



National Marketing Campaign

Think Turkey™ Raises A Drumstick To The Holidays

Now coming to the end of its third year, our national marketing program continues to engage and inspire primary meal planners across the nation to Think Turkey – raising awareness of the benefits of eating turkey all year.

A Dream Thanksgiving for Canadians

For Thanksgiving, Canadians were able to gather with their loved ones more safely and the dining table called for something extra special.

To inspire Canadians to place turkey on the table, Think Turkey partnered with influencers, chefs, and celebrities.

Think Turkey developed “Dream Thanksgiving” table settings, each with a different theme, a beautifully designed and styled table and its own custom curated Thanksgiving dinner menu, courtesy of celebrity Chef Lynn Crawford. For a Thanksgiving to remember, a contest, open to social followers and newsletter subscribers from across Canada, gave winners the chance to host their own “Dream Thanksgiving” with a fully catered menu featuring the Chef’s recipes and décor to replicate one of the three table settings.

Inside this issue:

TFC 268th Meeting
Page 3

Market Insights
Page 4

Corporate Communications
Page 6

Trade Update
Page 7

On-Farms Programs
Page 8

CFA Update
Page 9

CPRC Update
Page 10

Upcoming Meetings
Page 12

Wishing you could go home for the holidays?

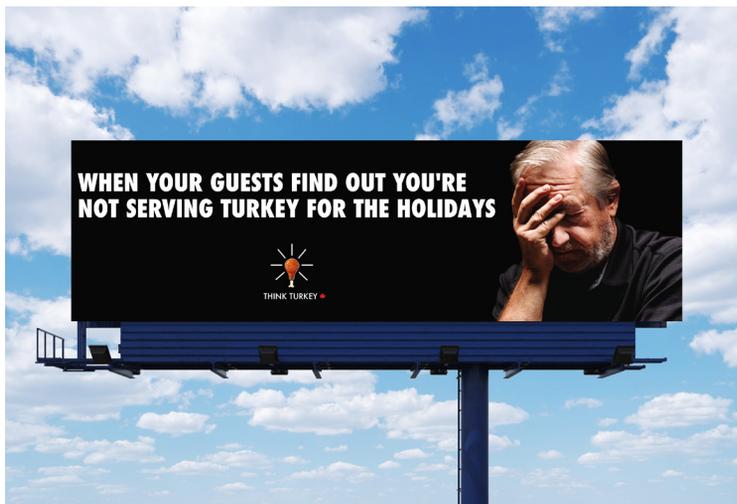
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Win a trip home courtesy of Think Turkey & VIA Rail

National Marketing Campaign continued

It's not the Holidays if it's not Turkey!



As we enter Holiday festivities, the challenge has been for turkey to return to its rightful place, as the star of the table. On top of ongoing efforts, this special time of the year called for something out of the ordinary, reminding Canadians that the Holidays are turkey time!

To break through the Holiday noise, the Think Turkey campaign will be leaning into comedy through light humour and hyperbole that comes to life across all channels.

To connect Canadians, the Think Turkey campaign has partnered with VIA Rail to launch a contest to win a trip home for seven winners and a guest to bring loved ones home for the holidays.

Think Turkey will reinforce turkey's place at the holiday table, reminding consumers of the comfort classic traditions bring, starting with the aroma of turkey cooking in the oven, warning hosts through humour that guests will be very disappointed if turkey is not served.

Watch for more Think Turkey updates.



Tasty. Nutritious. Versatile.

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 268th Business Meeting Notes

The Turkey Farmers of Canada's (TFC) 268th Meeting took place November 24th-25th in Edmonton Alberta, under a hybrid model with the Board of Directors in person and alternate directors, managers and observers joining via Zoom.

Highlights include:

At the TFC 268th Meeting, TFC Chair Darren Ference presented an update on the Executive activities over the last few months, including an introduction to new TFC Executive Member Jelmer Wiersma, and a thank you to exiting Executive Member Brian Ricker of Ontario.

Ron Bonnett provided an update from Farm Products Council of Canada (FPCC), including the approval of the Complaint Committee's recommendation to dismiss the CPEPC complaint to FPCC. The Complaint report, in English and French, will be available on the FPCC website.

