



National Marketing Campaign

We're giving Canadians even more reasons to Think Turkey™

Think Turkey™'s 2023 campaign focuses on the reasons to buy turkey - and this spring, the campaign gave Canadians FIVE new reasons to choose turkey.

1. Think Turkey™ Made Easter Easier
This year's Easter campaign delivered millions of impressions, increasing website traffic and views of delicious and easy turkey recipes.

2. Turkey is Making the Grill Sing this BBQ Season
Building on the momentum of 2021 and 2022, Think Turkey™ is inspiring Canadians to grill more turkey this season through catchy lyrics and memorable music. The TV campaign has run across premium sports channels and events.



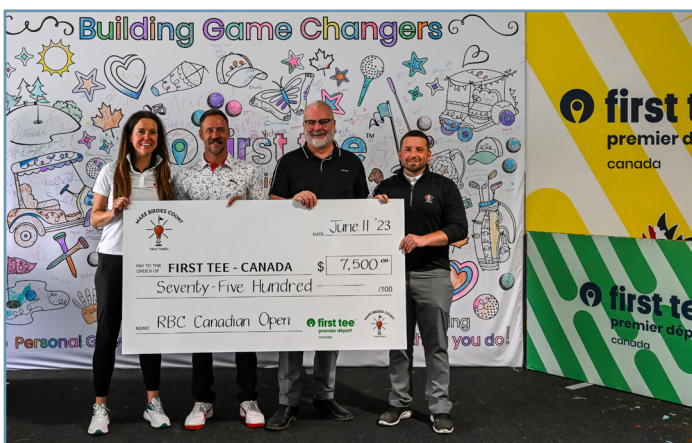
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National Marketing Campaign

- 3. Celebrity Chef Grills Up Turkey on Popular Quebec Show 5 à 7**
Think Turkey™ appeared on this popular sports show in Quebec in partnership with [BBQ Quebec](#), and featured two delicious grilled turkey recipes.
- 4. Think Turkey™ is Giving Shoppers More Reasons to Buy In-Store**
Think Turkey™ was in grocery stores with creative Vegetables Love Turkey shelf danglers.
- 5. A Delicious New Partnership: Think Turkey™ is Making Birdies Count**



Think Turkey™ was an Official Partner for the RBC Canadian Open!

During the RBC Canadian Open, which welcomed 130,000 visitors between June 8th and 11th, Think Turkey™ teed up the first ever Make Birdies Count challenge, calling on players to make ‘turkeys,’ (known as three birdies in a row – or better!) to benefit First Tee – Canada, a national organization focused on introducing the game of golf and its inherent values to young people, with a donation of up to \$15,000.



Recipes can be found at canadianturkey.ca/featured-recipes and provincial extensions.

Recipe videos can be found at canadianturkey.ca/videos.
Nutrition information is available at canadianturkey.ca/nutrition.

Sign up for Canadian Turkey’s Get Cooking with Canadian Turkey™ monthly e-Newsletter at canadianturkey.ca/e-newsletter.

TFC 274th Business Meeting

The Turkey Farmers of Canada's (TFC) 274th Meeting took place June 21st and 22nd in Charlottetown, PEI, following the Canadian Poultry and Egg Processors Council (CPEPC) Joint Poultry Sector Meetings and AGM earlier in the week.

Highlights of the 274th Meeting include:

- An Executive Committee report outlining Allocation Policy, advocacy work updates, and work on Avian influenza;
- An update from FPCC;
- An update from Zeno outlining summer plans for Think Turkey and campaign results to date;
- The Directors' update on the Allocation Policy Review, and the approval of a motion to develop the key principle components into a draft policy for review by the Directors;
- During the 2023/2024 Quota Regulation review, the quota for the 2023/2024 control period was modified to 141.5 mkg, a decrease from the initial volume of 144.0 mkg; and,
- As well as updates on On-Farms Programs, Trade, Corporate Communications and Government Relations.

