

National Marketing Campaign

Supporting Canadian Thanksgiving with local Canadian Turkey Farmers



At Thanksgiving, Think Turkey™ / Pensez Dindon^{MC} brought back the 'Here's to Canadian Thanksgiving' ad in English Canada, and launched the NEW 'Celebrate with Turkey' ad in French Canada. Both featured Canadian turkey farming families. This ran on national TV and in a digital campaign, encouraging shoppers to celebrate the holiday with Canadian turkey, raised by Canadian farmers. This campaign was supported by national retail including Walmart, Loblaws, Voila by Sobeys, and Metro. Social media and influencer collaborations shared helpful tips and techniques for cooking and preparing turkey for Thanksgiving.

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National Marketing Campaign

Getting Canadian Students to Join the Thanksgiving Tradition

This fall, Think Turkey™ / Pensez Dindon^{MC} introduced the Join Thanksgiving Fund, a program designed to help students away from home celebrate, and introduce newcomers to the Canadian Thanksgiving tradition.

Post-secondary student groups at colleges and campuses across Canada were invited to apply to receive grants for their on-campus Thanksgiving celebrations. Grants were awarded to student groups from universities and colleges in seven provinces, all of whom hosted Thanksgiving celebrations for their campus communities. To learn more about the recipients and their stories, visit ThinkTurkey.ca/JoinThanksgiving.

Helping More Canadians Celebrate the Holidays with Turkey!



With a reported 23% of Canadians living with food insecurity, Think Turkey™ / Pensez Dindon^{MC} is once again shining a spotlight on holiday heroes through its second annual Wishbone Awards.

From November 4-20, Canadians could nominate a deserving local hero at ThinkTurkey.ca/Wishbone & PensezDindon.ca/PrixDindons. Eight recipients received grants to help serve more turkeys to Canadians in need. The initiative gained additional visibility through social media, media coverage, and a PSA (public service announcement). Visit ThinkTurkey.ca/Wishbone / PensezDindon.ca/PrixDindons to read

Wishbone Awards

the award recipients' stories and hear about their efforts to combat food insecurity.

It's Not the Holidays Without Turkey!

The Holiday campaign began in November, featuring a holiday carol reminding Canadians that it's Turkey Time. The campaign is on national TV with additional media support through social media, digital media, and national retail presence with major retailer banners. Additionally, curated online turkey product pages are now live across all retailers, making it easier for Canadians to find and add turkey to their carts this holiday season.

TFC 280th Business Meeting Overview

The Turkey Farmers of Canada's (TFC) 280th General Business Meeting took place December 4-5, 2024, in Toronto, Ontario.

Highlights of the 280th Meeting include:

- An Executive Committee report outlining recent activity including a HPAI update, TFC's appearance before the Senate Standing Committee on Foreign Affairs and International Trade regarding Bill C-282, the CPEP Joint Poultry Sectors Meeting and the CPEP Animal Welfare Workshop, a SM5 CPC CUSMA meeting, a meeting with FPCC and a meeting with CPRC.
- A presentation from Zeno Group with an overview of Thanksgiving and the holiday plans for the national marketing campaign.
- A Turkey Market Advisory Committee report with forecasting of the market needs for 2025/26 and commercial allocation;
- Deliberations on the 2025/26 Quota Allocation and Quota Order amendment will continue into the new year.
- Updates from the On-Farm Programs Committee, a Flock and Animal Welfare update, Research Committee report and a regulatory update including the current avian influenza situation and a presentation on the Canadian Integrated Program for Antimicrobial Resistance Surveillance (CIPARS) survey results regarding AMU/AMR; and,
- Reports on Corporate Communications including details on advocacy activities with a particular focus on Bill C-282 and an International Trade Update.

On-Farm Programs

REMINDER -

TFC ON-FARM PROGRAMS EDITS IMPLEMENTATION DATE AND AVAILABILITY OF ELECTRONIC PROGRAM VERSION

Producers are reminded of the upcoming target implementation date of January 1, 2025 for the new edits to the TFC On-Farm Programs producer manuals for both commercial and breeder production. From this date onward, producers will be audited according to the updated program criteria.