Other files the Directors focused on included:

- An update from Zeno on the national campaign, focusing on Thanksgiving results and upcoming plans for the Holidays, including the Via Rail contest,
- The Turkey Market Review (TMR) and the Turkey Market Advisory Committee (TMAC) report. As reflected in the TMAC report, the TMR arrived at a commercial quota of 143 million kilograms for the 2022/2023 Control Period,
- The TFC Allocation Policy Review focusing on the Committee report,
- Updates were also provided on the on-farm programs, corporate and consumer communications, and trade files,
- In light of the flood disaster in British Columbia earlier in November, the Board also approved an interprovincial quota lease in order to ensure production compromised in BC would be produced so that supply could be maintained through the balance of 2021/2022.

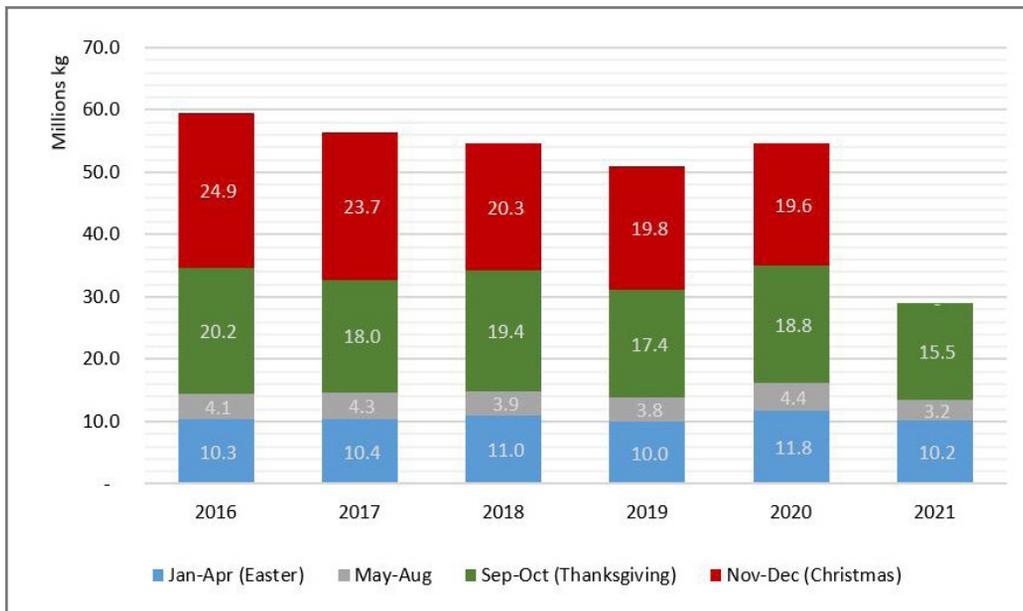
TFC Donation to the BCAC

In times of disaster, communities come together to assist each other. TFC donated \$35,000 to the BC Agriculture Council (BCAC) Emergency Fund for Farmers, to help support producers in British Columbia affected by the severe weather events. The TFC donation was made under the umbrella of the Wishbone Project. Read the full update [here](#).

Market Insights

Although COVID restrictions are slowly being lifted as 2021 ends, the pandemic is still having an effect on the turkey market and the food industry as a whole. While Restaurants Canada reports that foodservice sales are beginning to return to pre-COVID values, rising feed prices, labour shortages and other supply chain disruptions have all lead to increasing prices and lower consumption for all proteins, including turkey. *Figure 1,* contains annual grocery sales of all turkey products in Canada . Over this same period, average retail sales' prices have been notably higher.

Figure 1: Annual Grocery (Retail) Sales Volume (kg) of All Turkey Product Categories in Canada



