



Farm Products Council
of Canada

Conseil des produits agricoles
du Canada

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Le 25 mars 2026

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 24 mars 2026, 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 9 janvier 2026, pour la période réglementée 2026-2027, qui commence le 26 avril 2026 et se termine le 24 avril 2027.

Après un examen approfondi de la justification fourni 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



TURKEY FARMERS
OF CANADA™
LES ÉLEVEURS DE DINDON
DU CANADA^{MC}

January 9, 2026

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 2026/2027**

Please find enclosed a submission and supporting rationale from the Turkey Farmers of Canada (TFC) establishing the 2026/2027 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 284th Meeting of December 3 and 4, 2025, the TMAC meeting of November 24, 2025, the recommendations of the TFC Supply Policy committee, and TFC policies. After careful consideration, the TFC Directors approved a change to the control period calendar to start at the beginning of July and to the end in June the following year. To bridge the current and new schedules, 2026/2027 will be a transitional 14-month control period from Sunday, April 26, 2026, to Saturday June 26, 2027. The necessary one-time adjustments for a 14-month control period in 2026/2027 are detailed.

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,

Adam Power
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 2026/2027
Date: January 9, 2026

This submission provides background and rationale for establishing the federal quota with respect to the inter-provincial and export trade of turkey at 206,677,986 kg for the transitional 2026/2027 Control Period.

Contents:

- 1) **Preamble: Control Period Schedule Change and Transitional 2026/2027 Control Period**
 - a) **Adjustment to Commercial Allocation for the 14-Month 2026/2027 Control Period**
 - b) **Other Adjustments to Account for a 14-Month Control Period**
- 2) **Chronology of Discussions at the TFC 284th Meeting and Relevant Motions**
- 3) **Federal Turkey Allocations**
- 4) **Turkey Market Advisory Committee (TMAC) Report from Their Meeting of November 24, 2025, and Corresponding Turkey Market Review (TMR)**
- 5) **Further Consideration at the TFC 284th Meeting**
- 6) **Statutory Obligations**
- 7) **Federal Quota and Conditional Allocations**
 - a) **Multiplier Breeder Allocation**
 - b) **Primary Breeder Allocation**
 - c) **Export Policy Allocation**
- 8) **Provincial Allocations of Federal Quota**
- 9) **Appendices**

1) **Preamble: Control Period Schedule Change and Transitional 2026/2027 Control Period**

At the TFC 284th Meeting, the TFC Directors approved a change to the control period calendar to start the week of July 1 and to end the last Saturday of June the following year. Shifting the control period calendar by two months will make quota setting easier in the future. Starting with 2027/2028, quota will be set after Christmas, when the production requirement for the upcoming control period will be clearer. It has also been noted that with this change, flocks lost to HPAI in fall and winter, will more easily be replaced within province before the end of the control period, thereby reducing the need to lease quota interprovincially. The first control period under the new schedule will be from Sunday, June 27, 2027, to Saturday, June 24, 2028.

To bridge the current and new schedules, 2026/2027 will be a transitional 14-month control period from Sunday, April 26, 2026, to Saturday June 26, 2027. To ensure that production and supply patterns remain unaffected, the following one-time adjustments were approved that are reflected in this quota order:

a) **Adjustment to Commercial Allocation for the 14-Month 2026/2027 Control Period**

There are distinct seasonal production patterns by province. Some provinces regularly produce a disproportionately large amount of turkey in May and June each year, while others produce relatively little. As May and June will occur twice in 2026/2027, production patterns in these months were taken into consideration so that provincial industries can carry on business as normal. **For 2026/2027, each province's**

12-month commercial allocation has been increased by its five-year average production of young turkeys in May and June as a % of control period production. In Section 3, Table 1, the allocations resulting from this decision are illustrated.

b) Other Adjustments to Account for a 14-Month Control Period

While production under the commercial allocation is subject to fixed limits, breeder and export production is covered by conditional policy utilizations that allow for fluctuations in provincial production patterns. Due to the mechanics of the breeder and export policies, and the two additional months in 2026/2027, several adjustments to policy provisions are required (see Appendix II). To account for the longer timeframe in 2026/2027, the following have been increased by 1/6th:

- The Egg and Poult Cap in the Multiplier Breeder Policy (TFO).
- The conditional utilizations available in the Primary Breeder Policy.
- The upper limits on utilizations that can be earned on parts exports under Section 1 of the Export Policy.

2) Chronology of Discussions at the TFC 284th Meeting and Relevant Motions

At the TFC 284th Meeting, discussions and motions relevant to the quota occurred in the following order:

- a) **Review of TMAC Report/TMR and Quota Motions Relevant to a 12-Month Control Period**
- b) **Review of Supply Policy Committee Report and Decision to Adjust the Control Period Schedule and to Implement a Transitional Control Period**
- c) **Quota Motions Relevant to a 14-Month Control Period**

a) Review of TMAC Report/TMR and Quota Motions Relevant to a 12-Month Control Period

Following review of the TMAC report, TMR and related discussions, the following two (2) motions, applicable to a 12-month control period, were passed.

Motion #1

To set the preliminary commercial allocation for the 2026/2027 Control Period at 134,000,000 kg with a further review by TMAC following the release of January 1 stocks.

Motion #2

To approve the requests from Ontario and Quebec, as per their correspondence, for allocations under the Section 1 Whole and Section 2 provisions of the Export Policy for the 2026/2027 Control Period in the following amounts:

For Section 1 Whole:

- *Ontario* 7,640,000 kg
- *Quebec* 2,000,000 kg

For Section 2:

- *Ontario* 8,247,376 kg
- *Quebec* 950,000 kg

b) Review of Supply Policy Committee Report and Decision to Adjust the Control Period Schedule and to Implement a Transitional Control Period

Following review of the Supply Policy Committee Report, the TFC Directors passed the following motion to adjust the control period schedule and to implement a transitional 14-month control period for 2026/2027.

