



Maritime Beef Sector Development & Expansion Strategy

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1. Overview

Since 2007, there has been a reduction in cattle inventories in the Maritime Provinces. By the end of 2007, the Maritime cattle population consisted of 63,700 cows and 8,100 replacement heifers and as of January 1, 2016, there were 42,300 cows and 6,200 replacement heifers in the Maritime Provinces (Statistics Canada, 2014). The Maritime beef industry is largely comprised of cow-calf operations that maintain replacement heifers and market feeder calves to other provinces, including Quebec and Ontario. Cow populations by province include: New Brunswick (15,600), Nova Scotia (17,400) and Prince Edward Island (9,300). The Atlantic Beef Products (ABP) plant in Albany, PEI is the only federally inspected plant within the Atlantic region. In order to have interprovincial distribution of beef products, the product must first be federally inspected, making ABP a critical component of the Maritime beef value chain. Improvements at ABP have led to increased throughput and sales of beef products. With the projected growth of ABP, the plant will be anticipating an increased requirement of 10,000 additional feeders per year.

At the present time, PEI is deficit in feedlot capacity/utilization, and feeder production, and cannot meet the combined demand requirements of the provincial abattoirs and of ABP. Finished beef production from the three Maritime Provinces must be increased substantially if the processing capacity and the market potential offered to the beef industry in the Maritimes is to be realized.

Throughout the winter and spring of 2016, a number of Maritime beef industry players started discussions on a growth strategy for the regional beef sector. This effort was driven by a realization of the vast grass production resource that exists in the region that is currently underutilized. Leveraging this resource to grow the cow herd, and provide additional stocker animals to support feedlot sector expansion and drive economic growth in the region.

One of the core components of the growth strategy will be enhanced production education for Maritime producers. Topics such as infrastructure maximization, programming, the adoption of a consistent cost of production, improvement of feeder cattle consistency, management and quality of feed and pastures may be delivered through workshops, presentations and a proposed beef school for the region. These seminars will be delivered with the goal to provide producers with tools to be used toward the expansion of the Maritime industry.

Academic and applied research has been supported previously by the cattle producer organizations of the three Maritime Provinces. Producers in the Maritime region have access to the sophisticated feed intake system (GrowSafe® system) located at the Maritime Beef Testing Society (MBTS) in Nappan, Nova Scotia. Past research has successfully identified feed efficient breeding animals, including bulls and heifers, which were incorporated into local operations. To optimize the capabilities of MBTS, the Maritime Beef strategy will be aimed towards the complete use of the facility through out the year. The region is also fortunate to have valuable feed and pasture research, pertinent to the Maritime Provinces. To benefit the industry, these findings should be disseminated to the industry through various channels of extension.

Improved extension and education can improve the communication of the research being done in the region with producers and other stakeholders. This could make research more applicable to production systems within the region which may help to improve overall farming practises, reduce operating costs and increase profit margins. Extension efforts may also be used to target producer groups such as young and long-standing producers in collaboration with the beef school and workshops.

Branding efforts with local product has been successful and continues to grow. The Certified Island Beef (CIB) Program in particular is sharing price premiums with value chain partners including cow/calf producers and feedlot operators. Demand is growing for this program but supply is limited. Local is one of the most important drivers of consumer choice and one of the few attributes for which consumers are willing to pay extra. Brands offered at ABP including CIB, Blue Dot and Island View Farms provide an opportunity to provide consumers with a local product. Working with marketing groups such as Food Island and Fresh Media may provide further opportunities for strategic marketing of Maritime Beef.

This report outlines a number of development goals, the challenges and opportunities facing the sector, an extension strategy and a listing of research priorities and projects that could be implemented over the next 6-years to support sector growth. The sector was rationalized into 4-component cattle enterprise types, in order to develop specific development needs for each, as follows:

1. Seed stock development
2. Cow-calf production
3. Background feeding
4. Finish feeding

In April 2016 a small group of industry practitioners met in Truro, NS to talk in broad terms about the current state of the industry and true opportunities for growth into the future. The results of this meeting are outlined in Table 1.

