

B.C. Turkey Industry 2022

2020 QUICK FACTS

- B.C. turkey production is regulated at the federal and provincial levels under supply management. All farmers producing 301 or more turkeys a year must be registered with the B.C. Turkey Marketing Board (the Turkey Board) and hold quota.
- 64 registered turkey farmers in B.C. produced and marketed 22 million kg of turkey (eviscerated weight) valued at \$45 million.
- B.C. turkey farm cash receipts represented 1% of B.C.'s total farm cash receipts in 2020.
- 77% of producers are located in the Lower Mainland, 14% on Vancouver Island, 3% in the Interior, and 6% in the North.
- 25 specialty producers accounted for 7% of turkey production in B.C. and 1 organic producer accounted for less than 1%.
- The average licenced B.C. turkey farmer produced 343,034 kg live weight of turkey.
- There are 31 registered small lot producers who raise fewer than 300 birds per year without quota in B.C..
- There are 7 processors and 3 hatcheries licenced in B.C.
- B.C. is Canada's third largest turkey-producing province.

MARKET TRENDS

The B.C. Turkey market experienced losses due to COVID-19 related impacts on the market with national cuts decreasing B.C.'s allocation from 85.6% in 2019/2020 to 82% in 2020/2021 with another national allocation cut in 2021 pushing B.C.'s allocation down to 76.5% by the end of the period.

The retail turkey market has seen a shift in recent years from whole birds towards breast meat items such as roasts. Data from the AC Nielsen Company of Canada shows that sales of whole turkeys at major retail banners (excluding wholesale club stores) declined from 48.8 Mkg in 2016 to 38.6 Mkg in 2020.



Photo: BC Turkey Marketing Board

Canadian Turkey Production (2020)

Prov	Eviscerated weight (kg)	%
ON	71,085,000	45%
QC	33,283,000	21%
BC	18,381,000	12%
AB	14,584,000	9%
MB	9,087,000	6%
SK	4,812,000	3%
NS	3,335,000	2%
NB	3,249,000	2%
Canada	157,815,000	100%

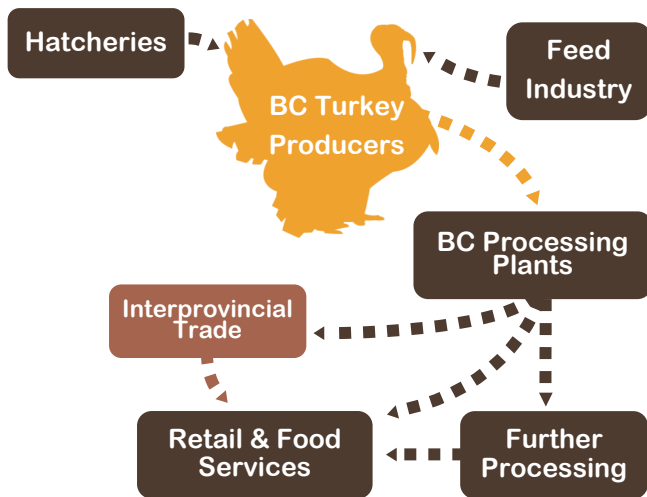
Source: Turkey Farmers of Canada

TRADE

In 2020, Canadian turkey meat exports totalled about 25 million kg. Imports reached 3.1 million kg.

The Canada-United States-Mexico Agreement (CUSMA), which came into force on July 1, 2020, includes provisions which will likely increase access to the Canadian market but will fluctuate due to the new calculation method. The Comprehensive and Progressive Agreement for Trans Pacific Partnership (CPTPP) technically opened Canada to 1.75Mkg eviscerated but no imports have occurred under this agreement yet due to partner country export capacity.

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, the industry has phased out category I and II antibiotics for disease prevention in poultry and is currently phasing out category III.

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, Turkey Farmers of Canada (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 B.C. Turkey Association represents B.C. turkey producer interests. The Primary Poultry Processors Association represents the interests of processors in the province.

The B.C. 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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