



ICAR 2022
MONTREAL CANADA
May 30 - June 3
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Canadian Dairy Industry Overview

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About Canada

- 2nd largest land mass in the world (9.88M km², ≈7% is arable)
- 20% of world's freshwater resources
- Population: 38.3M (ranked 37th)
- 10 provinces and 3 territories
- 6 time zones
- Official languages: English and French
- 18% of people are foreign born
- 1.4M are Indigenous
- Largest cities: Toronto, Montreal, Calgary, Ottawa



Importance of Agriculture

- Agriculture and agri-food sector employs 2.1M people = 1 in 9 jobs in Canada
- Generates \$140B of Canada's GDP
- Crops: \$34.4B GDP

Top 3: Canola, Wheat, Corn

- Livestock: \$5.4B GDP

Beef / Veal (12.3M head, 72,985 farms/ranches)

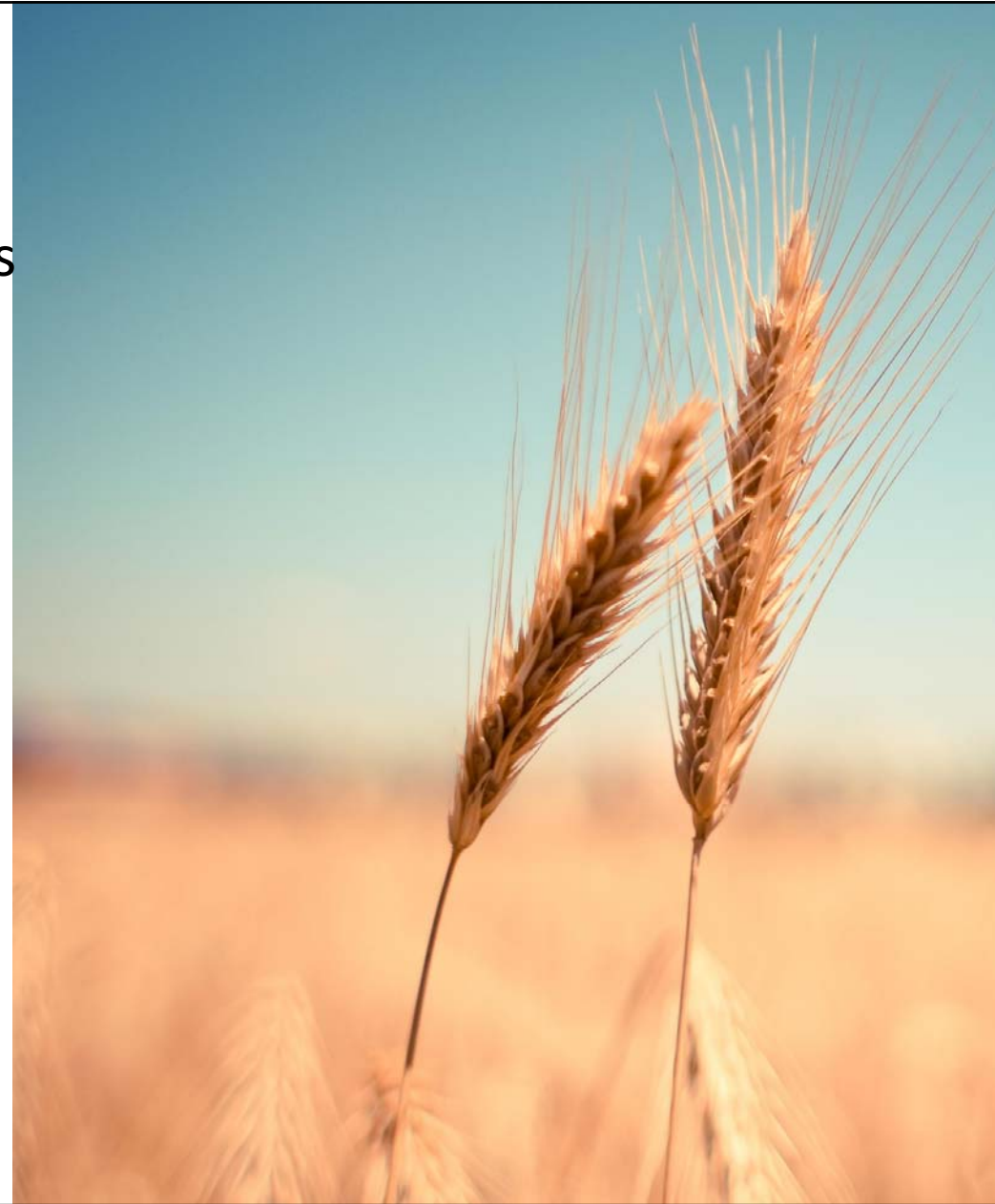
Swine (14.0M head, 7,635 farms)