The context for growth was centered largely on the strong demand growth in two regional branded beef markets. The first being Atlantic Beef Products (ABP) in Borden, PEI, the second being the Ontario Corn Fed Beef program. Both programs have reported a significant shortfall in slaughter animal numbers, limiting their opportunity to leverage the full value of the brand. Strong demand for animals to support these two branded programs was identified as an opportunity for the Maritime beef sector to expand cow-calf, backgrounding and finishing operations.

Table 1. Growth Strategy Overview

Target Production Efficiency	Heifer Development	Cow-Calf Summer / Winter Calving	Background 600 to 925 2.7 lb/day @120 days	Finishing 925 to 1450 2.7 lb/day @180 days
	10 to 14 months (23 months at calving)	0 to 10 months	10 to 14 months	~ 20 months
Market	Growth- existing and new entrants 2,000 per year- 1,200 import and 800 retained heifers	85% Export 13% retained 2% NB,NS to finish 87% PE to finish	10,000/yr for export 10,000/yr for local	Prime or Blue dot is \$0.06 4,000 spaces Volume = contracts
Animal Production	Low stress / gentle handling RFI testing Genomic testing Synced AI with clean-up bull	Preconditioning RFI Weaning practices Calving Systems	Low stress handling RFI	Carcass cut-out 55 to 57% 700 to 900 lb carcass
		Integrated production		Integrated production
Feed Production	High quality forage based diet Steady gains Pasture preferred	Low cost grazing systems Extended pasture and storage	Commodity feeding Bunk management Forage /silo management	Commodity feeding Bunk management Forage /silo management
Maritime Growth Opportunity				
	2,000 / year 1,200 import and 800 retained	45,000 current 20,000 growth over 10 years	6,000 required background spaces (new or existing)	9,100 current 10,000 growth 4,000 required finishing spaces (new or existing)

Significant observations and conclusions from this review of industry challenges and opportunities include the following:

1. Atlantic Beef Products has stated a need for an additional 10,000-slaughter animals per year.
2. The Ontario Corn Fed Beef program requires an additional 215,000-animals to fully satisfy market growth.
3. The growth strategy was built around the assumption that 10,000-stocker animals would be destined for finished cattle markets in both Prince Edward Island and Ontario, creating an opportunity to grow the cow herd by 20,000-head, a roughly 44% increase over the current 45,000-cow herd.
4. The brood cow herd will need to see stimulated growth by 2,000-head per year over the next 10-years to meet market demand. It is estimated that 800-heifers could be retained from the local marketplace annually without placing significant pressure on farm gate cashflows. The remainder of the 1,200 replacement heifers needed to support growth will need to be sourced from outside the region.
5. In order to add value to stocker cattle prior to export from the region, an additional 3,000-head spaces of backgrounding capacity will be need to be added to regional feeding capacity.
6. An additional 4,000-head spaces of finishing capacity will need to be added to support the volume of fat cattle marketings being targeted for Atlantic Beef Products and other regional processors.

7. The land base resources are currently available in the region to support significant cow herd expansion.
8. Feed grain and harvested forage resources are available to support the backgrounding and finishing sectors.
9. The industry will require a professional development strategy to support sector growth based on profitable management models.
10. The Nappan Research Station, the Maritime Beef Test Station and the research expertise available through Dalhousie University Faculty of Agriculture and Agriculture and Agri-Food Canada, are all valuable resources that could be developed as a hub for industry expansion, providing academic and applied research and extension expertise to producers throughout the Maritimes. Hub activity should be based at the Nappan Research Station to support the use of currently under-utilized and/or coordinated resources in the region.

This report outlines a unique, first of its kind, industry led regional development approach that can be used by provincial cattle associations, provincial extension staff, AAFC and University researchers and private industry to drive regional development activities.

The following table outlines the specific expansion goals by cattle enterprise type, the barriers that need to be overcome and the research, innovation and extension measures that need to be considered in overcoming these barriers to successful industry growth.

2. Innovation Concepts

The following innovations were identified as specific project ideas that can be delivered either provincially or regionally. In a number of cases (VBP, BIXS, Calf Clubs, Leadership Training) existing programs can be leveraged to provide the producer engagement and training necessary to achieve the adoption of the innovation concept.

In many cases, these innovation concepts are mature and widely adopted in other regions of Canada. Positive producer experiences in other regions of Canada can be leveraged to drive innovation in the Maritime region, which has tended to trend behind other parts of Canada in innovation adoption.

