



National Marketing Campaign

The Think Turkey™ 2023 campaign continues to reach new audiences and target new occasions to enjoy turkey.

Turkey made the grill sing this summer

Think Turkey™ kicked off grilling season with its third annual Griller's Bird campaign. The new ads showed how turkey makes the grill "sing," and featured three catchy tunes and cuts – [Smokin' Whole Turkey](#), [Jerk Turkey Breast](#), and [Greek Turkey Kebabs](#).

Getting New Audiences Grilling with Turkey

To encourage new and diverse audiences to try turkey on the grill, Think Turkey™ brought grilling creative to life in Hinglish, Punjabi, Arabic, and Tagalog. These spots were amplified through Meta Platforms, YouTube and OMNI – the number one channel for reaching diverse audiences through broadcast.

Thinking Turkey on the Course

In August, Think Turkey™ hosted the Make Birdies Count challenge at the CPKC Women's Open in Vancouver, BC as the Official Agriculture Partner of the competition. Recall, that in



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National Marketing Campaign

June, Think Turkey™ brought the Make Birdies Count challenge to the RBC Men's Canadian Open in Toronto. Players were challenged to achieve a turkey – known as three birdies in a row, or better – in support of First Tee – Canada. A total of 17 turkeys were achieved at the CPKC Women's Open, bringing the season total to 58 turkeys across both tournaments.

Putting the “Canadian” in Canadian Thanksgiving

This Thanksgiving, Think Turkey™ leaned into all the things that make Canadian Thanksgiving unique, including Canadian Turkey raised by Canadian Turkey Farmers! Think Turkey™ enlisted a Canadian third-generation turkey farmer and his family to star in a new ad. View it [HERE](#).

This new campaign is supported by TV, PR, Digital, Social and Search. To reach shoppers, Think Turkey™ launched new audio ads across Canadian grocery banners ahead of the holiday weekend. These unique ads featured the voice of a Canadian turkey farmer to capture shoppers' attention and inspire them to buy Canadian turkey at Thanksgiving!

This campaign reached French Canadians highlighting that turkey is a fit for every occasion.

As well, throughout autumn leading into early winter, a French-Canadian version of the campaign highlighting that turkey is fit for every occasion, will feature a video focusing on being together in celebration with family and friends. View link [HERE](#).



L to R: Adam Stanley, Canadian golf journalist; Natalie Veles, Executive Director; BCTMB, Maude-Aimée LeBlanc Canadian professional golfer and Think Turkey ambassador; and Debbie Etsell, BCTMB, Marketing Representative, present a \$7,500 cheque to Lisa Ferkul, Golf Canada, Chief Commercial Officer and Sean Reczulski, Director of First Tee Development, First Tee Canada at the CKPC Women's Canadian Open at Shaughnessy Golf & Country Club in Vancouver.



The Brubacher family part of the Thanksgiving advertisement

TFC 275th Business Meeting

The Turkey Farmers of Canada's (TFC) 275th Meeting took place on September 19, 2023 and was followed by the Strategic Planning from September 20-21, 2023.

Highlights of the 275th Meeting include:

- An Executive Committee report outlining the continued work of the Allocation Policy, work on the fallout of the avian influenza detections throughout 2022 and earlier in 2023.
- An overview and explanation from FPCC Chair, Brian Douglas, regarding the FPCC three-year Strategic Plan ([link here](#)).
- An update from Zeno overviewing the Think Turkey™ campaign to-date, its overall performance, and the Think Turkey™ Thanksgiving program.
- The adoption of an Allocation Policy by the board of directors, its application for the 2023/24 Control Period and the determination of provincial allocations and the next steps in the process.
- As well, updates dealing with On-Farms Programs, trade, and corporate communications were provided to the meeting.

Market Insights

The table below displays the actual Canadian and American production figures and prices for principal field crops in the 2021-22 season as well as forecasts for the 2022-23 and 2023-24 seasons. These are based on crop production and forecast reports from Agriculture and Agri-Food Canada (AAFC) and the United States Department of Agriculture (USDA).

