



National Marketing Campaign

It's not the holidays without turkey.

Now in its fifth year, the Think Turkey™/Pensez Dindon^{MC} campaign continues to keep turkey top of mind by celebrating the deliciously creative ways to bring turkey to the table – from the holidays to everyday.

Putting the “Canadian” in Canadian Thanksgiving



This Thanksgiving, Think Turkey™/Pensez Dindon^{MC} tapped into national pride by enlisting a Canadian turkey farming family to star in an [ad spot](#) celebrating what makes Canadian Thanksgiving special!

To reach shoppers directly at the point of purchase, Think Turkey™/Pensez Dindon^{MC} also launched

new audio ads across Canadian grocery banners leading to the holiday weekend, capturing shoppers' attention, and encouraging them to purchase turkey.

A robust PR campaign including a proprietary survey on how Canadians celebrate Thanksgiving generated buzz Canada-wide.

continued page 2

Inside this issue:

National Marketing Campaign	Page 1-2
TFC 276th Business Meeting	Page 3
Market Insights	Page 4
Corporate Communications	Page 5-6
Trade	Page 7
On-Farm Programs	Page 8
CFA Update	Page 9
Happy Holidays and TFC Update	Page 10-11
Upcoming Meetings	Page 12

National Marketing Campaign



Celebrating holiday heroes who put turkey on the table

With food insecurity at an all-time high, according to recent reports from Food Banks Canada, Think Turkey™/Pensez Dindon^{MC} recognized unsung holiday heroes who bring holiday spirit to Canadians in need by launching the first Wishbone Awards.

On November 2, there was a national call for nominations and communities across Canada were invited to identify local heroes who embody holiday spirit by donating turkeys, cooking in a community kitchen, or volunteering at a local food bank. PR, Social and Search helped generate awareness and drive to the nomination form

on the Think Turkey™/Pensez Dindon^{MC} website.

Eight recipients were awarded a Wishbone Award and a \$2,500 grant towards their holiday efforts. The Wishbone Awards are supported by celebrity chef Chuck Hughes, who partnered with Think Turkey™/Pensez Dindon^{MC} to kick-off the program and appeared in the launch video.



Chef Chuck Hughes

Deck the table with turkey!

This holiday season, the Think Turkey™/Pensez Dindon^{MC} veggie characters are getting a festive makeover. The four characters sing a cheerful holiday carol in new ad spots both in English and French. [View it.](#)

This Holiday campaign will be supported by TV, PR, Digital, Social and Search. Recipe creators will be engaged to connect with consumers through social media and TV segments to share whole turkey recipes for the holidays. Think Turkey™/Pensez Dindon^{MC} will also be leveraging audio ads across Canadian grocery banners leading to the holidays to reach shoppers in-store.

TFC 276th Business Meeting

The Turkey Farmers of Canada's (TFC) 276th Meeting took place in Toronto from November 29-30, 2023.

Highlights of the 276th Meeting include:

- An executive report outlining work by the committee through the fall including lobby activity and avian influenza.
- An update from Zeno overviewing Think Turkey at Thanksgiving, results and plans for the holidays.
- The New National Commercial Allocation Policy: The TFC Directors approved the written text of the new Commercial Allocation Policy that was previously adopted at the September meeting for implementation starting with the 2023/2024 Control Period.
- The 2024/2025 Allocation: Upon review of current and forecast market conditions and the report of the Turkey Market Advisory Committee, the National Commercial Allocation for the upcoming 2024/2025 Control Period was established at 139.5 mkg, down 2.0 mkg from 2023/2024. This preliminary allocation will be reviewed early in 2024, allowing for Christmas performance, imports under CPTPP and the impacts of HPAI to be better assessed.
- The Inter-Provincial Leasing of Commercial Quota: Due to production losses because of HPAI in three provinces, the TFC Directors approved the inter-provincial leasing of quota to the provinces of SK and ON up to a maximum of 1.7 mkg eviscerated. Monitoring of HPAI will continue and depending on need, additional leasing may be approved subject to production capacity in other provinces.
- The Production Levy Order: Upon review of the report of the Audit and Finance Committee, the Directors approved the Agency's preliminary budget for 2024 and approved extension of the production levy order to March 31, 2025 – following the normal annual budget regulatory amendment process as per Guidelines of the Farm Products Council of Canada (FPCC). The amendment will be considered by the FPCC early in the New Year.
- Updates were provided regarding On-Farms Programs, trade, and corporate communications (in particular, Government Relations activities – see below) at the meeting.