Dairy (1.4M head, 9,952 farms)

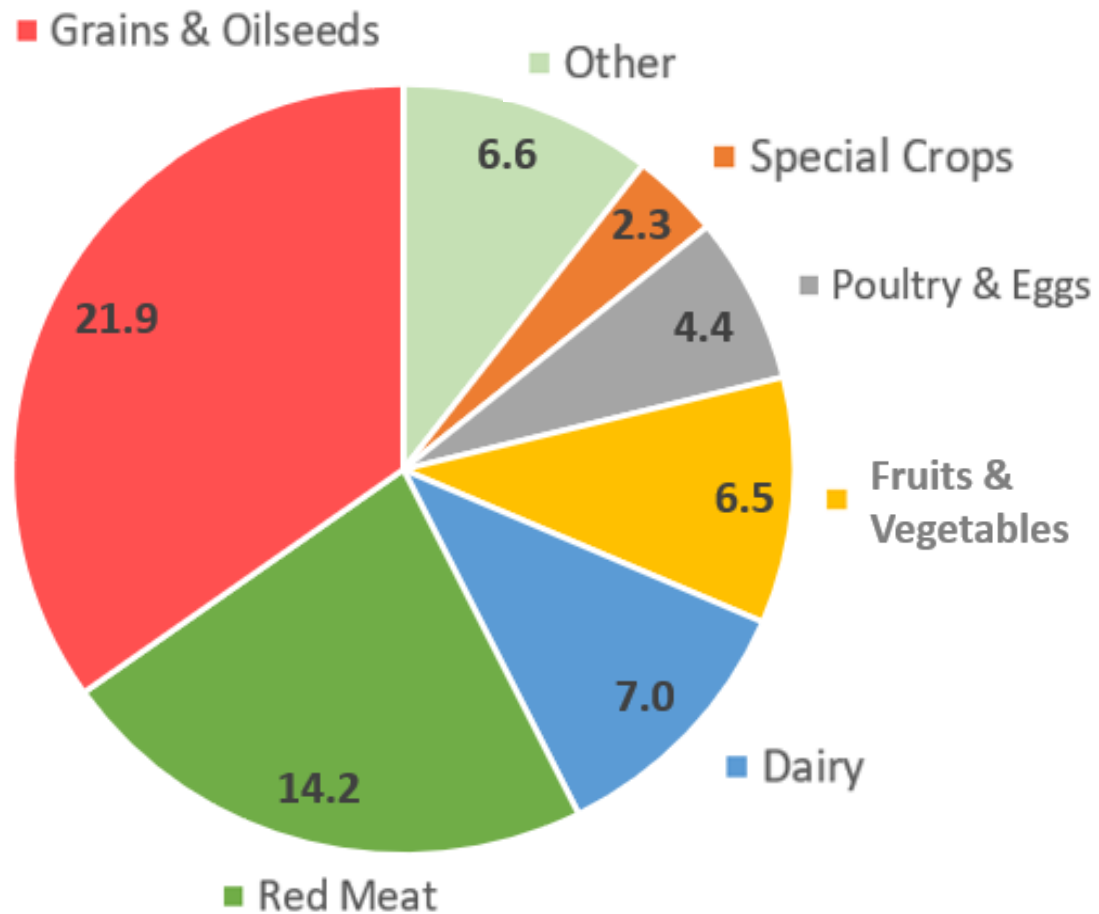
Sheep (796K head, 9,390 farms)

Goats (230K head, 5,627 farms)

Bison (119K head, 975 farms)

