



Farm Products Council
of Canada

Conseil des produits agricoles
du Canada

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Ottawa, Ontario K1A 0C6

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Édifice 59
960, avenue Carling
Ottawa, Ontario K1A 0C6

Le 11 septembre 2025

Monsieur Darren Ference
Président
Les Éleveurs de dindon du Canada
7145, avenue West Credit
Édifice 1, bureau 202
Mississauga (Ontario) L5N 6J7

Objet: Modifications proposées au *Règlement canadien sur le contingentement de la commercialisation du dindon (1990)*

Cher Monsieur Ference,

Lors de sa réunion du 10 septembre 2025, le Conseil des produits agricoles du Canada (le Conseil) a examiné les modifications proposées au *Règlement canadien sur le contingentement de la commercialisation du dindon (1990)* tel que demandé dans la requête datée du 14 août 2025, pour la période réglementaire 2025-26, qui commence le 27 avril 2025 et se termine le 25 avril 2026.

Après un examen approfondi de la justification fournie par les Éleveurs de dindon du Canada et suite à une analyse interne, les membres du Conseil ont convenu que les modifications étaient nécessaires à la mise en œuvre du plan de commercialisation énoncé dans la *Proclamation visant l'Office canadien de commercialisation des dindons*. Par conséquent, les modifications ont été approuvées et entreront en vigueur à la date à laquelle elles sont enregistrées.

Pour toute question, n'hésitez pas à communiquer avec moi ou avec Lisa Melanson-Daigle, secrétaire du Conseil, par courriel à l'adresse fpcc.secretariat.cpac@fpcc-cpac.gc.ca.

Sincères salutations,

Signature sur la version originale

Brian Douglas
Président

August 14, 2025

Mr. Brian Douglas
Chair
Farm Products Council of Canada
Central Experimental Farm
960 Carling Avenue, Building 59
OTTAWA, ON K1A 0C6

Dear Mr. Douglas:

Re: **Canadian Turkey Quota Regulations 2025/2026**

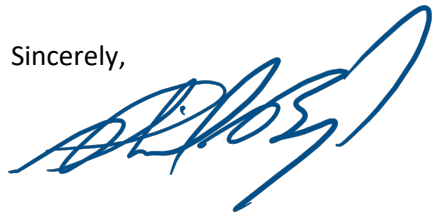
Please find enclosed a submission from the Turkey Farmers of Canada (TFC) revising the 2025/2026 Quota Regulation. We request that this be given consideration and prior approval by the Farm Products Council of Canada at its earliest convenience.

The proposed allocation is the result of discussions and motions at the TFC's Meetings of June 18 and 19, 2025, and July 22, 2025, along with the TMAC meeting of June 2, 2025. The TFC Allocation Policy guides the distribution of Commercial Allocation, while the conditional Export, Multiplier Breeder, Primary Breeder and Special Conditional Request policies guide allocations and utilizations under specific circumstances. The rationale for the proposed allocation amendment, reflecting decisions of the TFC Directors and consideration of the Proclamation Criteria as guided by the Allocation Policy is set out in the submission and appendices.

Should your staff have any questions on this submission, please do not hesitate to have them contact our office.

We look forward to the Council's consideration and prior approval of this amendment.

Sincerely,



Phil Boyd
Executive Director

Encls.
c. M. Kotipelto, FPCC

Canadian Turkey Marketing Agency c.o.b. **Turkey Farmers of Canada**

Submission to: Farm Products Council of Canada
Regarding: Amendment to the Schedule to the Canadian Turkey Marketing Quota Regulation (1990) for 2025/2026
Date: August 14, 2025

This submission provides background and rationale for revising the federal quota with respect to the inter-provincial and export trade of turkey at 164,991,072 kg for the 2025/2026 Control Period.

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- 1) Relevant Motion
- 2) Federal Turkey Allocations
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- 7) List of Appendices

1) Relevant Motion

At the TFC web conference of July 22, 2025, the following motion revised the commercial quota for the 2025/2026 Control Period:

To revise the commercial allocation for the 2025/2026 Control Period to 129,000,000 kg.

The motion increasing the commercial allocation by 3,100,000 kg resulted from the Directors' consideration of the TMAC assessment of the turkey market, the TMRs presented to the 282nd TFC Meeting and the July 22nd web conference and discussions.

2) Federal Turkey Allocations

As per the motion and allocations under conditional policies, the 2025/2026 federal quota for turkey, excluding the unregulated area, consists of the following components:

2025/2026 Federal Turkey Allocations			
		Pounds	Kilograms
A	Commercial Allocation	284,396,320	129,000,000
B	Multiplier Breeder	5,782,946	2,623,100
C	Primary Breeder	4,625,475	2,098,080
	Export Policy:		
D	<i>Section 1 Parts</i>	<i>41,828,449</i>	<i>18,973,065</i>
E	<i>Section 1 Whole</i>	<i>12,239,712</i>	<i>5,551,840</i>
F	<i>Section 2 Planned Exports</i>	<i>7,866,905</i>	<i>3,568,368</i>
G	<i>Section 3 Live</i>	<i>6,708,667</i>	<i>3,043,000</i>
H=D+E+F+G	Total Export	68,643,733	31,136,273
I	Special Conditional Request Quota	294,579	133,619
I=A+B+C+H+I	Total Quota	363,743,053	164,991,072
J	Base Allocations, Proclamation S. 3	213,940,000	97,041,552
K=I-J	Over Base Allocations	149,803,053	67,949,520

3) Turkey Market Advisory Committee (TMAC) Report and Turkey Market Review (TMR)

TMAC reported on its meeting of June 2, 2025, to the TFC 282nd meeting, where both the TMAC report and TMR were reviewed. In addition, a revised TMR was reported to the July 22nd web conference that:

1. Held forecast domestic disappearance and closing stocks for 2025/2026 constant with the June 2 TMAC report.
2. Reflected bagging, production, import, export, stock and conditional policy utilization data to July 18.
3. Reflected revisions to forecast import and policy utilization data for the remainder of 2025/2026, based on current import data and discussions with provincial boards.

Based on forecast disappearance and closing stocks from the June 2 TMAC report and data revisions noted in points 2 and 3, the allocation arrived at was 129.6 million kg, down from 130.3 million kg in the June 2, TMAC report.

