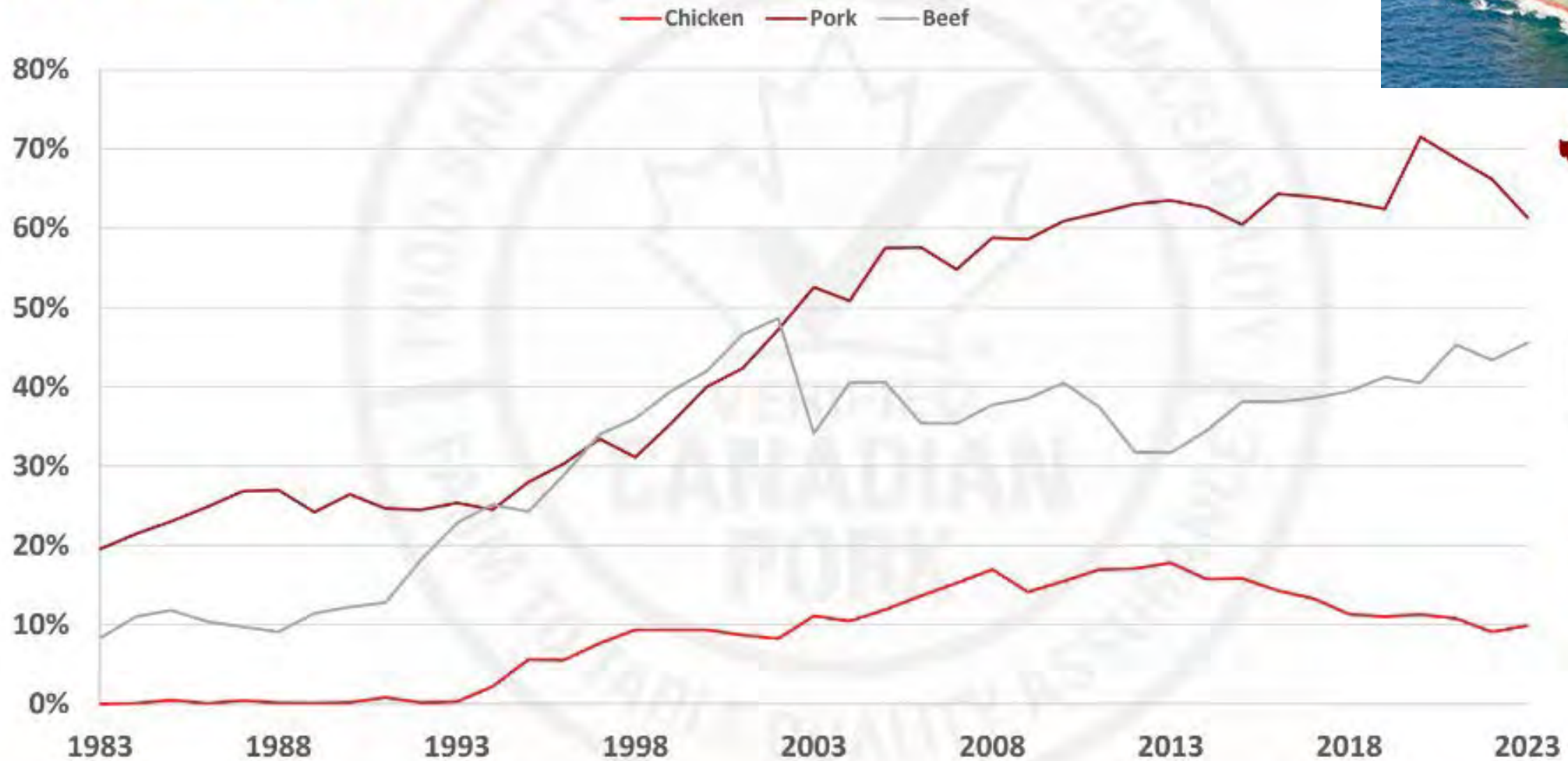
Countries depending on Pork Exports



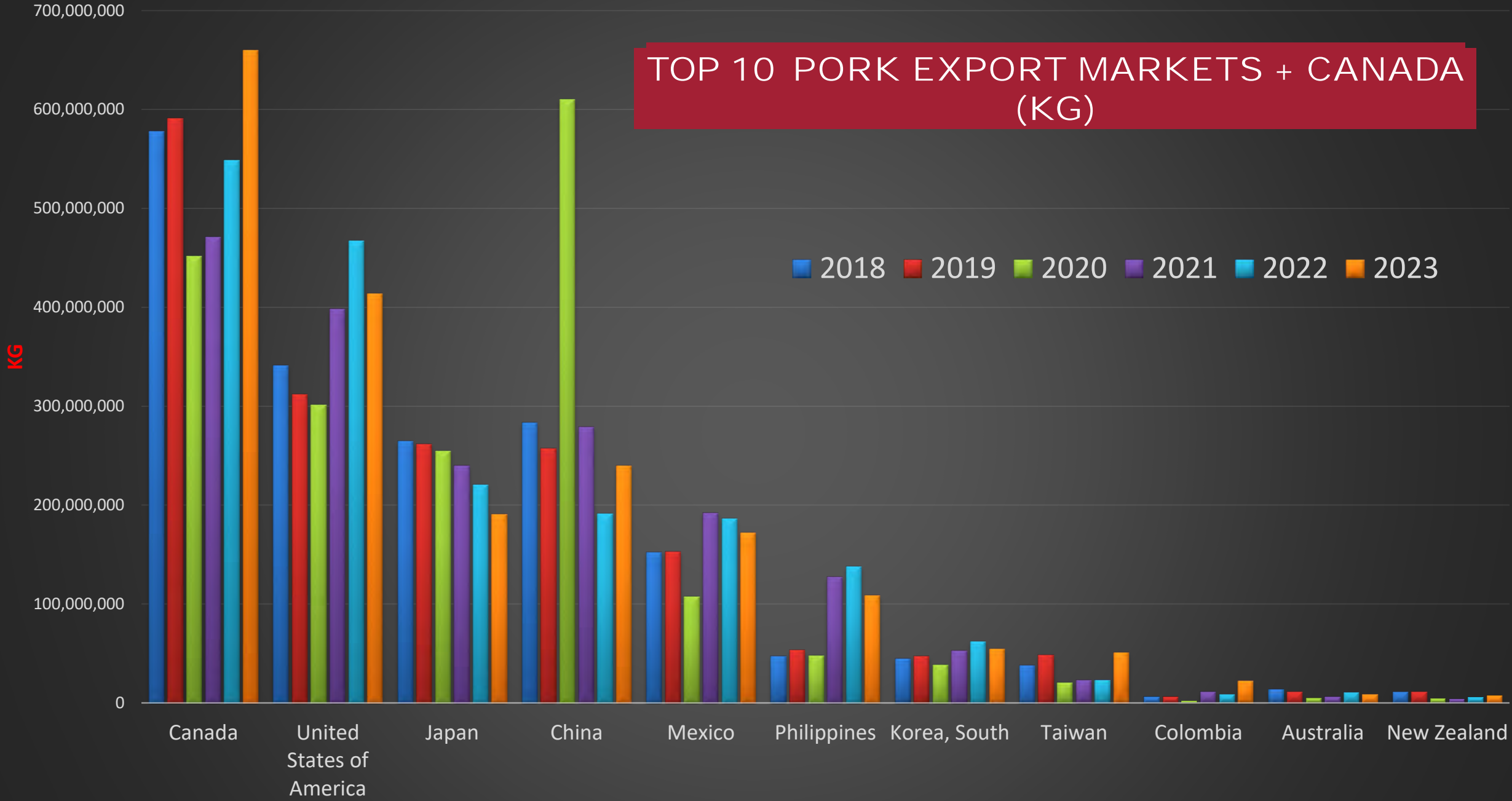
% of production Exported