Market Insights

Turkey movement has seen an overall improvement this year (Jan-Oct) compared to last with domestic disappearance increasing by 5.5% (5.3 mkg) to 99.7 mkg. Both whole bird and breast meat domestic disappearance have followed a similar trend, increasing by 9% (2.9 mkg) to 33.6 mkg and 1% (0.34 mkg) to 22.6 mkg respectively.

Closing stocks of all sizes of whole turkeys on October 1 were 20.4 mkg, 6.3 mkg higher than a year ago. Compared to a year earlier, a combination of factors brought about higher October 1 stocks:

- Opening (May 1) stocks were 12.9 mkg, 3.1 mkg higher.
- Bagging production from May 1 to October 31 was 34.9 mkg, 6.1 mkg higher.
- Imports were 0.3 mkg, up from 0 kg.
- The three above factors resulted in supply of 48.1 mkg, 9.4 mkg higher.
- Total disappearance (domestic + exports) was 25.2 mkg, 3.4 mkg higher.

As increased disappearance was not enough to offset increased supply, the closing stocks were 20.4 mkg, 6.3 mkg higher than the year earlier.

Supply and Disappearance of Whole/Bagged Turkeys: May to October - millions of kg

	2022	2023	Change
Opening Stocks	9.9	12.9	3.0
Production	28.8	34.9	6.1
Imports	-	0.3	0.3
Total Supply	38.6	48.1	9.4
Total Disappearance	24.5	27.6	3.1
Exports	2.7	2.4	-0.3
Domestic Disappearance	21.8	25.2	3.4
Closing Stocks	14.1	20.4	6.3

Supply and Disappearance of Breast Meat: May to October - millions of kg

	2022	2023	Change
Opening Stocks	1.2	1.7	0.5
Production	13.0	13.4	0.3
Imports	0.5	0.8	0.3
Total Supply	14.7	15.8	1.2
Total Disappearance	13.9	14.4	0.5
Exports	0.4	0.1	-0.3
Domestic Disappearance	13.5	14.2	0.7
Closing Stocks	0.8	1.5	0.7

Closing stocks of breast meat on October 1 was 1.5 mkg, 0.7 mkg higher than a year ago. Compared to a year earlier, a combination of factors brought about higher October 1 stocks:

- Opening (May 1) stocks were 1.7 mkg, 0.5 mkg higher.
- Breast meat production from May 1 to October 31 was 13.4 mkg, 0.3 mkg higher.
- Imports were 0.8 mkg, 0.3 mkg higher.
- The three above factors resulted in supply of 15.8 mkg, 1.2 mkg higher.
- Total disappearance (domestic + exports) was 14.4 mkg, 0.5 mkg higher.

As increased disappearance was not enough to offset increased supply, closing stocks were 1.5 mkg, 0.7 mkg higher than year earlier.

Corporate Communications

Advancing Women in Agriculture Conference

TFC participated in the Advancing Women in Agriculture Conference from November 19-21 through a student sponsorship. This provides an opportunity for an agriculture student to attend the conference, aiding the next generation of agriculture to become more aware of opportunities in the industry and the organizations in it. The sponsorship is a good value, also including branding and networking opportunities during the event, including a sponsor lunch. Maegan MacKimmie, Manager - Corporate Communications attended the event and met with the student sponsored by TFC. A video of the student that TFC sponsored is available here: www.advancingwomenconference.ca/2023east/student-program/.



Left to right: Maegan MacKimmie and student Hanna Mermuys

Government Relations



Senator Salma Ataullahjan, centre with (left to right) Michael Laliberte, CFC; Roger Pelissero, EFC; Debbie Etsell, TFC; and Teddy Markey, CHEP.