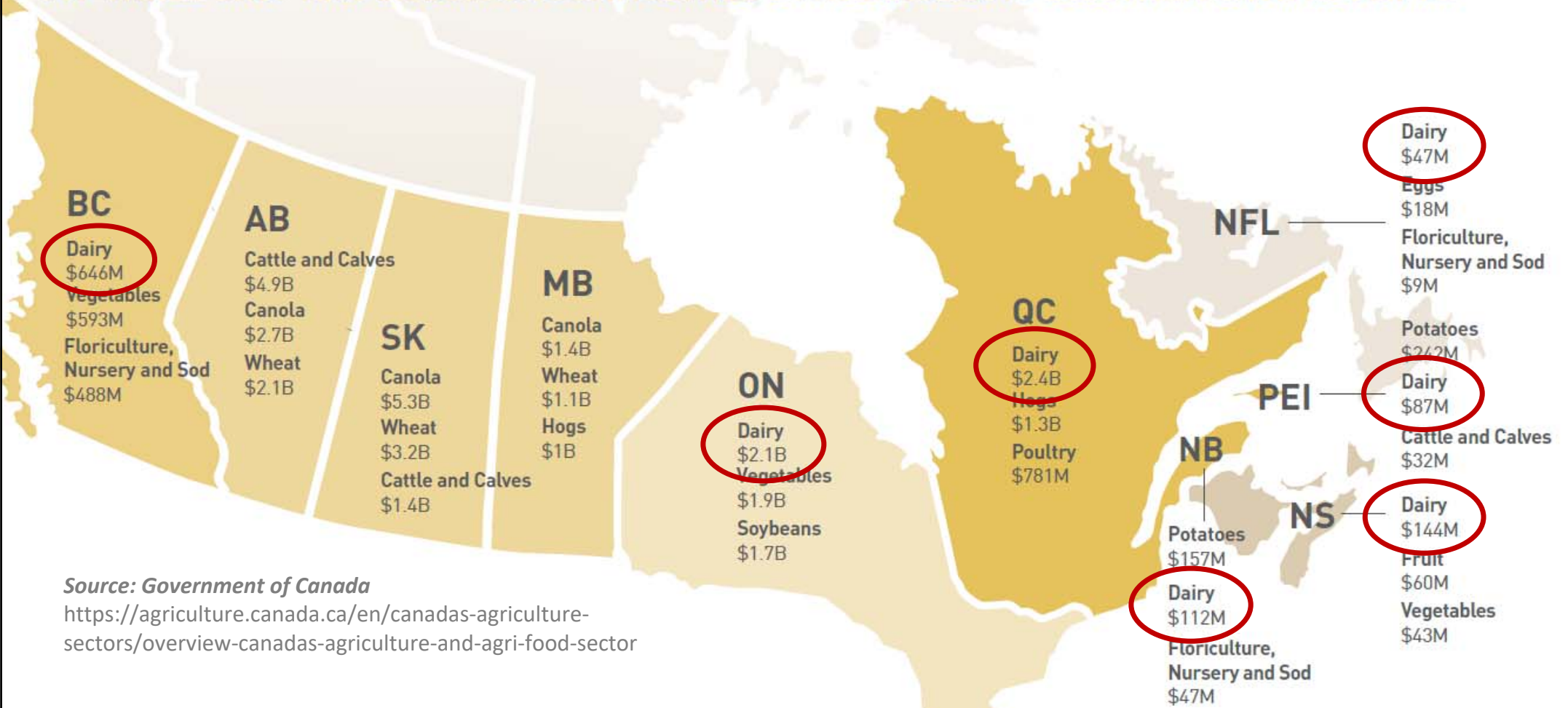


Farm Receipts (Billion \$, 2019)



Top Commodities by Province

TOP THREE CROP AND LIVESTOCK COMMODITIES BY AVERAGE 2016-2020 FARM CASH RECEIPTS



Source: Government of Canada

<https://agriculture.canada.ca/en/canadas-agriculture-sectors/overview-canadas-agriculture-and-agri-food-sector>