CANADIAN MEAT EXPORTS AS % OF PRODUCTION

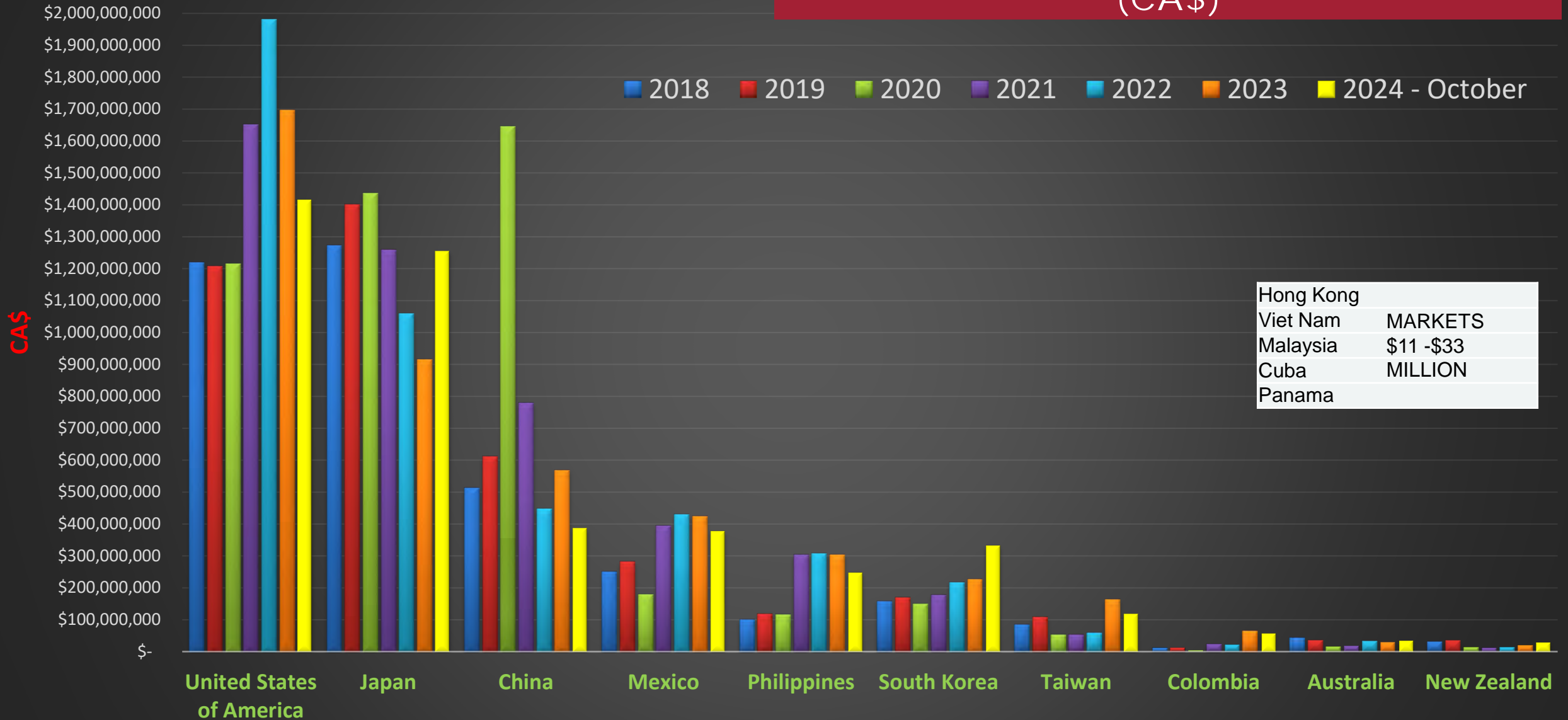


TOP 10 PORK EXPORT MARKETS + CANADA (KG)



