



Centre for
Meat Innovation
& Technology

COLLABORATE INNOVATE EDUCATE

CMIT: Advancing the Canadian Meat Industry



Agenda

- What is CMIT?
- The context
- Why was CMIT created?
- How will CMIT help our industry?
- Get involved!
- What makes us different
- Our Supporters
- Our Sustainability Plan

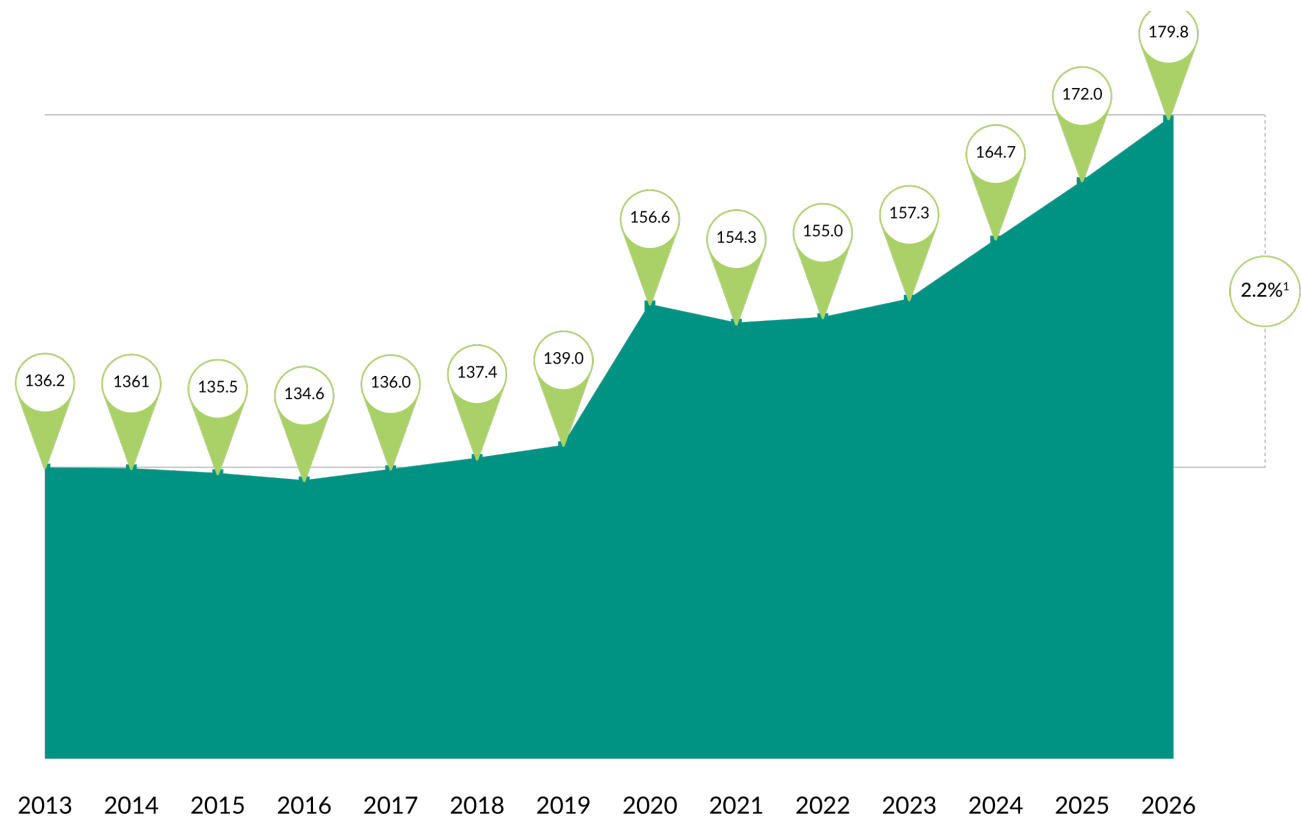


What is CMIT's Purpose?

The Centre for Meat Innovation and Technology (CMIT) strives to advance and strengthen the Canadian meat processing industry to grow our local and international reputation and success.

Global Meat Sales Volume Will Grow

Worldwide Volume: Sales in Billion kg

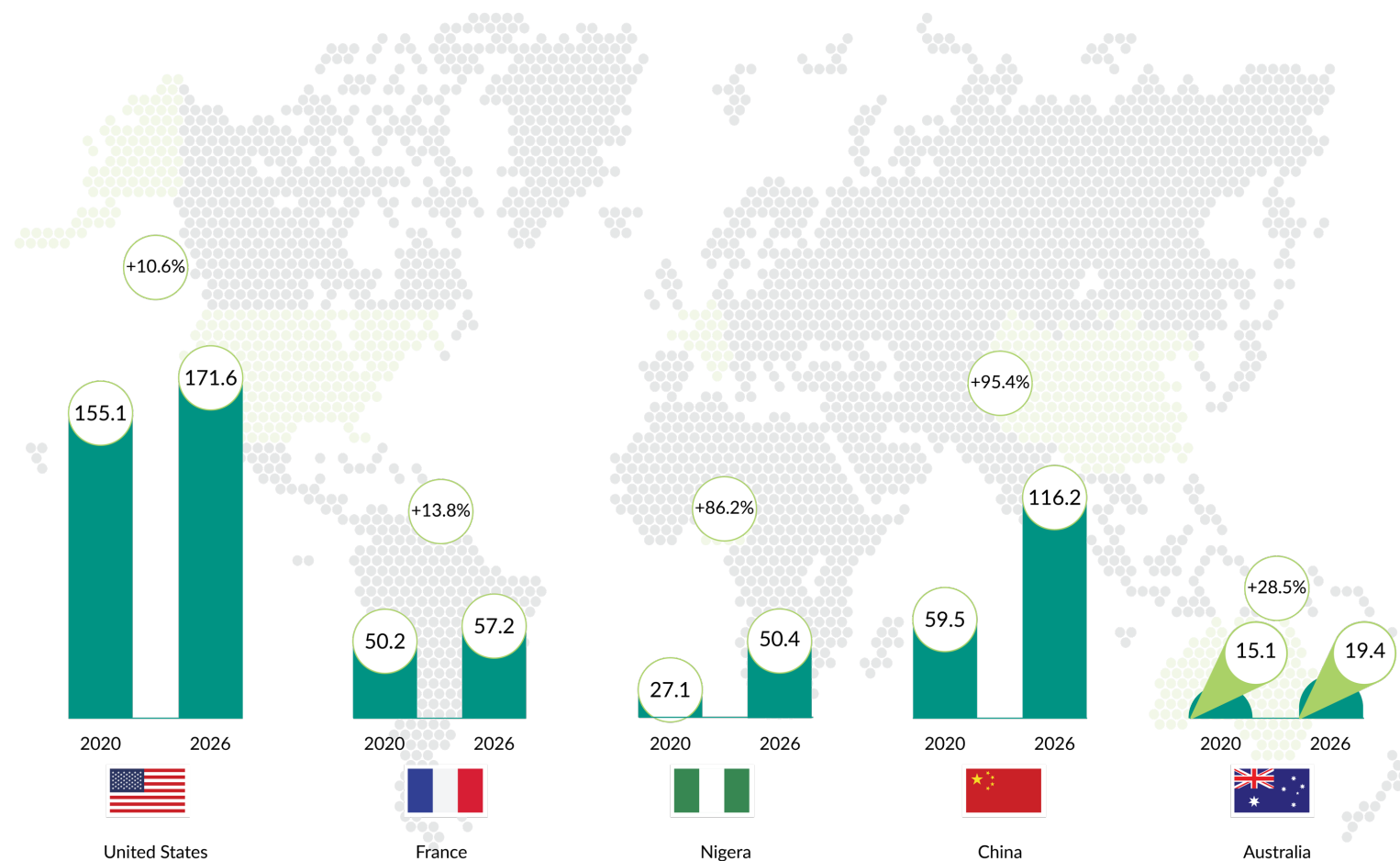


Source: StatCan

China: Meat Segment will grow by 95% in 6 years

2020-2026

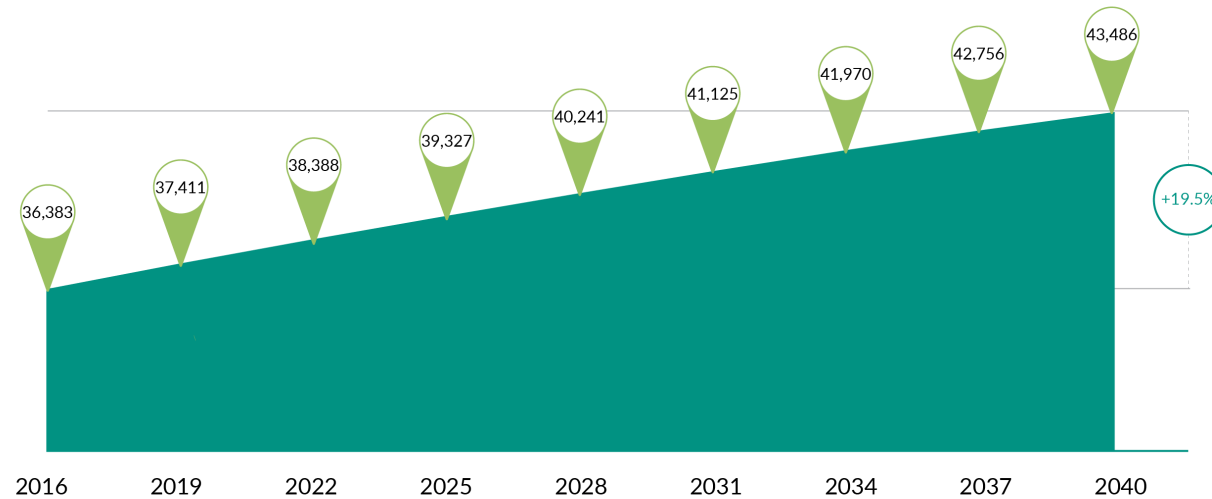
Top countries by region: Revenue in the top countries in billions US\$1



Source: Statista Consumer Market Outlook

Canada 2040: Population 43.5 million?

