

## Message from Phil Boyd



Greetings and Season's best to everyone;

This is my final note to participants in the Canadian turkey sector, and a farewell. I am retiring from the Turkey Farmers of Canada (TFC) at the end of December. Although unusual, I wanted to write a brief article for this last issue of 2025.

TFC is a unique organization, as are its member provincial marketing boards, and its trade association members. It has been my good fortune to have been a part of this organization. And its great to welcome Adam Power to the fray as our new Executive Director; congratulations and every success to him (see *TFC Staff Update*).

I especially want to acknowledge the Directors current and past for the difficult task they take on as they are appointed to the TFC Board. Theirs is not an easy task by any stretch and is often thankless and I think at times a bit underappreciated. TFC has had strong Executive Committees, elected from the Board, over time. Different challenges need different skill sets from the elected leadership. Our successive Executive Committees have met the tasks. It has been a terrific experience working with and learning from Board members and the leadership.

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# Message from Phil Boyd

At a personal level, I have been the mix of so many interesting, challenging, difficult and rewarding circumstances that exist in the world of national supply management marketing plans. And have had the opportunity to work with colleagues from other national supply management organizations, other national farm organizations, including the Canadian Federation of Agriculture, hard working public servants from AAFC, to the CFIA, to GAC, to CBSA, to the FPCC. Remarkable, just remarkable.

I owe such a debt of gratitude to our farmers, our industry players, many from the groups listed above, it is difficult to explain. My office colleagues, since the start, have been wonderfully supportive of the work we have done for the TFC and its membership.

Finally, a word about supply management - it is worth fighting for - the public and political support has been nurtured along through one international trade negotiation after another and through public debate and through years of antagonistic views that seemingly have not changed. These challenges will continue – the fight is worth it in order to maintain a marketing system that is unique in the world and that works so well.

TFC has been good to me and our household. I am grateful. From our household to yours accept our very best wishes for the Holiday Season and for 2026.

Thank you.



## TFC 284<sup>th</sup> Business Meeting

The Turkey Farmers of Canada's 284<sup>th</sup> General Business Meeting took place December 3-4, 2025, in Toronto, Ontario.

Highlights of the 284<sup>th</sup> meeting include:

- Darren Ference, Chair, provided an update on the Executive Committee activities since the last meeting, including bi-weekly meetings, participation in key sector and international meetings, monitoring CUSMA consultations, and engagement with CPEP and the Farm Products Council of Canada. D. Ference welcomed Adam Power, as TFC's new Executive Director and recognized Phil Boyd on his retirement.
- Zeno Group presented highlights of the Think Turkey national marketing campaign, including current performance, the 2026 holiday program, and 2026 strategy. Discussion included positive feedback on the Tim Hortons campaign.
- A review of the Turkey Market Advisory Committee (TMAC) report and Turkey Market Review.
- The preliminary commercial allocation for the 2026/2027 Control Period was set at 134,000,000 kg with a further review by TMAC and Directors following the release of January 1<sup>st</sup> stocks.
- TFC Directors approved changes to the control period calendar; further details on this change follow this update.
- Updates on the On-Farm Programs Committee, Flock and Animal Welfare, and Research Committee. Including vaccination considerations and trials (vaccine types, species currently vaccinated, and restrictions), and that the Turkey Industry Antimicrobial Use Strategy Survey remains open (see On-Farm Programs report).
- Reports on trade, and corporate communications and public affairs, touching on details on SM5 supply management work and U.S. Trade implications and CUSMA.

# Control Period Calendar Change

At their December meeting, the TFC Directors approved changes to the control period calendar to start the week of July 1 and to end the last Saturday of June the following year. The first 12-month period under the new schedule will run from Sunday, June 27, 2027, to Saturday, June 24, 2028. To bridge the current May to April control period and new schedules, a transitional 14-month control period will run from Sunday, April 26, 2026, to Saturday June 26, 2027.