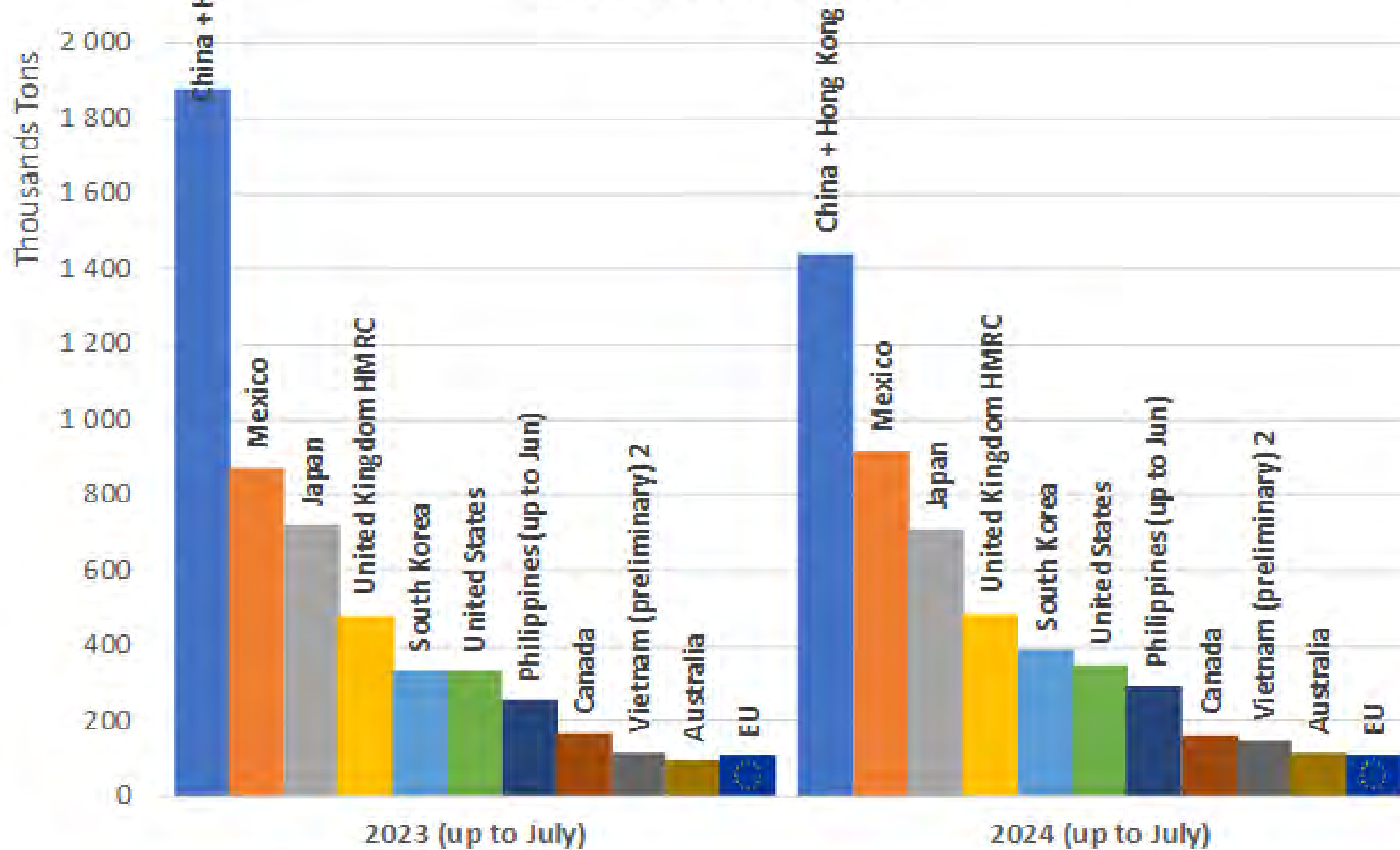
Source: Statistics Canada

TOP 10 PORK EXPORT MARKETS (CA\$)