Table 2: Innovation Concepts Required to Support Industry Growth

	Cow-Calf Sector	Background Sector	Finishing Feedlot Sector
Goals	Increase 20,000-head (2,000-head/year for 10-years)	Increase 10,000/year for export	Increase 10,000/year for local slaughter
1	Human Resource Systems Structure and Management		
2	Calf Clubs		
3	Production Clubs		
4	BIXS		
5	Leadership Training and Industry Focus		
6	Feeding Systems		
7	Pasture Systems		
8	Community Pastures		
9	Records Management - VBP		
10	Industry Programing		
11	Value Added Market Access		
12	Cattle Barns and New Infrastructure		

3. Applied Research and Extension Strategy

The following applied research and extension strategy was developed to coincide with the identified professional development needs of the industry and to make use of existing demonstration and extension facilities at the AAFC Nappan Research Station, Maritime Beef Test Station, provincial community pastures, private landholdings, etc. Many of the extension events listed will also cover topics identified under the Maritime Beef School, but may be offered in a less intensive format.

The development of informal working and communications relationships with other applied research facilities across Canada (Manitoba Beef and Forage Initiative, etc), will extend the reach of regional work to influence other regions or Canada, and vice versa. The development of a comprehensive extension model that engages Canadian partners, will only serve to strengthen and extend the adoption of innovative production methods in the Maritime region, and support the stated industry expansion goals.

Table 3: Applied Research and Extension Strategies to Targeted Beef Sector Components

Cow-Calf Sector	Background Sector	Finishing Feedlot Sector
Increase 20,000-head (2,000-head/year for 10-years)	Increase 10,000/year for export	Increase 10,000/year for local slaughter
Extension Concept	Action Plan	Delivery Partners
Young Beef Producer Leadership Development	Annual Leadership Workshop	Industry Youth Development Programs, Dalhousie University
Animal Handling Systems & Animal Behaviour, Temperament	Training Workshops and Field Tours	MBC, Provincial Associations, Equipment Suppliers, Integrity Livestock Consulting
Financing and COP Analysis	Training Workshop	MBC, Provincial Beef Associations, Economists, CALA, APP, Finance PEI, Livestock incentive program, Accountants

4. Maritime Beef School

The Maritime Beef School concept was conceived as a way of offering high level professional development opportunities for Maritime cattlemen seeking to develop modern farm management systems. The topics outlined in the course curriculum below cover all aspects of the beef production cycle, providing a holistic approach to farm management. A course guidebook will be developed to guide producers through the development of a comprehensive farm management strategy, including documentation and record keeping.

Table 4: Proposed structure and content of the Maritime Beef School

Course	Topic	Session
1	Herd Procurement & Replenishment	1
2	Feeding & Nutrition Management	1
3	Pasture Feeding Systems	2
4	Breeding Strategies, Breeding for the Target Market, Calving Seasons, Bull Management	2
5	Cattle Handling Systems & Housing	3
6	Herd Health Management	3
7	Marketing Strategies, Value Chain Management, Dairy Beef	4
8	Farm Business Management	4

5. Research Projects

The following research projects have been identified as key components to an industry development strategy. These projects are focussed clearly on driving the development of a highly efficient herd of breeding females and the development of low cost, high output production models for backgrounding and finishing operations.