Population projection (thousands)

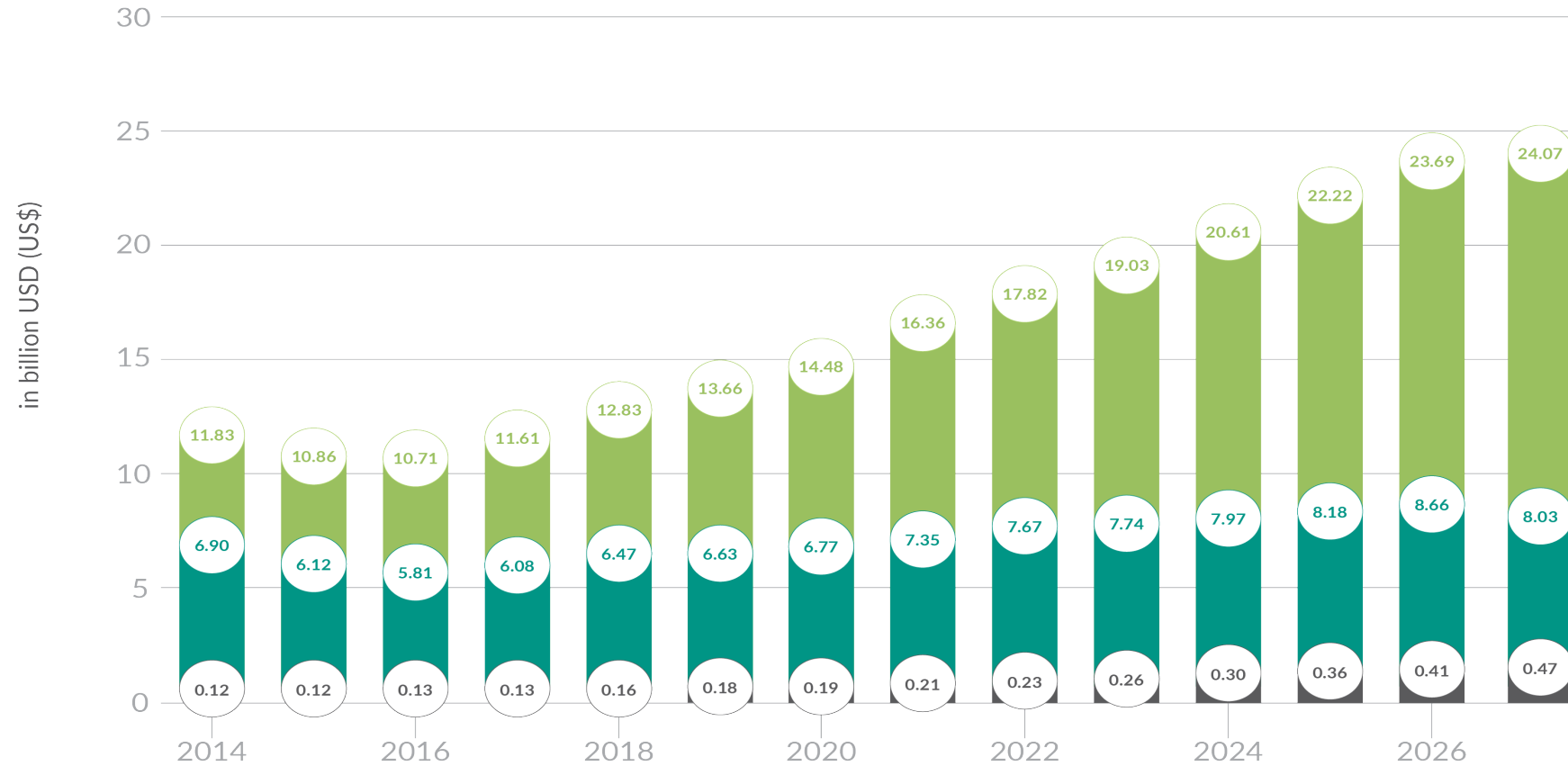


(1) The medium fertility variant assumes that total fertility will eventually coverage toward a level of 1.85 children per woman

Source: Statista, based on UN DESA and other statistical offices as of Q4 2021

Meat- Revenue - Canada

Billion USD (US\$)

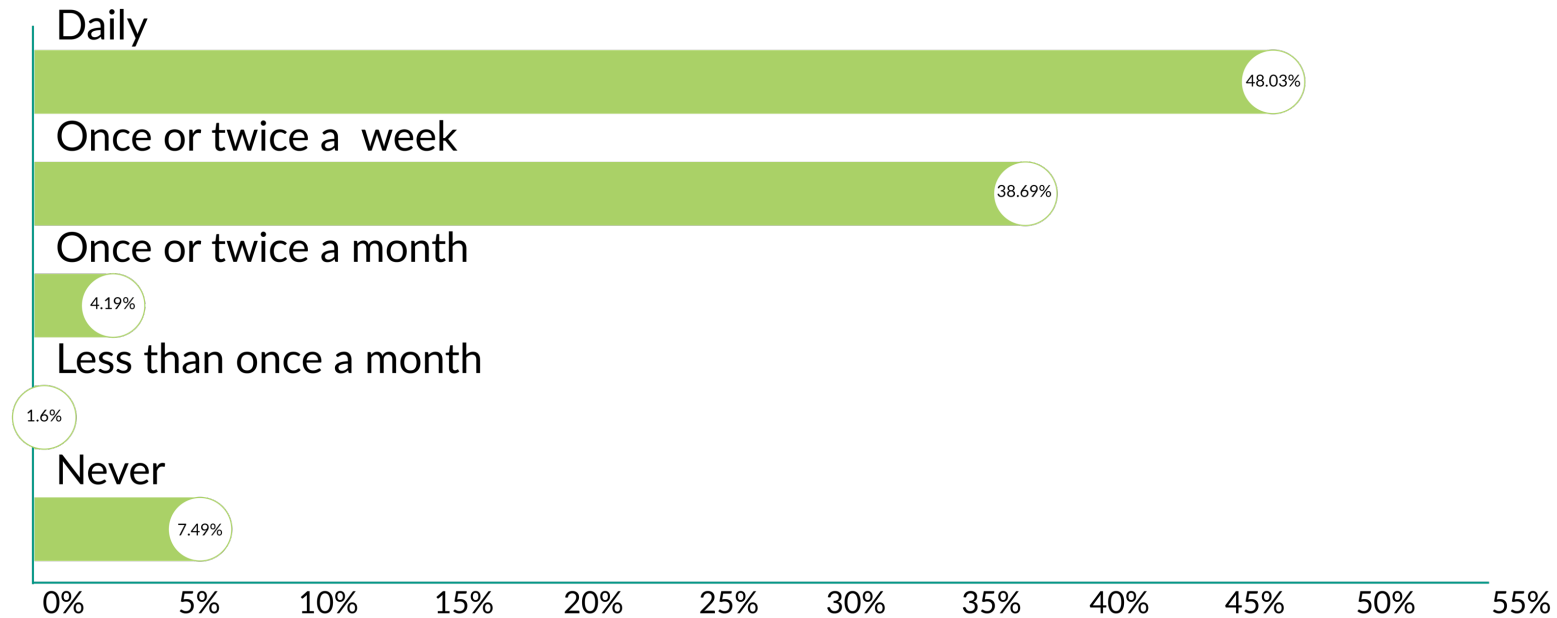


Source: Statista

● Fresh Meat ● Meat Substitutes ● Processed Meat

How often do you eat meat or meat containing products?

Canada - 2020

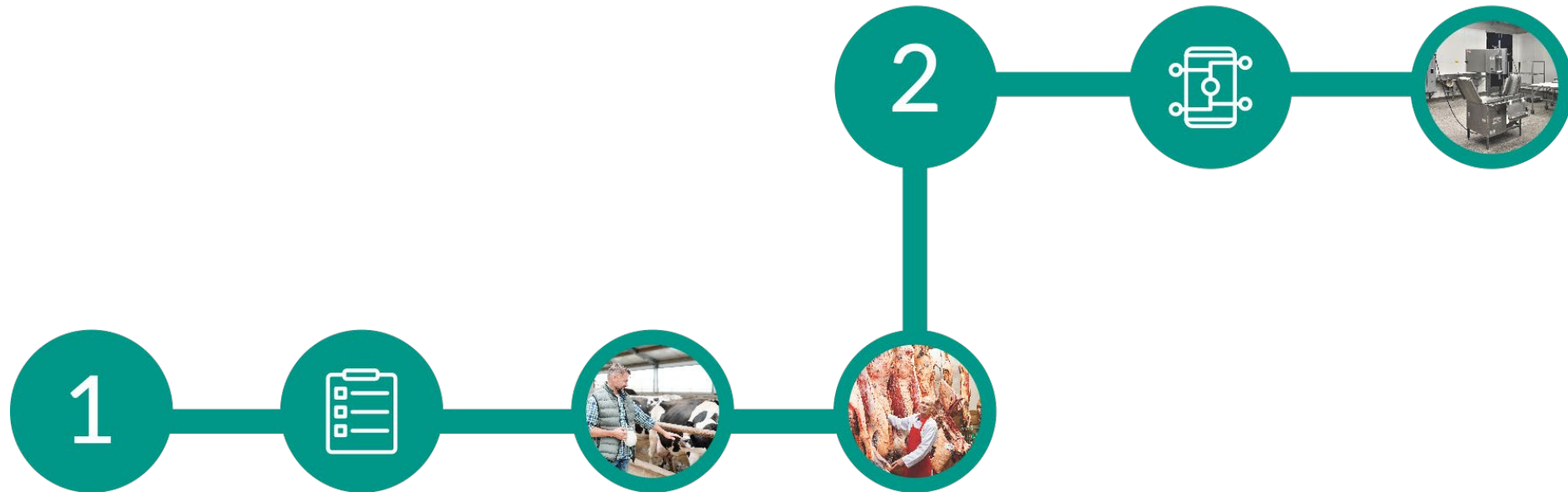


Source: StatCan

Why was CMIT Created?

