Concessions to Canada’s system of supply management made in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the Canada-United States-Mexico Agreement (CUSMA) are of significant concern to Turkey Farmers of Canada (TFC).

Farmers, not only in turkey, but in the dairy, chicken and egg sectors as well, are facing increased market disruption from these international trade deals. TFC is working with our supply management partners on measures to mitigate the impact of these two consecutive trade deals that grant new market access that will displace domestic production, negatively impacting farmers, processors and the entire value-chain.

CUSMA amends Canada’s international trade obligations on turkey by offering up to an additional one million kilograms of import access each year for the next 10 years above current access levels, with potentially more after that, depending on the rate of domestic production growth.

The CPTPP agreement with Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore and Vietnam will increase market access to Canada by 4.0 million kilograms.

Import access into Canada for turkey in 2018 equals 5.6 million kilograms. Combined, CPTPP and CUSMA will increase access by up to 5.0 million kilograms or 90%. The increase in access under CPTPP will legally take effect on December 30, 2018, but effectively will be phased in during the first five years of full implementation, commencing in 2019. CUSMA is expected to take effect by no later than 2020.

TFC representatives have been meeting with Agriculture and Agri-Food Canada (AAFC) officials, and other government representatives, to discuss policies and measures to mitigate the impact of the trade deals.

The government acknowledges both the impact of the deals and the need for remedies, recently announcing a working group for the poultry and egg sectors that brings together officials from AAFC, representatives from national poultry and egg organizations and associations, as well as regional representatives. TFC, along with the other feather sector and downstream partners, is advocating for market development and investment strategies to support farmers and processors to enhance production and processing efficiency and minimize the impact on production throughput by increasing domestic consumption.

TFC Chair Darren Ference notes: “Our position is that while there is urgency, particularly with a federal election in the near future that could result in delays, a short-term fix or band-aid solution is not a complete answer. A long-term view is needed with respect to ensuring the sustainability of the industry in all eight member provinces.”

Increased domestic consumption is the key to the sustainability of Canada’s turkey sector and our ability to absorb increased market access. At the same time, we must examine how to reduce production costs, facilitate value-added activity, and communicate about food safety, flock care and our antibiotic use strategy with the consumer.

TFC will continue working with government officials regarding implications for the turkey sector to ensure that supply management will remain a strong platform for turkey farmers.
Thanksgiving 2018 (September-October) domestic disappearance of all turkey was 38.4 million kg (Mkg), an increase of 4.7 Mkg from 2017, and the highest for the period since 2015. September-October domestic disappearance of breast meat, other parts and further processed products such as roasts was 15.3 Mkg, an increase of 0.4 Mkg over the previous year, and 1.2 Mkg more than the average 14.1 Mkg for the previous five years.

Whole bird domestic disappearance this past Thanksgiving was 23.1 Mkg, a rebound of 4.3 Mkg from 2017, and an increase of 0.5 Mkg from the five-year average for 2013-2017 of 22.7 Mkg. Thanksgiving whole bird disappearance from 2013-2017, averaged 22.7 Mkg, accounting for a little over 31% of whole bird sales for the year. Christmas disappearance over those same five years averaged 30.9 Mkg, accounting for 43% of annual movement. When both holidays are combined, we see that about three-quarters of all whole turkey movement occurs in the last third of the year.

Detailed information on store flyer featuring activity of turkey products at major Canadian supermarkets has been tracked since Spring 2017. While it’s known that certain products are more likely to be featured at certain times of the year, tracking enables featuring activity to be quantified as illustrated by the following chart. In the four months of May to August, seven whole bird features were identified across Canada in both 2017 and 2018. However, in the two months of September and October, 339 whole bird features were identified in 2017 and 369 were identified in 2018.
The Processed category in the above chart consists of a number of items including roasts. This past Thanksgiving, 114 flyer ads for roasts were tracked, in comparison to two in the four months of May to August of 2018 and 63 at Thanksgiving 2017. In the following chart, we see that per capita consumption of whole birds has declined, possibly creating a market opportunity for sales of roasts.