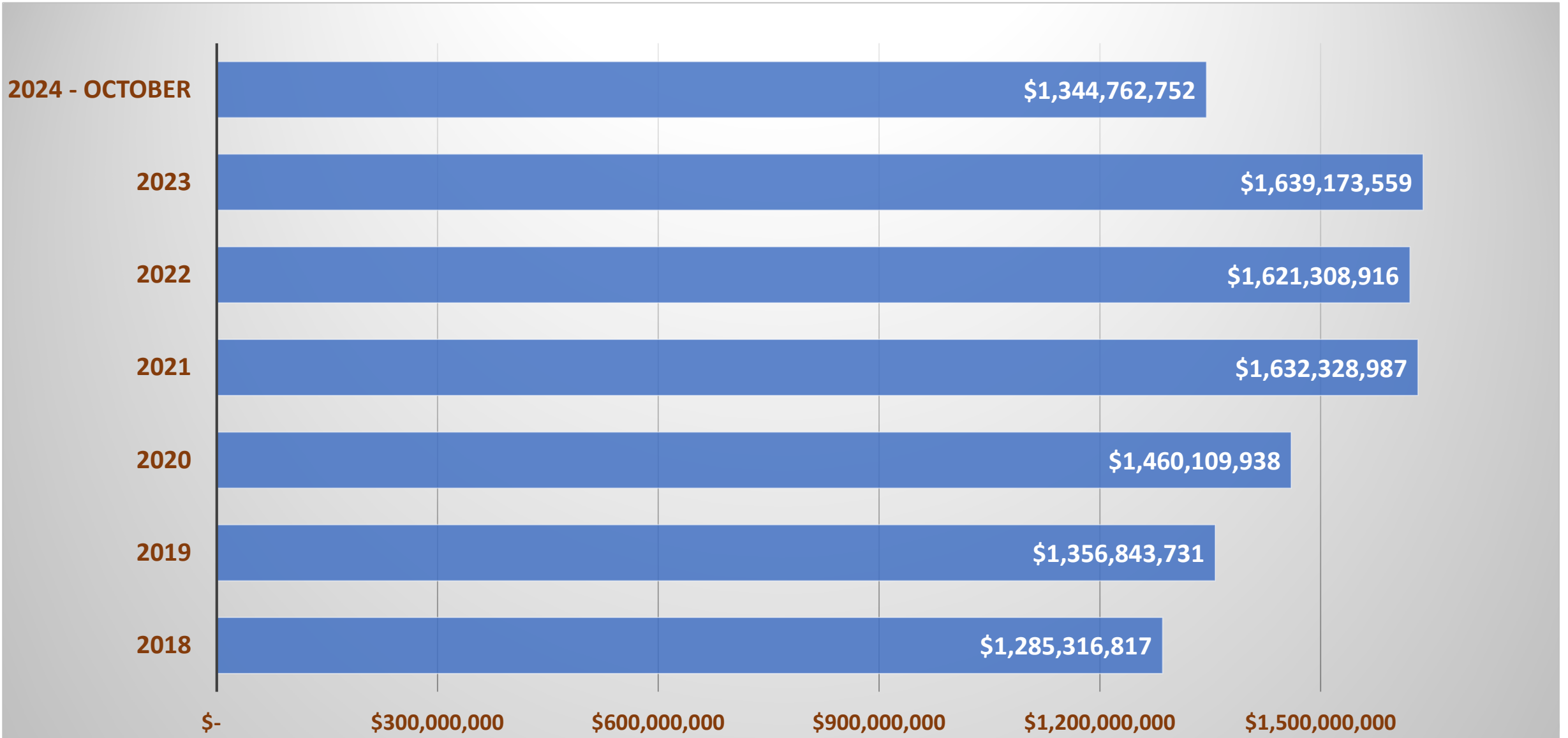


Hong Kong
 Viet Nam
 Malaysia \$11 - \$33
 Cuba
 Panama
 MARKETS
 MILLION

Main Importers of PIG Products (up to July) in Tons of Product

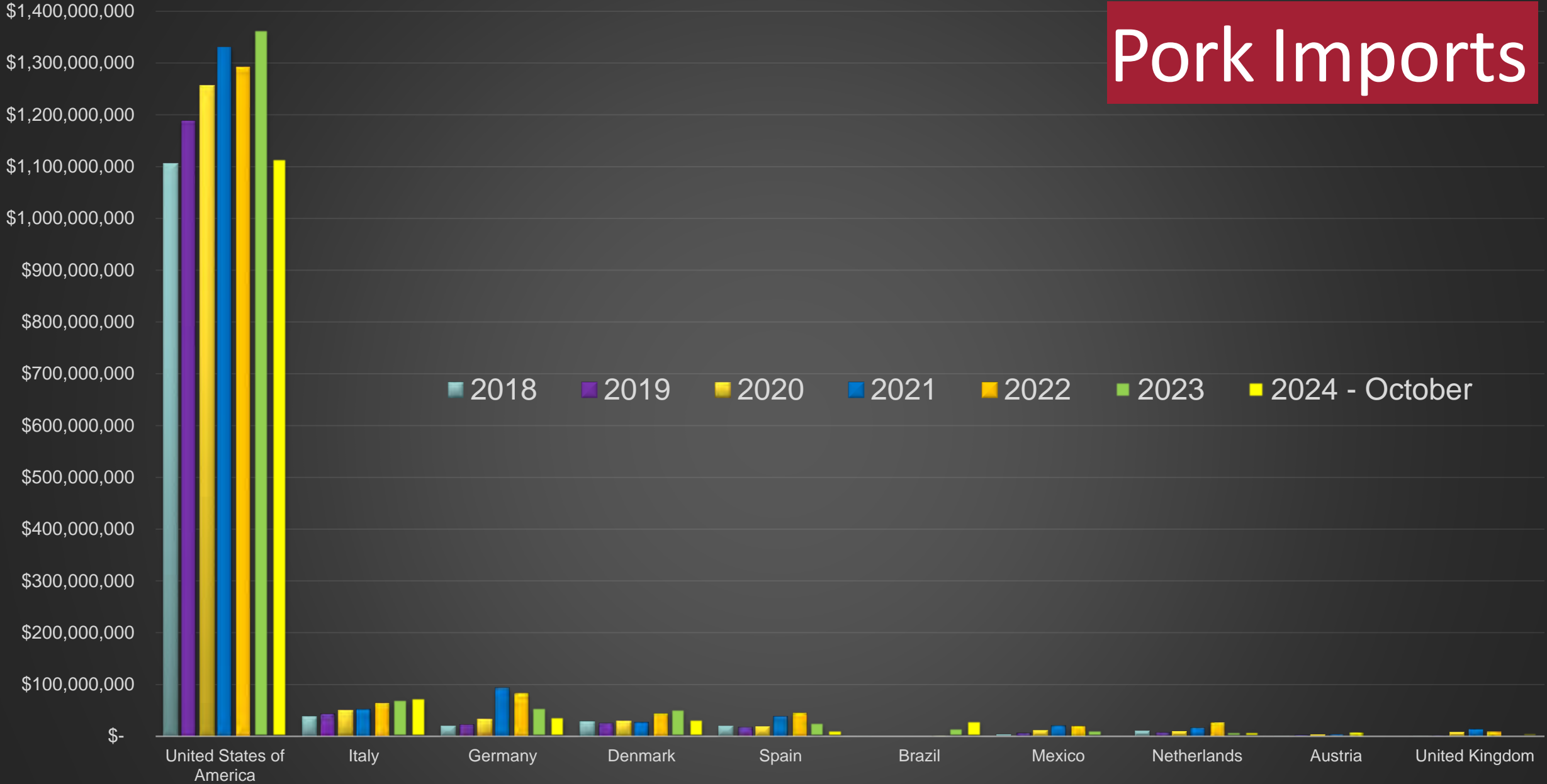


TOTAL PORK IMPORTS FOR CANADA - 2018 – Oct 2024



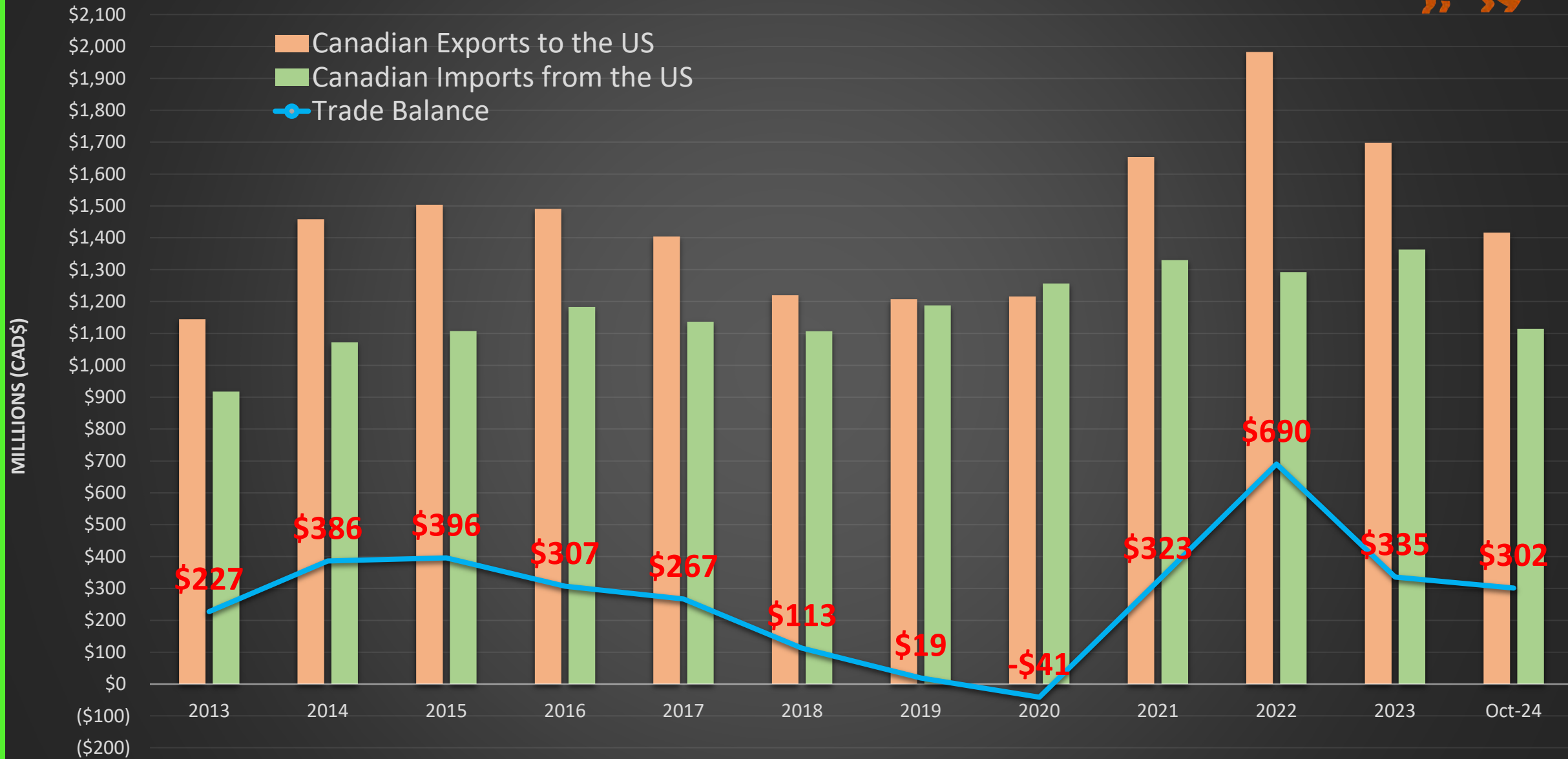
Source: Statistics Canada

Pork Imports



Source: Statistics Canada

Canada – US Pork Trade Balance | 2013 – OCT 2024

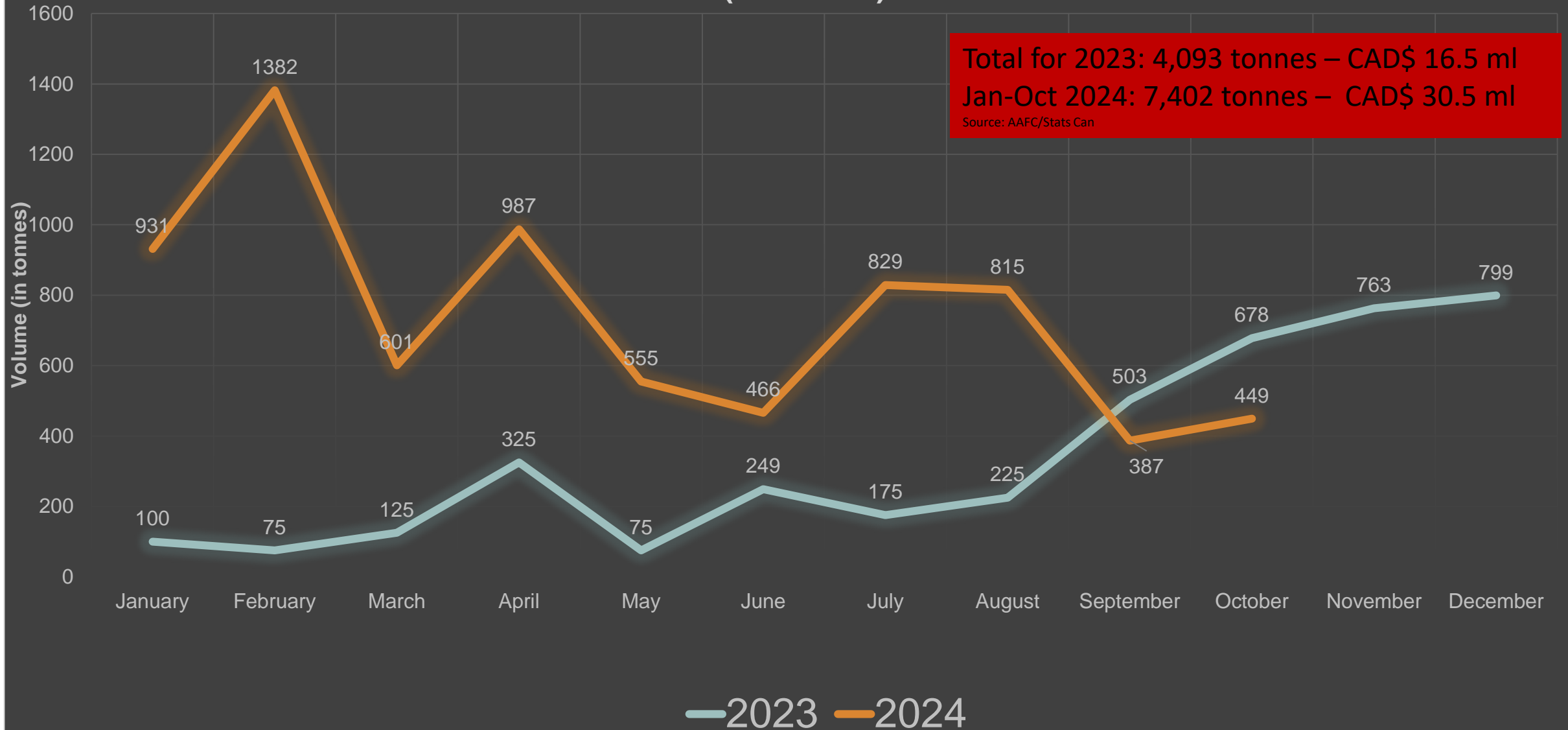


Source: Statistics Canada

Canada – EU Pork Trade Balance | 2015 – OCT 2024



Monthly frozen pork cut imports from Brazil into Canada 2023-2024 (in tonnes)





MEAT INDUSTRY TRADE CHALLENGES



Politics



US/CANADA POLITICAL LANDSCAPE



Canada:

- The current political environment is complex with turmoil surrounding Prime Minister Trudeau announced his anticipated resignation and prorogued Parliament until March 24th
- Election coming (6 months max), new PM, new Ministers and new Canadian Ambassadors in every G7 country and the EU
- Poilievre's government initially will take time to settle in so means months and months of political uncertainty

US:

- Different views about the tariff imposition: negotiation leverage, improve border issues or new \$ to cover costs for tax cuts and other fiscal measures.
- Government and industry are doing the homework advocating to avoid any tariff imposition and increasing awareness of potential consequences.
- Canada is adopting a "negotiate before retaliate" approach, while Mexico has announced plans to retaliate.
- Provinces will potentially play a larger role.