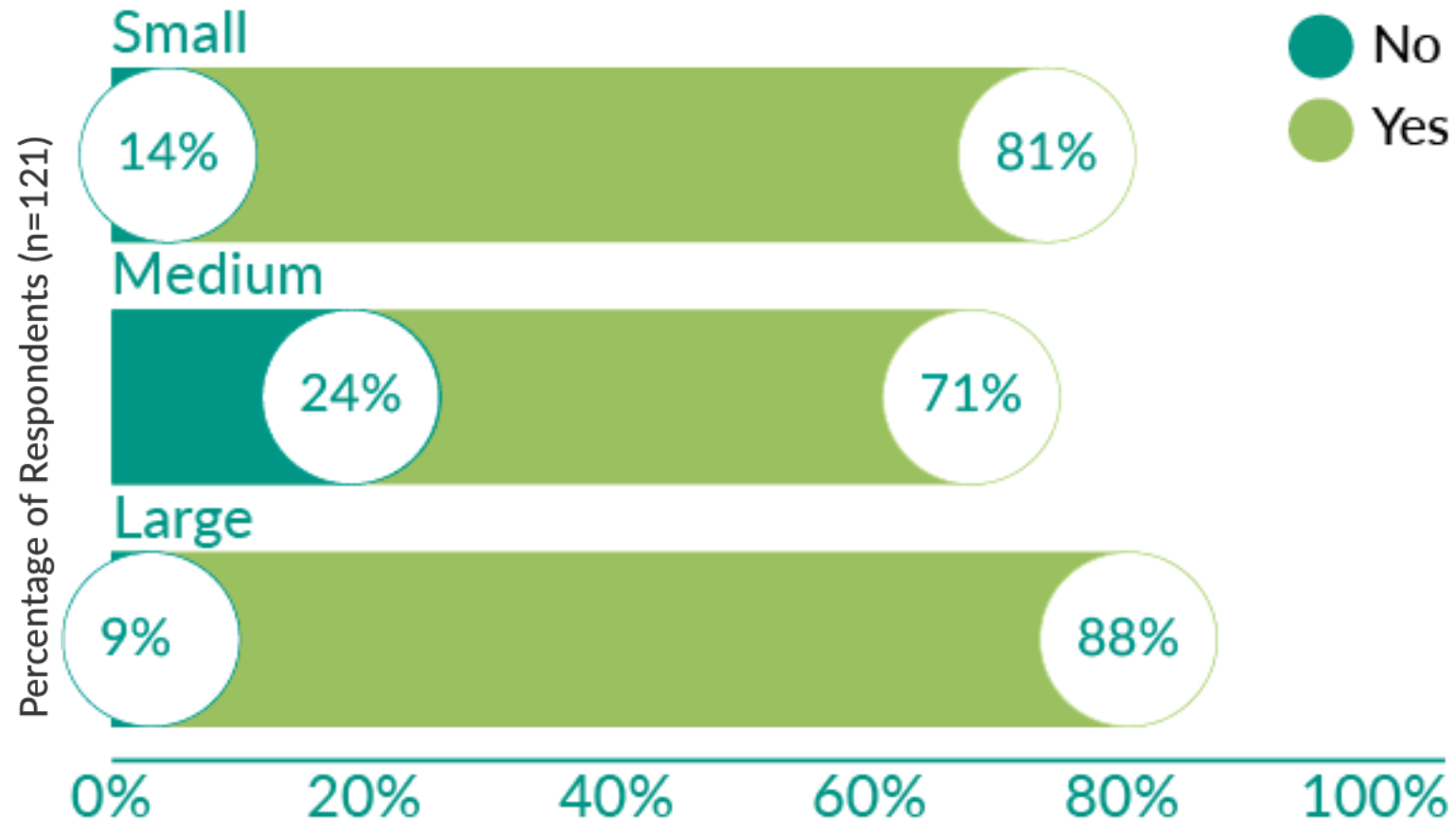
Examined barriers to meat processing industry growth

- Step 1: Surveys – producers and abbatoirs
- Step 2: Identify technologies and establish roadmap for implementation



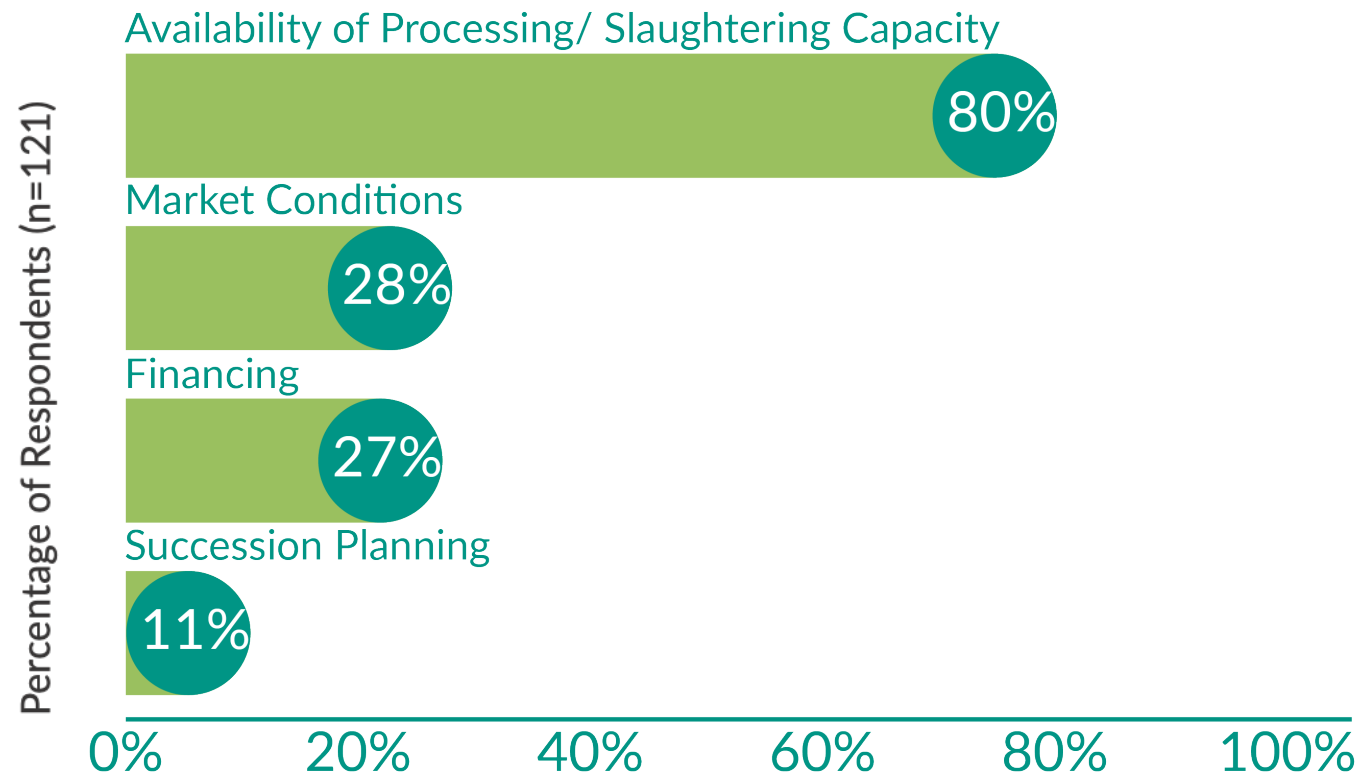
Producer Survey

Percentage of producers experiencing barriers to growth



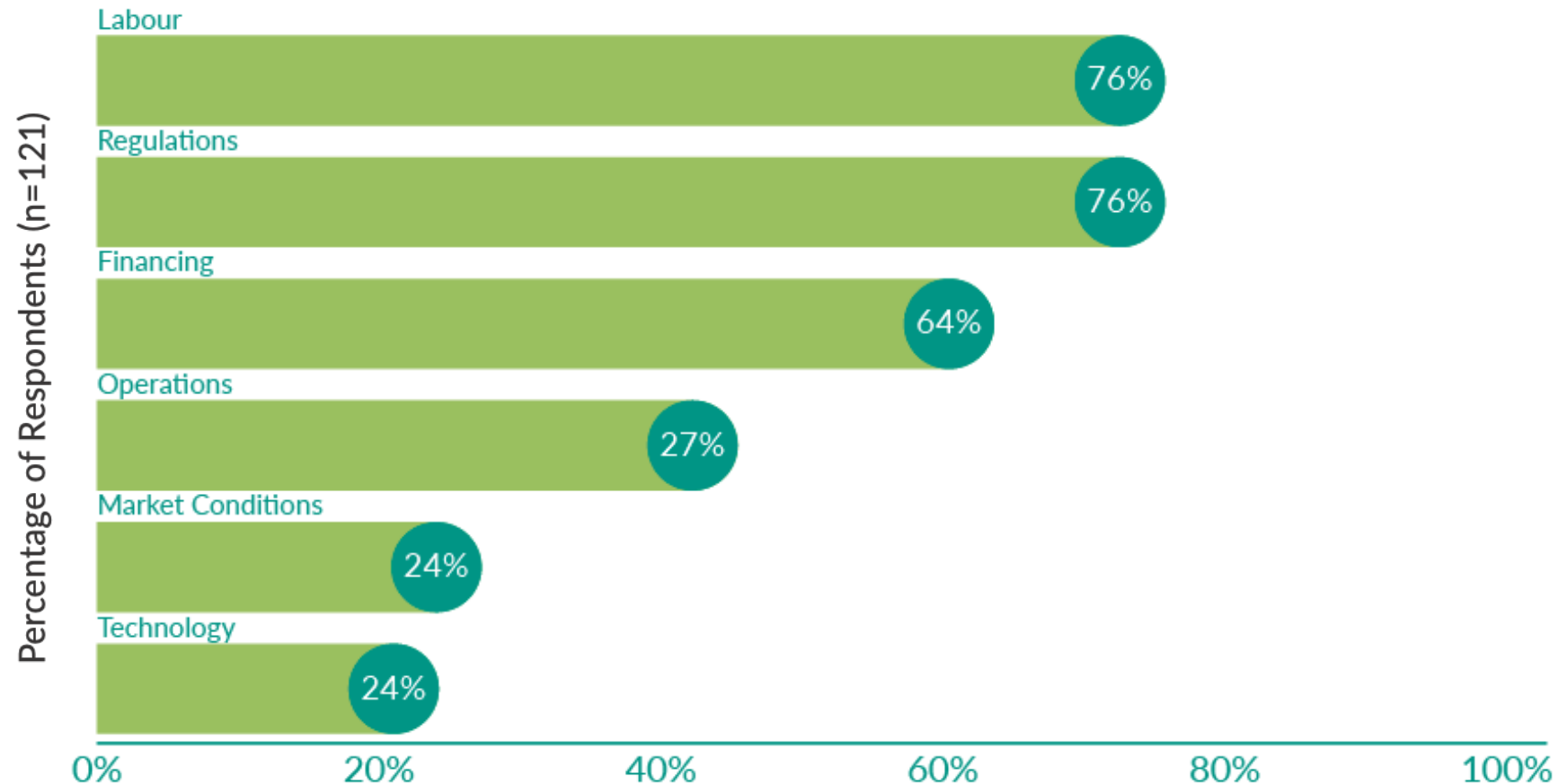
Barriers to Growth for Producers?

What are the main barriers to growth for producers?