Table 6: Maritime Region Beef Sector Research Priorities

Project 1	
Project 1	Heifer Development Project
Purpose	Feed efficiency testing in foundation females
Research Goal	Identify Feed Efficient Animals through RFI testing, genomic assessment
Industry Goal	Build a feed efficient cow herd (Green Herd), Show Environmental and Economic Impacts
Resources Required	Management Labour, Feed, Herd Health Protocol, Breeding Strategy
Background	Given the current size, structure and variance in the Maritime beef herd expansion opportunity can be maximized by bringing young breeding stock into the region. This project will test heifers for RFI to determine which animals will be retained into the breeding herd. Conducting full RFI testing using GrowSafe technology is an involved, expensive program which can last between 84 and 112 days. Research supported in the region previously identified alternative testing methods which are easy for farmers, cost effective and provide immediate results. Further testing on heifers and bulls at the Test Station is required to show the efficacy of the tests.
Project 2	
Project 2	RFI Testing on Offspring
Purpose	Test for transfer of RFI trait to offspring
Research Goal	Track heritability of the RFI trait
Industry Goal	Identify RFI offspring for regional (Green) herd build
Resources Required	Access to calves from Project 1, Sample collection, Sample Analysis
Background	RFI testing has been completed on three crops of bulls which means that feeder calves and replacement heifers are now entering the market. RFI heritability is believed to be 30% in cattle, however we have not conducted this research on the Maritime genetic base. over time, breeding programs using both feed efficient males and females can be tested for genetic transfer.
Project 3	
Project 3	RFI Testing on Bulls
Purpose	Test bulls for RFI at MBTS
Research Goal	RFI testing for bulls on test, breeding soundness evaluation and genomic assessment
Industry Goal	Identify feed efficient sires
Resources Required	Sample collection, Sample analysis
Background	The MBTS is the only public multi-breed testing facility in Eastern Canada which uses RFI as a performance measure in relation to reproductive suitability. Each year more than 120 bulls are performance testing with about 60% introduced into herds as foundation sires.
Project 4	
Project 4	High quality forage production systems
Purpose	Identify barriers to high performance forage production
Research Goal	Identify opportunities to support innovation in forage production, forage digestibility
Industry Goal	Lower COP and increase production capacity in the sector
Resources Required	Sample collection, Sample Analysis
Background	Quality pastures and forage are key the efficiency, growth and profitability of the cattle industry in the region. a systematic approach to management is needed to ensure the maximization of the resources. Production of high quality forage can reduce cost of production by reducing the need for corn and grains. There is an opportunity in all three provinces to increase the use of community pastures. New species of grasses and legumes with increased yield and digestibility compared to traditional species, have become more widely used throughout the Maritime region.

	There may also be varietal digestibility variances within species that can be used to improve forage quality, especially for confined feeding and finishing pasture based operations.
Project 5	Extended Grazing Season Concepts
Purpose	Identify low-cost feeding models
Research Goal	Prove the performance metrics of extended grazing season principles for Maritime conditions
Industry Goal	Show the productive and financial opportunities that can be leveraged by regional producers to build low cost cow-calf production models
Resources Required	Applied research and extension facilities. Cost of production tracking systems.
Background	Extended grazing season principles are widely used across Canada to extend the grazing season, reducing labour input for managing the cow herd and increasing overall profitability of the calf production sector. Maritime producers have been slow to adopt extended grazing season production models. The establishment of applied research sites that can demonstrate the applicability of extended grazing systems in the Maritime region will help to drive adoption and reduce calf cost of production.

6. Sector Development Priorities

1. Communication

An enhanced communication strategy will be utilized to disseminate valuable information with the regions producers and stakeholders. Communication will be based on the modules offered through the Beef School and other points of interest such as producer profiling. Other points of interest will include the results of regional and national research projects which will be distributed to members through various interprovincial communication outlets, workshops and conferences.

2. Maritime Beef School

A project application will be developed for funding proposals. Upon funding approval, a comprehensive curriculum will be developed for the Beef School. The program will be designed as a high performance training program to host a minimum of 15-20 participants from across the region annually. The Beef School curriculum will be developed to cover the topics outlined in Table 5, and be delivered on-farm in an applied teaching style wherever possible.

3. Green Cow Herd Development

Funding proposals will be developed to support a heifer test at MBTS during the summer of 2017. The long term goal of this project is to identify replacement heifers known to exhibit a high feed conversion efficiency rate, and build a Green Herd brand of maritime brood cows.

Improvement in the efficiency of feed utilization in the cow herd may lead to an overall improvement of feed efficiency across all sectors, since this trait is heritable. New information on replacement heifers will be an advantage for the regions beef industry. Heifers with known feed efficiency will help to select the best replacement females to include in the herd and spread the improvements made to feed efficiency across all sectors. A heifer test during the summer months will maximize the use of the resources available in the region (Maritime Beef Testing Society). This important resource can be maximized by the inclusion of body composition assessment via ultrasonography. This technology is important to define the composition of the gain from a given animal. Such technology is widely used in North America but still lacking of equipment and expertise in the Maritimes, which limits the proper assessment of productive performance of growing (and mature) cattle.

4. Calf and Production Clubs

Cow-calf and feeding sector production clubs will be developed to improve overall consistency in feeder animal development and to promote producer education about improved production practises. Management practices including vaccination protocols will be developed with professional guidance. The content of these clubs will be based on current operational groups such as the Bruce Peninsula calf club which has consistently created market premiums for its members through specialized sale offerings¹.