Grains and Oilseeds Market Insights

The table below displays the actual Canadian and American production figures and prices for principal field crops in the 2021-2022 season and forecasts for the 2022-2023 and 2023-2024 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	US	CDN	Total	CDN	US	CDN	Total	CDN
Feed Grains												
Corn	383	15	398	\$ 312	349	15	363	\$ 305	388	14	402	\$ 255
Barley	3	7	10	\$ 432	4	10	14	\$ 410	4	10	14	\$ 350
Oats	1	3	4	\$ 565	1	5	6	\$ 340	1	4	5	\$ 325
Sorghum	11	0	11	\$ 293	5	0	5	\$ 361	9	0	9	\$ 254
Total	397	24	422		358	30	388		402	28	429	
Wheat (x.Durum)												
	44	19	63	\$ 271	43	28	72	\$ 400	44	30	74	\$ 370
Oilseeds												
Canola	1	14	15	\$ 1,075	2	18	20	\$ 840	2*	18	20	\$ 680
Soybeans	122	6	128	\$ 678	116	7	123	\$ 700	123	7	129	\$ 540
Soybean Meal	47	1	48	\$ 500	48	1	49	\$ 540	49	1	51	\$ 415
Total	170	21	191		166	26	192		174	26	200	

Sources:

Canada: Outlook for Principal Field Crops June 2023 (AAFC)

US: Feed Outlook, Oil crops Outlook and Wheat Data (Recent) for June 2023 (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

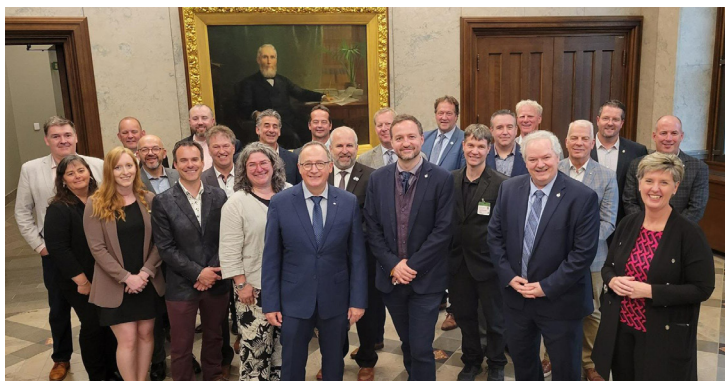
AAFC reports that supplies of most crops have returned to normal levels after the drop in 2021-2022 due to unstable growing conditions. Despite strong world demand, prices for most principal field crops for 2022-2023 are expected to drop from the previous season. For 2023-2024, prices will continue this downward trend as global supplies increase.

For the current season, Canadian production of most principal field crops increased between 5% (Soybeans) and 80% (Oats), although some crops are forecasted to increase between 20% and 40%. Prices are forecasted to decrease between 2% (Corn) and 40% (Oats), although there are exceptions, with wheat prices increasing by 48%. The 2023-2024 prices are projected to decline from the 2022-2023 prices by between 4%-30%.

While changes in US production of most principal field crops for 2022-2023 are forecasted to move in the same direction as Canadian crops, there are two main outliers. Soybeans are predicted to decrease by 4% rather than increase by 5%, while wheat production is anticipated to decrease by 1% rather than increase by 46%. This difference in wheat production between the two countries is largely accounted for by the poor wheat harvest in 2021-2022, as both countries experienced similar increases in wheat production for the 2023-2024 season. The US is forecast to see production growth of all principal field crops for the 2023-2024 season relative to 2022-2023, with sorghum almost doubling production.

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

Corporate Communications



Bloc Québécois Press Conference Attendees

TFC continues to monitor several Bills and government work. Most notably Bill C-282, an Act to amend the Department of Foreign Affairs, Trade and Development Act (supply management). C-282 passed the third reading with a vote of 262 Yeas to 51 Nays ([you can see the breakdown of votes here](#)). The Bloc Québécois held a press conference following the vote, together with representation from other parties, including Minister Bibeau and NDP Agriculture critic Alistair MacGregor. Provincially and nationally, representatives from all five supply-managed commodity groups were in attendance, including TFC staff.

On June 22nd, the Bill was introduced in the Senate, but further activity will only occur once the Senate returns in the fall. Senator A. Gerba is sponsoring this Bill in the Senate.