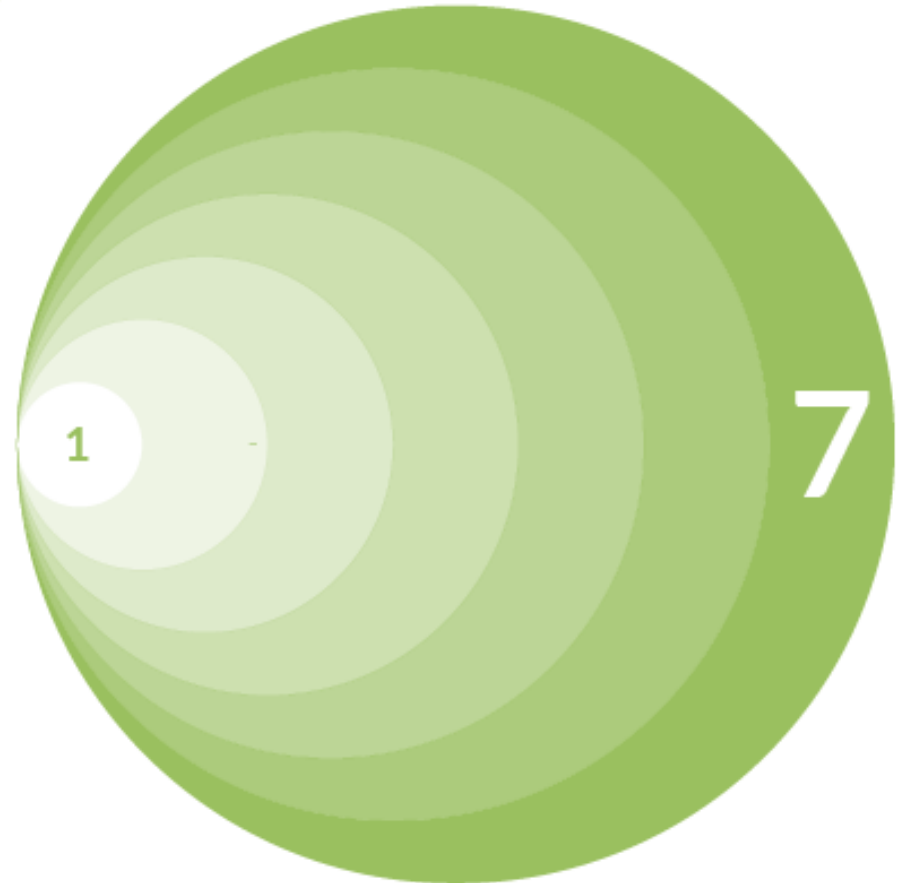


Abattoir Survey

What are the barriers to growth for abattoirs?



\$40-\$50
Million Investment



\$260-\$320
Million Increase

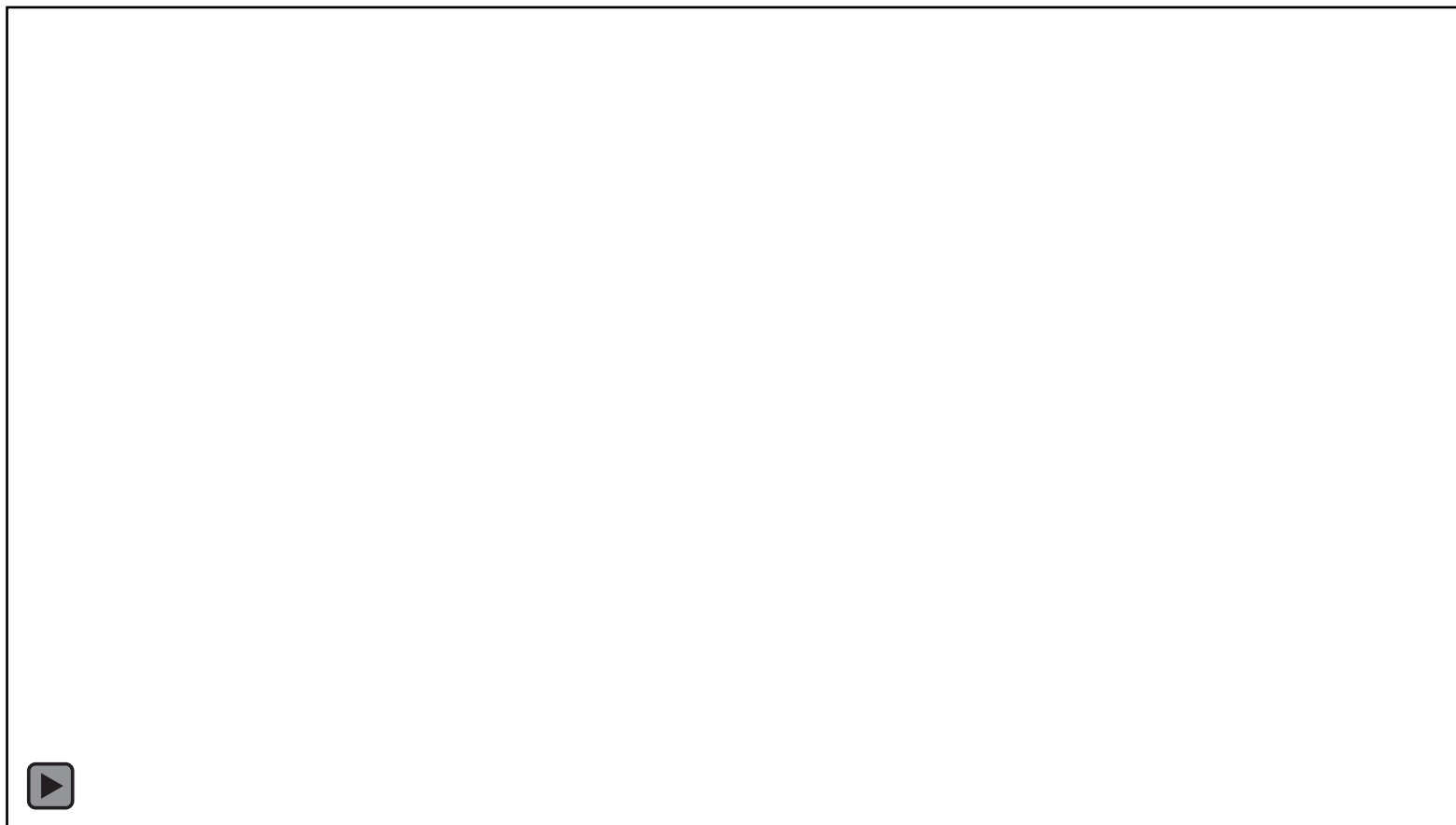
Roadmap for Implementation

- Implementation of technology, training and resources that could spur growth
 - Short term
 - Medium term
 - Long term

CMIT was Founded!

- Results used to create the plan for CMIT –
- Over the past year we have been putting the plan into place and we formally launched in April 2023.

How will CMIT help our industry?



How will CMIT help our industry?

CMIT is the leading Canadian meat processing hub powering industry collaboration and innovation

How will CMIT help our industry?

CMIT is dedicated to showcasing the world's leading meat processing technology to our industry in Canada



How will CMIT help our industry?

CMIT is dedicated to helping Canadian meat processors adopt new technology to become more competitive

Get Involved – processors

- New product & process development
- New packaging testing/development
- Custom small batch processing
- Test equipment specific to your plant
- Train your staff at CMIT



Get Involved

Are you a consultant or an expert in a specific area?

- Let's talk about the services you offer
- Are you an instructor – can we work together to offer training?



CMIT is the only Canadian meat processing technology hub that encompasses skills development, training and sharing best practices, backed by world class research and education



Thank you to our supporters to date!



Thank you to OMAFRA for believing in us and providing funding without which we would not be here!



Ministry of
Agriculture, Food &
Rural Affairs

A special thank you to the University of Guelph, especially Jim Squires, Chair of the Department of Animal Biosciences, for working with us and helping make CMIT a reality!



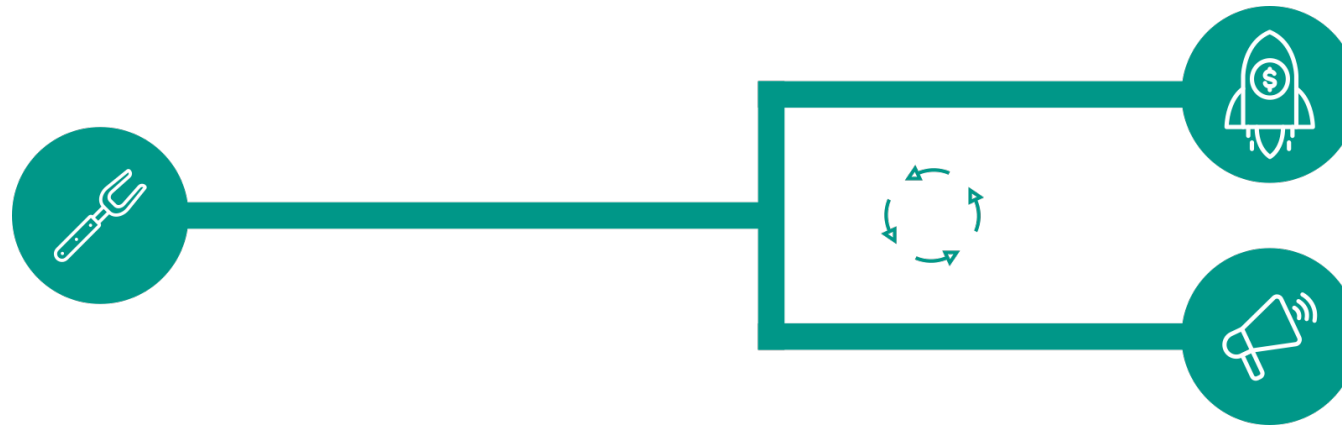
Our path to sustainability



Our goal: To be self-sustaining within 5 years

Two-pronged approach

- Cover initial start-up costs and early operations through fundraising
- Promote the organization and build our products and services revenue streams



Fundraising Goal

Raise \$1 Million to sustain CMIT operations for the first five years while we build revenue streams.



CMIT Income Generation Streams

**In the next 5 years we will build our revenue streams:
(Fee-for-Service)**

- ✓ Technology innovation
- ✓ Product, process, packaging
- ✓ Small production runs
- ✓ Education and training

We are open for business!

Projects, training and collaborations

- Craigmore Farm – harvesting high quality lambs and new product development
- Equipment demonstration
- Training (Guelph, Port Perry, Brantford, Bruce Mines)
 - Knife skills, retail meat cutting, sausage making
 - Stagionello - introducing the Cuomo Method
- Supporting Fanshawe College - Butchery Techniques program
- Working with software providers re creation/adoption of technologies for smaller companies
- More than 40 tours and over 200 people!