Production (1,000,000 t) and Prices (CDN \$/t) of Feed Grain and Oilseed Crops by Crop Year												
	2021-2022				2022-2023 Forecast				2023-2024 Forecast			
	Production			Price	Production			Price	Production			Price
	US	CDN	Total	CDN \$/t	US	CDN	Total	CDN \$/t	US	CDN	Total	CDN \$/t
Feed Grains												
Corn	383	15	398	\$ 312	349	15	363	\$ 300	384	15	400	\$ 250
Barley	3	7	10	\$ 432	4	10	14	\$ 417	4	9	13	\$ 350
Oats	1	3	4	\$ 565	1	5	6	\$ 346	1	3	3	\$ 370
Sorghum	11	0	11	\$ 293	5	0	5	\$ 353	10	0	10	\$ 260
Total	397	24	422		358	30	388		399	27	426	
Wheat												
(x.Durum)	44	19	63	\$ 271	43	28	72	\$ 401	46	28	74	\$ 370
Oilseeds												
Canola	1	14	15	\$ 1,075	2	18	20	\$ 857	2*	19	21	\$ 790
Soybeans	122	6	128	\$ 678	116	7	123	\$ 701	113	7	120	\$ 670
Soybean Meal	47	1	48	\$ 500	48	1	49	\$ 551	49	1	50	\$ 415
Total	170	21	191		166	26	192		164	27	191	

Sources:

Canada: Outlook for Principal Field Crops (AAFC)

US: Oil Crops Outlook, Wheat Outlook and Feed Grains Yearbook (USDA)

Note: Soybean Meal Prices are US prices per short ton reported in CDN \$ per metric ton

** These numbers are carried forward from the previous period due to lack of forecast data*

With the 2022-23 crop season ending, AAFC has reported strong increases in production of all major field crops except for corn, which appears to remain unchanged from the previous season. For the US, production levels were a bit more varied, with substantial increases in production only occurring for barley, oats, and canola. The direction of the relative price changes of major field crops were also varied.

For 2023-24, AAFC predicts that western droughts will have a negative impact on crop production, with only corn and oilseed production expected to increase. The USDA is a little more optimistic in their production forecasts, but several of those forecasted increases for 2023-24 are just bringing production back to their 2021-22 levels. Most prices are expected to fall with a forecasted increase in global crop supplies.

Please note that due to the ongoing invasion of Ukraine and ongoing issues with fertilizer supply, that forecast numbers are more volatile than in other years.

Corporate Communications



Government Relations

The House of Commons returned for the fall on September 18, 2023. TFC, individually and in conjunction with the SM5, has been planning advocacy work and government relations activity for the fall.

Bill C-282, an Act to amend the Department of Foreign Affairs, Trade and Development Act (supply management) has been at the forefront of much SM5 attention. Building on previous collaborative work by the SM5 on Bill C-282 in the House of Commons, the SM5 is working on a joint outreach strategy to advance the bill through the Senate and continue to present a strong supply-management front in support of this legislation.

Bill C-234 (Carbon Tax), an Act to amend the Greenhouse Gas Pollution Pricing Act has gone through the House and is at committee in the Senate. The agriculture and forestry committee in the Senate began review on September 21, which was ongoing at the time of writing. TFC has been providing input through the Ag Carbon Alliance.

Bill C-275, an Act to amend the Health of Animals Act (biosecurity on farms) is now at committee in the House of Commons and TFC continues to monitor this Bill.

Media

In August, a negative opinion piece on supply management was published in the *Globe and Mail*. Recognizing that opponents of Bill C-282 were a probable part of this opinion piece, the SM5 developed and submitted a Letter to the Editor in response but was not published. Another opinion piece on supply management was written in the *National Post* and the SM5 responsive piece was published in the Saturday edition of the newspaper.