The House of Commons rose for the winter break on December 15, 2023, and return on January 29, 2024.

The SM5 have taken several meetings with Senators on Bill C-282, an Act to amend the Department of Foreign Affairs, Trade and Development Act (supply management) through the Fall with a focus on two lobby days on November 7 and November 23 in Ottawa. This will present a strong supply managed front in support of the Bill, while also allowing the identification of any concerns of the Bill by Senators to address.

Another aspect of C-282 work is a media and advertising campaign with information about supply management. This campaign is targeting outlets such as iPolitics, Politico and the Hill Times, where both elected officials and the public will see material.

An example of this work is available at the following link: www.ipolitics.ca/sponsored/supply-management-a-strong-and-sustainable-future-for-canadian-agriculture.

TFC has also been monitoring Bill C-275, an Act to amend the Health of Animals Act (biosecurity on farms), which, passed committee with a few amendments, followed by Third Reading in the House of Commons.

Corporate Communications

At the time of writing the Bill is at First Reading in the Senate. To watch the Bill sponsor, MP John Barlow, speak at Third Reading, follow the link starting at 17:46:20: parlvu.parl.gc.ca/Harmony/en/PowerBrowser/PowerBrowserV2?fk=12390183.

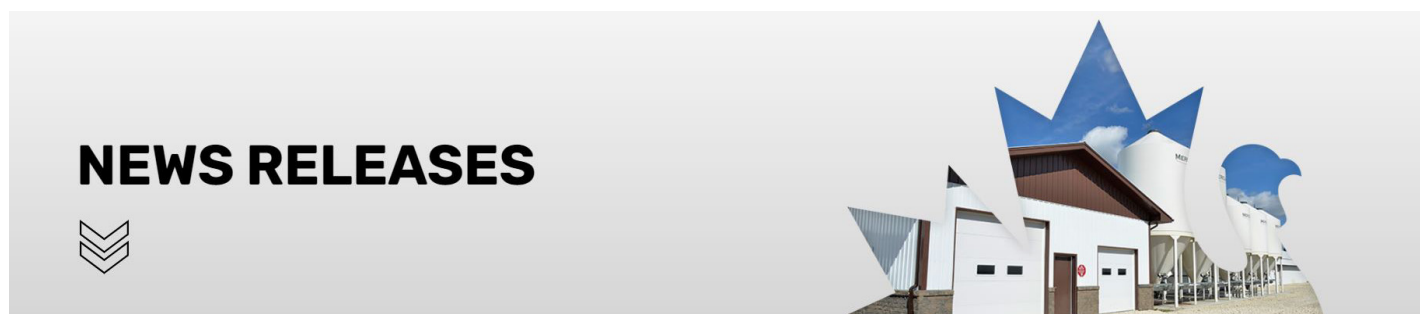
Bill C-234 - an Act to amend the Greenhouse Gas Pollution Pricing Act, which TFC is working on through membership with the Agriculture Carbon Alliance (ACA), At the time of writing, a Senate vote resulted in favour of the proposed amendment on Bill C-234, which excluded heating and cooling of livestock facilities and other production facilities including greenhouses. The amended Bill C-234 will go to vote at Third Reading in the Senate now that the amendment has been voted on. If supported, the amended Bill will be sent back to the House of Commons, but to the bottom of the order of precedence. More information is available on the ACA website: agcarbonalliance.ca/vote-for-bill-c-234/.

In total over the fall, representatives from the national SM5 met with approximately 30+ Senators and MP's on the bills of interest both in person and virtually.

Media

TFC continues to monitor the media and again provided key messages to be used by provincial boards and spokespeople in advance of the holiday season, in particular addressing supply, pricing and avian influenza.

The SM5 recently worked with Abacus Data on a survey regarding the dairy, poultry and egg industry. The survey conducted by Abacus Data looked at Canadians' perspectives on the food system and the value they place on the system of supply management. According to the findings, 9 in 10 Canadians say it's important to them that the dairy, eggs, chicken and turkey they buy come from Canada. This sentiment is strong across multiple demographics and geographical regions, reflecting a shared belief in the benefits of this approach. To read more about the survey and findings, check out the news release:



www.turkeyfarmersofcanada.ca/media-room/news-releases/canadians-overwhelmingly-support-supply-management-and-homegrown-food-security/.