Motion #3

That starting with 2027/2028, that the control period schedule be adjusted to run from the Sunday of the week of July 1 to the last Saturday of June the following year, and further, that a 14-month transitional control period with all one-time policy exceptions detailed at the TFC 284th Meeting, be implemented from Sunday, April 26, 2026, to Saturday June 26, 2027.

Among the one-time policy exemptions detailed at the TFC 284th Meeting, and implemented as per the motion, for 2026/2027, each province’s 12-month commercial allocation is to be increased by its five-year average of May-June production of young turkeys as a % of control period production. This is illustrated in Table 1, in which:

- Column A shows each province’s allocation as per Motion 1.
- Column B shows each province’s five-year average of May-June production of young turkeys as a % of the control period total.
- C shows the additional allocation to account for May-June production patterns.
- D shows the Commercial Allocation for the transitional control period

Table 1

Province	26/27 Allocation (12 months)	5-Year Avg May-Jun Production of Young Turkeys	Additional Allocation for 13th and 14th Month	14-Month 26/27 Commercial Allocation
	A	B	C=A*B	D=A+C
BC	17,656,236	16.963%	2,995,018	20,651,254
AB	12,733,470	15.791%	2,010,793	14,744,263
SK	4,587,404	13.950%	639,942	5,227,346
MB	8,388,263	22.915%	1,922,207	10,310,470
ON	53,600,000	16.925%	9,072,025	62,672,025
QC	30,050,107	16.892%	5,076,097	35,126,204
NB	3,099,132	16.648%	515,953	3,615,085
NS	3,885,388	19.698%	765,334	4,650,722
CAN	134,000,000	17.162%	22,997,369	156,997,369

c) Quota Motions Relevant to a 14-Month Control Period

Following the decision to adjust the control period schedule, the TFC Directors passed the following motions that take the 14-month timeframe into account.

Motion #4

To set the preliminary commercial allocation for the adjusted 14-month 2026/2027 Control Period at 156,997,369 kg with a further review by TMAC following the release of January 1 stocks.

Motion #5

That the Federal Quota for interprovincial and export trade for the adjusted 14-month 2026/2027 Control Period be allocated to the provinces as reviewed during the TFC 284th Meeting of December 3-4, 2025, as follows:

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

Motion #6

That the Federal Quota for interprovincial and export trade of 206,677,986 kg eviscerated for the adjusted 14-month 2026/2027 Control Period be allocated as follows:

<i>British Columbia:</i>	<i>22,159,067 kg</i>
<i>Alberta:</i>	<i>16,561,203 kg</i>
<i>Saskatchewan:</i>	<i>5,931,140 kg</i>
<i>Manitoba:</i>	<i>16,070,354 kg</i>
<i>Ontario:</i>	<i>95,960,531 kg</i>
<i>Quebec:</i>	<i>40,748,487 kg</i>
<i>New Brunswick:</i>	<i>4,047,599 kg</i>
<i>Nova Scotia:</i>	<i>5,199,605 kg</i>

Motion #7

To direct staff to prepare and submit the Quota Regulation for the adjusted 14-month 2026/2027 Control Period reflecting the allocations approved during the TFC 284th Meeting of December 3-4, 2025, for blue stamping by the Justice Department and prior-approval by FPCC subject to Members' approval, and to prepare a Promotion Agreement.

3) Federal Turkey Allocations

As per the motions, the 2026/2027 (14 months) federal quota for turkey, excluding the unregulated area, consists of the following components:

2026/2027 Federal Turkey Allocations (kg)			
		Pounds	Kilograms
A	Commercial Allocation	346,119,952	156,997,369
B	Multiplier Breeder	5,570,870	2,526,905
C	Primary Breeder	5,396,387	2,447,760
	Export Policy:		
D	<i>Section 1 Parts</i>	<i>48,799,858</i>	<i>22,135,243</i>
E	<i>Section 1 Whole</i>	<i>21,252,562</i>	<i>9,640,000</i>
F	<i>Section 2 Planned Exports</i>	<i>20,276,743</i>	<i>9,197,376</i>
G	<i>Section 3 Live</i>	<i>8,230,590</i>	<i>3,733,333</i>
H=D+E+F+G	Total Export	98,559,753	44,705,952
I=A+B+C+H	Total Quota	455,646,962	206,677,986
J	Base Allocations, Proclamation S. 3	213,940,000	97,041,552
K=I-J	Over Base Allocations	241,706,962	109,636,434

4) Turkey Market Advisory Committee (TMAC) Report from Their Meeting of November 24, 2025, and Corresponding Turkey Market Review (TMR)

Note: At the time of the November 24, 2025, TMAC meeting, the decision to adjust the control period schedule and to implement a transitional 14-month control period had not occurred. As a result, TMAC's analysis and recommendations reflected a 12-month control period.

The TMAC report and TMR presented to the TFC 284th Meeting (Appendixes III and IV) provided an analysis of the whole bird and breast meat/further processing markets and a commercial quota recommendation.

Whole Bird

In the whole bird section of the TMAC report, it was noted that:

- Control Period To-Date (CPTD) or May to October, whole bird disappearance was a historically low 14.0 mkg, as consumers move away from whole birds and primary processors increasingly focus on further processing in response.
- For the remainder of 2025/2026 (November to April), whole bird domestic disappearance was forecast at 29.0 mkg, a decrease of 1.9 mkg from year earlier. This forecast was due to the decline in featuring activity over the previous Thanksgiving and the trend toward declining whole bird disappearance.
- For 2026/2027 (12-month), whole bird domestic disappearance is forecast at 44.0 mkg, a decrease of 15.0 mkg from 2024/2025.
- For a 12-month period in 2026/2027, TMAC reported that 41.3 mkg of commercial allocation is required for whole birds.