### Domestic Disappearance and Per Capita Consumption of Whole Turkeys - Thanksgiving and TFC Control Period

<table>
<thead>
<tr>
<th>Control Period</th>
<th>Population (millions)</th>
<th>Thanksgiving Disappearance (Mkg)</th>
<th>Thanksgiving Disappearance (Mkg)</th>
<th>Control Period Disappearance (Mkg)</th>
<th>Control Period Disappearance (Mkg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011/12</td>
<td>34.5</td>
<td>23.0</td>
<td>0.67</td>
<td>74.2</td>
<td>2.15</td>
</tr>
<tr>
<td>2012/13</td>
<td>34.9</td>
<td>20.9</td>
<td>0.60</td>
<td>73.4</td>
<td>2.11</td>
</tr>
<tr>
<td>2013/14</td>
<td>35.2</td>
<td>20.3</td>
<td>0.58</td>
<td>76.1</td>
<td>2.16</td>
</tr>
<tr>
<td>2014/15</td>
<td>35.6</td>
<td>25.1</td>
<td>0.71</td>
<td>76.3</td>
<td>2.14</td>
</tr>
<tr>
<td>2015/16</td>
<td>35.8</td>
<td>26.7</td>
<td>0.74</td>
<td>70.3</td>
<td>1.96</td>
</tr>
<tr>
<td>2016/17</td>
<td>36.3</td>
<td>22.4</td>
<td>0.62</td>
<td>72.9</td>
<td>2.01</td>
</tr>
<tr>
<td>2017/18</td>
<td>36.7</td>
<td>18.8</td>
<td>0.51</td>
<td>67.6</td>
<td>1.84</td>
</tr>
<tr>
<td>2018/19*</td>
<td>37.5</td>
<td>23.1</td>
<td>0.62</td>
<td>70.3</td>
<td>1.88</td>
</tr>
</tbody>
</table>

*Note: 2018/19 Control Period is an estimate based on the 12 months ended October 2018.

Thanksgiving 2018 saw domestic disappearance return to a more normal level after disappointing movement in 2017. Per capita consumption of whole birds has slowly declined and as a result sales and featuring of turkey roasts and other convenient products in smaller pack sizes may be increasing.
Turkey Farmers of Canada celebrated Canadian Turkey Month in October with plenty of recipes and resource tools to facilitate consumers’ understanding of how and why turkey is so versatile for all occasions. Leading up to Thanksgiving, our nutrition and social media experts shared key messages around this iconic Canadian holiday with our “Best Ever” Thanksgiving recipes and tips guide, and shared meal solutions for planning ahead, using leftovers and swapping in turkey at any meal.

We also ran a series of polls in collaboration with our influencers, as part of our Thanksgiving program, to help gauge consumer awareness of turkey. This was a new initiative started with our Summer and Back-to-School programs this year. The results provided valuable knowledge for planning our communications approach moving forward. Key insights, based on 896 people polled, indicated that:

- 89-91% of participants want to learn more about how to use turkey cuts. This information provides strategic insight in terms of program messaging going forward.
- 76% did not plan to upsize their Thanksgiving turkey in order to have additional leftovers on hand. This finding represents an opportunity to present leftover turkey as a bonus (batch cooking/make-ahead meals).
- 83% said they were looking for ways to create a Thanksgiving celebration for a smaller number of people. This insight supports the value of program messaging that focused on festive Thanksgiving meals for couples, families of four, or smaller crowds.

TFC ran four weekly contests in October with over 18,355 entries and 17,202,273 hashtag impressions, boosting our monthly newsletter list by over 2,000 new subscribers. We are currently dialoguing monthly with over 29,000 avid subscribers through the “Get Cooking with Canada Turkey” newsletter. You can find archived versions at canadianturkey.ca.

Canadianturkey.ca registered record-high numbers for new and returning visitors to the site in October, compared to the previous year (an increase of 73.46% and 89.54% respectively). Results also show that consumers are not only reaching out organically but that the traffic is also generating from our social media programs and mainstream platforms. That means that consumers are seeing and reacting to what we are sharing.
The 2018 holiday season is all about entertaining with turkey. Our influencers help keep turkey top-of-mind by educating their communities about all the reasons turkey is the perfect ingredient for all their celebration meals and festive gatherings.

Leading up to the Christmas holidays, we’ll share new recipes, and a new holiday guide. Tips and tools will help consumers learn how to use turkey to create easy and economical appetizers, meals and crowd-pleasing dishes that will wow guests and impress family members.

Check out our December newsletter!
Chefs Plate

Our partnership with Chefs Plate is ongoing with 15,195 SKUs sold in November. The program runs through December.