CHINA/CANADA



- ✓ Canada's electric vehicles, aluminum, and steel tariffs on China
- ✓ China's anti-dumping investigation on canola seed exports to China
- ✓ China released a notice of launching a safeguard investigation into imported beef following an application by Chinese industry from January 1, 2019 to June 30, 2024.
- ✓ Potential Canada's WTO Challenge on Beef and Pet Food
- ✓ CMC is in continuous contact with the Chinese Ambassador to Canada and made clear industry has opposed tariffs privately and public ally
- ✓ CMC and pork/beef industry to create the Canadian Meat Advocacy Office in China in 2025



EU/CANADA

- ✓ New EU Commissioner
- ✓ In favor of farmers (Party of the farmers, increase farmer voice)
- ✓ Emphasize in farmer competitiveness inside/outside the European Union
- ✓ Implement green sustainability initiatives and policies broadly in the EU (improved sustainability metrics)
- ✓ Reciprocal clauses in trade (same level playing field)



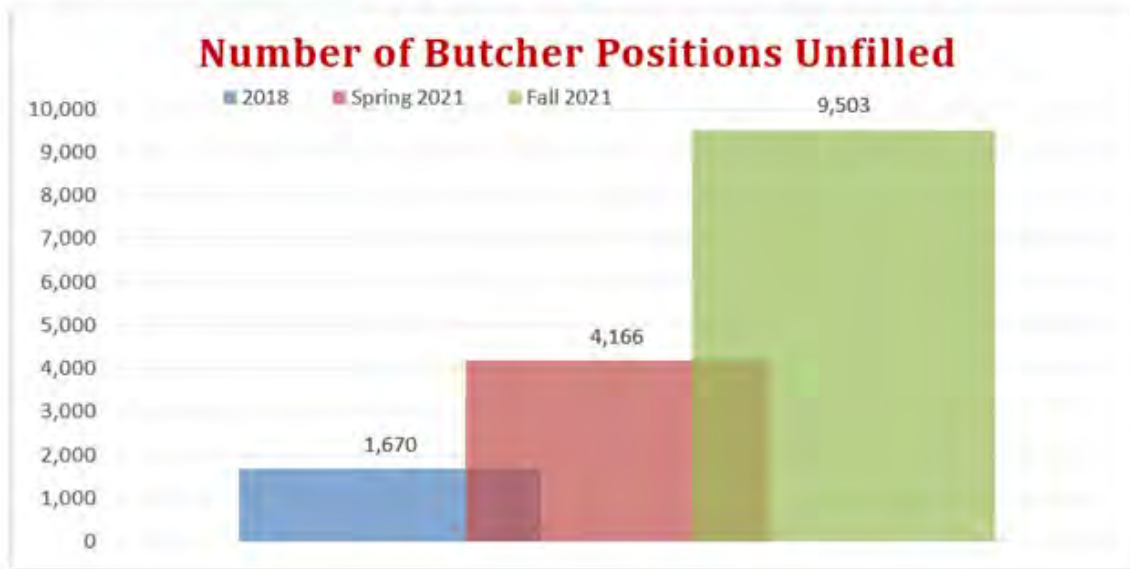


PORT STRIKES

- ***An intense period of instability in the last 24 months has harmed industry and Canada's international reputation.***
- ***CMC has struck a joint transportation working group to advocate for an outcome that guarantees business continuity (developing policy positions)***
- ***We understood work with Government needs to be done in "peacetime" as actions by the time a strike occurs, the intervention is too late.***
- ***We need a longer-term solution.....***



Key Data Points from 2018 to 2021



National Job Vacancy Rate Canadian Meat Processing

2018	Spring 2021	Fall 2021
7.27%	10.9%	21.1%

Food Processing Skills Canada projected that from 2023 to 2030 the meat sector would need 16,200 new workers (14,000 due to retirements and 2,200 from expansion and new opportunities).

Labour shortage

There's a crisis in Canada's meat processing industry.

There's a cap on meat processing capacity.

More than 9,500 butcher positions are vacant in Canada—twice the number of just six months ago. Canada is competing globally for foreign workers. The current 10 or 20% temporary foreign worker cap imposed on meat processors directly impacts our unprecedented labour shortage, our competitiveness and our sector's meat processing capacity.

We need the Government to reset the Temporary Foreign Worker cap to 30% for all meat processors. Bring back equity. Allow us to feed Canadians and the world.

KEEP MEAT PROCESSING AND JOBS IN CANADA. BRING BACK THE CAP TO 30%

THE SUPPLY CHAIN IS DIRECTLY IMPACTED BY OUR LABOUR SHORTAGE CRISIS.

- X**
Reduced export capacity
- X**
Availability of meat on grocery shelves
- X**
Less processing capacity
- X**
Shutdown of processing lines
- X**
Plant closures
- X**
Decreasing hog and cattle prices for our farmers

The Canadian meat industry represents over \$20 billion dollars to the Canadian economy and supports 300,000 jobs across Canada.



TEMPORARY FOREIGN WORKERS PROGRAM (TFWP)

- Effective Sept 26th 2024, the Government of Canada will refuse to process Labour Market Impact Assessments (LMIAs) in the Low-Wage stream, applicable in census metropolitan areas with an unemployment rate of 6% or higher. Exceptions will be granted for seasonal and non-seasonal jobs in food security sectors (primary agriculture, food processing and fish processing), as well as construction and healthcare;
- Employers will be allowed to hire no more than 10% of their total workforce through the TFWP. This maximum employment exceptions will be granted for seasonal and non-seasonal jobs in food security sectors (primary agriculture, food processing and fish processing), as well as construction and healthcare;
- CMC do not expect major changes for TFWP. However, higher scrutiny and increasing “tightening” of measures.
- CMC leading the advocacy of a federal permanent immigration stream.

Labour shortage



Avian influenza detected in non-commercial chicken flock south of Moncton



Disease found last Monday in the Turtle Creek area, according to Canadian Food Inspection Agency

Aidan Cox - CBC News - Posted: May 02, 2022 5:37 PM AT | Last Updated: May 2



Highly pathogenic avian influenza has been detected at a small flock poultry operation in Turtle Creek, a small community about 20 kilometres south of Moncton. (David Mdzinarishvili/Reuters)

Brazil 'free' of foot-and-mouth disease

By Oscar Rousseau

07-Dec-2017 - Last updated on 07-Dec-2017 at 10:22 GMT



Recognition should allow Brazilian producers to sell beef at much higher price

RELATED TAGS: Foot-and-mouth disease, Brazil, Oie

Brazil will be officially declared free from foot-and-mouth disease (FMD) next year, according to the country's government.

ASF Dominican Republic: Virus around in April, says OIE

16-08-2021 | Health | Health/Nutrition | News



Photo: Shutterstock

African Swine Fever (ASF) virus has been around in the Dominican Republic as early as April. New OIE data confirm that samples testing positive were taken at backyard farms in April, May and June as well.

