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Action Items from November 2018 Board Meeting

- AGM details finalized in preparation for the November 30th meeting in Calgary.
- BeefChain presentation planning finalized, for the November 30th meeting in Calgary.
- Survey developed and circulated to members in preparation for the December 1st strategic planning session in Calgary.

Canadian Sheep Identification Program / Traceability

- In conjunction with the Annual General Meeting, the CSF hosted a presentation and meetings with BeefChain executives Rob Jennings (BeefChain founder and CEO), Phil Schlump (Assistant in Functional Programming, University of Wyoming) and Dr. Bret Hess (Director and Associate Dean, College of Agriculture and Natural Resources, University of Wyoming). BeefChain’s mission is to create a new ‘rancher-centric’ supply chain utilizing blockchain technology to recapture the value currently realized by third-party feedlots and processors.

Industry Updates

- The Canadian Sheep Federation (CSF) is pleased to announce the election of Allan Ribbink as Chairman of the Board at the 2018 Annual General Meeting. Allan Ribbink, along with his wife Marlene and their son Cody operate a sheep and cash crop farm in Tiverton, Ontario. Their daughter Cailey works off the farm. The Ribbink’s have been involved in Canada’s sheep industry since 1979. “I look forward to working with the CSF Board and staff implementing the organization’s new strategic plan, focused on unifying the industry and helping improve results for the entire value chain” said Mr. Ribbink following the adjournment of the CSF’s 2018 Annual General Meeting.

For Broad Distribution

The CSF Executive Committee has a number of newly elected members this year including Morgan Moore (MB) as Vice-Chair, Liezel Kennedy (SK) as Secretary and Sheri Schweb (BC) as Treasurer. The rest of the CSF Board of Directors consists of Jocelyn McGraw (NB), Joseph Leck (NS), Harry Elsinga (PEI), Wilson Reid (NL), Brian Greaves (CCWG) and Ted Skinner (CSBA). The 2018 AGM took place in Calgary, following two days of Sheep Value Chain Round Table meetings. The Board also spent some time this year modernizing the organization's strategic plan.

- CSF staff met with representatives from the Yukon Agriculture Association to discuss the Yukon Sheep Control Order, its implications for Yukon sheep farmers, the precedent it sets for managing wildlife issues both for the sheep industry and potentially other livestock sectors. The CSF discussed similar issues with the BC Sheep Federation and is collaborating with American Sheep Industry staff and Alaska USDA veterinarians. The Yukon Sheep Control Order requires that:
 - All sheep and goats are being kept below 1,000 meters in elevation;
 - all sheep and goats are maintained in an enclosure approved by an inspector before January 1, 2020 and annually thereafter (the interpretation is that double fencing is required);
 - all sheep and goats have some form of permanent identification, e.g., ear tags;
 - records are maintained for each individual sheep and goat;
 - all sheep and goats are tested annually for pathogens of concern;
 - any sheep or goats that escape from an enclosure, or while being transported, must be reported immediately to the chief veterinary officer; and
 - sheep and goats can only be moved into Yukon, or out of Yukon, by permit.

In the opinion of local producers, the Order was politically motivated and developed without thorough consultation with those most affected by the program.

- The CSF was invited to participate in the National Farmed Animal Health and Welfare Forum's Collaboration in Action speaker panel, where industry and government representatives that participated in the PVS panel clearly identified commitment to addressing the recommendations and that addressing gaps will require input and action from both governments and industry to be successful.
- This year's Sheep Value Chain Round Table meeting took place in Calgary November 29th and 30th. Unique to this year's meeting was a shared morning session with the Beef Value Chain Round Table, where the agenda included:
 - Trade updates on the Canada-United States-Mexico Agreement (CUSMA), China, CPTPP and MERCOSUR updates along with status updates on Regulatory Cooperation Council work plans;
 - BVCRT Livestock Grading Committee discussions;
 - Animal Health Canada work to date; and

For Broad Distribution

- Agri-Food and Aquaculture Targeted Regulatory review consultation outcomes.

ShVCRT session agenda items included:

- Identifying how the ShVCRT can leverage Agri-Food Economic Strategy Table recommendations;
- Outcomes of recent research on meat and carcass quality, and possible next steps for the sector;
- Recent work in Sustainability and Public Trust, and determining future activities in these fields for the ShVCRT; and
- A presentation from the North American Lamb Company on their recent merger, and its implications for the sheep sector.