Trade

World Trade Organization (WTO)

The WTO's annual Public Forum, the purpose of which is to provide an opportunity for stakeholders to discuss the latest developments in global trade and ways of enhancing the multilateral trading system, was held September 11-15, 2023, in Geneva Switzerland. The theme of this year's Forum was how trade can contribute to a greener and more sustainable future. Six hundred and thirty-four (634) speakers participated across 134 sessions at this year's event. As climate change (e.g., drought conditions) will shift comparative advantage of agricultural production (i.e., impact where crops can be grown), and as the way countries are taking different approaches to combating climate change (e.g., European Union's Carbon Border Adjustment Mechanism [CBAM] and the U.S.'s Inflation Reduction Act), will have implications for other WTO members, especially developing countries. A key takeaway from this year's forum is that climate change policy will impact industrial policy and by extension international trade and investment. As a core objective of the WTO is to make sure that trade works for all countries and people, the emerging view is trade rules are needed to ensure a harmonized approach to carbon pricing. Climate change is the largest issue facing all countries and such a global challenge needs international action and cooperation, which the WTO should be leading.



SM5 Delegation - Geneva, Switzerland

Regarding the upcoming 13th World Trade Organization (WTO) Ministerial Conference (MC13) that will take place the week of February 26, 2024, in Abu Dhabi, United Arab Emirates (UAE), the prevailing feeling is that the road to a successful outcome is filled with a lot of potholes that need to be filled in a very short timeframe. Some of the more major issues on the road to MC13 include reform of the dispute settlement mechanism, special and differential treatment for developing countries, ratifying the fisheries negotiations, food security, moratorium on the imposition of customs duties on electronic transmissions and overall reform of the WTO (e.g., strengthen the work of the WTO's regular bodies and committees and improving notification and transparency disciplines and the WTO's negotiating function).

With respect to agriculture, the negotiations continue to be blocked. The main issue in agriculture is how to address Public Stockholding (PSH) for food security purposes. PSH programs are primarily used by developing countries to purchase, stockpile and distribute food to people in need. While such programs are a legitimate policy objective, they can sometimes distort trade depending on the prices paid to farmers and if the stockpiled farm products are exported below world prices. PSH is also closely linked to negotiations on Domestic Support (i.e., government subsidies), which some countries such as the U.S. have linked to progress on Market Access (e.g., tariff reductions) negotiations.

To move the overall negotiations forward in advance of MC13, a Senior Officials meeting is scheduled for late October, with numerous negotiating committee meetings through the fall, with the overall objective of narrowing down the decisions Ministers need to make in February 2024.