Become a founding contributor for CMIT

\$200,001 to \$250,000 donation:

Prime Founding Contributor

\$100,001 to \$200,000 donation:

Grade AAA Founding Contributor

\$50,001 to \$100,000 donation:

Grade AA Founding Contributor

\$1 to \$ 50,000 donation:

Grade A Founding Contributor



Get Involved!

- Become a founding contributor
- Donate equipment or software to demonstrate
- Donate some time as an advisor on your area of expertise
- Work with us on a project - new product development, new process development, new packaging testing/development, custom small batch processing and more
- Register for our training courses
- Join our mailing list
- Have another idea? Let's talk.

Stay up-to-date!

- Join our mailing list
- Follow us on social media



Meat & Poultry Ontario



@ontariomeatpoultry



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Thank you!





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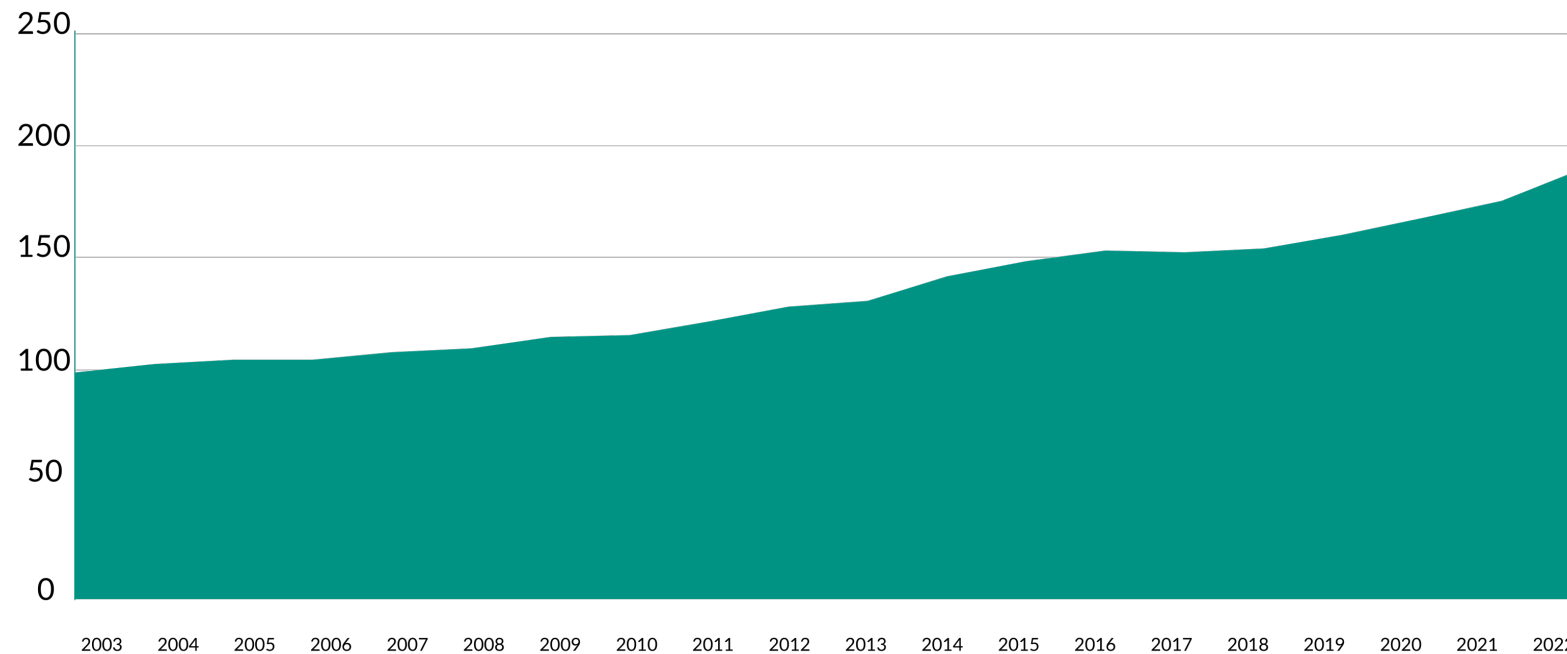
Supplemental Materials

Add or remove any of the following slides to the deck prior to this page - depending on who you are presenting to and what they will want to know.



Annual Consumer price index (CPI) of meat in Canada from 2003 to 2022

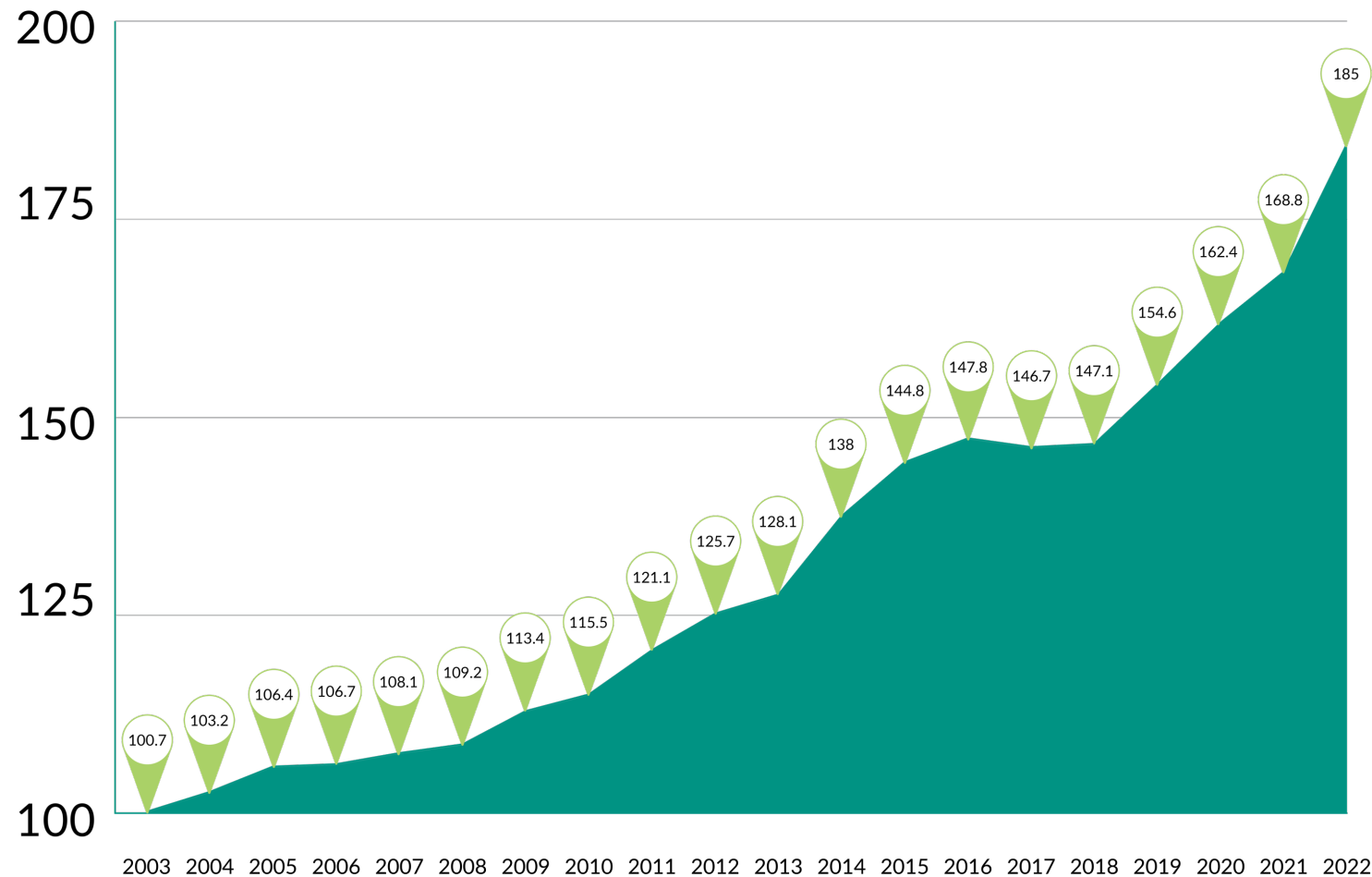
Consumer Price index of meat in Canada 2003-2022



Source: StatCan

Annual Consumer price index (CPI) of processed meat in Canada from 2003 to 2022

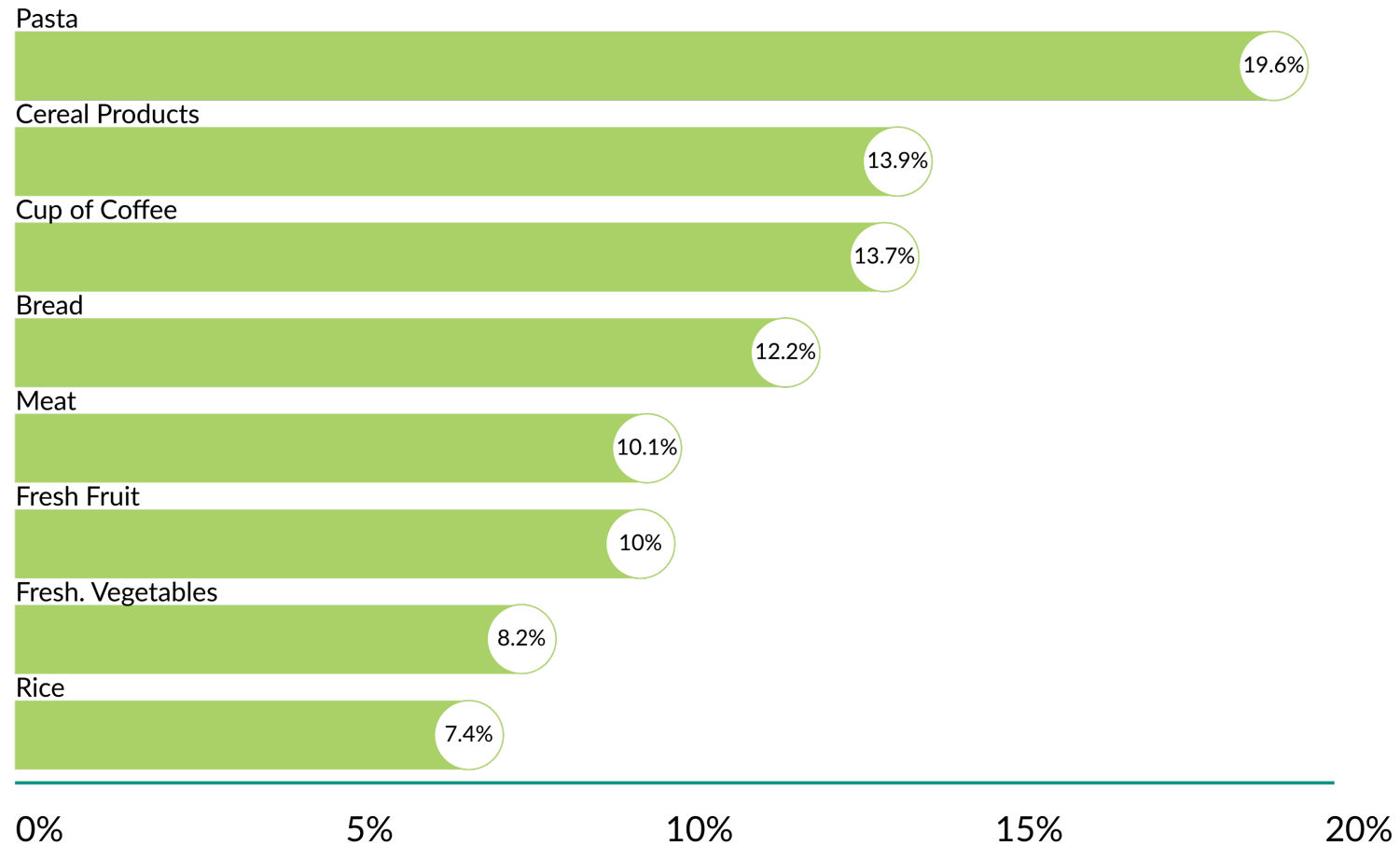
Consumer Price index of meat in Canada 2003-2022



