

B.C. Turkey Industry 2019

2018 QUICK FACTS

- B.C. turkey production is regulated at the federal and provincial levels under supply management. All farmers producing 300 or more turkeys a year must be registered with the BC Turkey Marketing Board (the Turkey Board) and hold quota.
- In 2018, 67 registered turkey farmers in B.C. produced and marketed 22.4 million kg of turkey (eviscerated weight) valued at \$49.5 million.
- B.C. turkey farm cash receipts represented 1.5% of B.C.'s total farm cash receipts in 2018.
- 70% of producers are located in the Lower Mainland, 15% on Vancouver Island, and 15% are in the Interior.
- In 2018, there were 23 producers who raised at least one flock of specialty turkey, and 3 certified organic turkey producers in B.C. Specialty production accounted for 7% of all turkey produced in the province, while organic accounts for less than 1%.
- The average B.C. turkey producer raised an estimated 41,000 turkeys per year in 2017 (345,000 kg total live weight).
- There are 34 registered small lot producers who raise fewer than 300 birds per year without quota in B.C.
- There are 11 processors and two hatcheries licenced in B.C.
- B.C. is Canada's third largest turkey-producing province.

Canadian Turkey Production (2017)

Prov	Eviscerated weight (kg)	%
ON	75,255,000	44%
QC	36,316,000	21%
BC	21,119,000	12%
AB	15,664,000	9%
MB	10,185,000	6%
SK	5,395,000	3%
NS	3,561,000	2%
NB	3,365,000	2%
Canada	170,860,000	100%

Source: Turkey Farmers of Canada

MARKET TRENDS

The overall market for B.C. turkey has been relatively stable over the last five years, with demand for whole birds (WB) decreasing and further processed turkey products (FP) increasing. Consumer-ready FP products, such as deli meats, ground turkey and sausages, are increasing in popularity. Annual sales of turkey parts and processed turkey products in Canadian supermarkets increased from 8.8 million kg in 1993 to 14.0 million kg in 2017.

Turkey Farmers of Canada (TFC) has launched a new "Think Turkey" marketing campaign aimed at encouraging consumers to think of turkey as a year-round protein, rather than a holiday staple.



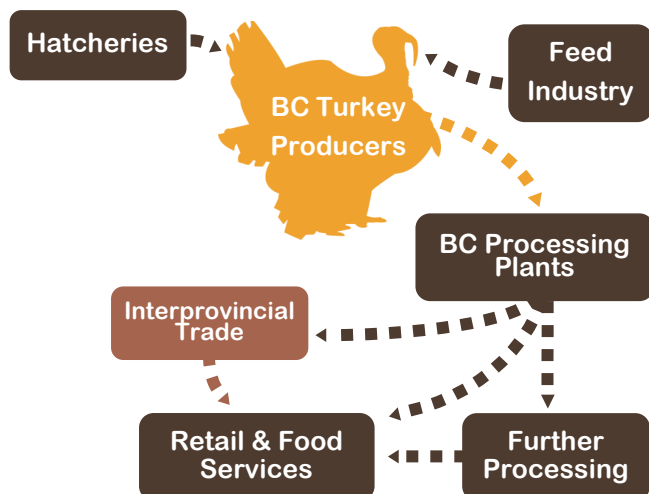
Photo: BC Turkey Marketing Board

TRADE

In 2018, Canadian turkey meat exports totalled about 19.8 million kg. Imports reached 5.7 million kg.

Recent trade agreements like the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) will result in increased turkey imports into Canada, on top of already existing trade agreements that grant market access. It is expected that Canada-United States-Mexico Agreement (CUSMA), once ratified, will increase access. TFC estimates that the CPTPP and CUSMA will double the amount of turkey imports into Canada, bringing the total import number to 10.6 million kg within 10 years. As a result, it is anticipated that Canadian turkey production will decrease by about 2%.

INDUSTRY VALUE CHAIN



B.C.'s turkey value chain includes hatcheries, turkey farmers, support services (feed mills), processors, wholesalers, small and large retailers, and food services (restaurants).

There are two production classes in B.C.: certified organic and commercial. Within the commercial class, some producers grow specialty turkey, which means the birds are raised without antibiotics and fed a vegetable-only diet; and/or they are free range; and/or they are pasture-raised.

When turkeys are between 11 and 17 weeks old, they are sent for processing. Producer-vendors (50-300 turkeys per year) can sell at the farm gate and farmers markets.

BIOSECURITY & ANIMAL CARE

Avian influenza (AI) is the most significant disease risk to turkeys. Strong biosecurity programs are in place in B.C. to reduce disease risk. The B.C. turkey industry is also researching ways to manage the sporadic, but deadly, black-head disease. Currently, there is no approved treatment for this disease.

To support the responsible use of antibiotics, the poultry industry has established the National Antimicrobial Use strategy. As part of this strategy, by 2020 the industry will phase out the use of antimicrobials for disease prevention in poultry. Category I and II antibiotics have already been phased out.

Turkey Farmers of Canada (TFC) administers two 3rd party audited programs designed to ensure a high standard of care on Canadian turkey farms: the On-Farm Food Safety Program and the Flock Care Program. These programs provide commercial turkey farmers with tools to ensure the proper management of food safety hazards, biosecurity, and flock care on their farms.

GOVERNANCE

Canada's turkey industry is supply-managed. It operates under federal and provincial legislation and agreements.

At the federal level, the TFC is responsible for the orderly production and marketing of turkeys in Canada and is supervised by Farm Products Council of Canada.

At the provincial level, the Turkey Board is the first instance regulator of turkey production in B.C. under the *Natural Products Marketing (BC) Act* and the British Columbia Turkey Marketing Scheme.

The Turkey Board is responsible for orderly production and marketing through promoting and regulating the volume of production, transportation, packaging, storage and marketing of turkey. It sets the price producers receive for their turkeys.

The BC Turkey Association represents B.C. turkey producer interests. The Primary Poultry Processors Association represents the interests of processors in the province.

The BC Farm Industry Review Board is responsible for ensuring the Turkey Board meets its responsibilities in an effective, strategic, and accountable manner that results in sound marketing policy.

SOURCES

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BC Farm Industry Review Board

www.gov.bc.ca/BCFarmIndustryReviewBoard

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