## Considerations

- Under the current May to April schedule, the quota is set late November/early December to allow adequate time before the control period starts. Quota setting requires multiple forecasts, with Christmas sales being possibly the most difficult.
- Currently, Christmas forecasts must be made for both the current year, and the upcoming control period. Christmas disappearance directly impacts stock levels, which impacts the production required for the upcoming control period.
- Shifting the control period by two months will make it possible to set the quota after the first Christmas is known, making the production requirement for the upcoming control period clearer.

In developing its recommendation for a 14-month control period, the TFC Supply Policy Committee (SPC) analyzed the consequences of this change. To ensure that normal production and supply patterns are not disrupted, the TFC Board of Directors also approved a list of one-time adjustments.

## Adjustment to Commercial Allocation for 14-Month Control Period

To arrive at a Commercial Allocation adjustment, the SPC noted that there are distinct seasonal production patterns by province. Taking those patterns into account and to allow provincial industries to carry on business, in 2026/2027, each province's 12-month commercial allocation will be increased by its five-year average of May-June production as a % of control period production.

At the TFC December meeting, the TFC Directors agreed that for a 12-month period, a quota of 134,000,000 kg is required. Considering May-June production patterns, the following has been allocated.

Province	26/27 Allocation (12 months)	5-Year Avg May-Jun Production	Additional Allocation for 13th and 14th Month	14-Month 26/27 Allocation
	a	b	c=a*b	d=a+c
<b>BC</b>	<b>17,656,236</b>	<b>16.963%</b>	<b>2,995,018</b>	<b>20,651,254</b>
<b>AB</b>	<b>12,733,470</b>	<b>15.791%</b>	<b>2,010,793</b>	<b>14,744,263</b>
<b>SK</b>	<b>4,587,404</b>	<b>13.950%</b>	<b>639,942</b>	<b>5,227,346</b>
<b>MB</b>	<b>8,388,263</b>	<b>22.915%</b>	<b>1,922,207</b>	<b>10,310,470</b>
<b>ON</b>	<b>53,600,000</b>	<b>16.925%</b>	<b>9,072,025</b>	<b>62,672,025</b>
<b>QC</b>	<b>30,050,107</b>	<b>16.892%</b>	<b>5,076,097</b>	<b>35,126,204</b>
<b>NB</b>	<b>3,099,132</b>	<b>16.648%</b>	<b>515,953</b>	<b>3,615,085</b>
<b>NS</b>	<b>3,885,388</b>	<b>19.698%</b>	<b>765,334</b>	<b>4,650,722</b>
<b>CAN</b>	<b>134,000,000</b>	<b>17.162%</b>	<b>22,997,369</b>	<b>156,997,369</b>

## Next Steps

The TFC is working to implement this adjustment in a way that avoids disruption to normal production, supply, and business patterns. Once the transitional control period ends, the adjusted schedule is expected to improve quota setting.

# National Marketing Campaign

## Thanksgiving Results

Think Turkey™ / Pensez Dindon™ focused on Canadian pride to encourage shoppers to buy Canadian turkey and support Canadian farmers at Thanksgiving with ads on TV, digital, social, and owned channels. Think Turkey also amplified promotion of the Tim Hortons limited-time Thanksgiving Stack, made with 100% Canadian turkey, which sold at more than 4,000 locations across Canada. The seasonal campaign had impressive results, including record-breaking visits to ThinkTurkey.ca, demonstrating strong growth in consideration for turkey this Thanksgiving.

## Encouraging Canadians to Get Active and Give Back



Leading into the holidays, Think Turkey extended its You Turkey platform with the Wishbone Challenge, encouraging Canadians to get active while supporting holiday meals for those in need.