5. Community Pastures

The beef sector is one of the most rapidly aging sectors of Canadian agriculture, and the Maritime region is an exemplary case. The beef sector has largely been an 'add-on' enterprise for farms typically engaged in cropping and/or dairy production which used beef as a value-added opportunity on marginal crop or pasture land. As the industry has evolved towards specialization, the mixed-farm model has given way to larger more specialized farms seeking to capitalize on economies of scale. In order to find a competitive niche, beef operations will need to adopt collective outcome management

¹ <http://www.omafra.gov.on.ca/english/livestock/beef/news/vbn1015a3.htm>

models that achieve the benefits of scale, without requiring amalgamation of assets. Community pastures are considered the lowest hanging fruit to access the opportunity of scale and collective outcome.

Community pastures also create a unique opportunity for new entrants to enter the beef production industry and access relatively low-cost summer grazing while they grow a base cow herd. The opportunity for collective over-wintering site management is an innovative option that can be supported by community pasture development projects, in conjunction with applied research at the Nappan Experimental Station. Investment in physical infrastructure and management systems on the 17,000-acres of Maritime community pasture currently is considered to be one of the most readily available opportunities to support growth in the Maritime beef herd.

7. Sector Development Programs

In order to facilitate public and/or private investment in the Maritime Beef Sector Development Strategy, program concepts were developed to maximize the regions strategic competitive beef advantage and address the challenges outlined previously in this report.

In anticipation of the Next Policy Framework being deployed in April 2018, programs were designed with similar infrastructure as Growing Forward 2 programming, but also to allow for as hoc delivery for any one element that may be viewed as a specific need for the region or individual provinces.

Each program concept has been developed in accordance with the six priority pillars outlined by the Federal Minister of Agriculture in the 2016 Calgary Statement. The applicability of individual priorities are identified in the NPF Priority Pillar column in APPENDIX A. The pillars and coding are as follows:

1. Markets and Trade (MT)
2. Science, Research and Innovation (SRI)
3. Risk Management (BRM)
4. Environmental Sustainability and Climate Change (ES)
5. Value-Added Agriculture and Agri-Food Processing (VA)
6. Public Trust (PT)

Program concepts were developed under the understanding that Federal/Provincial investments would be made on a cost share basis with members of the Maritime beef value chain, and will require refinement based on partner priorities.

APPENDIX A

Beef Development Program Guidelines

General Eligibility Requirements

1. Hold a valid farm registration issued pursuant to the Farm Registration Act at the time of application.
2. Be a Nova Scotia, New Brunswick or Prince Edward Island based cattle producer, partnership or corporation that has a breeding herd of no less than five cows. This requirement may be waived for producers, partnerships or corporations registered for less than five years pursuant to the Farm Registration Act.
3. Be a current NSCP, NBCP or PEICP member at the time of application.
4. Be up to date with levy remittance at the time of application.
5. Agree to abide by the specified Program Guidelines.
6. Business Case Development (innovative concept and financial justification)

Theme	Program Name	Eligible Items
Agronomy	Enhanced Grazing System	Energizers Electric Fencing & Hardware Fence Posts Remote Watering Systems
	4R Nutrient Management Strategy	4R Nutrient Management Strategy by a CNMP
	Pasture Management Planning	Pasture Management Plan by P.Ag
	Innovative Forage Technology	Wide Swath & Conditioning Equipment Row Merging Equipment Moisture Monitoring Systems Inoculant Application Systems
Herd Growth	Remote Pasture Handling	Mobile Handling System Crowding Tubs Squeeze Cutes Neck Extending Head gates
	Safe Animal Handling	Crowding Tubs Squeeze Cutes Vet Cages Neck Extending Head gates Scales / Scale Heads Calf Catcher
	Animal Health and Welfare Infrastructure Upgrades to Meet Code of Practice	Ventilation Lighting Housing Requirement Improvements
	Market Driven Animal Health and Welfare Infrastructure Upgrades	Infrastructure Improvements for Brands Approved by PCA.