Source: Nielsen Canada

Note: 2021 Data does not include Christmas Sales

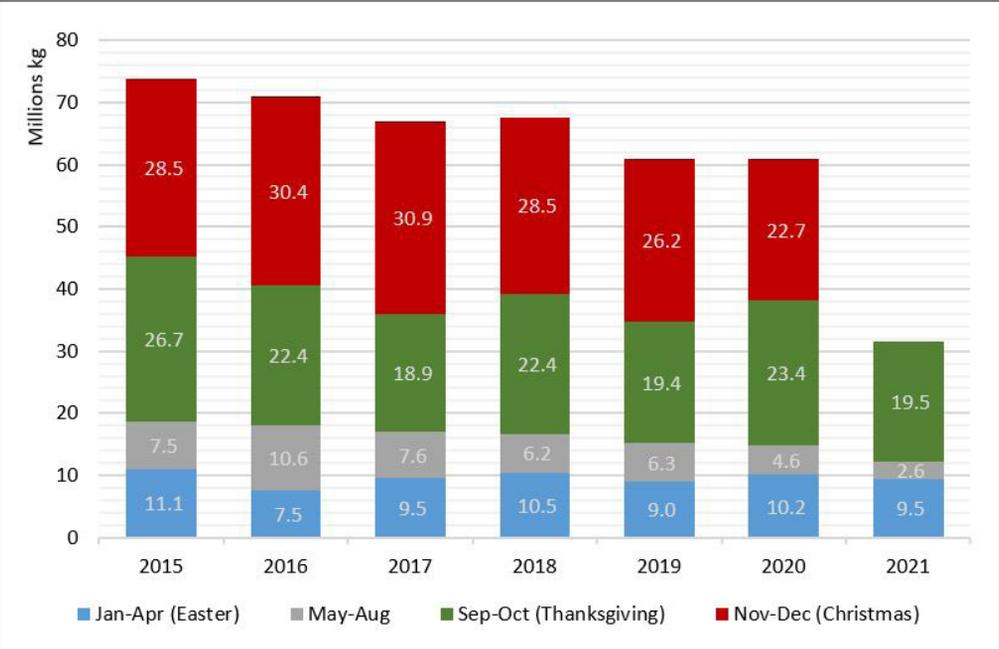
Whole Bird Sales

In recent years, whole bird sales have been reducing, with consumer preferences switching to other forms of turkey, such as turkey roasts. However, as can be seen in Figure 2, domestic disappearance in 2020 was comparable to the year earlier, despite it being a pandemic. Whether or not this trend will continue is difficult to tell in the current market environment. While May-August whole bird sales were lower than in previous years, the Easter and Thanksgiving periods returned to 2019 levels and with stronger retail pricing.

*1Nielsen data represents approximately 80% of grocery sales in Canada. Even though the exact % of turkey data captured by Nielsen at retail is not known, it provides a very good indication of overall trends.

Market Insights continued

Figure 2: Domestic Disappearance of Whole Turkeys in Canada by Time Period



Source: Turkey Farmers of Canada; Agriculture and Agri-Food Canada; Canadian Poultry and Egg Processors Council
Note: 2021 Data does not include Christmas Sales

Looking Forward

Though restaurants have begun to open, and restrictions have been generally relaxed, markets and supply chains are complicated, so forecasting when disruptions will subside can be difficult. While it is hoped that 2022 will see the turkey sector return to its pre-COVID behaviour, there are still unknowns with COVID.



Corporate Communications

With Prime Minister Trudeau's announcement of the new cabinet on October 26, 2021, TFC is undertaking outreach to Ministers and relevant MPs. This includes preparing letters to new cabinet ministers to discuss areas of importance for the turkey industry. Letters and meeting requests will also be sent to critics in other parties and MPs with several turkey farmers in their ridings.

Some Cabinet highlights of note for TFC and agriculture more generally include:

- Marie-Claude Bibeau remains Minister of Agriculture and Agri-Food. TFC will continue outreach to her office.
- Chrystia Freeland remains Deputy Prime Minister and Minister of Finance.
- Steven Guilbeault becomes the new Minister of Environment and Climate Change.
- Mary Ng is the Minister of International Trade, Export Promotion, Small Business and Economic Development.
- Mélanie Joly was appointed Minister of Foreign Affairs.
- Jean-Yves Duclos becomes Minister of Health; both CFIA and PHAC are accountable to this minister.



Advancing Women in Agriculture Conference

TFC sponsored the virtual Advancing Women in Agriculture Conference (AWC) again this year, which took place in November. The AWC is an opportunity for women across Canada to hear from business experts, motivational and inspirational leaders, and industry representatives. This conference was held virtually again this year due to COVID and TFC hosted a virtual booth with information about the industry.

Media

TFC continues to receive media inquiries on the turkey industry and supply leading to the holidays. Interviews were taken by the TFC Chair, executive members and a number of provincial board representatives depending on the media outlet.

Eye on the Industry

TFC distributes the regular news update called the *Eye on the Industry*. If you are interested in receiving this update, please contact mmackimmie@tfc-edc.ca.