Follow along at [@TurkeyFarmersCA](https://twitter.com/TurkeyFarmersCA).

Trade



World Trade Organization (WTO)

The 13th World Trade Organization (WTO) Ministerial Conference (MC13) will take place the week of February 26, 2024, in Abu Dhabi, United Arab Emirates (UAE). To create some momentum on the agricultural negotiations, which have been deadlocked for years, a virtual mini-ministerial meeting was held on November 28th with the aim of breaking the current impasse. The Ministers in attendance focused on two questions: how to reconcile different views on the approach to the negotiations, and how to achieve a meaningful outcome on agriculture at MC13. Although the exact outcome of this meeting is unknown, some political guidance was provided, which the Chair of the agriculture negotiations, Ambassador Alparslan Acarsoy of Türkiye, can use to work with agricultural negotiators towards a reasonable outcome on the food security pillar for MC13 and potentially a work program on other negotiating matters post MC13.

Addressing Food Security at the MC13 is a priority for the WTO. This is because acute food insecurity is likely to further deteriorate globally. It is estimated that up to 333 million people are acutely food insecure across the 78 countries. This is an increase of 184 million people relative to 2020 data. According to the Food and Agriculture Organization of the United Nations (FAO), conflict remains the primary driver of hunger for most people (7 out of 10) worldwide, followed by weather extremes being a primary cause of one in five countries with food crises.

Canada-United States-Mexico Trade Agreement (CUSMA)

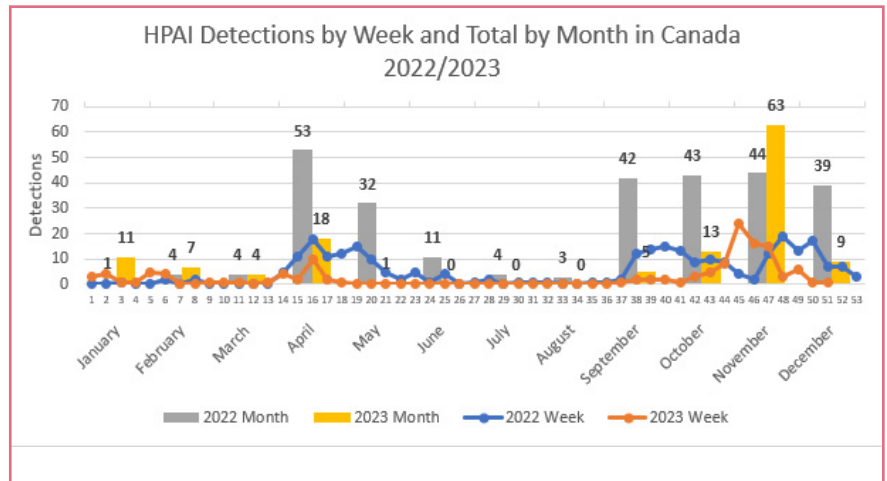
On November 24, 2023, a CUSMA dispute settlement panel that was established to review the tariff rate quota (TRQ) allocation methodology used by Canada for distributing dairy TRQs, made its findings public. Findings included that allocation measures used by Canada do not breach CUSMA commitments.

The U.S. initiated the panel due to concerns that Canada excludes retailers and food service operators from applying for dairy TRQs. The panel found that excluding downstream players are not inconsistent with the CUSMA. There is no appeal process for dispute settlements under CUSMA, however, statements by the U.S. government and dairy industry suggest they will explore ways to address what they see as a panel decision that is inconsistent with the intent of the CUSMA.

On-Farm Programs

Avian Influenza

The Highly Pathogenic Avian Influenza (HPAI) outbreak persists globally. The Canadian Food Inspection Agency (CFIA), along with provincial stakeholders and industry continue response efforts. Turkey Farmers of Canada maintains support for policy development, vaccination discussions, and improving preparedness and response procedures. In addition, an ongoing review of the TFC On-Farm Food Safety Program (OFFSP) focuses on assessing and strengthening biosecurity requirements, considering the experiences with HPAI.