The SM5 also released a statement welcoming the passage of the Bill in the House and calling on Senators to [support the legislation](#).

TFC is also engaged in advocacy regarding Bill C-234, an Act to amend the Greenhouse Gas Pollution Pricing Act and the Agriculture Carbon Alliance (ACA). The ACA has produced several outreach materials in support of C-234 and will continue these efforts at the Senate level. More information is available on the ACA work at: agcarbonalliance.ca/vote-for-bill-c-234. TFC has also submitted a letter in support of Bill C-234.

Senator P. Dalphond spoke on Bill C-234 and the Bill was referred to the committee stage on June 13th, though the Senate did not pass it before the summer break. The Bill has been sent to the Agriculture and Forestry Committee and to the National Finance Committees.

Downtown Diner



Minister Bibeau speaking with TFC's rep. J. Paquet & Poultry Representatives



MP J. Barlow speaking with TFC's rep. J. Paquet

SM4 and TFC held Downtown Diner again this year on May 18th. Farmers and representatives from each commodity group met with key government stakeholders, local media, and members of the Ottawa public. Attendees were able to try food from each of the commodities. Jennifer Paquet from the ÉVQ attended to represent TFC along with TFC staff member Maegan MacKimmie.

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Corporate Communications

Visitors were encouraged to take a copy of The Farmers' Times—our take on The Hill Times—a popular newspaper among Parliamentarians. This year's publication features articles from each participating organization rooted in the theme of Canadian farmers for a sustainable future. These communication pieces also ran in Hill Times to further promote supply management.

The event was a success, with over 35 MPs and several Senators in attendance.

Federation of Canadian Municipalities Conference (FCM)



Prime Minister Justin Trudeau Speaking with TFC's rep. Matt Steele



FCM Panel Session held by the SM5

The FCM Conference and Trade Show took place from May 25th-28th in Toronto to speak with municipal leaders about supply management. This event is a joint effort amongst the national SM5 and includes several panel presentations on Canadian supply-managed farmers.

The SM5 had a booth activation with food from each commodity provided. Farmers and staff from the SM5, including Matt Steele, TFO for TFC, were present at the booth to converse with councillors, Mayors, and federal leaders. Matt Steele and other SM5 farmers had a quick opportunity to meet the Prime Minister at the event.

This year, two panel sessions were held by the SM5 during the FCM schedule, with farmers and academics sitting on both panels. Between the two panels, there were over 300 attendees with positive feedback on each panel.

Sustainability

Turkey Farmers of Canada undertook a screening Life Cycle Assessment (LCA) of the turkey sector to better understand the environmental and social performance of the turkey industry in Canada. Turkey farmers, breeders, hatcheries, the feed industry and processing sector from across Canada worked together to participate in this study. The LCA infographic will follow and you can also find it online: www.turkeyfarmersof-canada.ca/media/y3njp2cp/23-03-31_infographic.pdf.

SCREENING ENVIRONMENTAL AND SOCIAL LIFE CYCLE ASSESSMENT (LCA) OF CANADIAN TURKEY



Turkey Farmers of Canada undertook a screening Life Cycle Assessment (LCA) of the turkey sector to better understand the environmental and social performance of the turkey industry in Canada. Turkey farmers, breeders, hatcheries, the feed industry and processing sector from across Canada worked together to participate in this study.

Approach

LCA is an assessment method regulated by the International Organization for Standardization (ISO 14040/14044).

LCA can help uncover the relative contribution of life cycle stages, identify hotspots and areas of improvement, and through scenario analysis, identify pathways for improvement.

Intended Application



Understand how **current practices** contribute to the carbon footprint and the social performance of the turkey industry.