Canadian Dairy Herd

Number of Farms with Milk Shipments: 9,952

Number of Dairy Cows: 977,800

Number of Dairy Heifers: 427,700

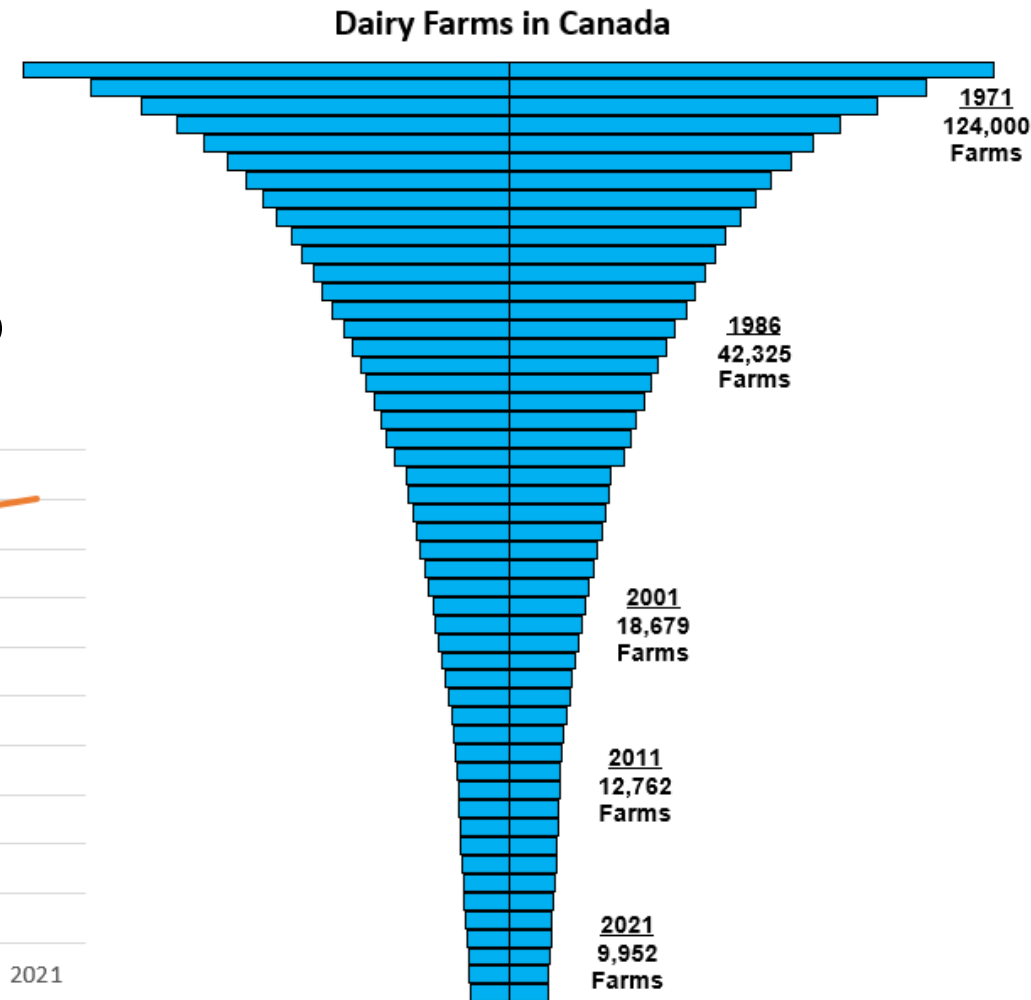
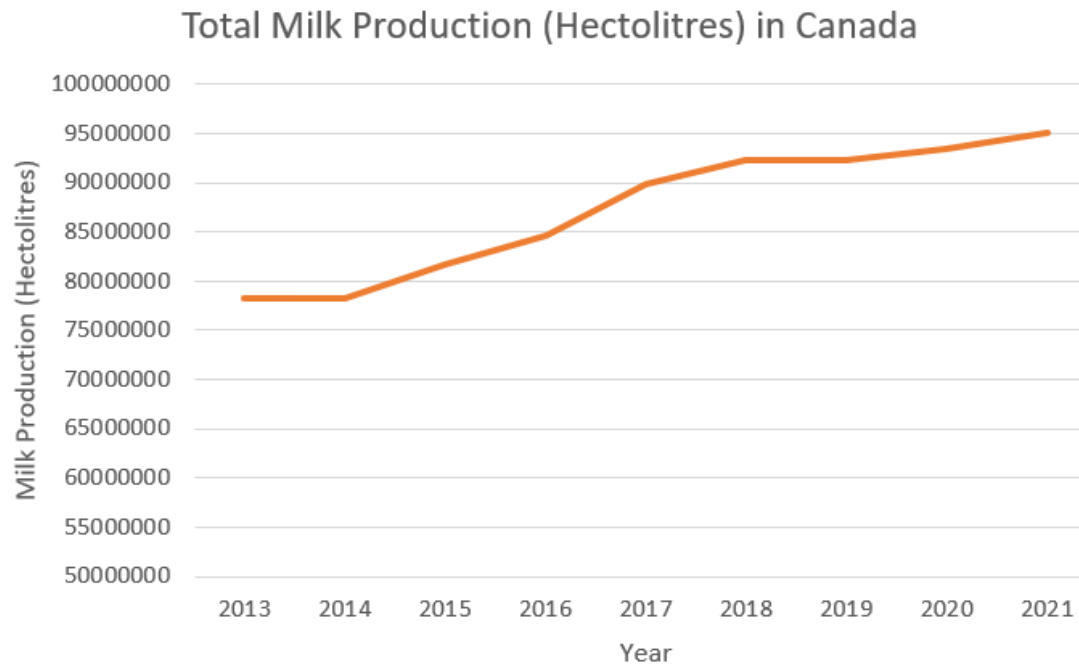