ASF Italy: Northern Italy culls tens of thousands of pigs

30-08 | Health | News



FOREIGN ANIMAL DISEASES

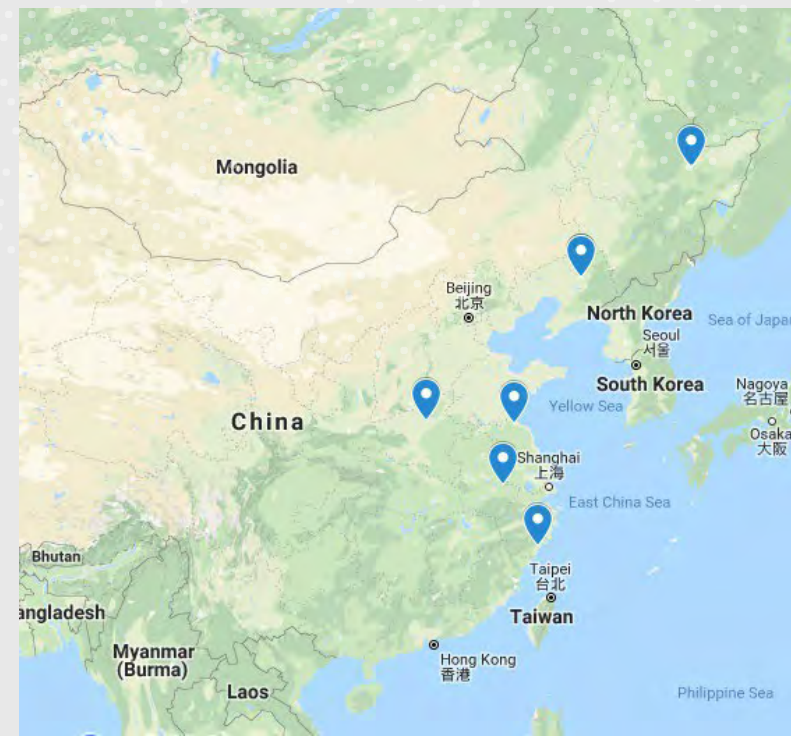
AFRICAN SWINE FEVER DISTRIBUTION IN THE WORLD



IN RED PRESENCE OF ASF

Since January 2022, ASF has been reported as present in 59 countries.

African Swine Fever CHINA



**AUGUST
2018**



**DECEMBER
2018**

African Swine Fever - China

Disease status in the Globe: CHINA

The virus is out of control

- ❖ Lack of biosecurity
- ❖ Massive under-reporting (>90% not reported)
- ❖ Inadequate compensation
 - No farmer confirmed payment
 - Not enough \$ to recover losses
- ❖ Government unwilling to cull (slaughter)
- ❖ Resources not enough to control spread across provinces
- ❖ Supply and demand of pork product affected

Pillar 1: Prevention and Enhanced Biosecurity



Pillar 2: Preparedness Planning



Pillar 3: Ensuring Business Continuity



Pillar 4: Coordinated Risk Communications



EXPORT MARKETS FOR CANADA

Agreement in place	Ongoing negotiations	Possible negotiation	No negotiation	Not sure
USA (37%)	Japan (20%)	Mexico (9%)	China (12%)	
EU	Philippines (7%)	New Zealand	Taiwan (4%)	
UK		Australia	South Korea (5%)	
Hong Kong			Cuba	
Vietnam			Colombia	
Singapore				
Guatemala				
Giorgia				

ASF zoning agreement (% exported in 2023)

38% **27%** **11%** **23%** **1%**

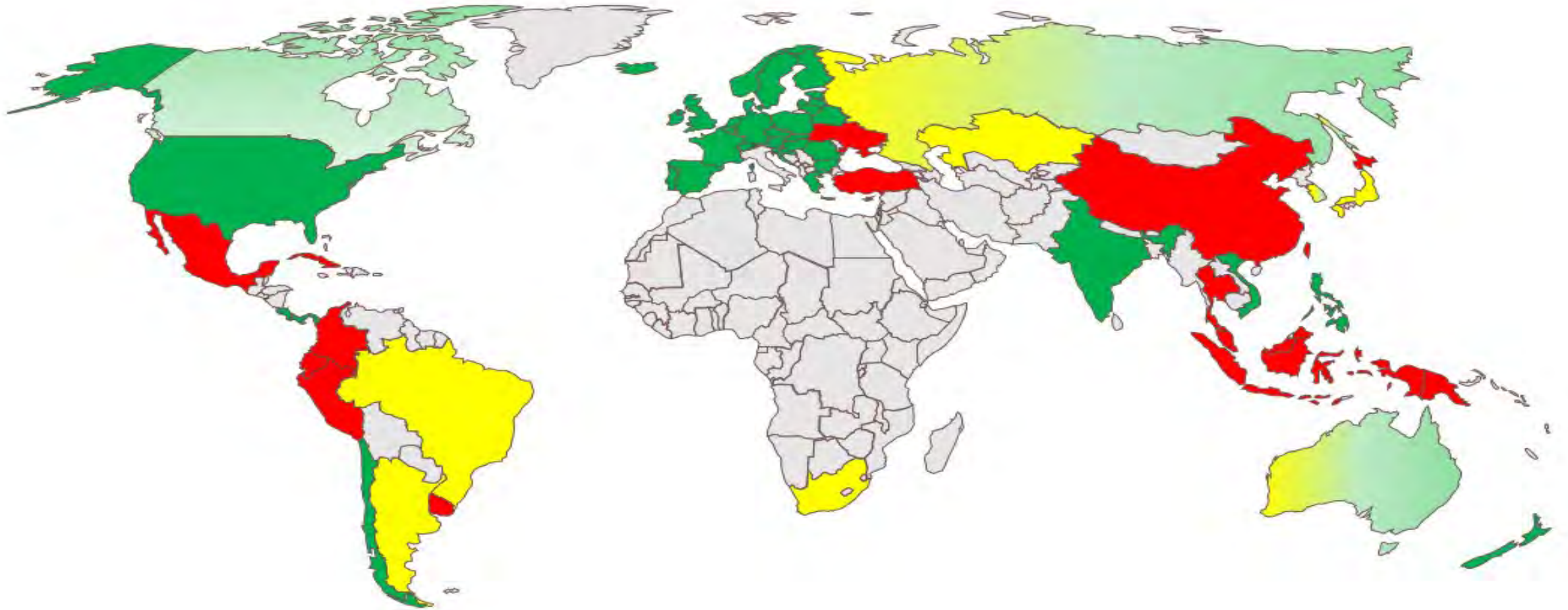
76%

Canada's ASF zoning agreements *

* Following an ASF outbreak, the CFIA and relevant provincial authorities will conduct an investigation to define geographic boundaries within which the outbreak is contained. Areas outside of these Primary Control Zones are considered disease-free zones that, through prearranged zoning agreements, are permitted to continue trading with foreign partners.