Source: StatCan

Current change in grocery prices in Canada in April 2022 vs April 2021, by Category

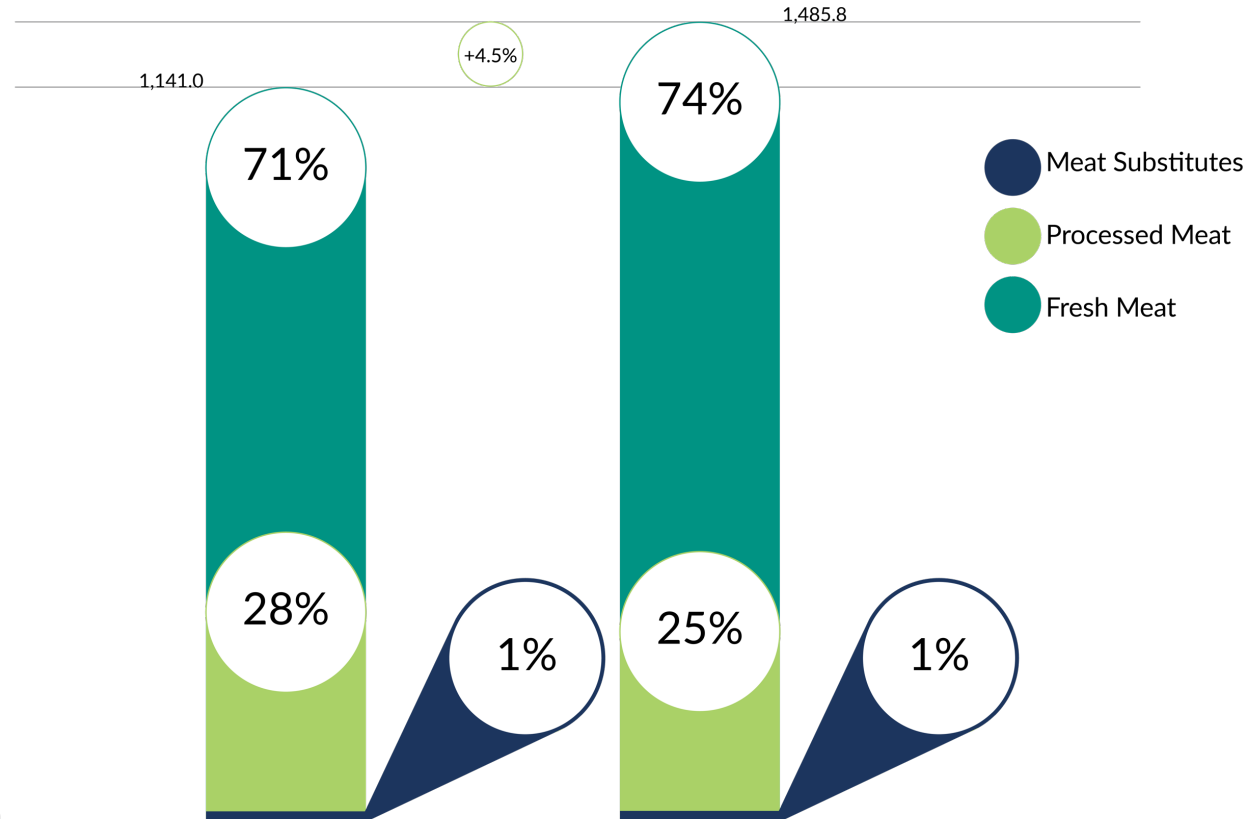
Change in grocery prices in Canada 2022 vs. 2021, by category



Source: StatCan

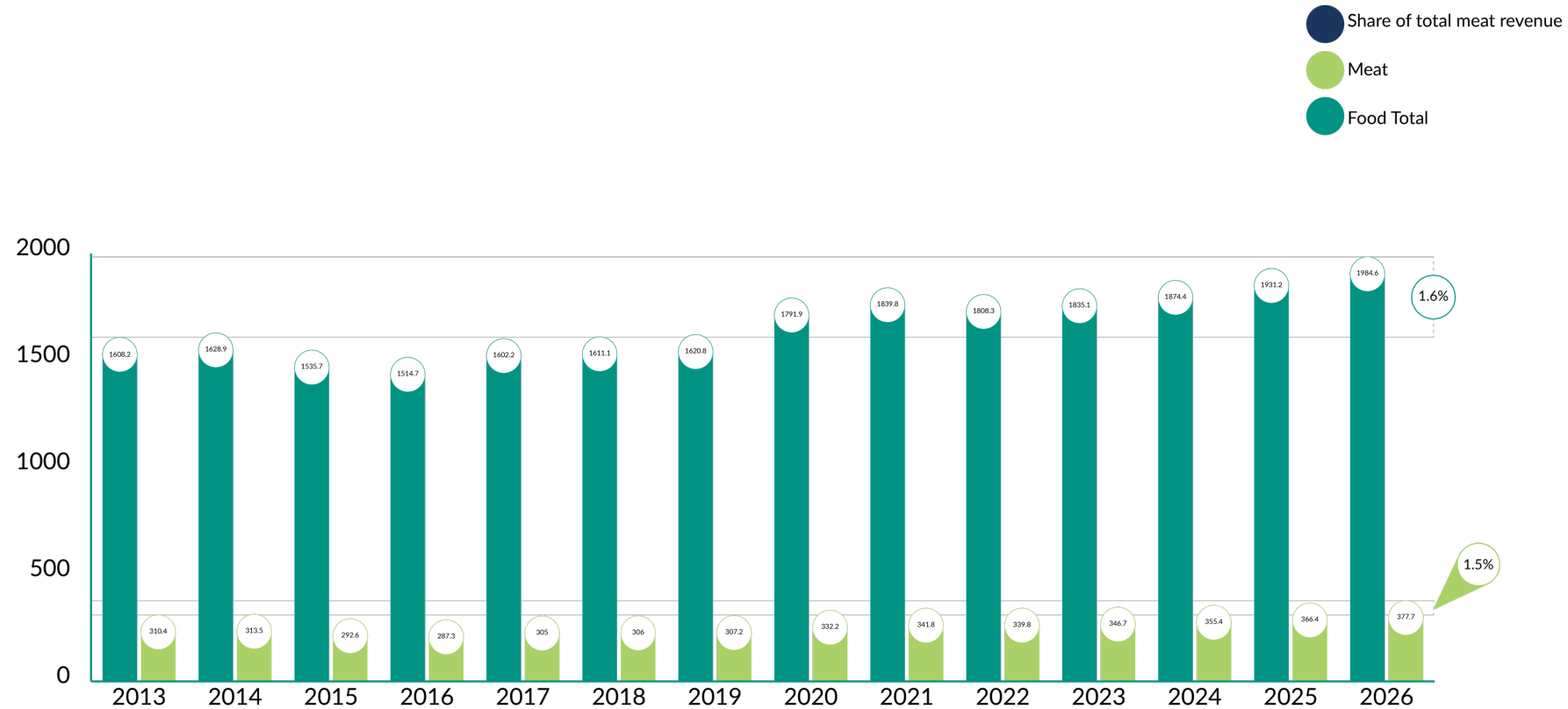
Fresh Meat generates the highest revenue in the Meat segment