The following are some of the key points in the abbreviated TMR presented to the July 22 web conference.

a) Regarding Whole Birds:

- July 1, 2025, stocks were 15.1 mkg, 8.2 mkg lower than year earlier, and the second lowest reported in the 8 years of 2018 to 2025.
- Forecast domestic disappearance for 2025/2026 is 52.0 mkg, down from 59.0 mkg in 2024/2025, and is comparable to 2021/2022 and 2022/2023 when disappearance was 52.9 mkg and 50.3 mkg respectively.
- To provide support to wholesale prices, TMAC targeted a closing stock level on May 1, 2026, of 9.5 mkg, for a stock to use ratio of 17.8%.
- Based on the above, a domestic supply of 61.5 million kg is required. After opening stocks and stuffing and basting are considered, 45.8 million kg of production is required for the whole bird market.

b) Regarding Further Processed Production:

- July 1, 2025, stocks were 1.1 mkg, 1.6 mkg below a year earlier and for that date, the lowest reported in the years 2018 to 2025.
- Forecast domestic disappearance for 2025/2026 is 27.0 mkg, down from 27.2 mkg in both 2023/2024 and 2024/2025.
- To support wholesale prices, a closing stock level on May 1, 2026, of 1.2 mkg, for a stock to use ratio of 4.5% has been targeted.

- Based on current import data and discussions at TMAC, imports of breast meat for 2025/2026 are forecast at 1.0 mkg, up from 0.9 mkg in the June 2, TMAC report.
- Based on the above, a domestic supply of 28.2 million kg is required. After opening stocks and forecast imports are factored in, production of 25.5 mkg of breast meat is required.
- To produce 25.5 mkg of breast meat, domestic production of 97.2 mkg is required.
- From discussions with provincial boards, it is expected that 11.7 mkg of conditional utilizations will be earned from exports of parts under Section 1 of the TFC Export Policy.
- After forecast Export and Breeder Policy utilizations are factored in, 83.8 mkg of commercial allocation would be required for FP production, down from 84.6 mkg in the June TMAC report.

4) Consideration at the TFC 282nd Meeting and the July 22 Web conference Regarding Market Requirements

In their quota discussions the TFC Directors focused on inventory forecasts, domestic disappearance, wholesale prices, the outlook for imports, current and forecast supplies from the US, and policy utilizations.

It was noted that in 2024, that there is a need to manage supply to return the primary processing sector to profitability.

Due to supplies and wholesale prices in the US, imports of breast meat are below normal for this time of year. In the TMR presented at the 282nd meeting, it was noted that to June 3, the 22nd week of the year, 783,294 kg of tariff rate quota had been used, which is less than 1/3 of pro rata. It was also noted that the USDA expects turkey production to remain below year earlier levels through the 3rd quarter of 2025, with only a modest increase during the 4th quarter, indicating that US breast meat supplies and exports to Canada should continue to be relatively low.

Conditional breeder and export policy utilizations and commercial allocation available for FP production in 2024/2025 equaled 100.3 mkg. At both meetings, it was noted that in recent years, use of the TFC Export Policy has declined and accounts for a smaller proportion of FP supply. The TMR to the July 22 web conference notes that Export Policy utilizations for 2025/2026 are forecast at 11.7 mkg, down from 12.1 mkg in 2024/2025 and 14.6 mkg in 2023/2024 and this change was taken into consideration.

5) 2025/2026 Federal Quota and Conditional Allocations

The TFC quota is the sum of the commercial allocation as detailed, and the following conditional allocations:

- a) Multiplier Breeder,**
- b) Primary Breeder,**
- c) Export Policy, and**
- d) Special Conditional Quota Request**

The application of the TFC's four Conditional Allocation Policies results in the following allocations.

a) Multiplier Breeder Allocation

Canada's multiplier turkey breeding industry supplies eggs and poults domestically and for export. Production of turkey hatching eggs is not supply managed but, as spent breeder production is, an allocation for multiplier breeders is necessary.

The Multiplier Breeder Policy Allocation facilitates mature turkey marketings, without impeding sales of hatching eggs and poults. Based on volumes when the Policy was developed, some spent marketings are

covered by the reference level portion of the commercial allocation, with the rest covered by policy utilizations. To arrive at Multiplier Breeder allocations, reference levels are subtracted from mature marketing forecasts. For the 2025/2026 Control Period, 2,623,100 kg has been allocated.

b) Primary Breeder Allocation

Canada's primary turkey breeding industry provides breeding stock to multiplier breeders globally. As the production of eggs and poults is not supply managed, but the marketing of by-product live turkeys is, 2,098,080 kg eviscerated is allocated to facilitate the needs of this industry.

c) Export Policy Allocations

Export Policy allocations are comprised of the following components:

Section 1 – Parts: These allocations are utilized when parts are exported subject to policy terms. Upper limits on utilizations that may be earned on part exports have been established for each province. As a practical matter, the upper limits, totaling 18,973,065 kg are allocated.

Section 1 – Whole Bird: There is no upper limit on the policy utilizations that may be earned on the export of whole turkeys. For each exported kg, a policy utilization of 1 kg is earned. Whole bird allocations are based on forecasts provided by Provincial Boards in consultation with exporters. For the 2025/2026 Control Period, 5,551,840 kg has been allocated.

Section 1 – Carry-Forward: Provincial Boards are permitted to carry-forward one-sixth of Export Policy Utilizations earned in a control period to the following if they have not already been used. It is not possible for this allocation to be determined until the Control Period Reconciliation has been finalized. Normal procedure is for this to be completed in September.

Section 2 – Planned Exports: These allocations accommodate exports of whole birds and/or breast meat along with co-product wings, thighs, and drums. Whole bird exports earn utilizations on a 1-to-1 basis. Part exports only generate utilizations if breast meat and co-product wings, thighs and drums are exported. Allocations are based on forecasts provided by Provincial Boards in consultation with exporters. Allocations totaling 3,568,368 kg have been made.

Section 3 – Live Exports: Allocations for live exports are based on forecasts provided by Provincial Boards in consultation with exporters. Export documentation is tracked by the TFC, and volumes are reflected in the Control Period Reconciliation. In consultation with the provinces, 3,043,000 kg has been allocated.

d) Special Conditional Quota Request Process

Starting in 2025/2026, the Special Conditional Quota Request process has been implemented to address market opportunities that cannot be met by normal market growth within the commercial quota. Provincial commodity boards in conjunction with processors may request conditional allocations to satisfy opportunities arising from specific events, product test marketing, the launch of innovative products, incremental sales by producer-vendors and/or niche markets. The utilization of these allocations is conditional upon policy terms being met, the failure of which will result in any production intended for these markets counting against commercial quota.

In the policy, ““niche” means a specialized segment of the turkey market, that may be distinguished by being a particular product such as but not limited to, meat from heritage turkeys, organic, free-range, a religious

designation and is sold through specialized channels such as but not limited to, farmers' markets, independent butcher shops and independent restaurants." Ontario has requested a conditional allocation of 133,619 kg for the marketing of niche products by producer-vendors.

6) The National Commercial Allocation Policy and Statutory Obligations

The National Commercial Allocation Policy guides the Agency in its consideration of the CTMA Proclamation Criteria and in making allocations to provinces.