PILLAR 3: ENSURING BUSINESS CONTINUITY

THIRD COUNTRY REACTIONS TO ASF ZONING – ITALY EXPERIENCE



Closed to all pig products **With restrictions** **Acceptance of zoning**

These restrictions have resulted in a loss of around 20 million EUR per month in lost exports for Italy



ASF Main risk of contamination for Canada

- Travelers carrying infected pork products
 - Canadian Border Service Agency reported from **April to October 2024**: travellers were found to be in contravention on failure to present/declare suspected pork products:
 - 764 travellers** were given a written warning, **and 1745 travellers** were given a monetary penalty (up to Ca\$1,300).
- Smuggled pork from ASF infected countries
- Imports of ingredients for animal feed (organic soybeans and flours, oilseeds, vitamins, amino acids and minerals).
- Backyard producers (no biosecurity in place)
- Wildlife (wild boar population mapping and eradication)
- E-commerce - Parcels (Alibaba, other sites), foreign workers, veterinarians abroad





Foot and Mouth Disease (FMD)

- ASF model adapted
- Multispecies
- Vaccination protocols



New World Screwworm in Live Animals

Transit restrictions of livestock in Mexico, El Salvador, Belize



Highly Pathogenic Avian Influenza (HPAI) virus in dairy cattle and swine

In 853 US dairy cattle herds
One case in US pig backyard farm



Porcine reproductive and respiratory syndrome (PRRS or “blue ear”)

- U.S., Denmark and Spain are being tested in China.
- Pork detected with PRRS is rejected
- China Agreement with Holland, France - Hogs come from farms that have no clinical cases of PRRS within 6 months before slaughter
- China Agreement with Russia, Austria - Hogs come from farms that have not had any clinical cases of PRRS in the past 12 months before
- Canada has no protocol on this requirement

POTENTIAL DISRUPTION BY OTHER FOREIGN ANIMAL DISEASE

Trichinella in the United States

400 cases reported each year

1940's

No Trichinella

2024

2008–2012

15 cases per year

- ✓ The last case of human trichinellosis associated with Canada's domestic pig supply occurred in 1980
- ✓ Countries with trichinella requirements: EU, UK, Ukraine, Russia, India, Brazil, Argentina, among other.

Trichinella

APHIS created the Trichinae Certification Program 9 CFR Part 149

2008

23 Sep. 2021

Voluntary Trichinae Certification Program (85 FR 52954) was eliminated.

APHIS concurrently announced
“The U.S. commercial swine herd is free of trichinae.”

23 Sep. 2024

- The U.S. commercial swine herd is considered free of trichinae, as long as, **the swine are confinement-raised and have robust biosecurity measures**. This means that the swine are limited in their exposure to rodents and wildlife. (supported by PQA+ on farm food safety standards).



Most recent update on Trichinella in the U.S.

- **3.2 million pigs tested - raised in the U.S.**
- 11 U.S. pork processing companies, including 30 locations in 12 states.
- Sampling began in August 2019
- Covid-19 forced suspension of testing in March 2020
- July 2021 and continued, at an increasing pace from 10,000 - 20,000/week,
- Finished December 2023.

Samples by state of origin of pigs tested.

STATE	SAMPLES TESTED	% TOTAL TESTED
Arkansas	73	0.002
Colorado	35,875	1.118
Georgia	931	0.029
Indiana	202,885	6.323
Illinois	23,074	0.719
Iowa	917,785	28.604
Kansas	107,315	3.345
Kentucky	1083	0.034
Michigan	4376	0.136
Minnesota	824,520	25.697
Missouri	5349	0.167
Nebraska	176,657	5.506
North Carolina	552,004	17.204
North Dakota	3637	0.113
Ohio	30,253	0.943
Oklahoma	62,823	1.958
Pennsylvania	2266	0.071
South Carolina	15,398	0.480
South Dakota	146,319	4.560
Tennessee	1363	0.042
Texas	36,947	1.151
Virginia	57,130	1.781
Wisconsin	580	0.018
TOTAL	3,208,643	100





ELSEVIER

Contents lists available at [ScienceDirect](https://www.sciencedirect.com)

Food and Waterborne Parasitology

journal homepage: www.elsevier.com/locate/fawpar



Surveillance for *Trichinella* infection in U.S. pigs raised under controlled management documents negligible risk for public health

H. Ray Gamble^a, Dolores E. Hill^a, Valsin Fournet^a, Brandon Adams^a, Diane Hawkins-Cooper^a, Jorrell Fredericks^a, Jovan Aquino^a, Sonia Agu^a, Nadya Chehab^a, Ako Ankras^a, Maria C. Antognoli^b, Marta D. Remmenga^b, Scott Kramer^c, Lori Gustafson^c, Benjamin M. Rosenthal^{a,*}

^a U.S. Department of Agriculture, Animal Parasitic Disease Laboratory, Beltsville, MD 20705, USA

^b U.S. Department of Agriculture, Animal and Plant Health Inspection Service, Veterinary Services, Fort Collins, CO 80526, USA

^c U.S. Department of Agriculture, Animal and Plant Health Inspection Service, Veterinary Services, Riverdale, MD 20737, USA

ARTICLE INFO

Keywords:

Trichinella
Surveillance
Negligible risk
Controlled management

ABSTRACT

Biosecurity measures preventing exposure of pigs to rodents, wildlife, and contaminated feed or waste products reduce the risk of zoonotic *Trichinella* infection in pork. To understand the benefits of such measures in the United States, we conducted the first comprehensive survey of pigs produced under the Pork Quality Assurance Plus production standard, surveying 3,208,643 pork samples from twelve processing locations tested over a period of 54 months. We detected no *Trichinella* sp. positives in any of these pork samples, providing a 95% confidence in a *Trichinella* sp. prevalence of <1 in 1,000,000 for the processors represented by the study. These results are consistent with international guidelines for having a negligible risk to public health. Results obtained here should generalize to all PQA+ sources, as *Trichinella* sp. exposure risk is based on production guidelines that extend to the larger PQA+ population.



U.S. Update on Trichinella in September 2024

- ✓ Canada needs to catch up
- ✓ Work with the EU for acceptance of Canada's commercial swine herd under controlled housing conditions as free of trichinae to be exempted of Trichinella testing or treatment (as Belgium and Denmark currently).
- ✓ *Same Trichinella testing procedures in Canada as many EU countries since it is today Canada is disadvantaged.*