The edits are dated June 2024, and printed revision packages were sent to Provincial Turkey Marketing Boards for distribution to producers and auditors in September. The changes are also reflected in the PDF fillable electronic program version available on the TFC On-Farm Programs portal (www.tfconfarmprograms.ca). Additionally, the online fillable program forms will be removed from the TFC On-Farm Programs portal, and only the updated PDF fillable electronic forms will remain available, as from feedback, the PDF forms are easier to maintain by users and there have been ongoing challenges with the functionality of the online fillable forms.

As previously reported, the edits are based on a review of new science and regulations, and comments received from Provincial Boards, auditors, and producers since the last review of the TFC On-Farm Food Safety Program (OFFSP) and Flock Care Program (FCP). Most of the edits are aimed at strengthening current biosecurity requirements resulting from the turkey industry's experience with avian influenza and are intended to provide additional clarification for existing program requirements. The edits specific to turkey breeders include provisions that incorporate applicable requirements from the new Hatchery Regulations that came into force in November 2023.

AVIAN INFLUENZA

The Highly Pathogenic Avian Influenza (HPAI) outbreak persists globally, with some new emerging trends. The Canadian Food Inspection Agency (CFIA), along with provincial stakeholders and industry continue response efforts. Turkey Farmers of Canada maintains support for communication efforts, policy development, and vaccination discussions through the HPAI Vaccination Task Force.

A grouping of detections in British Columbia on October 21, 2024, started the sixth wave of HPAI in Canada, with similar trends to 2023. Since then, there have been 85 detections total, 73 in British Columbia, 4 in Alberta, 2 in Saskatchewan, 1 in Manitoba, 1 in Ontario and 4 Low Pathogenic Avian Influenza (LPAI) in Quebec. 93% of the detections were in commercial flocks of which 22% involved turkeys. The United States of America is also continuing to see cases, seeing 100 detections since October 15th. Sixty percent were commercial flocks of which 49% involved turkey. Detections were mainly along Western states, concentrated in California, and the Midwest.

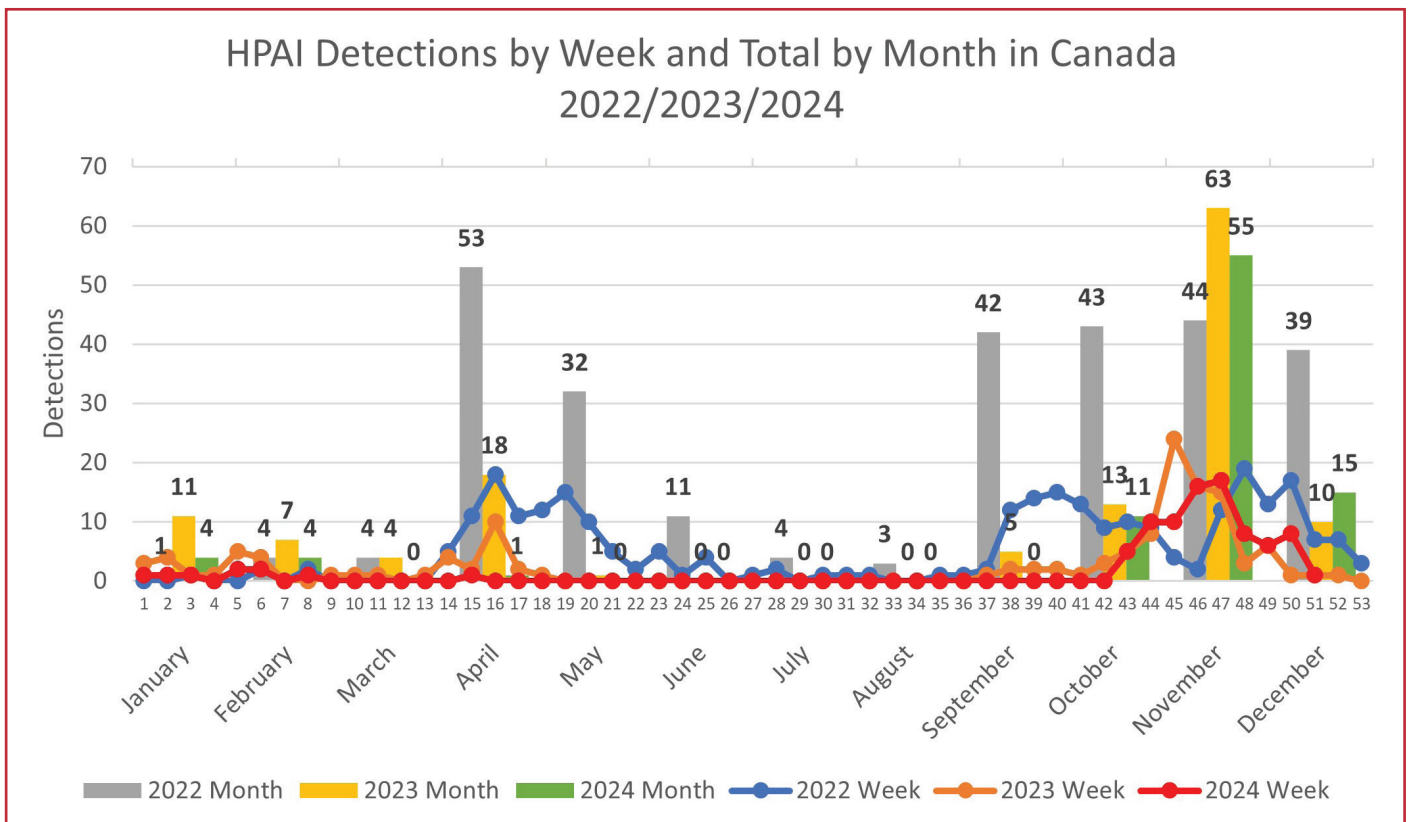
The presence of HPAI virus of H5N2 subtype was also detected on two commercial farms in British Columbia. This new variant is similar in behaviour to the current H5N1 subtype and the existing response plan was followed. Additionally, LPAI H5N2 was confirmed on four farms in Quebec. CFIA's emergency response measures for