Consideration of the FPAA and the Proclamation Criteria with regards to the Commercial Allocation

A commercial allocation of 129,000,000 kg, 15,000,000 kg below the starting point allocation of 144,000,000 kg in the Agency's National Commercial Allocation Policy, is necessary to maintain a strong, efficient industry. Sections 4.01 and 4.02 of the National Commercial Allocation Policy provides for allocations at or below 144,000,000 kg to be made on a pro-rata basis. Consistent with the objects of an Agency in the FPAA, this is seen as a means of maintaining a viable industry in all provinces. The Agency believes it would be unreasonable, for the sake of preserving production stability in the industry, to implement radically different allocations for each control period, as the national allocation shares capture historic production patterns.

The CTMA Marketing Plan:

The aggregate of base provincial allocations (excluding the unregulated area) set out in Table 1 of Section 3 of the CTMA Marketing Plan for the year 1973 equals 97,041,552 kg.

Part 2 (1) of the CTMA Marketing Plan states:

"The Agency shall, by order or regulation, establish a quota system by which quotas are assigned to all members of classes of turkey producers in each province to whom quotas are assigned by the appropriate Board or Commodity Board."

Since the market for turkeys is greater than the volumes set out in the Marketing Plan and the Agency is responsible for establishing a quota system, an overbase allocation must be made. By province, the allocation table in Appendix III illustrates total allocations for 2025/2026, the base allocations as per the Marketing Plan and the Over Base Allocations for 2025/2026.

7) List of Appendices:

Appendix I:	List of Motions Revising the Commercial Quota for the 2025/2026 Control Period
Appendix II:	2025/2026 Allocation Table for Consideration Presented to the Web Conference of July 22, 2025
Appendix III:	2025/2026 Allocation Table
Appendix IV:	TMAC Report to the TFC 282 nd Meeting
Appendix V:	TMR prepared for the July 22, 2025, Web Conference

Motions revising the federal quota with respect to the inter-provincial and export trade of turkey for the 2025/2026 Control Period.

Relevant Motion from the TFC 282nd Meeting:

1. *To approve a Special Conditional Request Allocation to Ontario for the marketing of niche products of 133,619 kg for the 2025/2026 Control Period.*

Relevant Motions from the TFC Web Conference of July 22, 2024:

1. *To revise the commercial allocation for the 2025/2026 Control Period to 129,000,000 kg.*
2. *That the total 2025/2026 Federal Quota for interprovincial and export trade of 164,991,072 kg eviscerated be allocated as follows:*

<i>British Columbia</i>	<i>18,289,833 kg</i>
<i>Alberta</i>	<i>13,815,718 kg</i>
<i>Saskatchewan</i>	<i>5,019,485 kg</i>
<i>Manitoba</i>	<i>12,880,314 kg</i>
<i>Ontario</i>	<i>75,101,261 kg</i>
<i>Quebec</i>	<i>32,319,362 kg</i>
<i>New Brunswick</i>	<i>3,354,218 kg</i>
<i>Nova Scotia</i>	<i>4,210,881 kg</i>

3. *That the 2025/2026 Federal Quota for interprovincial and export trade be allocated to the provinces as reviewed during the TFC web conference of July 22, 2025, as follows:*

- *Row 1c: Commercial Quota*
- *Row 2f: Conditional Multiplier Breeder*
- *Row 3a: Conditional Primary Breeder*
- *Row 4f: Conditional Export Policy*
- *Row 5a: Special Conditional Request Quota*

4. *To direct staff to prepare and submit the 2025/2026 Quota Regulation reflecting the allocations approved during the TFC web conference of July 22, 2025, for blue stamping by the Justice Department and prior-approval by FPCC subject to Members' approval, and to prepare a revised appendix to the Promotion Agreement.*

2025/2026 Allocation Worksheet - July 2025

		Total	BC	AB	SK	MB	ON	QC	NB	NS
Section 1: Commercial Allocation										
Shares as per Policy	a	144,000,000	18,973,866	13,683,729	4,929,748	9,014,253	57,600,000	32,292,652	3,330,410	4,175,342
Adjustment +/- Starting Point	b	- 15,000,000	- 1,976,444	- 1,425,388	- 513,515	- 938,985	- 6,000,000	- 3,363,818	- 346,918	- 434,932
2025/2026 Commercial Allocation	c=a+b	129,000,000	16,997,422	12,258,341	4,416,233	8,075,268	51,600,000	28,928,834	2,983,492	3,740,410
Section 2: Conditional Multiplier Breeder										
Reference %	a			1.62%	0.60%	3.28%	2.13%	1.75%		
Reference Level	b=1c*a	2,095,286	-	198,585	26,497	264,869	1,099,080	506,255	-	-
Egg & Poults Cap	c	1,488,166					1,488,166			
Reference Level Total	d=b+c	3,583,452	-	198,585	26,497	264,869	2,587,246	506,255	-	-
Forecast Marketings	e	5,805,215	-	-	-	893,189	4,582,026	330,000	-	-
Conditional Multiplier Allocation	f=e-d	2,623,100	-	-	-	628,320	1,994,780	-	-	-
Section 3: Conditional Primary Breeder	a	2,098,080	-	-	-	-	2,098,080	-	-	-
Section 4: Conditional Export Policy										
Section 1 Parts	a	18,973,065	1,292,411	1,557,377	603,252	1,133,726	11,254,574	2,290,528	370,726	470,471
Section 1 Whole Bird	b	5,551,840	-	-	-	-	5,551,840	-	-	-
Section 1 Carry-Forward	c	-	-	-	-	-	-	-	-	-
Section 2 Placement for Export	d	3,568,368	-	-	-	-	2,468,368	1,100,000	-	-
Section 3 Live (evis. Equivalent)	e	3,043,000	-	-	-	3,043,000	-	-	-	-
Conditional Export Policy Allocation	f=sum(a:e)	31,136,273	1,292,411	1,557,377	603,252	4,176,726	19,274,782	3,390,528	370,726	470,471
Section 5: Special Conditional Request Quota	a	133,619					133,619			
Section 6: 2024/2025 Overmarketings	a	-								
Section 6: Total Allocation for Consideration (1c+2f+3a+4f+5a-6a)		164,991,072	18,289,833	13,815,718	5,019,485	12,880,314	75,101,261	32,319,362	3,354,218	4,210,881

2025/2026 PROVINCIAL TURKEY ALLOCATIONS - KILOGRAMS

Reflecting decisions of the TFC Directors during their web conference of July 22, 2025.