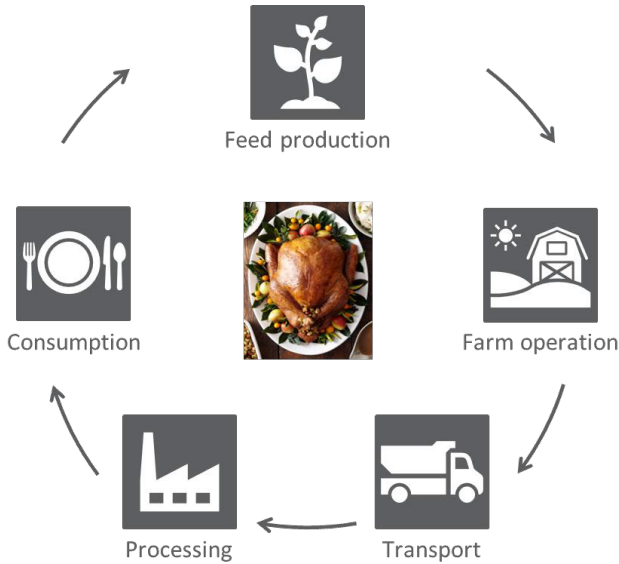


Identify opportunities for improvement to **help set realistic sustainability goals** for the future and target areas where the most change can be made.



Establish a baseline to **track the benefits** of the adoption of **best environmental and social practices** by producers in the future.

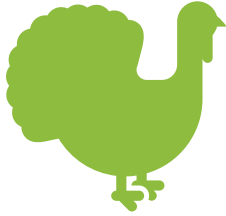
LCA methodology – a cradle to grave approach



Study commissioned by:



Environmental Life Cycle Assessment Results



1 kg eviscerated Canadian turkey emits 3.5 kg CO₂ eq

The largest contributors to emissions are:

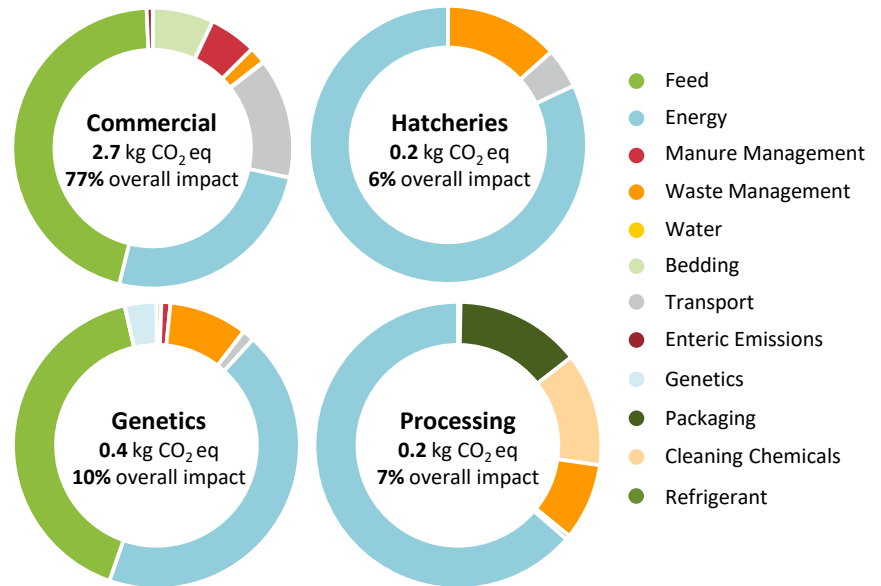
- 1. Feed**
Primarily from corn, wheat, and soybean meal and their energy and fertilization inputs.
- 2. Energy**
Electricity, heating, and diesel for on-farm equipment are the main sources.
- 3. Waste Management**
Landfilling of animal waste drives impact.

Annually, turkey consumption accounts for **13.3 kg CO₂ eq/year** or about **0.3%** of a typical consumer's total annual emissions.

This is equivalent to driving **53 km** in a passenger vehicle.



Global benchmarking indicated genetic selection and historically improved feed conversion ratios have kept the carbon footprint of Canadian turkey competitive with other poultry products.



A serving size of **100 g of eviscerated Canadian turkey emits 0.35 kg CO₂ eq**



75-100 g of cooked turkey is the typically recommended serving size for adults.