Marketing and Processing	Provincial Processing Improvement Program	Infrastructure Improvements to meet Regulatory Requirements Infrastructure Improvements to increase market penetration
	International Trade Certification Transition Program	CFIA Certification to meet Trade Regulatory Requirements
	Value Chain Coordination Program	Professional Support for Value Chain Development and Implementation
	Market Access	Product Development Market Development Market Implementation Processor Protocols
Traceability Implementation	Industry Traceability Coordination and Education	Maritime Traceability Coordination Stakeholder Education / Training
	Traceability Technology Program	Readers (hardware and software) Software
Farm Management	Electronic Farm Record Modernization Program	Specialized Farm Data Management (Field Manager Pro, BioTrack) *Excludes basic accounting software
	Cost of Production Model Development	Technical Support for Development
	Industry Financial Benchmarking Program	Technical Support for Development and Management
	Coordinated Marketing Club Pilot Project	Technical Support for Development and Management
	Price Insurance	TBD
Beef School	Development of Maritime Beef School	Technical Support for Development
	Maritime Beef School Implementation	Technical Support for Management
Genetic Improvement	Elite Sire Program	Bull Testing Incentive Bull Purchase Incentive
	Elite Female Program	Heifer Testing Incentive Heifer Purchase Incentive (Purebred /F1)
	Beef Genetic Veterinary Program	AI Vet Service (AI/Embryo)
	Genetic Evaluation Infrastructure Program	

APPENDIX B

Maritime Beef Sector Development & Expansion Alignment with National and Regional Strategies

	Program Name	Next Policy Framework	National Beef Strategy	Atlantic Growth Strategy
Agronomy	Enhanced Grazing System	ES / VA	PRO	CG / INF / SR
	4R Nutrient Management Strategy	ES	PRO	CG
	Pasture Management Planning	ES	PRO	INF
	Innovative Forage Technology	SRI / ES	PRO	INN / INF
Herd Growth	Remote Pasture Handling	VA / PT	PRO	INF
	Safe Animal Handling	VA / PT	PRO / BD	INF
	Animal Health and Welfare Infrastructure Upgrades to Meet Code of Practice	VA / PT	PRO / BD / CON	INF / SR
	Market Driven Animal Health and Welfare Infrastructure Upgrades	VA / MT / PT	PRO / BD / CON	INN / TI / INF / SR
Marketing and Processing	Federal Processing Improvement Program	MT	BD	INN / TI / INF
	Provincial Processing Improvement Program	MT	BD	INN / INF
	International Trade Certification Transition Program	MT	BD / CON	INN / TI / SR
	Value Chain Coordination Program	MT / BRM	BD / CON	TI / SR
Traceability Implementation	Industry Traceability Coordination and Education	BRM	PRO / CON	TI / SR
	Traceability Technology Program	MT / BRM / PT	PRO / COMP	INN / TI / INF
Farm Management	Electronic Farm Record Modernization Program	BRM / VA	COMP	INN / SR
	Cost of Production Model Development	BRM	COMP	SR
	Industry Financial Benchmarking Program	BRM	COMP	SR
	Coordinated Marketing Club Pilot Project	BRM / VA / MT	COMP	SR
	Price Insurance	BRM	COMP	SR
Beef School	Development of Maritime Beef School	BRM	BD / COMP / PRO	INN / INF / SR
	Maritime Beef School Implementation	BRM	BD / COMP / PRO	INN / INF / SR
Genetic Improvement	Elite Sire Program	VA / ES	COMP / PRO	INN / CG / SR
	Elite Female Program	VA / ES	COMP / PRO	INN / CG / SR
	Beef Genetic Veterinary Program	VA	COMP / PRO	INN / CG / SR
	Genetic Evaluation Infrastructure Program	VA / ES / SRI	COMP / PRO	INN / CG / SR

Next Policy Framework Pillars		National Beef Strategy Pillars		Atlantic Growth Strategy Pillar	
BRM	Business Risk Management	BD	Beef Demand	INN	Innovation
ES	Environmental Sustainability & Climate Change	COMP	Competitiveness	CG	Clean Growth & Climate Change
MT	Markets & Trade	PRO	Productivity	TI	Trade & Investment
PT	Public Trust	CON	Connectivity	INF	Infrastructure
SRI	Science, Research & Innovation			SR	Sector Renewal & New Entrant Opportunities
VA	Value Added Agriculture and Agri-Food Processing				