	TOTAL	BC	AB	SK	MB	ON	QC	NB	NS
A) Commercial Allocation	129,000,000	16,997,422	12,258,341	4,416,233	8,075,268	51,600,000	28,928,834	2,983,492	3,740,410
B) Multiplier Breeder									
1) Reference %			1.62%	0.60%	3.28%	2.13%	1.75%		
2) Reference Level (AxB1)			198,585	26,497	264,869	1,099,080	506,255		
3) Egg & Poult Cap						1,488,166			
4) Reference Level Total (B2+B3)			198,585	26,497	264,869	2,587,246	506,255		
5) Forecast Marketings	5,805,215				893,189	4,582,026	330,000		
6) Conditional Allotment (B5-B4, or "0")	2,623,100				628,320	1,994,780			
C) Primary Breeder	2,098,080					2,098,080			
D) Conditional Export Policy Allocations									
1) Section 1 - Upper Limit on Parts	18,973,065	1,292,411	1,557,377	603,252	1,133,726	11,254,574	2,290,528	370,726	470,471
2) Section 1 - Whole Bird Exports	5,551,840					5,551,840			
3) Section 1 - Carry-Forward						2,468,368	1,100,000		
4) Section 2 - Placements for Export	3,568,368								
5) Section 3 - Live (evis.)	3,043,000				3,043,000				
6) Total Conditional Export Policy Allocations	31,136,273	1,292,411	1,557,377	603,252	4,176,726	19,274,782	3,390,528	370,726	470,471
E) Special Conditional Request Quota	133,619					133,619			
F) Overmarketings									
G) Total Allocations (A+B+C+D+E+F)	164,991,072	18,289,833	13,815,718	5,019,485	12,880,314	75,101,261	32,319,362	3,354,218	4,210,881

Base Allocations (as per the proclamation)	97,041,552	9,298,644	8,278,061	3,628,739	7,824,468	41,730,498	24,493,988	653,173	1,133,981
Over Base Allocations	67,949,520	8,991,189	5,537,657	1,390,746	5,055,846	33,370,763	7,825,374	2,701,045	3,076,900

ALLOCATIONS PROVINCIALES DE DINDON 2025-2026 – EN KILOGRAMMES

Tenant compte des décisions des administrateurs des ÉDC lors de leur conférence Web tenue le 22 juillet 2025.

	TOTAL	BC	AB	SK	MB	ON	QC	NB	NS
A) Allocation commerciale	129,000,000	16,997,422	12,258,341	4,416,233	8,075,268	51,600,000	28,928,834	2,983,492	3,740,410
B) Multiplicateurs									
1) % de référence			1.62%	0.60%	3.28%	2.13%	1.75%		
2) Niveau de référence (A x B1)			198,585	26,497	264,869	1,099,080	506,255		
3) Plafond pour les œufs et les dindonneaux						1,488,166			
4) Total du niveau de référence (B2 + B3)			198,585	26,497	264,869	2,587,246	506,255		
5) Prévisions des mises en marché					893,189	4,582,026	330,000		
6) Allocation conditionnelle (B5 - B4 ou « 0 »)					628,320	1,994,780			
C) Éleveurs primaires						2,098,080			
D) Allocations conditionnelles en vertu de la Politique d'exportation.									
1) Article 1 – Limite supérieure pour les morceaux	18,973,065	1,292,411	1,557,377	603,252	1,133,726	11,254,574	2,290,528	370,726	470,471
2) Article 1 – Exportations d'oiseaux entiers	5,551,840					5,551,840			
3) Article 1 – Report									
4) Article 2 – Placements pour exportation	3,568,368					2,468,368	1,100,000		
5) Article 3 – Dindons sur pied (éviscérés)	3,043,000				3,043,000				
6) Total des allocations conditionnelles en vertu de la Politique d'exportation	31,136,273	1,292,411	1,557,377	603,252	4,176,726	19,274,782	3,390,528	370,726	470,471
E) Demande de contingent conditionnel spécial	133,619					133,619			
F) Mises en marché excédentaires									
G) Allocations totales (A+B+C+D+E+F)	164,991,072	18,289,833	13,815,718	5,019,485	12,880,314	75,101,261	32,319,362	3,354,218	4,210,881

Allocations de base (conformément à la proclamation)	97,041,552	9,298,644	8,278,061	3,628,739	7,824,468	41,730,498	24,493,988	653,173	1,133,981
Allocations en sus de la base	67,949,520	8,991,189	5,537,657	1,390,746	5,055,846	33,370,763	7,825,374	2,701,045	3,076,900

Turkey Farmers of Canada
282nd Meeting
June 18-19, 2025

AGENDA #2a.

[TURKEY MARKET ADVISORY COMMITTEE (TMAC) REPORT]

Quota System: Market, Supply, Policy *2025/2026 Commercial Allocation*

OVERVIEW

The Turkey Market Advisory Committee (TMAC) met June 2, 2025, to review the market outlook relative to the Commercial Allocation of 125.9 mkg for the 2025/2026 Control Period. The meeting included representatives from Turkey Farmers of Canada (TFC), Canadian Poultry & Egg Processors (CPEP), the Further Poultry Processors Association of Canada (FPPAC), and the third-party consultant. Accompanying this report is the Turkey Market Review (TMR).

Discussions focused on the domestic supply of whole bird (WB) and further processed (FP) turkey for 2025/2026, with wholesale prices, imports, stocks, and production taken into consideration, among other data sources. Of note, WB May 1, 2025, stocks were lower than previously forecast, due to a combination of lower-than-expected production and higher-than-expected domestic disappearance at the end of 2024/2025. With lower opening stocks for the 2025/2026 Control Period, keeping the same forecast for disappearance and closing stocks, higher WB production in 2025/2026 will be required than had been previously anticipated. Within that context, the Committee was concerned about the market performance of lower volumes in combination with lower pricing for 2025/2026.

In discussions about breast meat, a shift to WB production within an allocation of 125.9 mkg would reduce the breast meat production. If there is no change to the breast meat disappearance, this would result in closing stocks of 0.1 mkg. One key factor, imports in 2025/2026, remain a challenge to forecast. However, TMAC concluded that imports are likely to remain lower than in previous control periods due to high U.S. prices and the outlook for restrained production in the U.S. for the remainder of the year.

Due to these and other factors detailed in this report, a majority of TMAC recommends that the Commercial Allocation increase from 125.9 mkg to 130.3 mkg for the 2025/2026 Control Period.

MARKET ENVIRONMENT

Macro-Economic

The macro-economic environment remains largely unchanged from the May 9, 2025, TMAC meeting. Key indicators such as GDP per capita, unemployment, household savings, and population growth have remained steady. More information on this can be found within the TMR. Consumer spending trends have not significantly shifted, and the turkey sector continues to face challenges.

Wholesale Prices

The Committee discussed wholesale prices and volume data for WB and breast meat provided by CPEP to the end of 2024/2025.