Participants could join the challenge on Strava, Canada's #1 fitness app, and log 500 minutes of activity to earn their Wishbone badge. Each workout contributed to Think Turkey's goal of 1 million active hours for a total combined donation of \$20,000 to Food Banks Canada and Moisson Québec, supporting the industry's commitment to fighting food insecurity. Read the news release: [www.turkeyfarmersofcanada.ca/media-room/news-releases/](http://www.turkeyfarmersofcanada.ca/media-room/news-releases/).

## Helping Canadians Savour the Holidays

For the holidays, Think Turkey introduced the You Holiday, You Turkey creative, featuring Canadian turkey in holiday meal settings. Advertising ran across TV, online video, social media, and Think Turkey's channels. As well, Chef partners Haan Palcu-Chang, Frédérique Lachance-Brulotte, and Raj Thandhi shared simple turkey recipes and cooking tips on social media, as a resource for both new and experienced hosts to prepare turkey.

An integrated program targeted Canadians searching for holiday food ideas and directed them to the Holiday hub for turkey recipes and preparation information.

At retail, Think Turkey launched in-store and online ads with Sobeys, including a new Scene+ Points offer, rewarding shoppers who picked up Canadian turkey for their holiday gatherings.

**YOU HOLIDAY,  
YOU TURKEY.**

THINK TURKEY™

# Market Insights

Compared to 2024, year-to-date (January–October) domestic disappearance of all turkey decreased by 9.1% (9.5 mkg) to 94.8 mkg. The decline was driven primarily by whole bird, while domestic disappearance of breast meat only decreased by 0.7%.

Total opening stocks on January 1, 2025, were 18.9 mkg, an increase of 1.3 mkg from the previous year. Apart from January and February, stocks have been consistently lower than last year, reaching a peak on August 1<sup>st</sup>, when they were 11.9 mkg lower than 2024. Given the current allocation of 129 mkg, stock levels have declined as a portion of consumption has been facilitated by reduced stocks.

U.S. breast meat prices have risen considerably over the last year, starting at \$7.06/kg (CDN) in the first week of January and achieving a price of \$22.42/kg by the last week of November. This is a historical high, with the previous highest price of \$20.21/kg occurring in 2022. Unlike 2022, upward pressure is also being exerted on thighs, wings, and drums, although to smaller degree. These prices contributed to reduced demand for imports, which were at a 5-year low until August. Since then, record volumes of imports have been coming in from Poland.

Feature prices for turkey during Thanksgiving and Christmas were mixed this year compared to last year. As shown in Table 1, which outlines average prices for key whole bird and roast sizes during Thanksgiving, the last two weeks of November, and the first week of December, unit prices for 3-5 kg and 5-7 kg turkeys increased compared to 2024, while prices for 7-9 kg turkeys declined. However, there appears to be a shift away from \$/unit pricing towards traditional 'Any Weight' \$/lb pricing, making that category the most important, and compared to 2024 it has declined by about \$1.

Table 1: Average Feature Prices for Turkey Products at Key Weight Ranges for Thanksgiving, to the First Week of December

Product	Unit or kg	Size Range		2024	2025
		(kg)			
Whole	\$/Unit	3 to 5	\$21.00	\$23.75	
		5 to 7	\$23.67	\$25.00	
		7 to 9	\$32.33	\$30.75	
		Over 9	\$39.33	N/A	
	\$/lb	Any weight	\$2.52	\$2.44	
		3 to 5	\$1.93	\$2.56	
		5 to 7	\$2.38	\$2.56	
		7 to 9	\$2.99	\$2.99	
		Over 9	\$2.49	\$2.99	
Roast	\$/Unit	1.0	\$13.16	\$15.66	
		1.5	\$18.82	\$20.99	

Source: Constructed by TFC using collected sales prices from flyers

# Corporate Communications

## Government Update

The 2025 Federal Budget was released and focused on building economic stability, with the government's key priorities being strengthening Canada's supply chains, encouraging innovation, and supporting rural and regional economic growth. For agriculture, the budget mentions moderating spending and making improvements to operational efficiency across government departments. This will impact Agriculture and Agri-Food Canada (AAFC) by focusing more on its core priorities, streamlining scientific activities, and increasing use of technology and automation. One point to note, is support for the CFIA to modernize trade systems and expand market access for Canadian agri-food and seafood sectors.