In the TMR:

- Slides 23 and 24 illustrate the decline in the whole bird market over time, with domestic disappearance dropping from 67.9 mkg in 2017/2018 to a forecast of 44.0 mkg in 2026/2027.
- Slides 23 and 24, also show that opening stocks have been drawn down from 17.2 mkg in 2024/2025, to a forecast of 8.6 mkg in 2026/2027.+ The drawdown in stocks facilitated 8.6 mkg of consumption over 2024/2025 and 2025/2026. Stocks are not forecast to be drawn down further in 2026/2027.

Further Processed/Breast Meat

In the breast meat section of the TMAC report, it was noted that:

- CPTD domestic disappearance for breast meat was 14.7 mkg, an increase of 0.5 mkg from year earlier and 0.6 mkg from two years earlier.
- For the remainder of 2025/2026, TMAC forecast breast meat disappearance at 13.8 mkg, an increase of 0.8 mkg from year earlier.
- Breast meat domestic disappearance for 2026/2027 is forecast at 29.0 mkg, up from 28.5 mkg in 2025/2026.
- To facilitate the production of 28.4 mkg of breast meat, 108.2 mkg of FP production is required. After production from Section 1 of the Export Policy and breeder production is factored in, 95.6 mkg of commercial allocation is required.

In the TMR:

- Slide 8 shows that November 1 breast meat stocks of 0.8 mkg are close to an all-time low in data going back to May 2018.
- Slide 12 shows that a decreased amount of this supply will come from Section 1 of the Export Policy, with 11.4 mkg forecast for 2025/2026 and 2026/2027, down from 14.6 mkg in 2023/2024.

5) Further Consideration at the TFC 284th Meeting

At the TFC 284th Meeting, the TFC Directors took into consideration the endemic nature of high path avian influenza. In their deliberations, the Directors lowered the utilization rate of allocations and conditional utilizations in 2026/2027 from the TMAC forecast. This adjustment changed the commercial allocation required for further processing to increase to 98.0 mkg.

With regards to whole bird, the Directors are of the opinion that further decreases to whole bird sales are likely in 2026/2027, with domestic disappearance forecast at 40.0 mkg, down from the TMAC forecast of 44.0 mkg. In order to adequately supply the whole bird market, the TFC Directors expect that 36.0 mkg of allocation will be required to satisfy the whole bird market.

With the combination of 98.0 mkg for further processing and 36.0 mkg for whole bird, the Directors arrived at a commercial allocation for 2026/2027 (12 months) of 134.0 mkg.

6) Statutory Obligations

The motions setting the 2026/2027 allocation are the result of the Directors' consideration of:

- TMAC's assessment of the market for turkey, total supply requirements and supply provided by conditional policy utilizations and imports.
- Other relevant factors such as avian Influenza, the outlook for feed and live prices, the competitive position of turkey compared to competing meats, import volumes and economic indicators.
- The policy provisions that require one-time adjustments during a transitional control period so that the control period can be permanently adjusted to run from the beginning of July to the end of June.

The National Commercial Allocation, Export, Multiplier Breeder and Primary Breeder policies guide the Agency in its consideration of the CTMA Proclamation Criteria.

The CTMA Marketing Plan:

The aggregate of base provincial allocations 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.

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

Given the methodology agreed upon to adjust the commercial allocation to a 14-month control period, the starting point allocation of 144,000,000 kg in the National Commercial Allocation Policy is equivalent to 168,713,591 kg. Using that same methodology, the 12-month commercial allocation of 134,000,000 kg has been set to 156,997,369 kg. The National Commercial Allocation Policy provides for allocations at or below 144,000,000 kg to be made on a pro-rata basis. To arrive at the allocation for 2026/2027, the pro-rata allocations have been adjusted to account for provincial variations in production patterns. This allocation and adjustment methodology is necessary to maintain a strong, efficient industry. Consistent with the objects of an

Agency in the FPAA, this is 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 and the adjustments based on production patterns capture historic production patterns.

7) 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**

These three Conditional Allocation Policies result 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 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 transitional 2026/2027 Control Period, 2,526,905 kg has been allocated.

b) **Primary Breeder Allocation**

Canada's primary turkey breeding industry provides breeding stock to multiplier breeders globally. For the transitional 2026/2027 Control Period, 2,447,760 kg is allocated to cover the marketing of by-product live turkeys to facilitate the needs of this industry.

c) **Export Policy Allocation**

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 are allocated. For the transitional control period, the upper limits have been adjusted by 1/6th to 22,135,243 kg.

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 2026/2027, 9,640,000 kg has been allocated. Please note that the amount allocated has not been adjusted for the 14-month control period. If it is necessary for this to be adjusted to account for the longer control period, it will be done later.

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. It is normal for this to be completed in September of each year, and for this allocation to be made at that time.

Section 2 – Planned Exports: These allocations reflect production to be used for planned exports. This section accommodates firms exporting 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 9,197,376 kg have been made. Please note that the amount allocated has not been adjusted for the 14-month control period. If it is necessary for this to be adjusted to account for the longer control period, it will be done later.

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, 3,733,333 kg has been allocated.