Whole bird – 2024/2025 Control Period:

- According to CPEP data, total commodity whole bird (WB) wholesale prices are down 13% while corresponding external sales volumes were down 15%.

Breast meat (BSB) – 2024/2025 Control Period:

- External breast meat (fresh and frozen) wholesale prices decreased 21%. Reported sales volumes are down 8%. The decrease in sales volumes was only in the fresh category, which is down 15% while in the frozen category, there was an increase of 17% in volume.
- Thigh meat (fresh and frozen) wholesale prices are down 1% on sales volumes that are down 15%.

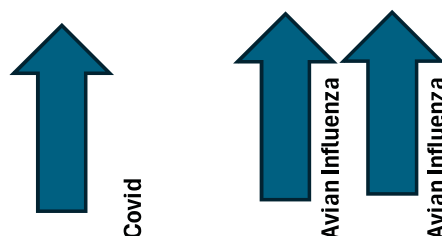
These wholesale prices occurred during a draw-down in stocks for both whole bird and breast meat. The Committee acknowledges that wholesale prices must increase in comparison to 2024/2025 and is optimistic that it will happen because of tighter supplies for both WB and FP.

As you will see from the table below, there is historical precedence for wholesale prices to increase following the previous control period when stock-to-use ratios are lower. For example, in the case of WB, in 2022/2023, following two control periods with stock-to-use ratios of 12.2% and 17.9% respectively, the wholesale price hit a high of \$5.53/kg. Similarly, for breast meat in 2022/2023, following two control periods with stock-to-use ratios of 7.7% and 4.2% respectively, the wholesale price hit \$12.92/kg.

Table 1 - Comparison: Stock-to-Use Ratios, Disappearance & Subsequent Wholesale Prices

Whole Birds	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25 (f)	25/26 (f)
Opening Stocks	24.9	21.0	18.8	18.2	17.3	7.5	9.9	12.9	17.2	11.2
Closing Stocks	21.0	18.8	18.2	17.3	7.5	9.9	12.9	17.2	11.2	9.5
Change in Stocks	-3.9	-2.2	-0.6	-0.9	-9.8	-7.4	5.4	4.3	-6.0	-1.7
Closing S/U Ratio	28.8%	27.7%	27.5%	27.7%	12.2%	17.9%	23.7%	28.4%	18.5%	17.0%
Average Wholesale Price	\$ 3.27	\$ 3.19	\$ 3.61	\$ 3.60	\$ 3.96	\$ 5.09	\$ 5.53	\$ 4.71	\$ 3.94	?
									(May-Oct)	
Domestic Disappearance	72.9	67.9	66.1	62.1	60.2	52.9	50.3	57.5	59.0	52.0

Breast Meat	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25 (f)	25/26 (f)
Opening Stocks	1.8	4.1	3.8	2.5	3.5	2.1	1.2	1.7	2.4	1.7
Closing Stocks	4.1	3.8	2.5	3.5	2.1	1.2	1.7	2.4	1.7	1.2
Change in Stocks	2.3	-0.3	-1.3	1.0	-1.4	-2.3	-0.4	0.7	-0.7	-0.5
Closing S/U Ratio	15.5%	12.9%	8.6%	12.5%	7.7%	4.2%	6.4%	8.7%	6.1%	4.5%
Average Wholesale Price	\$ 8.67	\$ 6.86	\$ 7.01	\$ 7.43	\$ 7.57	\$ 9.84	\$ 12.92	\$ 10.99	\$ 8.93	?
									(May-Oct)	
Domestic Disappearance	26.3	29.7	29.2	28.3	27.8	27.6	26.3	27.2	27.3	27.0



Imports of Turkey Meat

The following metrics were used to assess the current market conditions for imports:

- Cumulative weekly WTO TRQ usage to May 27th was 748,420 kg, 67% below pro rata.
- Total breast meat imports from January to April were, on a boneless skinless equivalent, 208,000 kg down from 397,000 kg in 2024 and 772,000 in 2023.
- Current U.S. breast prices of more than \$10 CDN per kg, are higher than the most recent wholesale prices reported by CPEP.
- The outlook for restrained production in the United States.

While predicting imports remain difficult, the information available to TMAC indicates that imports are unlikely to increase to normal levels this control period. While TMAC is optimistic that wholesale prices in Canada will increase with lower stock-to-use ratios at the end of the 2024/2025 Control Period, U.S. prices are also expected to continue to be high. Since November 2024, U.S. prices have risen due to tight supplies. Moreover, USDA forecasts show that turkey production is expected to be below the years 2022 to 2024 for the remainder of the year (page 23 of the TMR).

TMAC settled on a forecast of 0.9 mkg for imports in 2025/2026 due to the high price of breast meat in the U.S., relative to Canada. TMAC also acknowledges that under the current environment, import volumes are very difficult to forecast, given the potential for imports from Europe and the possibility of changes to wholesale prices in the U.S. and the ongoing trade war. Therefore, 0.9 mkg could equally result in an overestimation or underestimation by the end of the control period.

FORECASTING – WHOLE BIRD AND FURTHER PROCESSED

Whole Bird (WB) Market

Table 2 - 2025/2026 WB Supply and Disappearance Revised

Whole Bird	22/23	23/24	24/25	25/26 Base Scenario	25/26 rev.*
Opening Stocks	9.9	12.9	17.2	11.2	11.2
Production	57.3	64.9	54.3	47.4	51.4
Imports	0.0	0.3	0.0	0.0	0.0
Total Supply	67.2	78.0	71.5	58.6	62.6
Total Disappearance	54.3	60.8	60.4	53.1	53.1
Exports	4.0	3.3	1.3	1.1	1.1
Domestic Disappearance	50.3	57.5	59.0	52.0	52.0
Closing Stocks	12.9	17.2	11.2	5.5	9.5
PCC	1.28	1.41	1.4	1.2	1.25
Stocks to Use %	23.7%	28.4%	18.5%	10.3%	17.8%

**Forecast. For 2025/2026, a total production figure of 51.4 mkg, less 1.1 mkg for exports and 4.6 mkg for basting and stuffing equals a forecast domestic commercial allocation requirement of 45.7 mkg.*

An assessment of WB supply and disappearance for the 2025/2026 Control Period is set out above in Table 2. In order to support higher wholesale prices, TMAC has held domestic disappearance at 52.0 mkg, which is 7 mkg lower than in 2024/2025.

However, TMAC is concerned with closing stocks of 5.5 mkg. In 2024/2025, domestic disappearance came in higher-than-expected and production at the end of 2024/2025 was lower than expected, leading to whole bird stocks on May 1, 2025, of 11.2 mkg. With these lower opening stocks, the production forecasts from previous meetings would lead to closing May 1, 2026, stocks of 5.5 mkg. TMAC agreed that an additional 4 mkg in production is necessary to adequately supply the market. The “25/26 rev.” column illustrates a scenario with 51.4 mkg of production leading to a supply of 62.6 mkg and closing stocks of 9.5 mkg, for a S/U ratio of 17.8%.