## SM5 Supply Management Campaign



A supply management campaign by the SM5 launched on November 7<sup>th</sup> and is designed to engage Canadian consumers aged 18 to 34 to raise awareness of the important role Canada's supply-managed farmers play in the Canadian food system. This is a collaborative effort with Dairy Farmers of Canada, Chicken Farmers of Canada, Egg Farmers of Canada, Turkey Farmers of Canada, and the Canadian Hatching Egg Producers.

The campaign highlights the message to "Choose Canadian" and showcases how supply-managed farmers provide Canadians with a steady supply of domestic food produced to the high national standards. The campaign builds on the current pride in buying local food and introduces a unique attention-grabbing theme called "The Canadian Food Guardians" to engage younger audiences on social media.

The campaign will run across Meta, YouTube, and TikTok from November through December 2025, and a new phase in early 2026 with information gathered through phase 1.

# Trade Update



## Ongoing Trade Negotiations with Canada

The Canadian Government is exploring new trade agreements to diversify Canada's trade portfolio and to decrease reliance on the U.S., as the threat of tariffs remains:

- Canada–Thailand Free Trade Agreement: As of November 2025, formal negotiations have been initiated.
- Canada–Philippines Free Trade Agreement: As of November 5, 2025, Canada issued a Notice of Intent to start FTA negotiations with the Philippines.
- Canada and Mercosur: As of 2025, talks have resumed with Mercosur (South American trade bloc formed in 1991 by Argentina, Brazil, Paraguay, and Uruguay) since stalling negotiations in 2021. In August 2025, Ottawa and Brazil announced that senior trade officials would meet, with a first meeting of chief negotiators for early October.
- Canada and India: Both countries have agreed to restart negotiations for a Comprehensive Economic Partnership Agreement (CEPA), after a hiatus. The decision was announced in late November 2025.
- Canada–Indonesia Comprehensive Economic Partnership Agreement: Signed September 24, 2025 and pending full implementation. The vast majority of goods between countries will now enter tariff free, with the exception of supply-managed products.

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# Trade Update (cont'd)

None of these agreements pose a current risk to increased imports of turkey meat, but their negotiations can shape the narrative around supply management both internationally and domestically. TFC and its SM5 partners continue to monitor and advocate for supply management.

## **Canada – U.S. Trade Tariffs**

As of December 2025, there are no additional tariffs on products in the agricultural or supply management sector. However, the U.S. continues to uphold tariffs on steel & aluminum (50%), passenger vehicles & auto parts (25%), and certain timber, lumber & wood products (10% to 25%). These tariffs continue to be used by the U.S. as bargaining power during the upcoming 2026 CUSMA review process.

## **CUSMA Review**

The CUSMA review process requires Canada, the U.S., and Mexico to jointly review the agreement six years after its entry into force, with the first review occurring in 2026. During this process, each country conducts domestic consultations and then formally indicates whether it supports extending the agreement for an additional 16-year term. If all agree, CUSMA is extended and the next review takes place six years later; if one or more parties do not agree, the agreement remains in force but enters a period of annual reviews and a 10-year countdown to potential termination. The review does not automatically trigger renegotiation but creates a sensitive political window in which parties may raise unresolved trade issues and seek concessions, posing particular risks for agriculture and supply managed sectors even without formal changes to the agreement.

Broadly, the U.S. agriculture industry is in support of renewing CUSMA and seeks a do no harm approach, where seeking concessions are less important than a renewed agreement. However, the National Turkey Federation (NTF) and the U.S. Poultry and Egg Export Council (USAPEEC) have raised concerns over market access for turkey products into Canada. In response, TFC will provide a second submission in response to the NTF and USAPEEC to support the interdepartmental efforts during the CUSMA review process.