Turkey recipe selections are available at chefsplate.com/menu.

2018 in a Nutshell

Social media was the driver for reaching out to consumers in 2018, but we did things a little differently. While we kept our seasonal approach to programs in order to position turkey all year long, we armed our influencers with practical meal prep solution tools they could share with their communities in addition to a substantial body of new and on-trend recipes and videos to choose from. The enviable position turkey holds as a star for special occasions and its versatility day-to-day was well demonstrated with:

- 7 new whole bird recipes
- 12 monthly newsletters featuring 12 new recipes
- 12 new recipe videos shared on social media
- 18 new recipes developed for our various programs
- 40 new turkey recipes developed and shared by our influencers with their communities
- 6 new seasonal cooking guides
- 11 new resource assets
- 12 new nutrition focussed blog posts

TFC sponsored campaigns and built partnerships with Walmart, Canada Bread, Weight Watchers, Subway and Chefs Plate.

canadianturkey.ca is THE go-to-resource for recipes and more.

Spread the word!


Recipes can be found at canadianturkey.ca/featured-recipes. Recipe videos can be found at canadianturkey.ca/videos. Nutrition information is available at canadianturkey.ca/nutrition. Resource materials are available at canadianturkey.ca/resources.

Sign up for Canadian Turkey’s Get Cooking with Canadian Turkey™ monthly e-Newsletter at canadianturkey.ca/e-newsletter.
There has been increasing national and global attention to the threat of antibiotic resistance, which has led to a number of initiatives from government and organizations addressing antimicrobial use in animals.

Recognizing this, the Canadian turkey industry has established a strategy for the reduction of use of antibiotics across the industry, while ensuring the current options to maintain the health and welfare of turkeys remain available to farmers. A strong turkey industry reduction strategy is important to maintain and build consumer confidence in Canadian turkey and to meet the needs of government, processors, retailers, and restaurants.

The strategy has set timelines to eliminate the preventive use of antibiotics important in human medicine by eliminating the preventive use of Category II antibiotics by the end of 2018 and Category III antibiotics by the end of 2019. The strategy builds on the current Category I initiative, in place since 2014. To ensure the well-being of birds, the strategy will permit the use of all categories of antibiotics for treatment and the use of ionophores (Category IV antibiotics: not used in human medicine) and chemical coccidiostats. The strategy will be enforced through the revised TFC On-Farm Food Safety Program©.

In addition, as a result of regulatory and policy changes by Health Canada, a veterinary prescription is now required by farmers in order to use medically important antibiotics (Category I, II and III antibiotics).

The move to prescription status, which came into effect December 1, 2018, aims to promote the responsible use of antibiotics in animals to address the risk of antibiotic resistance. Farmers are now only able to purchase medically important antimicrobials with a prescription from a veterinarian, a pharmacist, or as a medicated feed from a feed mill.

Farmers are encouraged to discuss these changes with their veterinarian, feed mills, hatcheries and other suppliers. For more resources on antimicrobial use, visit the TFC On-Farm Programs Portal at www.tfconfarmprograms.ca.

Turkey Load-Out Report – Changes and New Mandatory Implementation Date

A Turkey Load-Out Report was approved by the TFC Board of Directors in April 2018 to ensure consistent application of oversight of the catching and loading process across the Canadian turkey industry. The Load-Out Report collects information on the catching crew, barn and flock conditions, and reviews the catching and loading process. The Load-Out Report was distributed to turkey farmers in June 2018 for a voluntary implementation period until the Load-Out Report was to become a mandatory record in the TFC Flock Care Program© in October 2018.

Due to provincial feedback received in September, the mandatory use of the Load-Out Report was delayed until necessary changes to the form could be made. The Load-Out Report was finalized and approved by the TFC Board of Directors on November 29, 2018 with a new mandatory implementation date of January 1, 2019. Changes were made to the transfer of care statement, and an option was added to allow for catching crew member names to be kept on file on-farm instead of listed on the form. As part of the process, producers must also submit a copy of the Turkey Load-Out Report to the processor following flock shipment.