Social Life Cycle Assessment Results

Over 520+ turkey farmers contribute to the Canadian economy:



The turkey industry in Canada generates **\$4 billion in economic activity annually**



The turkey industry **also contributes over \$1.2 billion to Canada’s Gross Domestic Product (GDP), and generates \$400 million in annual farm sales**



Supporting **over 16,000 jobs** across rural and urban centres

In addition to the industry economic contribution, **the social performance of Canadian turkey producers** was assessed through over 30 indicators documenting on-farm adoption of best management practices (BMPs) with respect to 3 key areas:

Business Management

Results show that farmers actively seek out opportunities to learn and innovate. Most respondents are active in training with a particular focus on: biosecurity, animal welfare and On-Farm Food Safety. Opportunities remain to adopt strong managements practices including, strategic plans and written succession plans.

Animal Health and Care

Animal health and care is a long-standing priority for Canadian turkey farmers. Responses indicated a high adoption rate of practices to prevent and assess animal health issues. The sector needs to continuously work to maintain the current high standards of animal health and care.

99% of existing turkey farmers have been certified under the TFC On-Farm Programs, with new entrants undergoing the initial certification process.

Social Well-Being

Over half of respondents have hired labour on farm. The majority (75%) have adopted actions to improve working conditions by providing benefits to employees. Additionally, most respondents, including paid and family working on farm, take great care on issues related to Occupational Health and Safety (OHS). Given the current labour shortage situation, farmers need to continue to ensure their practices sets them apart as employers of choice.



For more information: info@tfc-edc.ca

The study was funded by



Trade

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 facilitate the chances of a positive outcome and avoid extending the ministerial when it takes place, the WTO intends to escalate the technical work between now and December. This is anticipated to result in:

- Text-based negotiations starting in July on reforming the WTO dispute settlement process, agriculture, and fisheries subsidies.
- A min-ministerial meeting between October and early November.
- Additional negotiations and narrowing of options by ambassadors posted in Geneva between now and the end of the year.

Also currently being discussed is general WTO reform, which includes procedural and operational reforms to improve how countries deliberate and perform day-to-day work.

The overall objective of intensifying the negotiations is to narrow down the decisions Ministers need to make in February 2024.

Regarding agriculture specifically, a priority will be given to food security and sustainability issues for developing countries (public stockholding of food [PSH], special safeguard [SSM]). Two other anticipated matters of importance are reining in export restrictions in agriculture, and transparency issues (e.g., better and more detailed reporting of domestic subsidies). Currently, WTO members are deadlocked on how to reduce overall domestic support levels, which is linked to the negotiations on market access. The thinking is that a greater focus on transparency issues will provide domestic support information on which more detailed negotiations can then take place.

CPTPP

On May 5, 2023, Ukraine formally requested to accede to the CPTPP. Ukraine is the 7th country to request accession, following the United Kingdom (UK), the People's Republic of China, Taiwan, Ecuador, Costa Rica, and Uruguay.

With all accession applications, Canada will work with other CPTPP members to evaluate the application and decide, by consensus, whether to commence negotiations with Ukraine. The CPTPP is designed for expansion through accessions and allows existing members the opportunity to secure new preferential access.

The only formal accession negotiations that have been concluded was with the United Kingdom (UK) on March 31, 2023. Of importance is no additional access for supply-managed commodities was provided through the accession process. The UK, like all other CPTPP countries, will be able to access the existing CPTPP tariff rate quotas (TRQs) that are currently in place once the accession agreement enters into force.

On-Farm Programs

Avian influenza

New detections of Avian Influenza, in domestic and wild birds, continue to be lower than levels from this time in 2022 in North America. Canada saw a cluster of cases in April in Quebec, as well as sporadic cases in Ontario and isolated cases in Alberta and British Columbia. South America continues to see occasional cases as well.

While detections of Avian Influenza (AI) slowed this spring into summer, work continued with the Canadian Food Inspection Agency (CFIA), in partnership with provinces and industry associations, to continue to build capacity for response efforts, considering lessons learned through the event.

At TFC, a Farmer AI Committee was established, with a representative from each province, to share information and will act as an avenue for providing practical feedback on developed communication materials. The Committee set several priority work items, which included cleaning and disinfection SOPs and a preparedness guidebook. The Guidebook incorporated details on the AI response in Canada and a farm-specific preparedness planning section with SOPs and other resources to get producers thinking about their farm-specific protocol if AI is detected on their farms. Committee members continue to be a valuable resource for practical information and support for other farmers.