Given these factors, **TMAC recommends a WB commercial allocation requirement of 45.7 mkg for the 2025/2026 Control Period (up from the previous recommendation of 42.1 mkg).**

Further Processed (FP – Breast Meat) Market

Table 3 - 2025/2026 FP Supply and Disappearance Revised

(Breast Meat)	22/23	23/24	24/25	25/26 Base Scenario	25/26 125.9 (-4 mkg to WB)*	25/26 130.3 Rev. Rec.*
Opening Stocks	1.2	1.7	2.4	1.7	1.7	1.7
Production	25.1	26.2	25.9	25.4	24.5	25.6
Imports	1.7	1.6	1.0	0.9	0.9	0.9
Total Supply	27.9	29.6	29.3	28.0	27.1	28.2
Total Disappearance	26.3	27.2	27.6	27.0	27.0	27.0
Exports	0.1	0.0	0.3	0.0	0.0	0.0
Domestic Disappearance	26.1	27.2	27.3	27.0	27.0	27.0
Closing Stocks	1.7	2.4	1.7	1.0	0.1	1.2
PCC	0.66	0.67	0.658	0.65	0.647	0.647
Stock-to-Use %	6.4%	8.7%	6.1%	3.7%	0.2%	4.5%
Total FP Production	95.7	100.0	98.6	96.8	93.2	97.6

*Forecast

The initial forecast breast meat supply and disappearance reviewed by TMAC is shown in the column “25/26 Base Scenario”. The production and domestic disappearance forecasts are based on previous TMAC reports. Breast meat stocks on May 1, 2025, came in higher-than-expected due to higher-than-expected FP production at the end of 2024/2025.

Without a change to the Commercial Allocation, shifting production of 4.0 mkg from FP to WB will lower breast meat production in 2025/2026 by 1.1 mkg, leading to closing stocks of 0.1 mkg and a stock-to-use ratio of 0.2% [Table 3, column “25/26 125.9 (-4 mkg to WB)"]. Considering that 0.9 mkg in imports could be an overestimation, this raised significant concerns with the Committee.

To better support wholesale prices and domestic supply for the FP market, the Committee targeted closing stocks of 1.2 mkg with a stock-to-use ratio of 4.5% which is 1.6 percentage points lower than the 2024/2025 Control Period (Table 3, column “25/26 130.3 Rev. Rec.”). This resulted in an increase from 93.2 to 97.7 in total FP production, holding domestic disappearance constant with the previous 2025/2026 forecast. However, it is important to note that some TMAC members registered their concern about an allocation leading to 2025/2026 closing BSB stocks as low as 1.2 mkg.

With these considerations, TMAC recommends a **FP commercial allocation requirement of 84.6 mkg for the 2025/2026 Control Period (up from the previous 83.8 mkg recommendation).**

SUMMARY OF TMAC DISCUSSIONS

TMAC reviewed the overall market outlook relative to the current Commercial Allocation of 125.9 mkg for the 2025/2026 Control Period. Considering supply and forecast closing stocks, TMAC agreed that an increase in production for both WB and FP is required. Considering that imports are likely to be lower than in previous control periods, the Committee agrees that a change in commercial allocation is necessary to address these concerns.

TMAC recommends that the Commercial Allocation be revised from 125.9 mkg to 130.3 mkg for the 2025/2026 Control Period, consisting of an FP commercial allocation requirement of 84.6 and a WB allocation requirement of 45.7.



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

Turkey Market Review

(all numbers in millions of kg, unless otherwise noted)

July 22, 2025, TFC Web Conference

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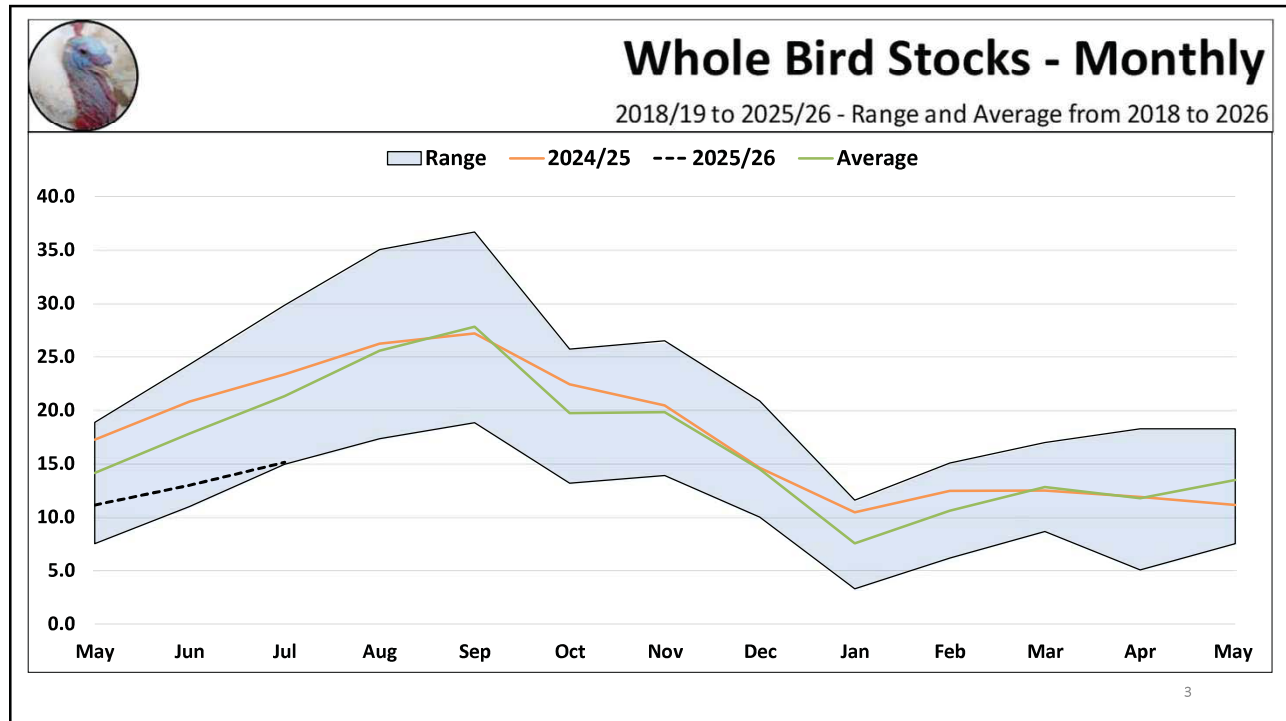
Forward

This abbreviated TMR reflects:

- 1. Forecast disappearance and closing stocks from the TMAC Meeting of June 2, 2025.**
- 2. Updated production, bagging, import, export, stock and conditional policy utilization data to July 18.**
- 3. Revisions to forecast imports and policy utilizations for the remainder of 2025/2026.**
- 4. Based on forecast disappearance and closing stocks from the TMAC report of June 2, and updated data as per points 2 and 3, the allocation arrived at in this scenario is 129.6 mkg, down from 130.3 mkg in the June TMAC report.**

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Whole Bird S & D
2023/24 to 2025/26 May-Jun and Jul-Apr (2025/26 Forecast)

	2023/24			2024/25			2025/26		
	May-Jun	Jul-Apr	Total	May-Jun	Jul-Apr	Total	May-Jun	Jul-Apr	Total
Opening Stocks	12.9	18.6	12.9	17.2	23.3	17.2	11.1	15.1	11.1
Production	10.7	54.1	64.9	10.9	43.5	54.5	7.2	44.2	51.4
Imports	0.1	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Total Supply	23.7	72.9	78.0	28.2	66.9	71.7	18.4	59.3	62.6
Total Disappear.	5.1	55.7	60.8	4.8	55.7	60.6	3.2	49.9	53.1
Exports	1.3	2.0	3.3	0.1	1.4	1.5	0.1	1.0	1.1
Dom. Disappear.	3.8	53.7	57.5	4.7	54.3	59.0	3.1	48.9	52.0
Closing Stocks	18.6	17.2	17.2	23.3	11.1	11.1	15.1	9.5	9.5
Avg \$	\$ 5.92	\$ 4.69	\$ 4.71	\$ 3.35	\$ 4.10	\$ 4.03	\$ 4.21		

25/26 Forecast Production = Commercial (45.8) + Stuffing and Basting (4.5) + Exports (1.1) = 51.4 Mkg (Numbers may not add up due to rounding).

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Whole Bird S & D

2016/17 to 2025/26 - 2025/26 (129.6) Forecast

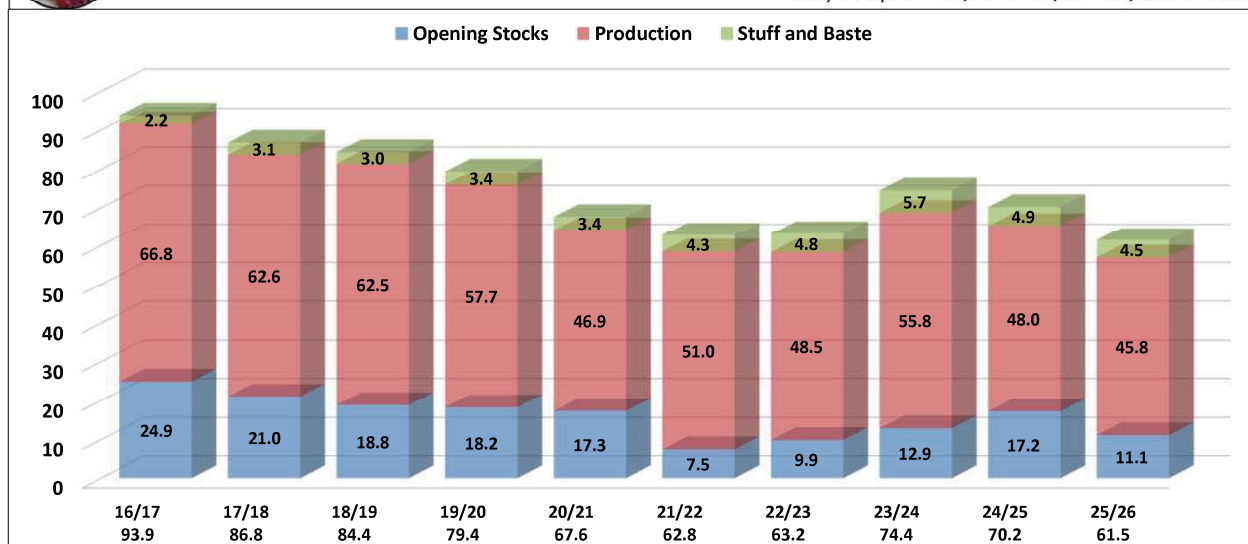
	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129.6)
Opening Stocks	24.9	21.0	18.8	18.2	17.3	7.5	9.9	12.9	17.2	11.1
Production	69.3	65.9	65.7	61.6	51.5	57.5	57.3	64.9	54.5	51.4
Imports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0
Total Supply	94.2	86.9	84.6	79.8	68.8	65.0	67.2	78.0	71.7	62.6
Total Disappear.	73.1	68.0	66.3	62.5	61.3	55.2	54.3	60.8	60.6	53.1
Exports	0.3	0.1	0.2	0.4	1.1	2.2	4.0	3.3	1.5	1.1
Dom. Disappear.	72.9	67.9	66.1	62.1	60.2	52.9	50.3	57.5	59.0	52.0
Closing Stocks	21.0	18.8	18.2	17.3	7.5	9.9	12.9	17.2	11.1	9.5
Population (Nov1)	36.3	36.7	37.3	37.9	38.0	38.5	39.4	40.6	41.5	41.7
PCC	2.01	1.85	1.77	1.64	1.6	1.4	1.3	1.4	1.4	1.2
Stock to Use	28.8%	27.7%	27.5%	27.7%	12.2%	17.9%	23.7%	28.4%	18.4%	17.8%
Avg \$	\$ 3.27	\$ 3.19	\$ 3.61	\$ 3.60	\$ 3.96	\$ 5.09	\$ 5.53	\$ 4.71	\$ 4.03	
Stuff & Baste	2.2	3.1	3.0	3.4	3.4	4.3	4.8	5.7	4.9	4.5
Quota	66.8	62.6	62.5	57.7	46.9	51.0	48.5	55.8	48.0	45.8