## **World Trade Organization**

At the WTO Committee on Agriculture in Special Session meeting on November 21, the Chair of the agriculture negotiations, Ambassador Ali Sarfraz Hussain of Pakistan, expressed cautious optimism that Members could put together an agriculture package for the WTO's 14<sup>th</sup> Ministerial Conference (MC14) in Yaoundé, Cameroon. The meeting identified several broadly supported ideas that could inform further negotiations: domestic support reform, Public Stockholding (PSH) and Special Safeguard Mechanism (SSM), market access, export restrictions and transparency, and food security deliverables.

Despite this progress, major differences remain. Pressure to reform agricultural rules has increased, driven in part by tariff-focused trade policies that undermined confidence in the multilateral system. Members increasingly agree that MC14 should advance meaningful WTO reform, potentially including future work on agriculture, though competing priorities risk diluting outcomes without strong political leadership.

# On-Farm Programs

## Wave Eight of Highly Pathogenic Avian Influenza Continues in Canada

*There is evidence of high levels of virus circulation in wild birds and high contamination of the environment. Continue to practice strong biosecurity on your farm.*

Wave 8 of Highly Pathogenic Avian Influenza (HPAI) started in Canada on September 8. Detections peaked in late October and continued to maintain into November and December. There have been 90 total detections, with 64 commercial flocks, 27 involving turkeys, and 26 non-commercial, across British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, and Quebec. Detections were concentrated in British Columbia and Alberta. The current wave is tracking like previous years with a slightly earlier peak. Fall migration typically results in more cases than spring.

Correspondingly in the U.S., detections started in late August and exceeded 230 by December 15, with roughly half involving commercial flocks. Commercial cases were mainly in Midwest turkey flocks (Dakotas, Minnesota, Michigan) and duck flocks in Indiana, while backyard cases were concentrated in the Northwest and Midwest, particularly Indiana. South America reported occasional backyard detections in Argentina, Guatemala, and Colombia.

Europe has seen a significant rise in detections this season, with outbreaks in Germany, France (including vaccinated ducks), Italy, the Netherlands, and Poland. This follows a sharp increase in HPAI H5 in wild birds, which is four times higher than last year and the highest since at least 2016. Nearly all detections were a new sub-lineage, which differs from the genotype that is dominant in Canada, raising concerns about the impact to birds in Canada as well as reassortment. Atlantic Canada has previously served as an entry point for European HPAI H5 viruses via the trans-Atlantic migratory pathways of seabirds and waterfowl.

As the risk and impacts of HPAI continue in Canada for another year, TFC maintains its participation in initiatives related to exploring the use of vaccination as a tool against HPAI.

## Provide Your Input on The Turkey Industry Antimicrobial Use Strategy

The deadline to complete survey on the turkey industry antimicrobial use strategy has been extended and it is an important opportunity to provide your feedback and have a say in the AMU Strategy and how the TFC Board considers next steps.

More information and the survey can be accessed at: [www.surveymonkey.com/r/tfc-amu-survey-2025](http://www.surveymonkey.com/r/tfc-amu-survey-2025).

# CFA Update

Submitted by Canadian Federation of Agriculture

## Joint Letter from Agriculture and Agri-Food Sector on Supporting the Renewal of CUSMA

On December 8th, a joint letter was sent to the Prime Minister, as well as to the Ministers of Agriculture and Agri-Food, Foreign Affairs, International Trade as well as the Minister responsible for Canada-U.S. Trade, Inter-governmental Affairs, Internal Trade and One Canadian Economy.