On-Farm Programs

LPAI H5 in commercial poultry include a stamping out approach, tracing of significant contacts, and application of a specific Primary Control Zone for LPAI.

No dairy cattle cases have been identified in Canada. As of December 10, 2024, the USDA has reported influenza A (H5N1) in a total of 742 dairy herds across 16 states with the majority of new cases in California.

In November, the first domestically acquired human case of H5N1 avian influenza in Canada was confirmed in a teenager in British Columbia. The genomic sequencing result indicates that the virus is related to the avian influenza H5N1 viruses from the ongoing outbreak in poultry in British Columbia (Influenza A (H5N1), clade 2.3.4.4b, genotype D1.1). There were no obvious sources of exposure, and no contacts of the individual have been identified with the virus. As of December 10, 2024, the U.S. Centers for Disease Control has confirmed 58 total human cases of influenza A (H5), 35 are associated with dairy farm workers, 21 associated with poultry workers, and 2 cases with no clear exposure.



On-Farm Programs

Avian Metapneumovirus (aMPV)

aMPV continues to impact turkey flocks in Canada, with confirmed cases so far in Ontario, Manitoba, and Quebec and evidence of infection in Alberta as well. Avian metapneumovirus infection results in welfare concerns and large economic and supply chain impacts. Currently, there are insufficient prevention or treatment options available in Canada to address the disease. The addition of vaccination strategies could contribute to the control of bird health and economic losses due to aMPV. TFC continues to advocate for options and is closely following the situation in the U.S. as well.

TFC is also conducting a survey of farmers impacted by Avian Metapneumovirus (aMPV). The purpose of the survey is to better understand the impacts of the disease to the turkey industry in Canada which will be helpful in communications on the need for preventive options, including vaccines. If your farm has been impacted by aMPV, please fill out the survey at the link: www.surveymonkey.com/r/8KVXGLJ. Individual responses from the survey will remain confidential and will only be reported in aggregate.

TFC staff have a meeting scheduled with the Canadian Food Inspection Agency before the end of the year to raise the key issues with officials as a means to advance the need for vaccine availability.



Market Insights



Compared to 2023, domestic disappearance of turkey year-to-date (Jan-Oct) has increased by 5.9% (5.8 mkg) to 104.4 mkg. This marks the highest domestic disappearance for this period since 2020.

Opening stocks on January 1, 2024, were 17.6 mkg, an increase of 5.8 mkg from the year earlier. For all of 2024 so far (Jan-Nov), stocks have been higher than the year earlier, reaching a peak on May 1, when they were 26.8 mkg, 6.0 mkg higher than year earlier. Since then, stocks have declined relative to the year earlier and on November 1, were 29.0 mkg, about 0.2 mkg higher than year earlier. Given the current commercial allocation, stocks are expected to fall below last year's levels soon and end the 2024/2025 Control Period sharply lower than where they began.