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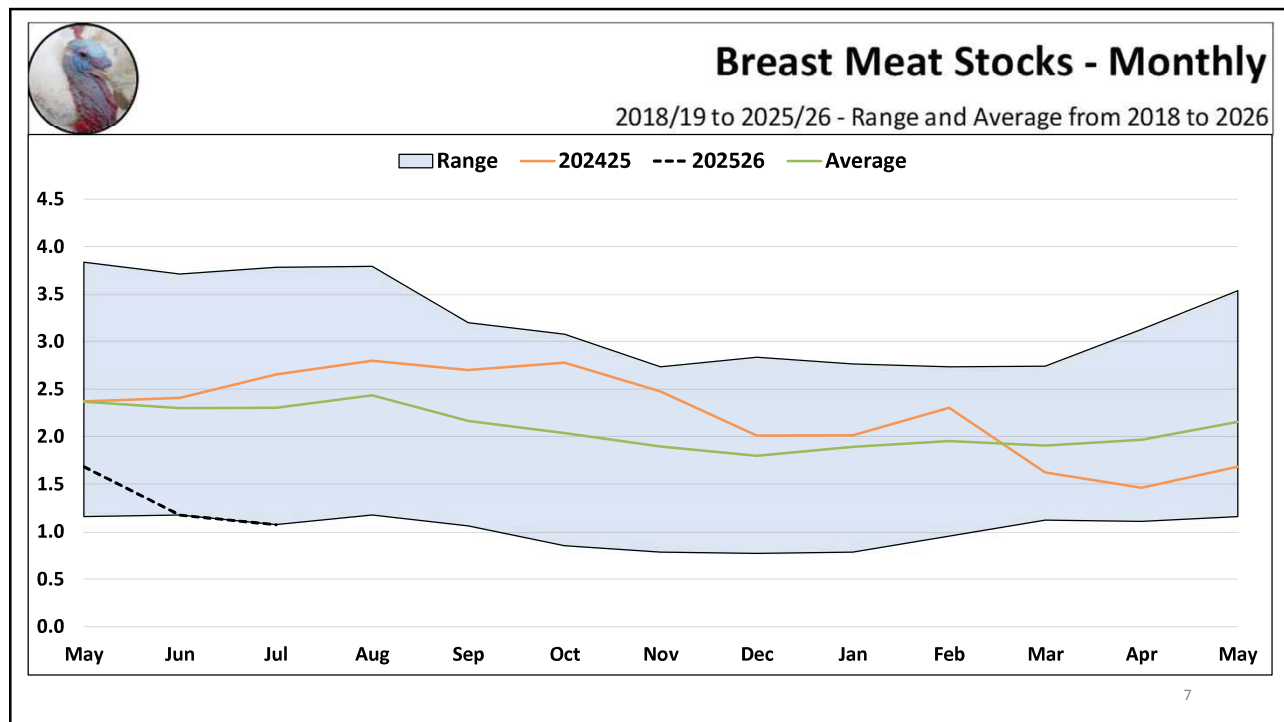
Control Period Bagging Supply

May to April – 16/17 to 25/26 - 25/26 Forecast



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Breast Meat S & D
2023/24 to 2025/26 May-Jun and Jul-Apr (2025/26 Forecast)

	2023/24			2024/25			2025/26		
	May-Jun	Jul-Apr	Total	May-Jun	Jul-Apr	Total	May-Jun	Jul-Apr	Total
Opening Stocks	1.7	1.7	1.7	2.4	2.7	2.4	1.7	1.1	1.7
Production	4.2	22.1	26.2	4.5	21.3	25.8	4.2	21.3	25.5
Imports	0.3	1.4	1.6	0.1	0.9	1.0	0.1	0.9	1.0
Total Supply	6.1	25.1	29.6	7.0	24.9	29.2	6.1	23.2	28.2
Total Disappear.	4.4	22.8	27.2	4.3	23.2	27.5	5.0	22.0	27.0
Exports	0.0	0.0	0.0	0.0	0.3	0.3	0.0	0.0	0.0
Dom. Disappear.	4.4	22.8	27.2	4.3	22.9	27.2	5.0	22.0	27.0
Closing Stocks	1.7	2.4	2.4	2.7	1.7	1.7	1.1	1.2	1.2
Weighted \$/kg	\$ 12.53	\$ 10.68	\$ 10.99	\$ 8.84	\$ 8.63	\$ 8.67	\$ 8.79		
FP Production	16.0	84.0	100.0	17.1	81.3	98.4	16.2	81.0	97.2

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Breast Meat S & D

2016/17 to 2025/26 - 2025/26 (129.6) Forecast

	16/17	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129.6)
Opening Stocks	1.8	4.1	3.8	2.5	3.5	2.1	1.2	1.7	2.4	1.7
Production	26.7	28.0	26.8	28.0	25.1	25.6	25.1	26.2	25.8	25.5
Imports	1.9	1.4	1.1	1.3	1.4	1.1	1.7	1.6	1.0	1.0
Total Supply	30.4	33.5	31.8	31.9	30.0	28.8	27.9	29.6	29.2	28.2
Total Disappear.	26.3	29.7	29.2	28.3	27.9	27.6	26.3	27.2	27.5	27.0
Exports	- 0.0	0.1	0.1	0.0	0.1	0.0	0.1	0.0	0.3	0.0
Dom. Disappear.	26.3	29.5	29.1	28.3	27.8	27.6	26.1	27.2	27.2	27.0
Closing Stocks	4.1	3.8	2.5	3.5	2.1	1.2	1.7	2.4	1.7	1.2
Population (Nov 1)	36.3	36.7	37.3	37.9	38.0	38.5	39.4	40.6	41.5	41.7
PCC	0.73	0.80	0.78	0.75	0.73	0.72	0.66	0.67	0.66	0.65
Weighted \$/kg	\$ 8.67	\$ 6.86	\$ 7.01	\$ 7.43	\$ 7.57	\$ 9.84	\$ 12.92	\$ 10.99	\$ 8.67	
S/U	15.5%	12.9%	8.6%	12.5%	7.7%	4.2%	6.4%	8.7%	6.1%	4.5%
FP Production	101.7	106.7	102.3	106.9	95.6	97.4	95.7	100.0	98.4	97.2

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FP Production Sources

2017/18 to 2025/26 - 2025/26 (129.6) Forecast

	17/18	18/19	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129.6)
FP Production	106.7	102.3	106.9	95.6	97.4	95.7	100.0	98.4	97.2
FP Utilization Rate	99.3%	97.5%	99.9%	98.5%	94.9%	86.8%	96.6%	97.7%	98.3%
Adj. Utl. and FP Allc.	107.5	104.9	106.9	97.1	102.7	110.3	103.5	100.7	98.9
Calendar Adjustment	100.4%	100.4%	100.8%	100.4%	98.0%	100.0%	100.8%	100.4%	100.4%
Total of Utl. and FP Allc.	107.1	104.5	106.1	96.7	104.7	110.3	102.7	100.3	98.5
Multiplier Breeder Utl.	2.1	1.8	1.9	1.8	1.4	0.2	0.5	0.7	1.1
Primary Breeder Utl.	1.9	0.1	0.3	1.0	1.3	1.0	1.4	1.9	1.9
Export – Section 1	15.1	15.9	15.8	14.2	14.2	11.7	14.6	12.1	11.7
Carry-Forward	0.8	0.1	- 0.7	0.5	- 0.2	- 0.6	0.5	0.9	0.0
FP Allocation	87.2	86.7	88.9	79.1	88.0	98.0	85.7	84.7	83.8

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