This joint letter included 98 signatories from organizations across Canada, including TFC, and expressed unanimous support for the full 16-year renewal of CUSMA. Specifically, the letter recommended to maintain:

- The agreement's Sanitary and Phytosanitary provisions, which have improved transparency and ensured science-based treatment of agricultural products.
- Science-based regulatory cooperation, which is critical to ensuring timely access to agricultural innovations.
- The Chapter 31 dispute settlement provisions in the Agreement which provide a mechanism for resolving barriers that otherwise disrupt market stability and growth.

The full text of the letter is [available here](#).

## Grocery Code of Conduct Finalizes Governance Framework - Set to be Fully Operational in January 2026

The Office of the Grocery Sector Code of Conduct (OGSCC) has finalized the governance framework for the Canada Grocery Code, marking a key milestone in the push for fairer retail-supplier relations nationwide. With the Dispute Resolution Management Process (DRMP) officially in place, and set to go live Jan. 1, 2026, the OGSCC has launched a formal recruitment campaign for retailers, manufacturers, wholesalers, distributors and primary producers across the grocery value chain.

Over 100 organizations already joined during the transitional period, having helped shape the Code's design and contributed to its early formation. CFA is proud to see the Code come to fruition, having been involved in its development since its inception. We believe the Code will usher in a new era for relations between buyers and suppliers in Canada.

## CFA at COP 30

CFA President Keith Currie attended the COP 30 Conference in Brazil from November 14-20, where he participated in a range of panels and events focused on climate action, agricultural resilience, sustainable and climate-smart agriculture, sustainable trade, and the role of farmers in addressing climate change.



## CFA Hill Day 2025

The CFA Board of Directors held a series of meetings with MPs, Senators and decision-makers during the Annual CFA Hill Day. This year CFA held approximately 40 meetings throughout the day.



High-level messaging used throughout the day can be found on the leave-behind document that was provided in each meeting, which can be [viewed here](#). CFA held our Hill Day Reception that evening at the Marriott Hotel. The reception had over 200 attendees with many MPs and Senators appearing.

# TFC Staff Update



## Executive Director Announcement

Turkey Farmers of Canada is pleased to announce the appointment of Adam Power as our new Executive Director.

Adam has served on the TFC Board since 2018 and brings extensive experience in the Canadian poultry sector, including leadership roles within the processing industry. His insight, leadership, and long-standing commitment to the sector position him well to guide TFC through its next chapter.

We look forward to the expertise and vision he will bring to the organization.

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## TFC Staff Milestones



Phil Boyd, Cathy Lane, Adam Power



Adam Power, Caroline Gonano, Phil Boyd

TFC is pleased to recognize two TFC team members for their milestone with the agency. Thank you both for your dedication and for the meaningful contributions you continue to make to TFC.

- 25 Years - Cathy Lane: Thank you for your dedicated service and the vital support you continue to provide to TFC. Your long-standing commitment is greatly appreciated.
- 10 Years - Caroline Gonano: Congratulations on ten years of service and the valued contributions you continue to make to TFC.

# TFC Holiday Hours

Please note the TFC office will be closed from Wednesday, December 24, 2025, and will reopen on Monday, January 5, 2026. Senior staff will be available for urgent matters by phone or email.

Turkey Farmers of Canada wishes you a warm and joyful holiday season. Thank you for your ongoing collaboration throughout the year.

## Upcoming Meetings

International Poultry Council (IPC) Annual Meeting  
January 25-26, 2026  
Georgia, USA

The Future of Food Conference 2026  
February 10, 2026  
Ottawa, ON

National Turkey Federation (NTF) 2026 Annual Convention  
February 18-21, 2026  
Florida, USA

TFC 285<sup>th</sup> General Business Meeting and TFC 52<sup>nd</sup>  
Annual General Meeting  
March 25-26, 2026  
Ottawa, ON

World Trade Organization's (WTO) 14<sup>th</sup> Ministerial Conference (MC14)  
March 26-29, 2026  
Yaoundé Cameroon, Central Africa

TFC 286<sup>th</sup> General Business Meeting  
June 22-23, 2026  
Saskatoon, Saskatchewan



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