Revenue share by subsegment
Worldwide revenue in billion US\$



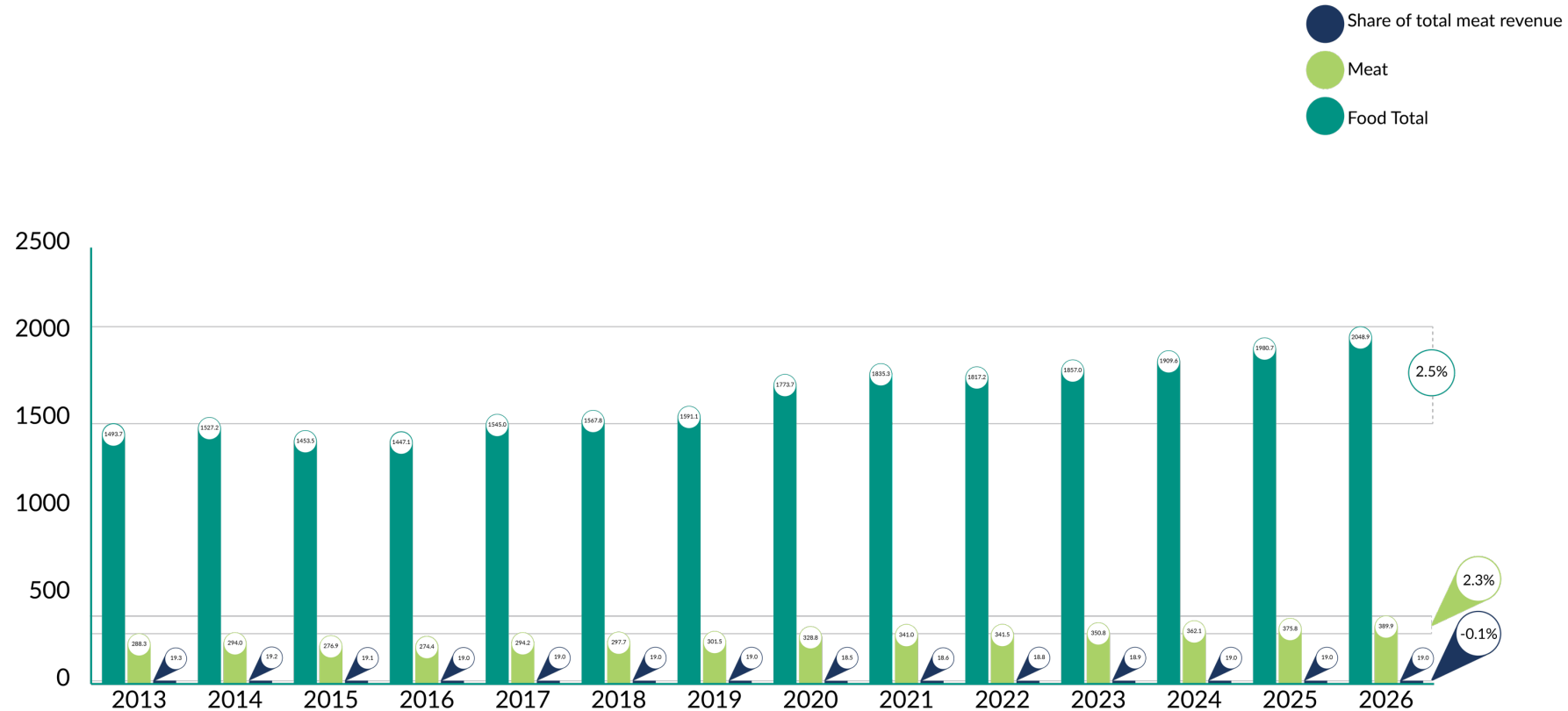
Meat Sales in the Americas will increase at a CAGR1 of 2.3% from 2013 to 2026

Revenue per capita in US\$



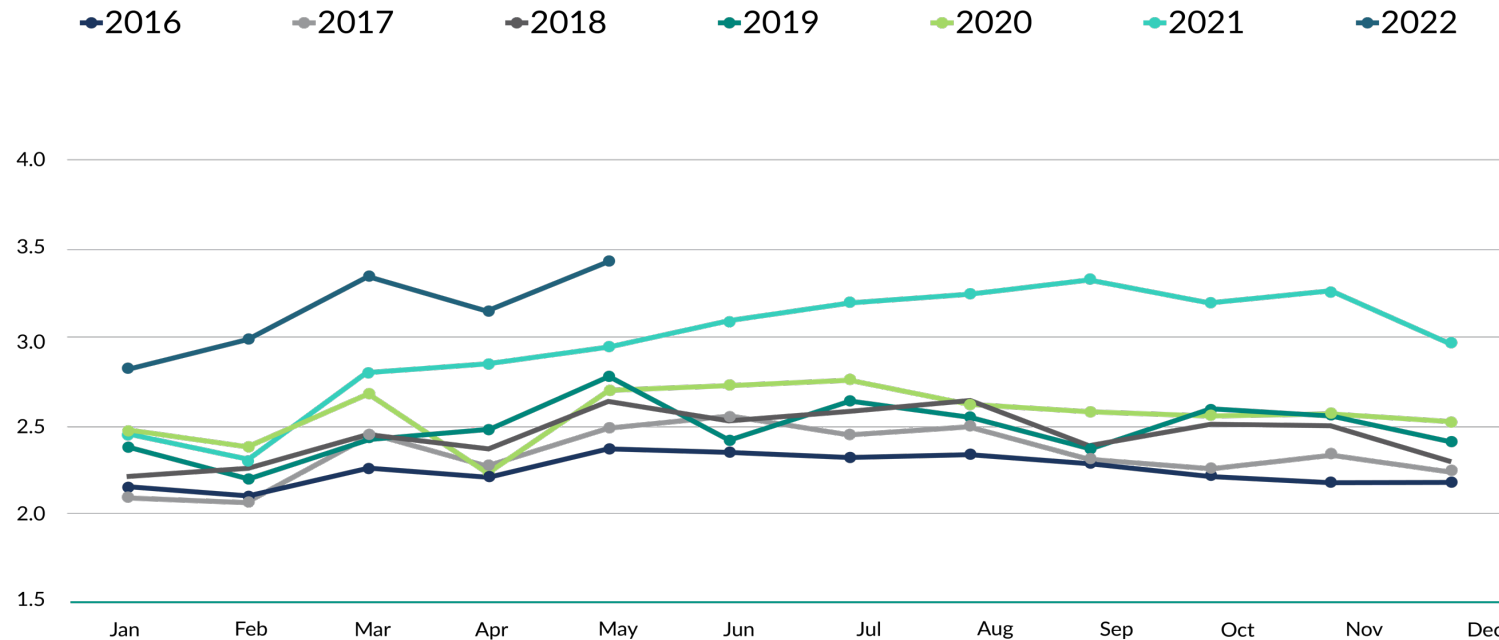
Meat Sales in the Americas will increase at a CAGR1 of 2.3% from 2013 to 2026

Revenue in billion US\$



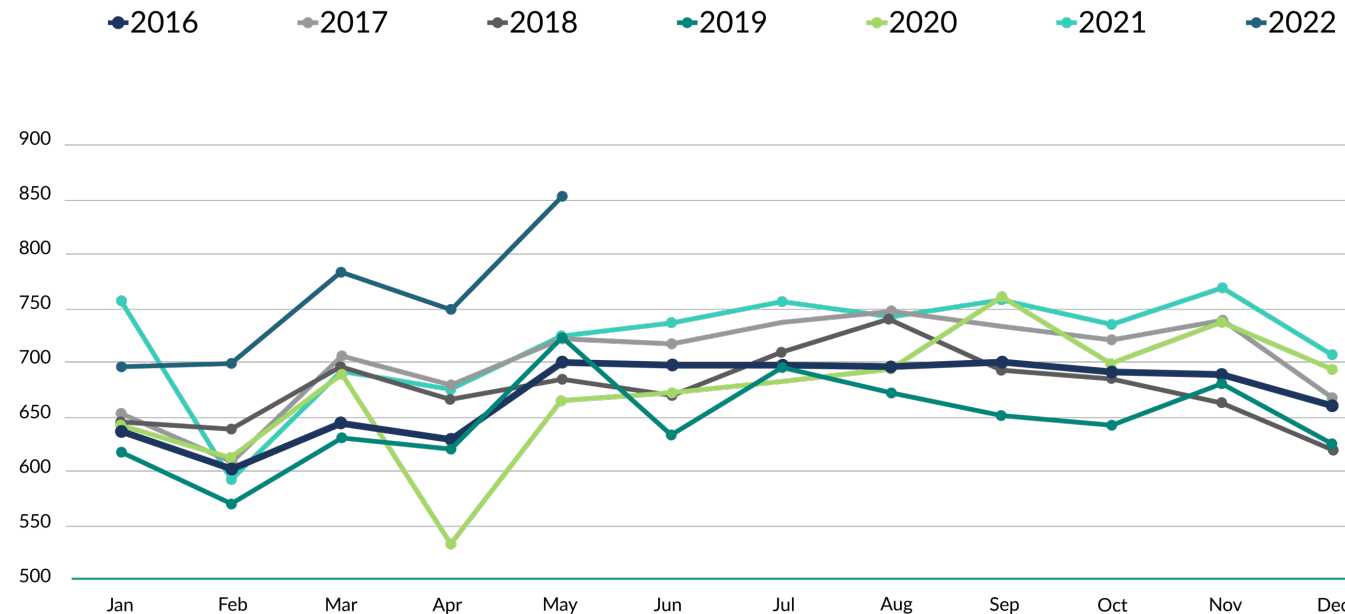
Monthly manufacturer sales of meat products in Canada January from 2016 to May 2022 (in million Canadian dollars)*

Monthly Manufacturer sales of meat products in Canada 2016-2022



Monthly manufacturer sales of poultry products in Canada January from 2016 to May 2022 (in million Canadian dollars)*

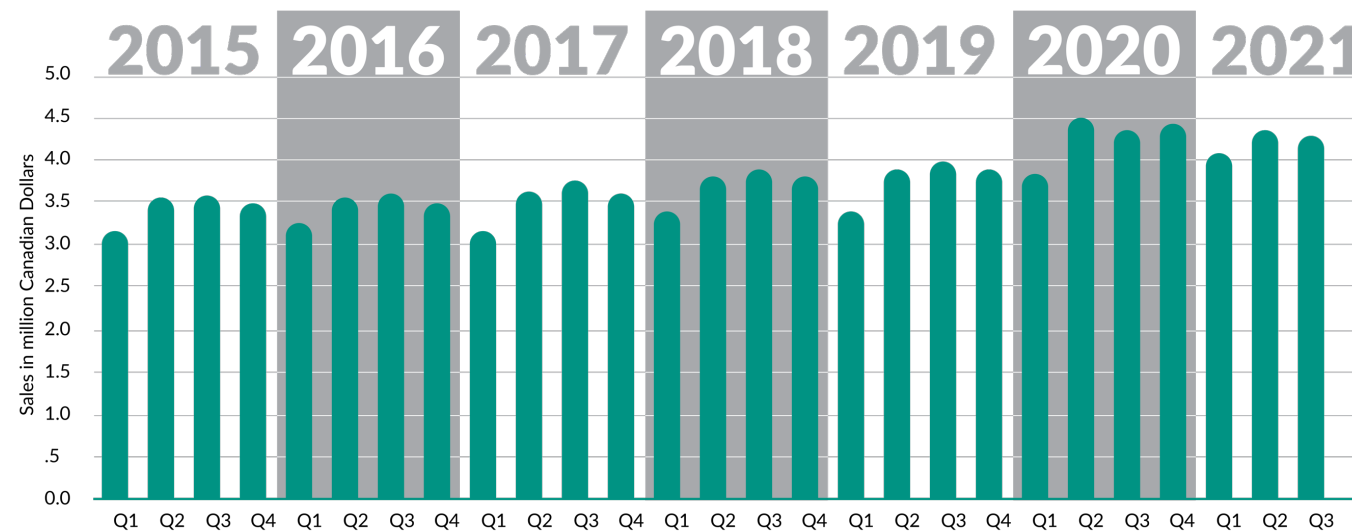
Change in grocery prices in Canada 2022 vs. 2021, by category