After a slower start to the Fall season compared to 2022, November saw a large number of detections in Western Canada, which appeared to peak a couple weeks earlier compared to 2022, based on the representation below. From September 1 to December 20, there were a total of 90 total detections, concentrated in British Columbia, Alberta, and Saskatchewan. A few cases were also detected in Manitoba and Quebec with one case in Ontario. 77% of the detections were commercial flocks of which 32% involved turkeys. The United States of America is also continuing to see cases and from September 1 to December 20, 2023, reported 199 total detections with 77 commercial turkey cases.

Mental Health and Wellbeing

Avian Influenza has been a devastating situation for all involved on top of the stressors that regularly impact farmers. Persistent stress can create mental health issues among farmers.

For resources on mental health in the poultry and egg sector, visit: www.turkeyfarmersofcanada.ca/media-room/news-releases/mental-health-and-wellness-in-the-poultry-and-eggs-sector/.

The Do More Agriculture Foundation also has many resources and crisis contacts available to farmers: www.domore.ag/.

A reminder that strict biosecurity is still your best plan to reduce the risk of avian influenza entering your flock. For more information and resources available on AI including response details and biosecurity, visit the TFC On-Farm Programs Portal and the CFIA website at: <https://inspection.canada.ca/animal-health/terrestrial-animals/diseases/reportable/avian-influenza/latest-bird-flu-situation/eng/1651075538411/1651075538958>

CFA Update

Submitted by CFA

CFA Farm Financial Health Report

The cost of critical farm inputs such as fuel, fertilizer, feed, machinery, pesticides, land and labour have increased dramatically. When coupled with high inflation, interest rates and a price on carbon for essential farming activities, for which farmers have no viable alternatives, Canadian producers are facing tremendous pressure on their farm financial and mental health.

The Canadian Federation of Agriculture (CFA) has put forward recommendations in its [Farm Financial Health Report](#) in several areas aimed at not only helping farmers manage the increasing cost of production and navigate challenging regulatory barriers, but also to help them mitigate the effects of climate change and support the next generation of farmers.

Released on October 20th, the report uses statistics and context to support a suite of 18 recommendations to support Canadian agriculture. [An infographic](#) based on this report was used as a leave-behind document during CFA's Lobby Day, where the CFA board had over 40 meetings with MPs and Senators on Parliament Hill. CFA urges its members to use any relevant messaging in this report to assist in their own advocacy efforts.

CFA Lobby Day

On October 24th, the CFA Board of Directors conducted its annual Hill Day, where CFA representatives held a series of meetings with MPs, Senators and influential decision-makers to share our unified vision for agriculture and the recommendations to achieve it.

This year, CFA had over 40 meetings, including with:

- Minister of Agriculture and Agri-Food, Lawrence MacAulay
- NDP Agriculture Critic Alistair MacGregor
- BQ Agriculture Critic Yves Perron
- and many more



CFA targeted politicians that sit on influential committees, with a priority on those that can impact the agriculture sector.

HAPPY HOLIDAYS

From
Turkey Farmers of Canada



Please note the TFC office will be
closed from December 22 at noon
and will resume operations on
January 2, 2024.



TURKEY FARMERS
OF CANADA™
LES ÉLEVEURS DE DINDON
DU CANADA™

TFC Update



TFC would like to recognize Lorna Morris for her 30-year Anniversary with TFC.

Lorna started with the Agency in November 1993 on a short-term basis, which turned into a long-term position. She has been part of much of the change and growth of the Agency over this time – always as a stabilizing force.

Lorna took on several TFC initiatives over the years and has contributed to the success of events, such as the Joint Annual Poultry Reception, TFC Business Meetings and AGMs. Her careful planning and attention to detail is highly appreciated. Not only does she provide valuable support to the TFC staff, but to the Executive Committee and to the full Board.

Chairman Darren Ference presented Lorna with a gift on behalf of the Agency membership at the 276th General Business Meeting in Toronto. Thank you to Lorna for her dedication to the TFC over the years.

Upcoming Meetings

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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