This month's meetings

- Market Access Secretariat – Pacific Alliance Free Trade Agreement
- Yukon Agricultural Association – Yukon Sheep Control Order
- Canadian Global Food Animal Residue Avoidance Database Advisory Board
- Sheep Value Chain Round Table Social Licence Working Group – Chair transition
- Ontario Master Shephard's Program presentation – Lindsay
- Health Canada – Pyrethrin registration renewal update
- Agricultural Trade Negotiation Consultative Group – USMCA update
- FoodNet
- Value Chain Management International – Project planning
- Canadian Cattle Identification Agency – Project planning
- BeefChain – Project planning
- National Farmed Animal Health and Welfare Forum – Panel presentation
- Sheep Value Chain Round Table – Annual Meeting, Calgary
- Canadian Sheep Federation Annual General Meeting – Calgary
- Canadian Sheep Federation Strategic Planning Meeting – Calgary



SHEEP SUPPLY CANADA

Year To Date for the Month Ending September 2018

Fed. & Prov. Slaughter (head)			
	2018	2017	% chg
preliminary			
B.C./Alta/Sask./Man.	88,889	91,145	-2.5
Ontario	193,754	204,482	-5.2
Quebec - Atlantic*	107,764	107,922	-0.1
Canada	390,407	403,529	-3.3
Federal Slaughter			
West - Ontario	8,299	10,014	-17.1
Quebec - Atlantic	8,031	8,442	-4.9
West - Ontario YTD	64,513	69,583	-7.3
Quebec - Atlantic YTD	61,047	55,096	10.8
Provincial Slaughter			
	preliminary		
West - Ontario	22,954	32,916	-30.3
Quebec - Atlantic*	4,560	8,776	-47.7
West - Ontario YTD	218,130	226,024	-3.5
Quebec - Atlantic YTD *	46,717	52,826	-11.6

Source: Canadian Food Inspection Agency, Provincial Governments
*Includes estimates for 2018

Imports			
	Year to Date September		% chg
(Number of head from U.S.)	2018	2017	
Pure-bred & Non Pure-bred			
East	88	58	17.2
West	93	56	66.1
Total	161	114	41.2

Source: Statistics Canada

Mutton & Lamb (Metric Tonnes)			
	Year to Date September		% chg
	2018	2017	
New Zealand	7,830	9,315	-15.9
Australia	6,504	6,431	2.5
Other	736	702	4.8
Total	15,160	16,448	-7.8

Source: Statistics Canada

UNITED STATES

Total Sheep and Lambs			
	Year to Date September		% chg
	2018	2017	
Slaughter ('000 head)	1,472	1,432	2.8
Avg Dressed Wt (lbs)	68	66	4.0
Avg Dressed Wt (Kg)	31	30	4.0
Lamb/Mutton (mil lbs)	104	98	6.6
Lamb/Mutton (tonnes)	47,356	44,407	6.6

U.S. Lamb & Mutton Exports (Metric Tonnes)			
	Year to Date September		% chg
	2018	2017	
Caribbean	544	459	23.6
Mexico	477	702	-32.1
Middle East	364	19	-
Canada	107	199	-45.4
European Union	85	78	9.0
Central & South America	68	159	9.0
Japan	66	20	-
Other	99	97	2.1
Total US Exports	1,810	1,740	4.0

Source: United States Department of Agriculture (USDA)

Monthly Prices			
	2018	2017	% chg
Ontario Auctions			
Lambs	Slaughter, live weight, weighted average		
< 65 lbs, new crop	218.72	243.06	-10.0
65-79 lbs	238.98	253.50	-5.7
80-94 lbs	231.96	245.10	-5.4
95-109 lbs	238.31	240.83	-1.0
Sheep	131.81	143.70	-8.3
Quebec Auctions			
Lambs	Slaughter, live weight, weighted average		
< 65 lbs, new crop	260.56	280.87	-7.2
65-79 lbs	236.17	279.82	-14.5
Sheep - Ewes	104.08	129.73	-19.8
Sheep - Ram	123.74	143.76	-13.9
LEOQ			
Quebec Heavy Lambs	S/kg carcass basis (Producer annual contract price)		
September 9 to October 20, 2018		12.00	
October 21 to December 1, 2018		11.50	
December 2 to December 29, 2018		11.00	

Source: Ontario Cattlemen's Association, Quebec Electronic Auctions and Les Elevateurs d'Ovins du Québec

Exports			
	Year to Date September		% chg
(Number of head)	2018	2017	
Total Live Sheep			
United States	4,376	4,760	-8.1
Other	0	219	-
Total	4,376	4,979	-12.1

Source: Statistics Canada

Mutton & Lamb (Metric Tonnes)			
	Year to Date September		% chg
	2018	2017	
United States	45.2	72.2	-37.4
United Arab Emirates	35.0	34.0	0.0
Saint Pierre and Miquelon	10.2	10.8	-6.0
Other	2.7	5.5	-51.2
Total	93.0	123.4	-24.7

Source: Statistics Canada

U.S. Price Summary

San Angelo Auction	September	
	2018	2017
	U.S. \$/cwt min/max	
Choice and Prime 1	40-70 lbs	179.33 - 198.58 185.00 - 208.67
	70-110 lbs	141.22 - 149.28 167.69 - 178.06
Good 1	45-80 lbs	119.48 - 134.23 130.00 - 147.17

Note: Monthly price averages are calculated off of daily/weekly price reporting

U.S. Lamb & Mutton Imports (Metric Tonnes)			
	Year to Date September		% chg
	2018	2017	
Australia	74,757	62,363	19.9
New Zealand	22,046	24,843	-11.3
Chile	539	1,032	-47.8
Iceland	180	213	-15.5
Uruguay	128	0	-
Other	120	83	44.5
Total US Imports	97,770	88,534	10.4

Source: USDA