The revised Load-Out Report has been distributed by Provincial Boards and can be found on the TFC On-Farm Programs Farmers Portal (www.tfconfarmprograms.ca) together with instructions on how to complete and other resources on catching and loading. The requirement for the Load-Out Report will also be included in the new printed and online versions of the TFC On-Farm Programs Producer Manual when released.
Release of New TFC On-Farm Programs Producer Manuals

Turkey Farmers of Canada (TFC) will release new TFC On-Farm Programs Producer Manuals that reflect the changes made to align the TFC Flock Care Program© (FCP) with the new Code of Practice for the Care and Handling of Hatching Eggs, Breeders, Chickens and Turkeys. The release is expected for early in the new year. The TFC FCP was updated through the National Farm Animal Care Council (NFACC) Animal Care Assessment Framework (ACAF) process, and turkey breeder operators were added to its scope. Additional edits to strengthen the biosecurity and animal health requirements of the TFC On-Farm Food Safety Program© (OFFSP) will also be included in the new manuals.

Program binders for both commercial production and turkey breeders will be republished. Producers can expect the new manuals to be similar in layout to the current program versions, and a detailed overview of the changes will be communicated with their release.

Printed manuals will be distributed to producers through Provincial Turkey Marketing Boards for implementation across the country. In addition, the updated program versions will become available on the TFC On-Farm Programs Portal (www.tfconfarmprograms.ca). The target dates for the implementation of the new program versions are June 30 and December 31, 2019 for the commercial and turkey breeder programs, respectively.

Funding for the ACAF process was provided through the Assurance stream of the AgriMarketing program under Growing Forward 2, a federal-provincial-territorial initiative.

New TFC On-Farm Programs Audit Cycle Coming

Changes to the TFC On-Farm Programs audit cycle are also coming in 2019. The new cycle will be a two-year cycle consisting of full audits and records review audits. It will be implemented across provinces over the course of next year, and replace the current TFC audit cycle, which is a combination of full, partial, record review and self-declaration audits.

The changes were approved by the TFC Board of Directors at their 255th General Business meeting in September 2018, aiming to increase the credibility of the TFC On-Farm Programs audit and certification system.
International trade, rural infrastructure and the need to modernize regulations were among the key issues that Canadian Federation of Agriculture (CFA) board directors raised with MPs and senior policy staff during the annual CFA Lobby Day that ran from October 29th to 30th.

In more than 30 productive meetings, parliamentarians and farm leaders looked at the various ways that Canada should be leveraging its agriculture sector.

The lobby day meetings concluded with even more conversations at CFA’s Annual Harvest Reception, which attracted a crowd of more than 100, including MPs and Hill staffers.

**CFA Speaks at House agriculture committee on farmer mental health and launches mental health award**

On Thursday, September 27th, CFA President Ron Bonnett presented to the House of Commons Standing Committee on Agriculture and Agri-Food on farmer mental health. CFA highlighted recent research that indicates Canadian producers face significant anxiety, depression, and stress, while demonstrating low resilience and a high potential for burnout. CFA, along with other stakeholders, recommended the need for increased funding to farmer mental health supports across Canada, while calling for the establishment of an agricultural mental health centre at the University of Guelph.

CFA also advocated for the Government of Canada to fund a national suicide prevention hotline through Crisis Services Canada, a group that has been in discussion with CFA regarding agriculture-specific training for distress centre representatives.

CFA has also launched a new annual award for those working in mental health in agriculture. The Brigid Rivoire Award for Champions of Agricultural Mental Health recognizes an individual, organization, or group of individuals that has made outstanding contributions in raising awareness, addressing stigma, and supporting agricultural mental health in their local community.
The Canadian Poultry Research Council (CPRC) was established 17 years ago and has undergone a number of changes over that period. It was originally run by part-time staff with administration support from Poultry Industry Council in Guelph, Ontario. CPRC’s member organizations (Turkey Farmers of Canada, Canadian Hatching Egg Producers, Chicken Farmers of Canada, Egg Farmers of Canada and Canadian Poultry and Egg Processors Council) decided in 2009 that the organization should take on more responsibility and become more active. As a result of that decision, CPRC was relocated to Ottawa in 2011 and a full-time Executive Director was hired to work toward the members’ vision for the organization.

CPRC had taken part in Agriculture and Agri-Food Canada’s (AAFC) Science Cluster programs and established the first research cluster in 2010 supporting poultry research in excess of $2 million. The cluster research was in addition to the research supported by CPRC’s annual call for research proposals. A second cluster with a total value in excess of $5.5 million was established in 2013 and completed in March 2018. CPRC’s Board of Directors and member organizations supported the second cluster with research funds and additional operating funds to create a Research Administrator position. CPRC submitted a proposal to AAFC in April 2018 for a third Poultry Science Cluster and a decision on that initiative is expected shortly.