Also contributing to the stock situation are imports, which year-to-date, were down 1.4 mkg to 1.46, a 49% decrease from last year. Historically, imports have occasionally lagged until the last two months of the year when they catch up. As of the time of writing, there is 1.5 mkg of WTO quota that has been returned and not claimed, making it likely that imports for 2024 will be lower than in recent years. Additionally, there have been no imports under CPTPP as of the time of writing. For the foreseeable future, no imports are expected under CPTPP. The current situation with imports under CPTPP may be illustrated by the announcement that AgroSuper, a major producer and exporter of Chilean turkey, is exiting the turkey business.

With these trends emerging over the past few months, there should be some strengthening of what have been soft wholesale prices over 2024. Part of the reason that the quota deliberations will continue into early 2025 for the 2025/26 quota year (see above highlights from the TFC 280th General Meeting) is to know with greater accuracy, once Christmas results are available, what the forecast holds for the last four months of the 2024/25 Control Period and to move forward from there.

Corporate Communications

Advancing Women's Conference



Advancing Women's Conference students



TFC Sponsored student Lydia Conrad.

TFC took part in the Advancing Women in Agriculture Conference held from November 17-19 and participated in a student sponsorship. This sponsorship offers an agriculture student to attend and provides a chance to gain exposure to the industry, helping them explore potential career opportunities and learn about the organizations in the sector, in addition to the regular conference agenda. While supporting the next generation of agricultural professionals, the sponsorship also provides excellent value, including branding opportunities and networking during the conference, such as a sponsor-hosted lunch. Lisa Cadeau represented TFC at the event and had the opportunity to meet our sponsored participating student.

Legislative Update Bill C-282

Regarding Bill C-282, an Act to amend the Department of Foreign Affairs, Trade and Development Act, an amendment proposed by Senator Harder was made during second reading at the Standing Senate Committee on Foreign Affairs and International Trade. The amendment suggests that Bill C-282 be modified to include the following provision that the Bill would not apply to commitments made on behalf of Canada under:

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Corporate Communications

(a) an international trade treaty or agreement that existed when the subsection came into force; (b) the renegotiation of an international trade treaty or agreement that existed when the subsection came into force; or (c) an international trade treaty or agreement that was being negotiated at the time the subsection came into force. The amendment of the Bill is included in the report of the Bill by the Committee. At the time of writing, the vote on the report and the amendment had not yet occurred.

The Senate vote on the Bill is now postponed to February when the Senate resumes following the holiday break. The SM5 will continue its work with Senators and Parliamentarians to advance this Bill to a "Yes" vote in its original text without the amendment.

Bill C-275

TFC, and other livestock and poultry organizations, have continued to be actively engaged on Bill C-275, An Act to amend the Health of Animals Act (biosecurity on farms) and TFC Chair Darren Ference appeared before the Standing Senate Committee on Agriculture and Forestry, regarding Bill C-275. For those interested, his appearance can be viewed at the following link: <https://senparlvu.parl.gc.ca/Harmony/en/PowerBrowser/PowerBrowserV2?fk=647708&globalStreamId=3> Darren speaks around the 9:11:45 mark of the recording, providing insights and perspectives on the bill.

On Tuesday, October 29, 2024, an amendment was made to apply the Bill to all people, not just those who enter without authorization. On December 3, the amendment was voted in favour during the report vote.

Media

TFC continues to monitor media activity on the turkey industry and supply management and send updates through the bi-weekly *Eye on the Industry* Newsletter. If you are interested in receiving this, please email mmackimmie@ffc-edc.ca.

Trade

World Trade Organization (WTO)

On November 29, 2024, WTO members unanimously reappointed Dr. Ngozi Okonjo-Iweala for a second four-year term as Director-General, set to commence on September 1, 2025. The reappointment process was expedited, partly to pre-empt potential opposition from the incoming Trump administration, which has previously challenged WTO leadership appointments.