Trade Update

World Trade Organization (WTO)

Since the end of July, WTO member countries have been engaged in high level discussions on an initial draft agricultural negotiating text, released by the Chair of the WTO Committee on Agriculture, Costa Rican Ambassador Gloria Abraham Peralta. Key agricultural negotiating subject matters captured in the text included: Domestic Support; Market Access; Export Competition; Export Restrictions; Cotton; Special Safeguard Mechanism (for developing countries); Public Stockholding for Food Security Purposes (PSH); and, Transparency.

On November 23rd, just in advance of the 12th WTO Ministerial (MC12) originally planned for November 30th to December 3rd but cancelled due to the new COVID variant and travel restrictions across Europe, a significantly revised agricultural text was released. As described by the Chair, the text constituted the best attempt to table a balanced and realistic package of outcomes on agriculture and that would be manageable for the Ministers to deal with, in addition to numerous other negotiating texts, at MC12.

With respect to Market Access, which is a key area of concern of Canadian supply managed commodities, the revised November text would have committed WTO members to continue negotiations and develop a detailed work programme following MC12. Any specific reference to tariff reductions, included in the July text, was removed.

With the WTO's 12th Ministerial (MC12) postponed on November 26th, due to restrictions on travelers from the new coronavirus variant Omicron, negotiations will shift to among Geneva-based officials with the objective of narrowing gaps further, until such time as the Ministers can gather again safely.

Association of Southeast Asian Nations (ASEAN)

On November 16, 2021, the Government of Canada announced that Canada and ASEAN have agreed to proceed with negotiations toward a comprehensive Free Trade Agreement (FTA). The ten ASEAN member countries include Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam. If ASEAN were one economy, it would be the fifth largest in the world and is one of the world's fastest-growing economic regions, with an estimated GDP growth rate of 4.9% for 2019. A key objective of these negotiations is to diversify Canada's international trade relationships, thereby reducing vulnerability from ad hoc trade disruptions. Of these ten countries, Brunei, Malaysia, Singapore and Vietnam (4) are also signatories to the CPTPP, although Brunei and Malaysia have yet to ratify the agreement.

On-Farm Programs

Reminder: Turkey Industry Antimicrobial Use (AMU) Strategy Follow-up Survey

A reminder that now is the chance to provide your feedback on the implementation of the turkey industry AMU strategy, through the follow-up survey. The survey collects information on experiences and impacts of the AMU strategy. Results of the survey will be reviewed by the TFC On-Farm Programs Committee and the TFC Board of Directors to assess the information available to make informed decisions on next steps, if any are warranted, for the strategy. Your feedback will also ensure that communication materials and tools developed on antimicrobial use and antimicrobial resistance are relevant.

To access the survey, click on the link at: www.surveymonkey.com/r/tfc-amu-survey-2021.

If you require a paper copy, please contact the TFC office.



CFA Update

Submitted by Canadian Federation of Agriculture

As we move into the end of the year, some of the key objectives CFA continues to work towards include the environment, Business Risk Management and chronic labour issues. Read below for some of the recent important events related to these topics:

The Next Policy Framework (NPF) and FPT Meeting

The Next Policy Framework (NPF) is a five-year (2023–2028) program by federal, provincial and territorial (FPT) governments to strengthen and grow Canada's agriculture and agri-food sector. The NPF is scheduled to take effect in April, 2023.

CFA, through working with national producer groups across the country, has found a high degree of commonalities on the program elements Canadian producers need in the NPF.

CFA co-signed a letter, which was sent to FPT Ministers in advance of the FPT meeting in November, that identified these shared priorities and also presented these priorities to the FPT Ministers on November 8th alongside several other agricultural industry stakeholders. FPT Ministers appreciated the input and were receptive to many of the ideas advanced by the producer groups.

COP 26

CFA attended COP 26, with the goal to ensure that the farmer perspective is central to the decision-making processes, to ensure that agriculture is recognized for its contributions and seen as a solutions provider in the fight against climate change.

CFA also coordinated with the UN Farmer Constituency, and co-hosted a side event on November 3rd, titled "Agriculture's Ambition: Delivering Food Security, Resilience and Mitigation to a Changing Climate" along with the national farm organizations of the UK and Germany.

National Workforce Strategy for Agriculture and Food and Beverage Manufacturing

CFA is partnering with Food and Beverage Canada, the Canadian Agricultural Human Resource Council (CAHRC) and the Future Skills Centre (FSC) to develop a National Workforce Strategy for Agriculture and Food and Beverage Manufacturing.