8) Provincial Allocations of Federal Quota

Based on consideration of the Proclamation criteria, the Agency’s federal quota for each province during 2026/2027 are detailed in the following section:

Allocations (kg)

Province	Commercial Allocation	Conditional Allocations	Total Federal Quota	Base	Overbase
	A	B	C=A+B	D	E=C-D
BC	20,651,254	1,507,813	22,159,067	9,298,644	12,860,423
AB	14,744,263	1,816,940	16,561,203	8,278,061	8,283,142
SK	5,227,346	703,794	5,931,140	3,628,739	2,302,401
MB	10,310,470	5,759,884	16,070,354	7,824,468	8,245,886
ON	62,672,025	33,288,506	95,960,531	41,730,498	54,230,033
QC	35,126,204	5,622,283	40,748,487	24,493,988	16,254,499
NB	3,615,085	432,514	4,047,599	653,173	3,394,426
NS	4,650,722	548,883	5,199,605	1,133,981	4,065,624
Total	156,997,369	49,680,617	206,677,986	97,041,552	109,636,434

Allocations (pounds)

Province	Commercial Allocation	Conditional Allocations	Total Federal Quota	Base	Overbase
	A	B	C=A+B	D	E=C-D
BC	45,528,222	3,324,159	48,852,381	20,500,000	28,352,381
AB	32,505,536	4,005,667	36,511,203	18,250,000	18,261,203
SK	11,524,325	1,551,600	13,075,925	8,000,000	5,075,925
MB	22,730,695	12,698,369	35,429,064	17,250,000	18,179,064
ON	138,168,164	73,388,593	211,556,757	92,000,000	119,556,757
QC	77,440,024	12,395,012	89,835,036	54,000,000	35,835,036
NB	7,969,898	953,530	8,923,428	1,440,000	7,483,428
NS	10,253,088	1,210,080	11,463,168	2,500,000	8,963,168
Total	346,119,952	109,527,010	455,646,962	213,940,000	241,706,962

Summary of 2026/2027 Allocations by Province (kg):

British Columbia

Commercial (12-Month)	17,656,236
May-June Adjustment	16.963%
Commercial (Transitional 14-Month)	20,651,254
Conditional Allocations	1,507,813
Total Allocation	22,159,067
Increase from Base Allocation	12,860,423

- The Section 1 Export Policy allocation of 1,507,813 kg reflects the adjusted upper limit on part utilizations.

Alberta

Commercial (12-Month)	12,733,470
May-June Adjustment	15.791%
Commercial (Transitional 14-Month)	14,744,263
Conditional Allocations	1,816,940
Total Allocation	16,561,203
Increase from Base Allocation	8,283,142

- The Section 1 Export Policy allocation of 1,816,940 kg reflects the adjusted upper limit on part utilizations.

Saskatchewan

Commercial (12-Month)	4,587,404
May-June Adjustment	13.950%
Commercial (Transitional 14-Month)	5,227,346
Conditional Allocations	703,794
Total Allocation	5,931,140
Increase from Base Allocation	2,302,401

- The Section 1 Export Policy allocation of 703,794 kg reflects the adjusted upper limit on part utilizations.

Manitoba

Commercial (12-Month)	8,388,263
May-June Adjustment	22.915%
Commercial (Transitional 14-Month)	10,310,470
Conditional Allocations	5,759,884
Total Allocation	16,070,354
Increase from Base Allocation	8,245,886

- Manitoba markets relatively few turkeys from January to April and a disproportionately large volume in May and June. As a result, Manitoba's May-June adjustment is 22.915%.
- To accommodate the marketing of spent multiplier breeders, the Multiplier Breeder allocation is set at 703,871 kg.
- The Section 1 Export Policy allocation of 1,322,680 kg reflects the adjusted upper limit on part utilizations.
- Producers in Manitoba export live turkeys. The Live Export allocation of 3,733,333 kg reflects the placements and forecast export marketings based on producer notification to the Provincial Board adjusted for the 14-month control period.

Ontario

Commercial (12-Month)	53,600,000
May-June Adjustment	16.925%
Commercial (Transitional 14-Month)	62,672,025
Conditional Allocations	33,288,506
Total Allocation	95,960,531
Increase from Base Allocation	54,230,033

- To accommodate the marketing of spent multiplier breeders, the Multiplier Breeder allocation is set at 1,823,034 kg.
- To accommodate marketings by the Primary Breeder sector, the Primary Breeder allocation is set at an adjusted 2,447,760 kg as per the terms of that Policy.
- The Section 1 Export Policy allocation of 13,130,336 kg reflects the adjusted upper limit on part utilizations.
- On behalf of processors in that province, Turkey Farmers of Ontario (TFO) has requested conditional allocations of 7,640,000 kg for whole bird exports under Section 1 of the Export Policy, and 8,247,376 kg under Section 2 of the Export Policy.

Quebec

Commercial (12-Month)	30,050,107
May-June Adjustment	16.892%
Commercial (Transitional 14-Month)	35,126,204
Conditional Allocations	5,622,283
Total Allocation	40,748,487
Increase from Base Allocation	16,254,499

- The Section 1 Export Policy allocation of 2,672,283 kg reflects the adjusted upper limit on part utilizations.
- On behalf of processors in that province, conditional allocations of 950,000 kg under Section 2 of the Export Policy and 2,000,000 kg for whole bird exports under Section 1 of the Export Policy have been allocated.

New Brunswick

Commercial (12-Month)	3,099,132
May-June Adjustment	16.648%
Commercial (Transitional 14-Month)	3,615,085
Conditional Allocations	432,514
Total Allocation	4,047,599
Increase from Base Allocation	3,394,426

- The Section 1 Export Policy allocation of 432,514 kg reflects the adjusted upper limit on part utilizations.