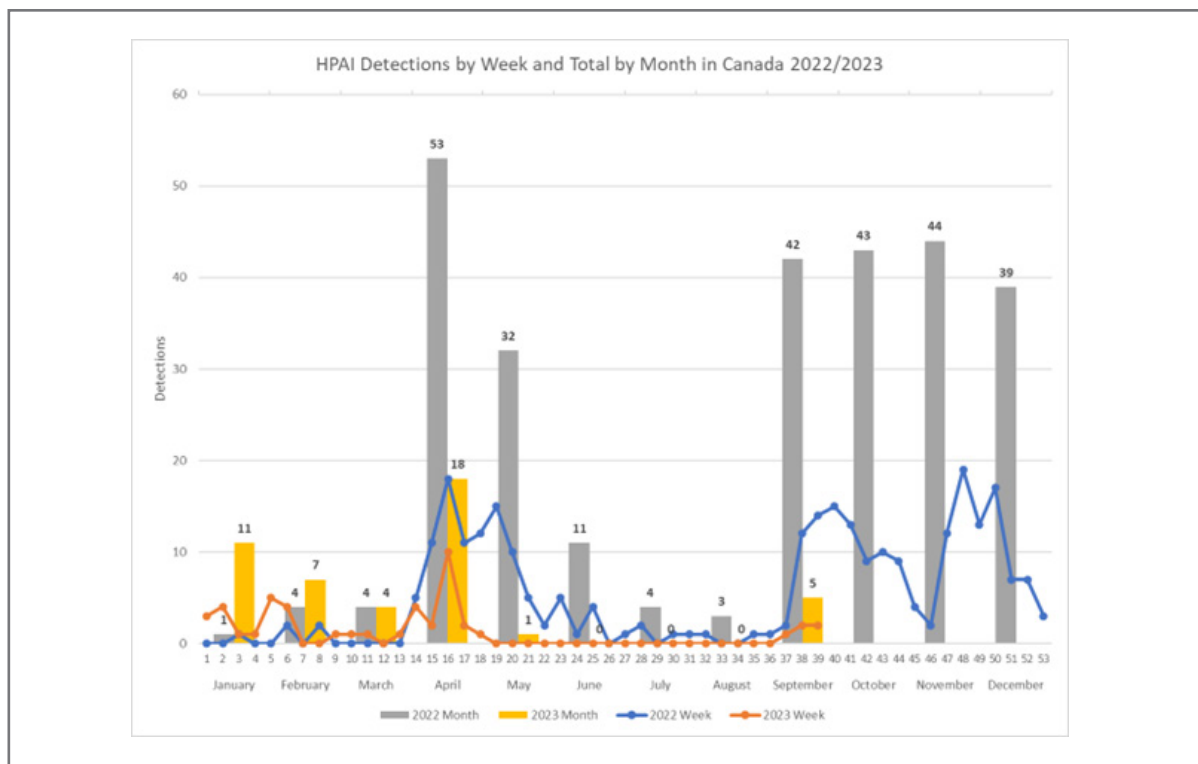
On-Farm Programs

Avian influenza

New detections of avian influenza, in domestic and wild birds, in 2023 remain at lower levels than in 2022. Work continues at multiple levels to incorporate lessons learned from the event into better preparedness moving forward.

Spring 2023 saw less detections than 2022 and summer remained quiet. September has seen a few new domestic detections, in Western Canada, but levels continue to be lower than in 2022. Regardless, CFIA and industry resources remain available to respond to new cases.

From an assessment of the residual risk in Canada and the global situation, some trends for fall 2023 and spring 2024 can be noted. From preliminary work on wild bird sampling, there is evidence of seroconversion and immunity. In principle, if there is seroconversion, this would mean less virus shed in environment and lower infection pressure. With reduced infection pressure from wild birds resulting in lower environmental contamination, we expect lower exposure of domestic birds to HPAI. However, risk still exists. Especially in areas of high density of wild water birds and high farm density and from lapses in biosecurity. There is still uncertainty moving forward on the potential for environmental impacts, host immunity, viral reassortments and mutations, and new introductions into Canada on the HPAI threat. Spring 2024 is still uncertain and will depend on outcomes of fall migration and how the virus behaves globally.