Source: Government of Canada <https://agriculture.canada.ca/en/canadas-agriculture-sectors/animal-industry/canadian-dairy-information-centre/dairy-statistics-and-market-information/farm-statistics/farms-dairy-cows-and-dairy-heifers>

Demand for Dairy Products

Canada has a **supply management system** for dairy, poultry and eggs.

Steady trend to fewer dairy farms, but the demand and production levels continue to increase.



Dairy Industry Partners

- Farmer funded
- Farmer run
- Representing 10,000 dairy farmers
- Industry voice to government(s)
- Invests and coordinates national dairy research, both animal and human nutrition
- “Blue Cow” logo



DFC's proAction® Initiative

Milk Quality



Food Safety



Traceability



proAction®



Animal Care



Biosecurity



Environment

Key Partners in Genetic Improvement

Breed Associations:

- Holstein Canada (94.2%)
- Jersey Canada (3.7%)
- Ayrshire Canada (1.4%)
- Brown Swiss, Guernsey
Milking Shorthorn and
Canadienne (0.7%)

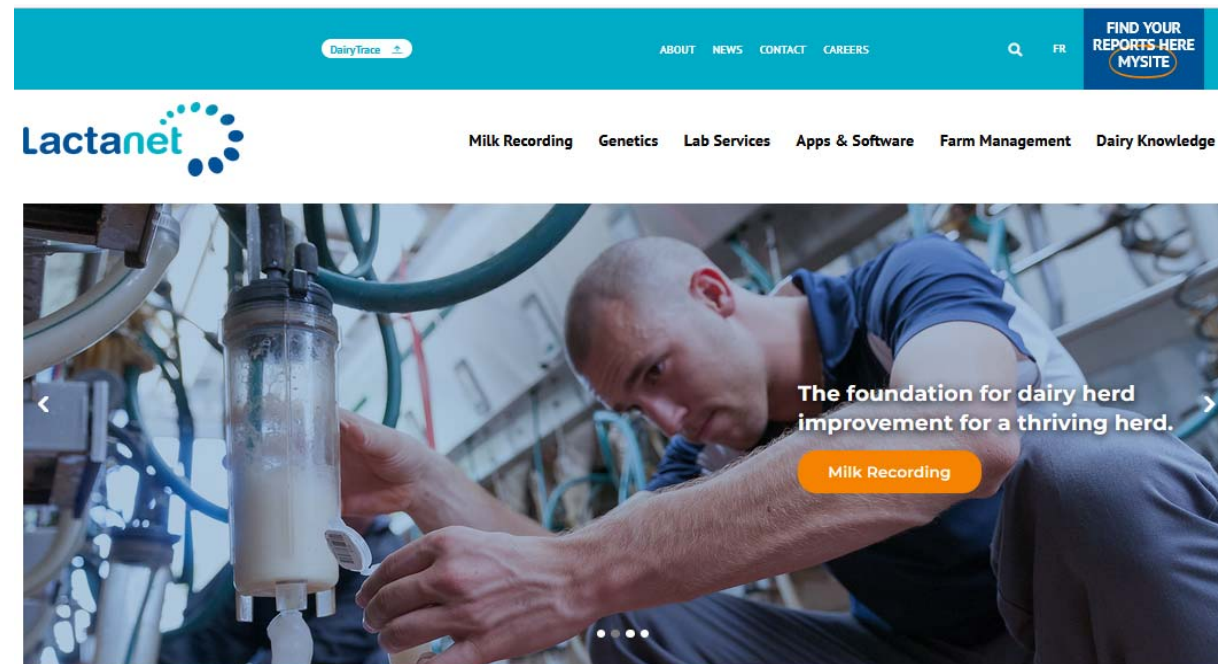


A.I. (>5% market share):