Nova Scotia

Commercial (12-Month)	3,885,388
May-June Adjustment	19.698%
Commercial (Transitional 14-Month)	4,650,722
Conditional Allocations	548,883
Total Allocation	5,199,605
Increase from Base Allocation	4,065,624

- The Section 1 Export Policy allocation of 548,883 kg reflects the adjusted upper limit on part utilizations.

9) Appendices:

Appendix I:	Interpretation and Application of the Marketing Plan Criteria for Conditional Allocations in the 2026/2027 Control Period
Appendix II:	Adjustments to Conditional Allocation Policy Provisions for a 14-Month Control Period
Appendix III:	TMAC Report from their meeting of November 24, 2025
Appendix IV:	Turkey Market Review prepared for the TFC 284 th Meeting of December 3-4, 2025
Appendix V	2026/2027 Allocation Table for Consideration Reviewed at the TFC 284 th Meeting of December 3-4, 2025
Appendix VI:	2026/2027 Allocation Table

Interpretation and Application of the Marketing Plan Criteria for Conditional Allocations in the 2026/2027 Control Period

4.1(c) the principle of comparative advantage of production

Primary Breeder, Multiplier Breeder and Export Quotas

Inherent in the theory of comparative advantage is that resources will be used in an efficient manner that maximizes benefits to all participants. Accordingly, it is the conclusion of the TFC that primary breeder, multiplier breeder and export quota production, is the result of resources being used in an efficient manner.

The Agency, by allocating quota by class (e.g., export, breeder) can influence resource use. By considering how quota will be utilized, the TFC can ensure quota is allocated in ways consistent with the S. 21 objects of an Agency: the promotion of a strong, efficient, and competitive production and marketing industry, and done so in a manner that has due regard for the interests of producers and consumers.

For the purposes of allotting turkey quota to provinces, the TFC Directors assess this principle in terms of the production of turkey in provinces and regions in response to the characteristics of industries supplying turkey into competitive markets for meat protein (domestically and internationally) and for turkey breeding stock.

Based on this approach, the following characteristics or elements are considered by the Agency as capturing the “principle” of Comparative Advantage of Production (CAP). Under the classical theory of CAP, these elements could be characterized as “factor endowments”.

- Efficient logistics (planning, implementation, coordination and movement of birds and products to/from farms, slaughter, processing, retailer, and consumer);
- Live Production & Processing Capacity;
- Transportation Costs (live haul, finished transport costs);
- Effective marketing and profitable markets (the ability to service different market segments e.g., foodservice, proximity to local markets, retail, etc.);
- Export potential (profitable markets for products not required on the domestic market, niche export markets, live export opportunities);
- Production oriented factors (availability of feed grains, feed prices, average bird weights, live prices, productivity, etc.); and,
- Critical mass/economies of scale (efficient production, slaughtering and processing capabilities).

Using the approach outlined above to interpret CAP, the manner in which the Agency applies the principle of CAP to the various breeder and export components of the overbase quota is detailed in the table below.

Overbase Quotas:	Consideration:
1. Primary Breeder and Multiplier Breeder Quota	Under the Primary Breeder Policy and the Multiplier Breeder Policy, conditional allocations are available to provinces in order to address the marketing of mature turkey meat, which is a by-product of the marketing of eggs and poult domestic and internationally.

	<p>It is the Agency’s position that the allocation of breeder quota is consistent with the principle of CAP for the following reasons:</p> <ul style="list-style-type: none"> • Canada is a net exporter of turkey breeding stock. The breeding sector is ideally situated to service clients in the United States and around the world with primary and multiplier breeding stock. For those provinces engaged in the export of breeding stock, it is the Agency’s position that the use of trade data “reveals” the underlying pattern of CAP in this market segment. • For provinces with a multiplier breeding sector that are not heavily engaged in the export of eggs and poults, CAP is still applicable as breeder flock operators in these provinces are ideally situated to supply hatcheries with eggs not easily supplied from elsewhere.
<p>2. Section 2 Export Quota and Section 3 Live Turkey Export Quota</p>	<p>Under the TFC Export Policy, Production for Export Markets (Section 2) and quota for Live Turkey Exports (Section 3) must be requested by the Provincial Board from the Agency.</p> <p>Under this approach, processors and producers estimate their export quota requirements and, through their Provincial Commodity Board, submit the request to the Agency.</p> <p>This market-driven process for requesting export quota is seen by the Agency as the most practical means of assessing and applying the principle of CAP.</p> <p>By allowing individual processors and producers to assess and request export quota based on demand conditions (e.g., ability to market live birds and niche products such as organic, Kosher, etc.); local resource availability (e.g., live production and processing capacity); and, taking into account related and supporting industries (e.g., availability of feed grains, transportation, capacity), the underlying pattern of CAP is revealed.</p>
<p>3. Section 1 Export Quota</p>	<p>Under Section 1 of the Export Policy, provinces that export young turkey (whole birds or parts) may replace those exported volumes, subject to the limitations set out in the Policy.</p> <p>The allocation of export quota under Section 1 of the Export Policy is consistent with the principle of CAP in that:</p> <ul style="list-style-type: none"> • Export quota allotted for part exports is a direct result of boning activity. Provinces with a comparative advantage in boning and FP (i.e., the ability to service the FP market segment), or for whole carcass exports, is in essence reflected in their export marketings of turkey meat products; and, • The effective marketing of products not required on the domestic market, or the development of niche export markets, is also regarded by the Agency as an element of CAP.

4.1(d) any variation in the size of the market for turkeys

The manner in which the Agency has taken into account criteria (d) in the allocation of primary, multiplier and export quota is detailed below.