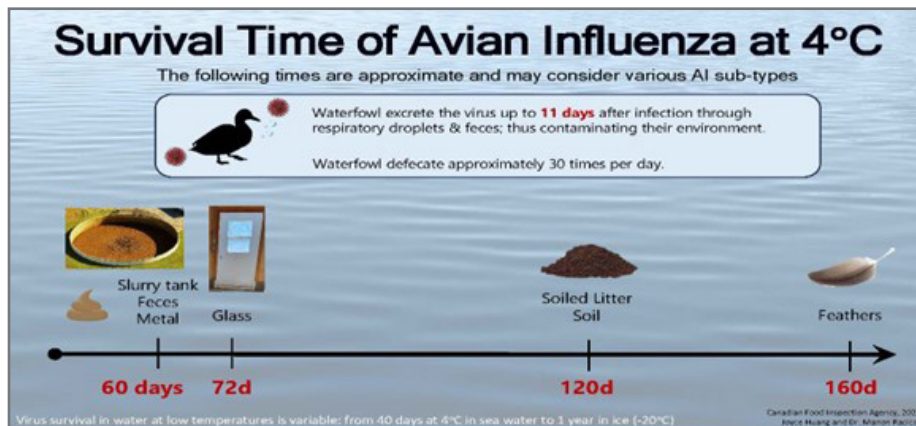
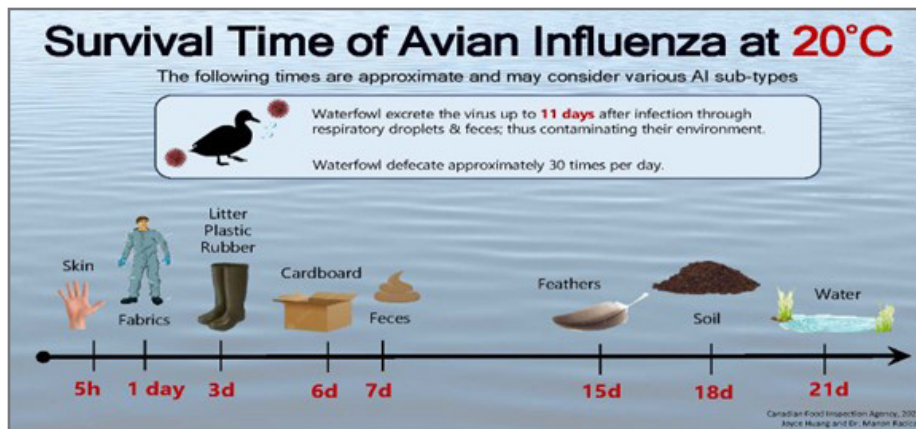
On-Farm Programs

What should producers do?

As there is continued ongoing risk, especially as we are in the fall migratory season, your best plan is still to heighten and vigilantly follow strict biosecurity measures to reduce the threat of avian influenza entering your flock, including:

- Enhanced barn entry measures;
- Pest control;
- Equipment biosecurity;
- Proper mortality and garbage disposal; and,
- Bedding requirements.

As you put in place your heightened biosecurity protocols, also keep in mind the survival times of the AI virus on various surfaces at different temperatures, as demonstrated in the following infographics.



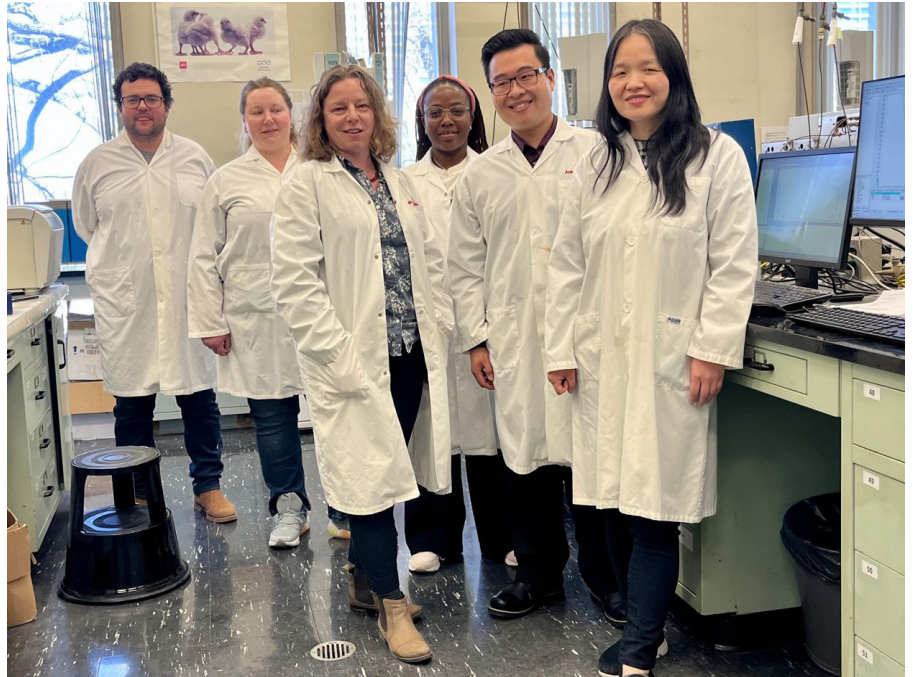
CPRC Update

Submitted by CPRC

Down to the molecule New understanding of yeast-based feed additives in poultry gut health