- Semex Alliance
*Canadian farmer-owned via CIAQ,
EastGen & WestGen*
- Select Sires GenerVations
- Alta Genetics / Urus
- ABS Global
- STgenetics Canada

Lactanet: Dairy Excellence

- Established in June 2019
- Partnership to integrate Canada's milk recording organizations (Valacta and CanWest DHI) with national dairy cattle genetic evaluation centre (CDN)
- Farmer-led Board of Directors
- Team of ≈450 employees
- Located in Montreal, Québec and Guelph, Ontario



About Lactanet

Canadian Network for Dairy Excellence



Milk Recording

Improve the profitability of your dairy farm and ensure its sustainability.



Genetic Services

Discover the latest in dairy genetics and genetic evaluations for all dairy breeds in Canada.



Lab Analysis

Our labs test your samples and offer you key information to help manage your herd.



Advisory Services

On-farm consulting to help you make the best business decisions.



Centre of Expertise

Explore the latest trends and developments in dairy production.



Traceability

Report dairy cattle traceability events and order animal tags.

Milk Recording Activities

DHI – *milk recording services*

- Traditional milk sampling
- eDHI remote data collection
- Herd management software
(*DairyComp, Lac-T, etc.*)



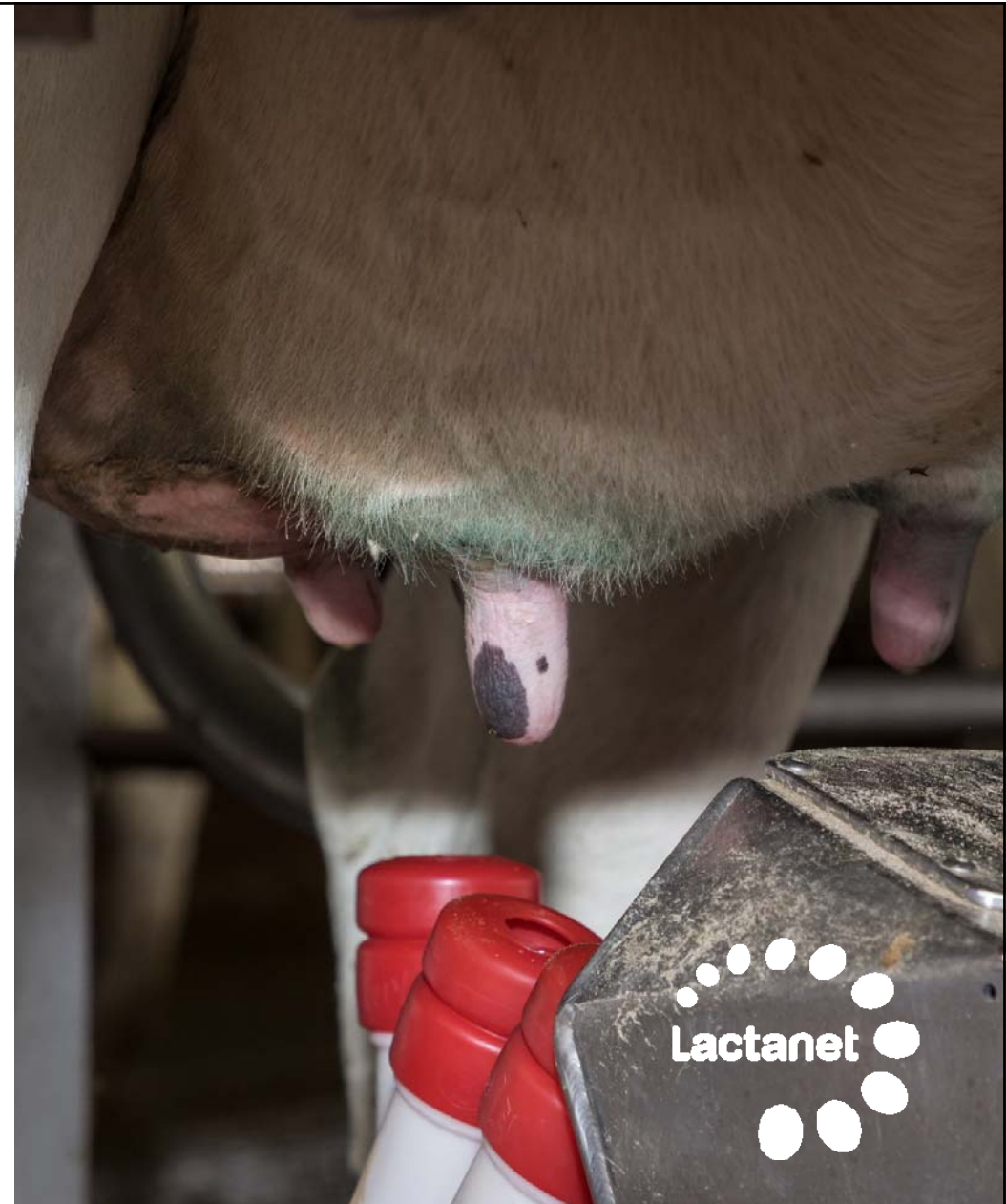
Average Herd Size

Region	Total Herds	DHI Herds	% DHI	Average Herd Size
BC	472	228	48.3%	185
AB	493	302	61.3%	166
SK	156	79	50.6%	201
MB	251	140	55.8%	190
ON	3,326	2,253	67.7%	92
QC	4,668	3,078	65.9%	82
Atlantic	552	289	52.4%	106
Lactanet Canada	9,918	6,369	64.2%	98

Robot Trends

Robotic Milking Systems

- 948 DHI herds with robots → 14.9%
- 121,500 DHI cows milking with robots → 19.4%
- Conversion rate of 2 barns/week
- Robot average of 128 cows, approximately 2 boxes
- Ranges by province: 4.7% in PEI to 44.3% in Manitoba



Adapting to Technology

- **Electronic DHI (eDHI)**
Novel service with only remote data access
- **Founding Partner of iDDEN**
International collaboration to facilitate authorized data access from on-farm systems
- **Collaborations with CDCB**
Genetics related data and services