Overbase Quotas:	Consideration:
1. Primary Breeder Quota, Multiplier Breeder Quota, Export Quota	The TFC utilizes a market-driven process for assessing market requirements in its Primary Breeder, Multiplier Breeder and Export Policies, subject to the conditions specified within these Policies. Given that under these Policies, processors, breeder operators, exporters, producers and provinces are required to submit quota requests and/or forecasts related to demand, any variation in the size of the market segment concerned (e.g., export markets, breeding stock market segment) is captured in the Agency’s consideration process.

4.1(e) any failures by turkey producers in any province or provinces to market the number of pounds of turkey meat authorized to be marketed

With respect to the Export and Breeder Policies, given that these allocations are based on the best available estimates and forecasts, and that they are conditional in nature, the Agency acknowledges that full utilization is not always possible due to changing marketing and production conditions between the time that estimates are made and the completion of the marketing year.

4.1(f) the feasibility of increased production in each province available to be marketed

In the allocation of primary, multiplier and export quota, under TFC’s interpretation and application of CAP (production and processing capacity, production-oriented factors and effective marketing), criteria (f) is considered an element of CAP; therefore, a separate consideration process is not required.

4.1(g) the existing production and storage facilities in each province

With respect to “existing production facilities”, in the allocation of primary, multiplier and export quota, under TFC’s interpretation and application of CAP, this element of criteria (g) is already captured; therefore, a separate consideration process is not required.

4.1(h) the comparative transportation costs to market areas from alternative sources of production

With respect to “comparative transportation costs”, in the allocation of primary, multiplier and export quota, under TFC’s interpretation and application of CAP, this element of criteria (h) is already captured; therefore, a separate consideration process is not required.

Adjustments to Conditional Allocation Policy Provisions for a 14-Month Control Period

To facilitate two additional months in 2026/2027, adjustments of 1/6 to several conditional policy provisions are required. In Table 1: the adjustments of 1/6th are illustrated, with the normal or 12-month value shown on the upper line and the adjusted or 14-month value on the lower line. In Table 2, the adjusted numbers in the allocation table are indicated by yellow shading.

Table 1: Adjustments to Conditional Allocation Policy Provisions for a 14-Month Period

	Total	BC	AB	SK	MB	ON	QC	NB	NS
Egg & Poul Cap - line 2c	12-month					1,488,166			
	Adjusted					1,736,194			
Forecast Multiplier Marketings - line 2e	12-month				893,189	4,194,979	330,000		
	Adjusted				1,042,054	4,894,142	385,000		
Conditional Primary Breeder - line 3a	12-month					2,098,080			
	Adjusted					2,447,760			
Section 1 Parts - line 4a	12-month	18,973,065	1,292,411	603,252	1,133,726	11,254,574	2,290,528	370,726	470,471
	Adjusted	22,135,243	1,507,813	703,794	1,322,680	13,130,336	2,672,283	432,514	548,883
Section 3 Live (evis. Equivalent) - line 4e	12-month	3,200,000			3,200,000				
	Adjusted	3,733,333			3,733,333				

2026/2027 Allocation Worksheet - 284th - 14 Months

	Total	BC	AB	SK	MB	ON	QC	NB	NS
Section 1: Commercial Allocation									
Shares as per Policy	168,713,591	22,192,393	15,844,581	5,617,447	11,079,909	67,349,041	37,747,562	3,884,867	4,997,791
Adjustment +/- Starting Point	- 11,716,222	- 1,541,139	- 1,100,318	- 390,101	- 769,439	- 4,677,016	- 2,621,358	- 269,782	- 347,069
Section 1: Commercial Allocation	156,997,369	20,651,254	14,744,263	5,227,346	10,310,470	62,672,025	35,126,204	3,615,085	4,650,722
Section 2: Conditional Multiplier Breeder									
Reference %			1.62%	0.60%	3.28%	2.13%	1.75%		
Reference Level	2,558,027	-	238,857	31,364	338,183	1,334,914	614,709	-	-
Egg & Poul Cap	1,736,194				1,736,194				
Reference Level Total	4,294,221	-	238,857	31,364	338,183	3,071,108	614,709	-	-
Forecast Marketings	6,321,196				1,042,054	4,894,142	385,000		
Conditional Multiplier Allocation	2,526,905	-	-	-	703,871	1,823,034	-	-	-
Section 3: Conditional Primary Breeder	2,447,760	-	-	-	-	2,447,760	-	-	-
Section 4: Conditional Export Policy									
Section 1 Parts	22,135,243	1,507,813	1,816,940	703,794	1,322,680	13,130,336	2,672,283	432,514	548,883
Section 1 Whole Bird	9,640,000					7,640,000	2,000,000		
Section 1 Carry-Forward	-								
Section 2 Placement for Export	9,197,376					8,247,376	950,000		
Section 3 Live (evis. Equivalent)	3,733,333				3,733,333				
Conditional Export Policy Allocation	44,705,952	1,507,813	1,816,940	703,794	5,056,013	29,017,712	5,622,283	432,514	548,883
Section 5: Special Conditional Request Quota									
a	-								
Section 6: 2025/2026 Overmarketings									
a	-								
Section 6: Total Allocation for Consideration (1c+2f+3a+4f+5a-6a)									
	206,677,986	22,159,067	16,561,203	5,931,140	16,070,354	95,960,531	40,748,487	4,047,599	5,199,605

Turkey Farmers of Canada
284th Meeting
December 3-4, 2025

AGENDA # 2a

[TURKEY MARKET ADVISORY COMMITTEE (TMAC) REPORT]

Quota System: Market, Supply, Policy *2025/2026 and 2026/2027 Commercial Allocation*

OVERVIEW

The Turkey Market Advisory Committee (TMAC) met in-person on Monday, November 24, 2025, to review current market information and assess potential market conditions for the remainder of the 2025/2026 and the entire 2026/2027 Control Periods. The meeting included representatives from Turkey Farmers of Canada (TFC), Canadian Poultry & Egg Processors (CPEP), Further Poultry Processors Association of Canada (FPPAC), and the third-party analyst.