Communication materials on biosecurity, one more general and one specific to barn entry biosecurity that consider some of the findings of the initial outbreak investigation have also been developed and circulated to Provincial Boards for distribution. These findings are also being considered in the ongoing TFC On-Farm Food Safety Program[®] review.

Third-party Audits of the TFC Flock Care Program[®]

Third-party audits were initiated in 2017 to meet the need for transparency of implementation of the TFC FCP to retailers, restaurants, and consumers to further provide assurance that turkeys in Canada are raised humanely and that the TFC FCP is an effective national standard to represent animal care on-farm.

The 2022 report of the third-party audits for the TFC Flock Care Program[®] (FCP) has been received from the third-party audit provider. Based on the 2022 audit program results, it was concluded that the National Flock Care Program had been implemented effectively. Animal care measures were consistently applied, and producers demonstrated compliance and continuous improvement to the program requirements, with support from Provincial Board representatives.

Verification audits were done on a statistically valid random sample of turkey farms across all provinces, in addition to the annual audits required to maintain a producer's certification under the TFC FCP. Qualified auditors from NSF Canada Agricultural Certification Company conducted audits.

The work of the selected farmers and the Provincial Boards is commended for the planning and execution of the third-party audits.

Audits for the 2023 round will be scheduled in combination with Provincial Boards and the third-party auditors.

On-Farm Programs (cont.)

Canadian Integrated Program for Antimicrobial Resistance Surveillance (CIPARS)

CIPARS is a national integrated surveillance program coordinated by the Public Health Agency of Canada in collaboration with federal, provincial, and industry partners. CIPARS collects, analyses, and communicates trends in antimicrobial use and in antimicrobial resistance for select bacteria from humans, animals, and retail meat across Canada.

TFC received the preliminary results for the 2022 Canadian Integrated Program for Antimicrobial Resistance Surveillance (CIPARS) Turkey Industry Report for farm surveillance covering animal health, antimicrobial use (AMU), antimicrobial resistance (AMR) and pathogen recovery. Due to AI, in 2022, there were fewer than expected flocks sampled in certain provinces.

The preliminary results show that the total nDDDvetCA/1,000 turkey-days at risk decreased by 63% between 2021 and 2022. Category II, III, and uncategorized antimicrobials decreased by 69%, 84% and 45%, respectively. Integrating AMU and AMR, E. coli isolates resistant to 3 or more classes of antimicrobials (≥ 3 multiclass resistance) continued to drop (-7%) while ≥ 3 multiclass resistance in Salmonella was stable and while a 2% increase in ≥ 3 multiclass resistance in Campylobacter was observed.

CIPARS sampling is an important tool to track the progress of the turkey industry AMU strategy.

Turkey Industry Antimicrobial Use Strategy

The strategy is in response to the increased global attention to the threat of antimicrobial resistance (AMR) and works to maintain and build consumer confidence in Canadian turkey and meet the needs of processors, restaurants, and retailers while maintaining effective treatment options. The strategy focuses on the elimination of the preventive use of antibiotics important to human medicine.

TFC Update

Summer Hours

The Turkey Farmers of Canada office is operating on summer hours as of July 4th:

8:00 a.m. – 4:30 p.m. (Monday – Thursday)

8:30 a.m. – noon (Friday)

Senior staff will monitor emails and be available by cell phone after early closures.

Upcoming Meetings

CFA Summer Board Meeting and FPT Roundtable
Fredericton, New Brunswick
July 18-19, 2023

20th Anniversary of Food Day Canada
Nation-wide
August 5, 2023

North American European Union (NA/EU) Farm Leaders'
Meeting
Charlottetown, PEI
September 12-14, 2023

TFC 275th General Business Meeting
Toronto, Ontario
September 19, 2023

Canadian Centre for Food Integrity (CCFI) Public Trust
Summit 2023
Toronto, Ontario
October 17-18, 2023

TFC 276th General Business Meeting
Toronto (TBD)
November 29-30, 2023



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