Source: StatCan

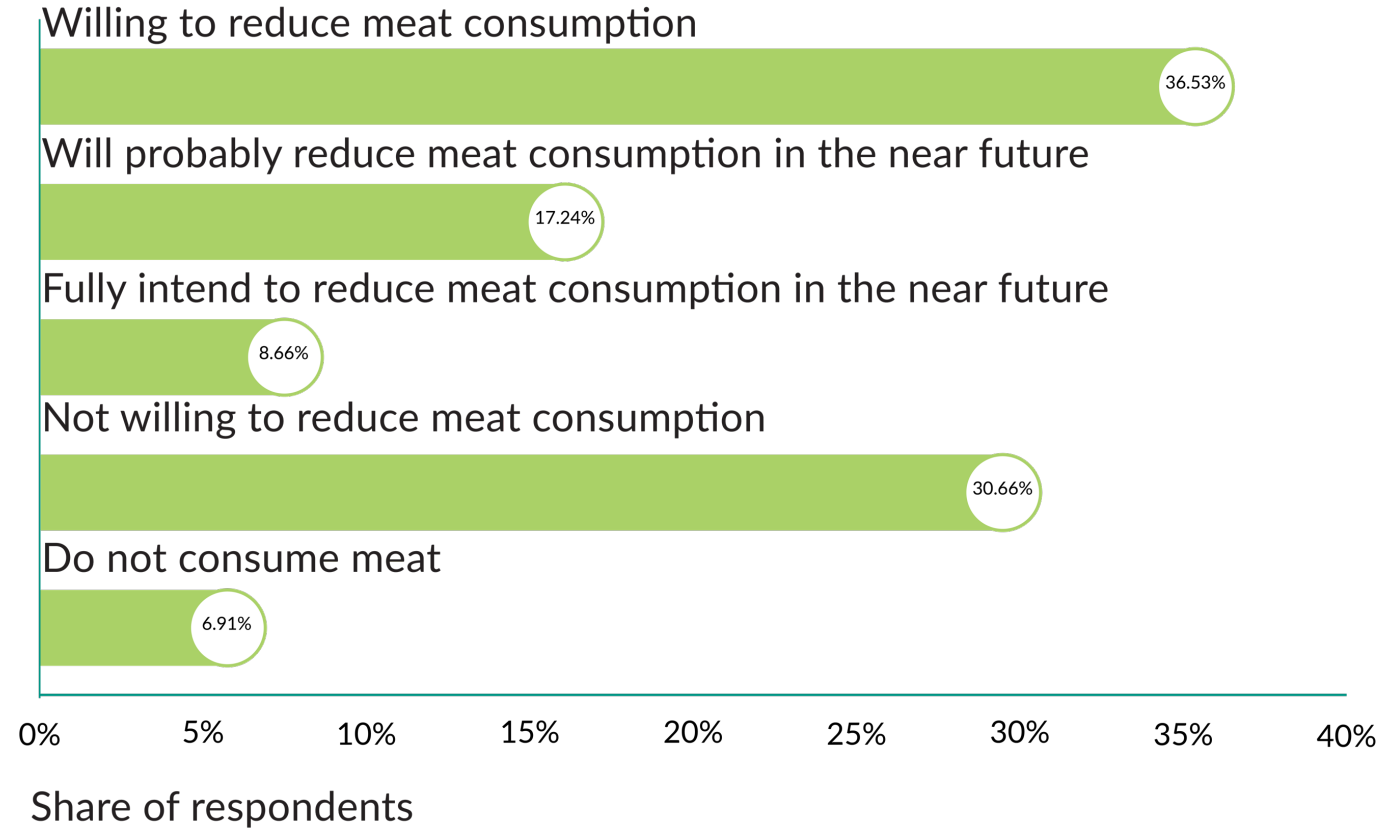
Quarterly retail sales of fresh meat and poultry in Canada from 1st quarter of 2015 to 3rd quarter of 2021 (in million Canadian dollars 2015-2021)

Quarterly retail sales of fresh meat and poultry in Canada 2015-2021



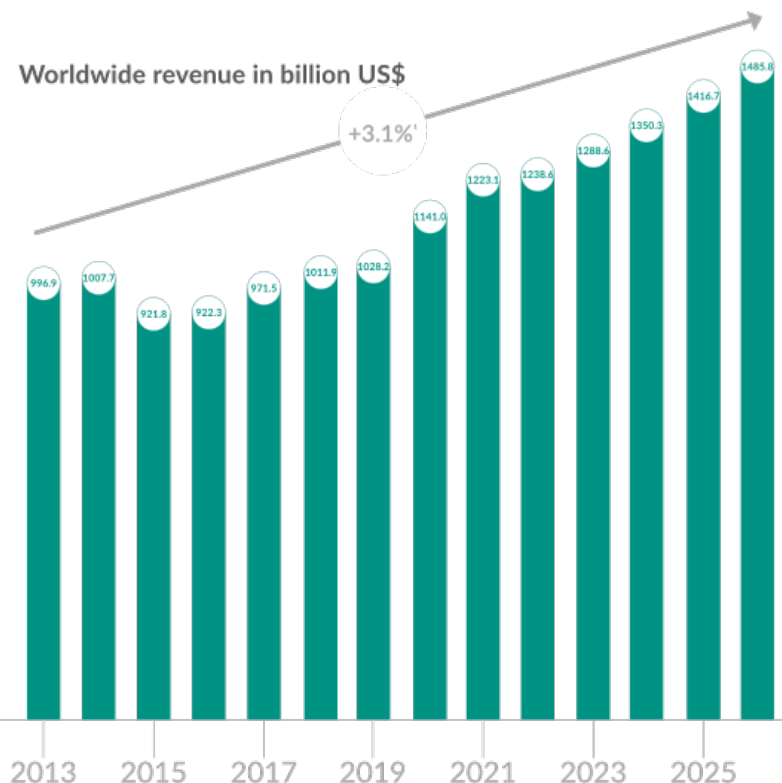
Source: StatCan

What is your opinion on cutting back on meat consumption



In 2020 worldwide Meat sales amounted to US \$1,141.0 Billion

Segment overview (1/2)



Key Takeaways

- The worldwide Meat revenue will increase at a CAGR¹ of 3.1% from 2013 to 2026, while Meat volume sales will grow annually by 2.2% in this period.
- In the Meat segment, Switzerland (US\$1178.3) and Iceland (US\$794.7) had the highest annual revenue per capita in 2020.



Revenue

US\$1,141.0bn
in 2020

#3.1%
CAGR¹ 2013-2026



Volume Sales

156.6bn kg
in 2020

\$2.2%
CAGR¹ 2013-2026

5

1: CAGR: Compound Annual Growth Rate / average growth rate per year
Sources: Statista Consumer Market Outlook 2021

What is CMIT?

CMIT is a global leader of innovation and technology in the meat and poultry processing sector

- CMIT is the leading Canadian meat processing hub powering industry collaboration and innovation
- CMIT is dedicated to showcasing the world's leading meat processing technology to our industry in Canada
- CMIT is dedicated to helping Canadian meat processors adopt new technology to become more competitive
- CMIT is the only Canadian meat processing technology hub that encompasses skills development, training and sharing best practices, backed by world class training and education

Why CMIT?

The Centre for Meat Innovation and Technology (CMIT) is driven to advance and strengthen the Canadian meat processing industry.

(If you are talking to government.... Use below instead)

- ***The Centre for Meat Innovation and Technology (CMIT) strives to advance and strengthen the Canadian meat processing industry to grow our local and international reputation and success.***

How will we help our industry?

The CMIT is the leading Canadian meat processing hub powering industry collaboration and innovation

- Access the best technology and knowledge locally and globally
- Share with Canadian processors
- Act as a hub to bring new options and ideas to our industry
- Source specialized training, equipment and software
- Make it easier for Canadian meat processors to find and adopt innovations

How will we help our industry?

CMIT is dedicated to showcasing the world's leading meat processing technology to our industry in Canada

- Make it easier for processors to research, find, learn about, access and test new technology and innovation
- Help them improve and grow their businesses
- New equipment, new products and much more
- Access to the University of Guelph federally licensed processing facility
- Finding connections our processors need to advance our industry

How will we help our industry?

CMIT is dedicated to helping Canadian meat processors adopt new technology to become more competitive

- Need meat processors of all sizes to meet local and international demand
- M&P members drive many local or rurally-based economies
- Help processors play a critical role in national and international market development
- Help all processors remain progressive and competitive through technology adoption

How will we help our industry?

CMIT is the only Canadian meat processing technology hub that encompasses skills development, training and sharing best practices, backed by world class research and education

- CMIT looks for research opportunities for our industry
- We find the experts, develop curriculum and deliver courses
- Micro-credentials to help our industry develop workforce skills
- Education and research to make it easier for our industry to grow and succeed

How will we help our industry?

- CMIT is exclusively dedicated to bringing together knowledge, education, technology, innovation and research to make our meat processing industry more successful.



CMIT Income Generation Streams

- In the next 5 years we will build the following revenue streams
- Fees for services
 - Company specific projects
 - Product development
 - Packaging development
 - Other
 - Small run processing in collaboration with the University of Guelph
 - Testing and demonstrating equipment
 - Education and training courses
 - Collaborations with experts who would like to offer their (paid) services through CMIT

Fundraising Goal

Raise **\$1 Million** to sustain CMIT operations for the first five years while we build revenue streams.

\$200,001 to \$250,000 donation:

Prime Founding Contributor

\$100,001 to \$200,000 donation:

Grade AAA Founding Contributor

\$50,001 to \$100,000 donation:

Grade AA Founding Contributor

\$1 to \$ 50,000 donation:

Grade A Founding Contributor



Get Involved – How you can help!

- Money
- Equipment or software to demonstrate to processors
- Some time as an advisor on your area of expertise
- New product development, new process development, new packaging testing/development, custom small batch processing,
- Join our mailing list
- Have another idea? Let's talk.

Get Involved – Offer Paid Services

Are you a consultant or expert in a specific area?

- Offer your services through CMIT
- Offer consulting services through CMIT
- Are you an instructor – can we work together to offer training?

Get Involved – processors

- New product development
- New process development
- New packaging testing/development
- Custom small batch processing
- Test equipment specific to your plant