In the ongoing quest for alternatives to antibiotics, many poultry producers have adopted yeast-based feed ingredients because of the impact on growth and gut health. Now, at the conclusion of a five-year research study that dug deep into the novel bioactives of yeast, researchers are better equipped to understand how and why yeast-based feed ingredients improve gut function in poultry.

Dr. Bogdan Slominski, leader of the novel feed technology research program at the University of Manitoba, has been working with feed additives derived from yeast for more than two decades. His work has contributed to the development of different multi-carbohydrases and enzyme-pretreated yeast products for poultry from Canadian Bio-Systems, an industry partner.



Bogdan Slominski's lab team

"Foodborne diseases continue to be an important health and economic issue in Canada and abroad, and there is considerable work being done to replace antibiotics as growth promoters with antibiotic alternatives," says Slominski. "We believe we have found an alternative in yeast-based bioactives, which have a prebiotic effect in poultry."

The prebiotic effect

Prebiotics are nondigestible compounds that, as they are metabolized by microorganisms in the gut, have a beneficial physiological effect. "Prebiotic components have a profound effect on the proliferation and function of the growth of beneficial bacteria to control pathogens and to ensure food safety," says Slominski.

Yeast-based prebiotics improve bird health in two ways. First, they provide important nutrients that encourage "good bacteria" to grow in the gut, serving to lower gut pH and fight pathogens such as Salmonella, E. coli or C. perfringens.

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CPRC Update

Submitted by CPRC

A second benefit is that in saturating the binding sites in the bird's gut, the enzymes prevent the pathogens from attaching and growing.

But Slominski says the microbiota of the gastrointestinal tract of poultry is a complex community with around one million bacterial genes. His team has been working to find the right combination of enzymes to provide the most beneficial prebiotic components from yeast cell walls. To accomplish that, they had to break down the yeast cell wall polysaccharides first to access other specific and beneficial components, including nucleotides.

New generation sequencing

Slominski has worked to combine yeast products and their fractions to refine the products currently on offer. And, thanks to new sequencing technology, they are now able to gain a better understanding of the processes that happen in a bird's gut.

"A newer tool called new generation sequencing (NGS) allows the genome structure of entire microbial communities to be studied, and to understand the structure and function of microbiota," says Slominski. "In the case of chickens, it has been estimated that about 20 per cent of bacterial genes in the ceca control carbohydrate metabolism, and much less are involved in metabolism of amino acids and lipids. However, only a few studies have sought to understand the turkey microbiome."

Turkeys

In the first part of the most recent study, Slominski's team used a yeast-based growth promoter alone, and in combination with other enzymes to measure how the additive modulates gut physiology of young turkeys to have an anti-inflammatory effect and generally improve essential functions and fight disease.

"We determined a diet with the multi-carbohydrase enzyme in combination with an enzymatically modified yeast cell wall can modulate the gut physiology and function of turkeys and could have anti-inflammatory effects due to an increased concentration of butyric acid in the ileal digesta," Slominski says.

Laying hens

In another study using laying hens, researchers examined how different components used in a yeast-based growth promoter affected laying hens when they were challenged with *Salmonella enteritidis* (SE) 0, 3 and 8 days post-infection.

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CPRC Update

Submitted by CPRC

Of the three types of yeast-based feed additives used in the study, each had different functions to support gut health. One reduced SE cecal counts and fecal shedding, and a second type of particle structure mitigated SE proliferation. The third type had little effect on SE, but it did support the growth of beneficial bacteria providing energy for gut development, function and health.

“Each component plays an important role in supporting antibiotic-free feeding programs in poultry,” says Slominski.