This project will establish an actionable road-map to lead the way in addressing workforce and skills shortages in agriculture and the food and beverage manufacturing industry, and help address the chronic labour shortages that Canadian farmers have faced for decades.

The strategy will be developed over two years. The first year will gather information about programs and services that already exist, identify gaps, and recommend new programs and tools.

The second year will see the development of the strategy. The strategy will outline a vision for the future, priorities, and stakeholder commitments, then map out the actions and tools needed based on the research findings.

CPRC Update

Submitted by Canadian Poultry Research Council

Growth begins in the Gut: Research examines improved Yeast-based Feed Products

In the race to replace antibiotics on Canadian poultry farms, some producers have successfully adopted yeast-based prebiotic supplements. But there's more potential to enhance the bioactivity of yeast-based products once researchers develop a better understanding of poultry gut health and the minute components that are active in yeast.

Recent work from Professor Bogdan Slominski, leader of the novel feed technology research program at the University of Manitoba, has led to promising results using new bioactive combinations, and new recommendations for how researchers should study poultry digestion in the future.

Enzyme combinations are key

"Yeast products are rich in protein and other nutrients, and they provide bioactive components that are known for their intestinal health benefits," says Slominski. "Feed supplements in general are pretty expensive, so we want to make sure we are enhancing bioactivity to make them more powerful, and bring more value to producers."

Slominski's team is working to understand to what extent feed additives change the proliferation of different good and bad bacteria in a chicken's gastrointestinal tract. He believes that combining yeast products and their fractions with specific enzymes will allow them to develop an even better product.

Getting to the fractions

To find the right combination of enzymes, Slominski needs to break down the yeast cell wall to access its specific components – a task that was impossible until recently, when his team landed on a process in previous research. Now, they are building on their work to access those fragments at the fractional level and release specific combinations that may be used to enhance yeast-based products.

In the first part of the most recent study, Slomin-

ski's team used a yeast-based growth promoter alone, and in combination with other enzymes, to measure how they modulate gut physiology of young turkeys to have an anti-inflammatory effect and generally improve essential functions and fight disease.

"We haven't found the ideal combinations – we aren't there yet," Slominski says.

"Once we find the best combination, we will produce larger amounts of the enzyme-modified yeast cell wall products and test them in Salmonella challenge studies using broilers and laying hens."

New recommendation for poultry researchers

To assess the success of each feed combination, Slominski's team collected digesta samples from the small intestine and the ceca, a small pouch that joins the small and large intestine to assess microbiome structure and short chain fatty acid production. In viewing samples from both locations, they gained a better understanding of the turkeys' digestive processes, and developed a case for changing research practice for future work in the field.

Slominski says researchers commonly look to the ceca for information about microbiota, but the digestive process mostly happens in the small intestine. By looking at both, he found the small intestine to provide more relevant information on microbiota proliferation and any beneficial effects related to gut health.

"Gut health refers to the ability of the gastrointestinal tract to perform its function of digestion and absorption efficiently," says Slominski. "Prebiotic components have



CPRC Update continued

a profound effect on the proliferation and function of the growth of beneficial bacteria to control pathogens and to ensure food safety.”

The qualitative structure of the material Slominski found in the gastrointestinal tract of young turkeys showed

that the small intestine is a better showcase of the physiological processes related to feed additives, than the ceca. He notes a young turkey’s digestive system closely resembles a chicken’s digestive system.

“Going forward, researchers should focus on studying

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



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

HAPPY HOLIDAYS

From the farm to the table, celebrate your holiday tradition with Canadian turkey.

Poultry and Egg On-Farm Investment Program (PEFIP) reminder

This is a reminder that the PEFIP details have been released and that producers should register with the Poultry and Egg On-Farm Investment Program Online System (PEFIPOS) using their license information. Visit: agriculture.canada.ca/en/agricultural-programs-and-services/poultry-and-egg-farm-investment-program. We encourage producers to register as soon as possible, even if you are not planning to apply for a few years.

The PEFIP provides funding for Canada's 4,800 chicken, egg, broiler hatching egg, and turkey farmers to make ongoing improvements to their operations and enhance the long-term efficiency and sustainability of their farms.

Upcoming Meetings

TFC 269th General Business Meeting and
TFC 48th Annual General Meeting
March 23-24, 2022
Ottawa, Ontario

TFC 271st General Business Meeting
September 22, 2022
(Location – TBA)

TFC 270th General Business Meeting
June 22-23, 2022
Halifax, Nova Scotia



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