Accompanying this report is the Turkey Market Review (TMR) which has been updated to reflect the Committee's analysis. The turkey live price report and CPEP wholesale price report, which are circulated separately to TFC members, were also reviewed by TMAC.

TMAC has assessed a preliminary forecast for the 2026/2027 Control Period and is recommending a Commercial Allocation of 136.9 mkg, comprised of a whole bird (WB) component of 41.3 mkg and a further processed (FP) component of 95.6 mkg. This is a majority recommendation.

TMAC expressed concern over historically low whole bird domestic disappearance of 14.0 mkg from May to October of 2025/2026, which resulted in a decrease in domestic disappearance from 59.0 mkg in 2024/2025 to a forecast 45.0 mkg in 2025/2026. However, the breast meat market has seen continued growth in domestic disappearance since 2022/2023 and into 2025/2026, despite an abnormally tight market. TMAC believes this reaffirms the continued shift in the market from WB to FP.

Despite an increase of 7.9 mkg in commercial allocation from 129 mkg (2025/2026) to 136.9 mkg (2026/2027), the forecast total supply is only increasing by 2.2 mkg for WB and 1.0 mkg for breast meat. It is important to note that:

- 1) total supply is also impacted by an expected increase in imports, and
- 2) in both segments, increased production is largely offset by the change in opening stocks:
 - The increase in the allocation required for bagging of 4.4 mkg to 41.3 mkg is largely offset by a decrease in opening stocks of 2.5 mkg.

- The increase to the allocation required for FP is expected to result in an additional 1.5 mkg of breast meat production is largely offset by a forecast decrease to opening stocks of 0.8 mkg.

TMAC believes that this recommendation is what best addresses market conditions with the information currently available. Christmas disappearance will provide more information, especially for the WB market. It can be expected that forecasts will change in early 2026 and that an adjustment to TMAC's recommendation will occur.

Wholesale Prices and Volume

The Committee discussed wholesale prices and volume of WB and breast movement from the data provided by CPEP.

Whole bird control period to-date

- Total commodity whole bird (WB) wholesale prices are up 9% (+ \$0.35/kg) sitting at \$4.48 per kg for 2025/2026 to date; while corresponding external sales volumes were up 16% (+ 1.459 mkg).

Breast Meat (BSB) control period to-date

- External Breast meat (fresh and frozen) wholesale prices increased by 8% (+ \$0.75 per kg) sitting at \$9.68 per kg for 2025/2026 to date. Corresponding sales volumes are down 8% (- 152,000 kg). The decrease in sales volumes was only in the frozen category, down 21% (- 350,000 kg). While in the fresh category, there was an increase of 61% in volume (+ 198,000 kg).
- Thigh meat (fresh and frozen) wholesale prices are up 37% (+ \$1.89 per kg) sitting at \$7.02 per kg for 2025/2026 to date, on sales volumes that were down 26% (- 0.695 mkg).

TMAC agreed that the CPEP KMI report likely does not reflect the entire picture for prices. With such a tight supply, the FPPAC delegate noted that spot prices are above \$20/kg for breast meat. These uneconomical prices are causing independent further processors to not purchase breast meat. As the volumes and prices reported in the KMI are dominated by contract pricing the state of the spot market is not adequately reflected in the KMI report.

Wholesale Price Forecast

The wholesale price forecast tool was used for the first time at TMAC's November meeting. It helped inform our forecast for the 2026/2027 Control Period. It is important to note that it relies solely on pricing data provided by CPEP's KMI report. The wholesale price forecast for WB and FP is included in the 2026/2027 Supply and Disappearance tables below.

FORECASTING – WHOLE BIRD AND FURTHER PROCESSED

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Whole Bird (WB) Market**2025/2026 Supply and Disappearance**

(Whole Bird)	23/24	24/25			25/26		
	Total	May - Oct	Nov - Apr	Total	May - Oct	Nov-Apr	Total
Opening Stocks	12.9	17.2	20.5	17.2	11.1	17.5	11.1
Production	64.9	31.9	22.6	54.5	23.2	21.1	44.3
Imports	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Total Supply	78.0	49.2	43.0	71.8	34.3	38.5	55.4
Total Disappearance	60.8	28.7	31.9	60.6	16.9	30.0	46.8
Exports	3.3	0.6	1.0	1.6	2.9	1.0	3.8
Domestic Disappearance	57.5	28.1	30.9	59.0	14.0	29.0	43.0
Closing Stocks	17.2	20.5	11.1	11.1	17.5	8.6	8.6
PCC	1.42			1.42			1.03
Stocks to Use %	28.4%			18.4%			18.3%

**For 2025/2026, total production of 44.3 mkg, less 3.8 mkg for exports and 3.5 mkg for basting and stuffing equals a domestic commercial allocation requirement of 40.4 mkg.*

Above is an overview of WB supply and disappearance to the end of October and a forecast for the remainder of 2025/2026, shaded in blue. In looking at the 2025/2026 WB assessment, the following observations are relevant:

- TMAC is concerned with the May to October domestic disappearance of 14.0 mkg. This historically low number is down 14.0 mkg (-50%) relative to last year. This significant decrease is indicative of consumers moving away from whole bird, a trend highlighted in the consumer research project. This also signals that primary processors have begun moving away from bagging, towards further processed products.
- TMAC is forecasting November-April domestic disappearance of 29.0 mkg, a decrease of 1.9 mkg (6.1%) from last year. This forecast is due to the following:
 - While wholesale prices for whole birds leading into the Christmas period, particularly when compared to beef prices, are supportive of featuring activity. Despite this, there was a decrease in overall featuring this past Thanksgiving.
 - Despite continued increases in beef prices, this forecast is based on a declining disappearance trend.
- The domestic disappearance forecast of 43.0 mkg for 2025/2026 is a historical low. A low of 14.0 mkg for domestic disappearance from May to October has never been seen before. TMAC will closely monitor the market over the holiday period to better forecast the 2026-2027 Control Period at the start of 2026.