CPRC’s members and the Board of Directors continue to support the organization and look to its future. The Board approved the creation of a new Research Coordinator position and a move to new offices at its November meeting. Chicken Farmers of Canada has provided office space to CPRC but the staff expansion makes the organization too large to continue that situation. CPRC has depended on member staff and consulting researchers for technical support but the demand for that expertise created by the proposed third cluster makes it necessary for CPRC to expand its in-house knowledge.

CPRC’s members and Board also held governance and research administration review sessions to ensure that CPRC’s systems reflect the increased demand on the organization as it moves forward.

CPRC, its Board of Directors and member organizations are committed to supporting and enhancing Canada’s poultry sector through research and related activities. For more details on these or any other CPRC activities, please contact the Canadian Poultry Research Council, 350 Sparks Street, Suite 1007, Ottawa, Ontario, K1R 7S8, phone: (613) 566-5916, fax: (613) 241-5999, email: info@cp-rc.ca, or visit us at www.cp-rc.ca.
Meeting Highlights

- TFC’s 256th Meeting was held November 28-29 at the Holiday Inn Toronto International Airport Hotel and Conference Centre.

- A national turkey marketing campaign co-funded by producers and processors was approved with Zeno Group Inc. being named as the agency of record to launch and run the campaign. Stay tuned for more details.

- The 2019 preliminary budget was approved.

- 2018/19 Quota Allocation amendments were approved.

- The 2019/20 preliminary Quota allocation was set at current levels pending release and examination of January 1, 2019 stocks.

- The Turkey Load Out amendments were approved with a new implementation date of January 1, 2019.

Thank you for your contribution...

TFC Chair Darren Ference congratulated Executive Services Administrator Lorna Morris on her 25th anniversary with TFC.

Finance Administrator Mabel Seto was wished a bon voyage after 12 years with TFC as she prepares to move overseas.

TFC appreciates the twelve years of Wayne Urbonas’ service as an Alternate Director representing CPEPC and as a participant in many TFC committees, most notably the Research and the On-Farm Programs Committees.

TFC thanks BC Alternate Director Les Burm as he finishes five years on the Board, in addition to 20 years of service on the Hazard Analysis Critical Control Point / Live Production Committee.
### Upcoming Events

**2019 TFC Meeting Dates**

- Poultry Industry Council (PIC) Science in the Pub  
  January 21, 2019 - Guelph, ON
- Canada’s Agriculture Day  
  February 12, 2019 - Ottawa, ON
- International Poultry and Production Expo  
  February 12-14, 2019 - Atlanta, Georgia
- 9th Annual Canadian Agri-Food Policy Conference  
  February 13-15, 2019 - Ottawa, ON
- Western Poultry Conference  
  February 25-26, 2019 - Red Deer, AB

**Canadian Federation of Agriculture (CFA) Annual General Meeting**  
February 27-March 1, 2019 - Ottawa, ON

**4th Annual BC Poultry Conference**  
February 28-March 1, 2019 - Vancouver, BC

**2019 Saskatchewan Poultry Industry Conference**  
March 13-14, 2019 - Saskatoon, SK

**National Poultry Show**  
April 3-4, 2019 - London, ON

**2019 Provincial Annual Meetings**

- Alberta Turkey Producers (ATP)  
  February 26, 2019 - Red Deer, AB
- British Columbia Turkey Marketing Board (BCTMB)  
  February 28, 2019 - Vancouver, BC
- Turkey Farmers of Nova Scotia (TFNS)  
  March 6, 2019 - Greenwich, NS
- Manitoba Turkey Producers (MTP) 50th  
  March 13, 2019 - Headingley, MB
- Turkey Farmers of Saskatchewan (TFS)  
  March 14, 2019 - Saskatoon, SK
- Turkey Farmers of Ontario (TFO)  
  April 2, 2019 - London, ON
- Les Éleveurs de volailles du Québec (ÉVQ)  
  April 16-17, 2019 - Saint-Hyacinthe, QC
- Turkey Farmers of New Brunswick (TFNB)  
  April 25, 2019 - Fredericton, NB