Next steps

“As we conclude this project on yeast-based feed additives, we have a better understanding of how to develop products for prebiotic feed supplements,” says Slominski. He suggests further fine-tuning of yeast components would be best completed by industry partners.

Slominski sees opportunities for further research looking at the release of bioactive components from different natural fibre components. He expects his research associate and colleague Dr. Anna Rogiewicz to continue work with fibres from such feedstuffs as canola meal, soybean, and other grains and oilseeds. “With this research we have better information about the microbiota of the gut and intestinal tract in poultry, and that gives us something to continue to build on,” he says.

This research is funded by the Canadian Poultry Research Council as part of the Poultry Science Cluster, which is supported by Agriculture and Agri-Food Canada as part of the Canadian Agricultural Partnership, a federal-provincial-territorial initiative. Additional funding was received from CBS Bio-Platforms and Manitoba Egg Farmers.

CPRC Board of Directors Welcomes New Executive Director

The CPRC is happy to welcome Caroline Wilson as CPRC’s new Executive Director. Caroline has been with CPRC since 2019 as the Research Coordinator. She has worked in the poultry sector for the past 15 years. Caroline can be contacted at caroline.wilson@cp-rc.ca or 613-714-4599 ext #103.

CFA Update

Submitted by CFA

CFA Hosts International Agriculture Conference to Discuss Global Issues Impacting Agriculture



The Canadian Federation of Agriculture (CFA), in partnership with COPA-COGECA, the American Farm Bureau and the Consejo Nacional Agropecuario, hosted the North American/European Union Agriculture Conference (NA/EU) in Charlottetown, PEI from September 12-14.

The NA/EU is a bi-annual event that brings together farm leaders from the European Union and North America to discuss the pressing issues affecting agriculture and to collaborate and share ideas to work towards solutions.

The NA/EU was attended by approximately 280 representatives from EU Member States, as well as from Canada, Mexico and the United States of America.

The conference provided a platform for constructive debate, featuring panels on the most pressing issues facing agriculture:

- Global challenges
- Agriculture and global trade
- Sustainability and innovation
- Responding to market and consumer trends
- Food security and resilience in agricultural systems

During the conference, presentations and remarks were given by a series of prominent international and Canadian leaders in agriculture and food, including:

- Lawrence MacAulay, Minister of Agriculture and Agri-Food
- Bloyce Thompson, Minister of Agriculture for Prince Edward Island
- Zippy Duvall, President of the American Farm Bureau Federation
- Marco Galindo, Director of Economic Studies, Consejo Nacional Agropecuario
- Ramon Armengol, President of Cogeca
- Christiane Lambert, President of Copa

On the evening of September 11th, a Leadership Summit and dinner was held, bringing VIPs and farm leaders together to learn about some of the innovative farm practices of PEI.

During the conference, a wide range of bilateral meetings were held between the leaders of various regions across North America and the EU for in-depth discussion on topics such as animal emergency preparedness, plant breeding innovation as well as consumer trends.

Upcoming Meetings

CPEPC Turkey Sector Meeting
Calgary, AB
October 23, 2023

CPEPC Poultry/Chicken Sector Meeting
Calgary, AB
October 24, 2023

TFC Board Strategic Planning
Calgary, AB
October 25, 2023

Poultry Industry Council (PIC) Poultry Innovations
Conference
Guelph, ON
November 14-15, 2023

TFC 276th General Business Meeting
Toronto, ON
November 29-30, 2023

CPEPC Joint Poultry Sector Meeting and CPEPC Turkey
Sector Meeting
Ottawa, ON
February 15, 2024

National Turkey Federation (NTF) Annual Convention
Austin, Texas, USA
February 21-24, 2024

WTO 13th Ministerial Conference (MC13)
Abu Dhabi, UAE
February 26-29, 2024

TFC 277th General Business Meeting
Ottawa, ON
March 19-20, 2024

SM4 Joint Annual Reception
Ottawa, ON
March 20, 2024



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