Genetic Evaluations

For the Canadian dairy cattle industry

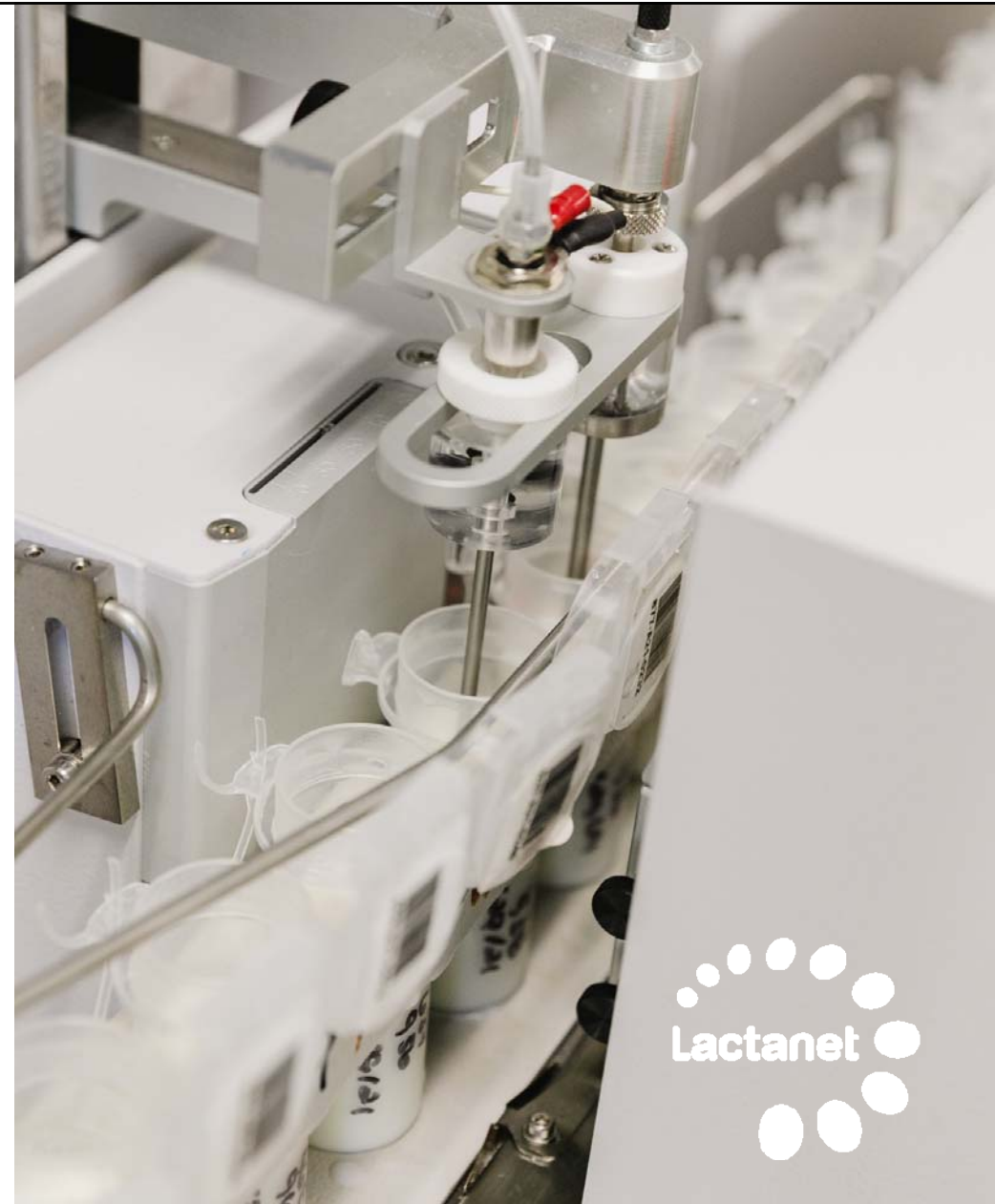
- Nearly 100 traits evaluated for >25M males and females
- Data exchange services for industry partners: breeds, A.I. and DHI



Lab Services

DHI, Payment/Quality, Reference Lab

- Components and Somatic Cell Count
 - BHB, Fatty acid profiles, MUN
 - MIR Spectra
- Quality: Bactoscan, Inhibitors
- Reference and calibration standards
- ELISA: Johne's Disease, Leukosis, BVD, Pregnancy
- PCR: Mastitis4, BVD



Advisory Services

- Québec and Atlantic Provinces
- Hourly consulting services – 33% of Québec customers

Centre of Expertise

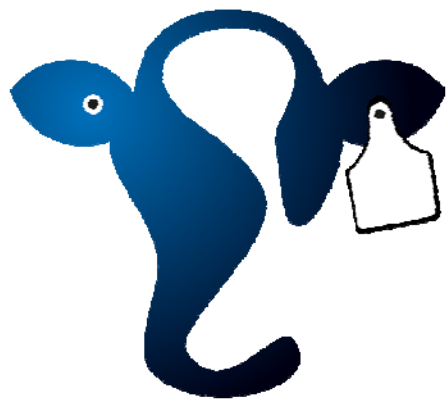
- Innovation team for herd management located in Québec
- \$1.5M/year funded by Québec Provincial Government (MAPAQ)



Traceability



National dairy cattle traceability
system launched in October 2020



Canada's Vibrant AG Culture

- Agriculture is at the core of Canada
- The dairy cattle industry is strong, organized and highly collaborative
- Lactanet was created for the benefit of dairy farmers
 - ➔ Vertical integration advantage
 - ➔ Economies of scale
 - ➔ Talent attraction and opportunities
 - ➔ National delivery of diversified products and services
 - ➔ Integrated R&D innovation for herd management and genetics
 - ➔ Single vision and strategic planning



A wide-angle photograph of a large, modern barn with a grey roof and multiple skylights. The barn's interior lights are on, and its large glass windows reflect the twilight sky. In the foreground, a green field contains several black and white cows grazing. To the left of the barn, two large white silos are visible. The background is filled with dark trees under a sky with soft pink and purple clouds.

Lactanet

CANADIAN NETWORK FOR DAIRY EXCELLENCE