The World Trade Organization's (WTO) Appellate Body, responsible for resolving trade disputes, has been non-operational since December 2019 due to the United States' sustained refusal to approve new appointments. This is unlikely to change with the incoming Trump Presidency. In April 2024, WTO members appointed Ambassador Dwarka-Canabady as the new chief negotiator for dispute settlement reform. Her mandate includes revitalizing negotiations to restore a fully functional dispute resolution system by year's end. As it stands, it doesn't seem likely that this goal will be reached.

The African Group and Cairns Group reported progress in their goal to submit a document for the membership's consideration in order to advance work ahead of MC14 in Yaoundé, Cameroon. The two groups said that they had detailed technical discussions on domestic support for the agricultural sector on key elements including how to cap trade-distorting support; how to design and implement reductions; how to establish new flexibilities for non-exporters that wish to provide support for specific products; and disciplines on the use of the "green box", a category of support deemed to cause no more than minimal trade distortions.

Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)

As of December 5, 2024, CPTPP tariff rate quota (TRQ) utilization for turkey remains at zero. Moving forward, it seems unlikely that TRQ utilization will be taken up due to the major processor, AgroSuper, moving away from turkey processing. To date, there has been no indication that the supply will be replaced elsewhere in Chile.

On November 30, 2024, Canada Chaired the CPTPP Commission where consensus was achieved to launch a working group to negotiate the accession of Costa Rica to the CPTPP, demonstrating that expansion of the CPTPP remains a core objective for members. Moreover, the United Kingdom will accede to the CPTPP on December 15, 2024, however, the agreement continues to be non-binding between Canada and the UK.

The Incoming Trump Administration and Canada-U.S. Bilateral Trade

President-elect Donald Trump has announced plans to impose a 25% tariff on all imports from Canada and Mexico, effective February 20, 2025. This measure aims to address concerns over illegal immigration and drug trafficking. Of note, the Canadian Ambassador to the U.S., Kirsten Hillman recently noted that 0.6% of illegal crossings and 0.2% of fentanyl seizures by U.S. authorities were at the northern border.

Trade

While Trump is clearly enthusiastic about his proposed tariff policy, it's important to remember that what he says today may not be what is ultimately implemented. Some experts think the president-elect may be using the threat of 25 per cent tariffs as a leverage tactic. Should sweeping tariffs be applied, considerations on retaliatory tariffs will be important and industry participation with government will be key. Our bilateral supply chains are heavily integrated and products moving back and forth across the border risk being tariffed twice hurting business on both sides. Because of this, Trump will also face opposition to his plan within his own country's borders. Trump's promise to implement sweeping tariffs would also be an apparent violation of the CUSMA deal, meaning there is a possibility Canada and Mexico could seek recourse under the terms of the agreement. However, the process to seek recourse can take several years to complete.

Alongside the returning Trump administration and threats of tariffs is the impending 2026 CUSMA review. The 2026 review starts a 10-year clock for expiration of the free trade agreement. To prevent expiration in 2036, the parties must submit notifications at or after the 2026 review approving the renewal for another 16-year term. The fifth meeting for the CUSMA Free Trade Commission is expected to be held later in 2025. In advance of the 2025 commission and the 2026 review, TFC provided Global Affairs Canada with a written submission to the consultation process, requesting that no further market access be provided for turkey and other supply managed products. More information will be available on these processes as we move into 2025.

For the United States, the Trump administration will likely withhold U.S. renewal approval to compel a partial renegotiation of certain commitments through the joint review. The full scope of the U.S. plan has not yet been developed, but initiatives under discussion in Washington include modifications to the automotive industry rules of origin, strengthened forced labor import prohibitions, new restrictions on Chinese companies in North America, and resolutions to ongoing disputes, especially for dairy.

Happy Holidays

TFC wishes everyone a joyful holiday season with turkey at the table. May the holidays bring you peace, happiness, and a well-deserved rest. Here's to a prosperous new year!

Please note that the TFC office will be closed from December 24, 2024 – January 1, 2025 for the holidays.

Upcoming Meetings

The Future of Food Conference on Canada's
Agriculture Day
February 11, 2025
Ottawa, ON

TFC 282nd General Business Meeting
June 18, 2025
Fredericton, NB

CFA Reception, AGM, and Board of Directors Meeting
February 24-27, 2025
Ottawa, ON

TFC 281st Meeting and TFC 51st Annual General
Meeting
March 19-20, 2025
Ottawa, ON



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