- Avian Influenza Uncertainty: Current outbreaks have altered supply with more reductions possible. At the time of the meeting, TMAC took into consideration recent information shared by provinces regarding HPAI-related losses and the recently approved interprovincial lease of quota.

2026/2027 Supply and Disappearance

(Whole Bird)	20/21	21/22	22/23	23/24	24/25*	25/26*	26/27*
Opening Stocks	17.3	7.5	9.9	12.9	17.2	11.1	8.6
Production	51.5	57.5	57.3	64.9	54.5	44.3	49.1
Imports	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Total Supply	68.8	65.0	67.2	78.0	71.8	55.4	57.6
Total Disappearance	61.3	55.2	54.3	60.8	60.6	46.8	47.8
Exports	1.1	2.2	4.0	3.3	1.6	3.8	3.8
Domestic Disappearance	60.2	52.9	50.3	57.5	59.0	43.0	44.0
Closing Stocks	7.5	9.9	12.9	17.2	11.1	8.6	9.8
PCC	1.58	1.38	1.28	1.42	1.42	1.03	1.05
Stocks to Use %	12.2%	17.9%	23.7%	28.4%	18.4%	18.3%	20.4%
Wholesale Price**	\$4.69	\$5.41	\$5.60	\$4.50	\$4.02	\$ 4.99	\$ 4.84

*Forecast. For 2026/2027, a total production figure of 49.1 mkg, less 3.8 mkg for exports and 3.9 mkg for basting and stuffing equals a forecast domestic commercial allocation requirement of **41.3 mkg**. Prices are adjusted for inflation to 2024 dollars.

An assessment of WB supply and disappearance for the 2026/2027 Control Period is set out above with a forecast through the end of 2026/2027 and comparisons to the 2020/2021 to 2024/2025 Control Periods. Regarding the 2026/2027 WB assessment, TMAC notes the following:

- TMAC is forecasting domestic disappearance of 44.0 mkg, 1.0 mkg higher than in 2025/2026 but 15 mkg less than 2024/2025. The Committee believes that this forecast reflects the current downward demand trend of whole bird and the adjustments made by processors to address this demand with reduced bagging, while also considering the impacts of HPAI.
- Included in this forecast is a closing stock level of 9.8 mkg, equal to a S/U ratio of 20.4%.
- Given these factors, **TMAC forecasts a WB commercial allocation requirement of 41.3 mkg for the 2026/2027 Control Period.**

Further Processed (FP – Breast Meat) Market**2025/2026 Supply and Disappearance**

(Breast Meat)	2023/24	2024/25			2025/26		
	Total	May - Oct	Nov - April	Total	May - Oct	Nov - April	Total
Opening Stocks	1.7	2.4	2.5	2.4	1.7	0.8	1.7
Production	26.2	13.8	12.0	25.8	13.4	13.5	26.9
Imports	1.6	0.5	0.5	1.0	0.6	0.7	1.3
Total Supply	29.6	16.7	15.0	29.2	15.6	15.0	29.9
Total Disappearance	27.2	14.2	13.3	27.5	14.9	14.1	28.9
Exports	0.0	0.0	0.3	0.3	0.2	0.3	0.4
Domestic Disappearance	27.2	14.2	13.0	27.2	14.7	13.8	28.5
Closing Stocks	2.4	2.5	1.7	1.7	0.8	0.9	0.9
PCC	0.67			0.66			0.683
Stocks to Use %	8.7%			6.1%			3.3%

TMAC's assessment of breast meat supply and disappearance for the remainder of the 2025/2026 Control Period is set above. The following observations can be made:

- May to October domestic disappearance of 14.7 mkg is up +0.5 mkg from 2024/2025 and + 0.8 from 2023/2024. This reaffirms the market shift from WB to FP.
- The utilization rate for the commercial allocation and conditional utilizations was decreased to 96.3% to account for AI losses. A further decrease in Section 1 export filings was also factored in.
- With respect to breast meat imports, TMAC is forecasting an increase in imports. This is due to the recent pick up of 0.6 mkg of WTO TRQ with more likely on the way. **For the current control period, imports are now forecast at 1.3 mkg.** However, imports could end up higher due to recent interest in imports from Poland. TMAC will continue to closely monitor imports.
- Because of lower imports throughout the control period, HPAI, and a reduction in quota to help address wholesale prices for 2025/2026, ending stocks are forecast at 0.9 mkg, resulting in a stock to use ratio of 3.3%.
- Avian Influenza Uncertainty: As noted in the whole bird section, TMAC took into consideration the interprovincial lease process in the production forecasts. New outbreaks could alter supply for the remainder of the 2025/2026 Control Period.

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2025/2026 Supply and Disappearance

(Breast Meat)	20/21	21/22	22/23	23/24	24/25	25/26*	26/27*
Opening Stocks	3.5	2.1	1.2	1.7	2.4	1.7	0.9
Production	25.1	25.6	25.1	26.2	25.8	26.9	28.4
Imports	1.4	1.1	1.7	1.6	1.0	1.3	1.5
Total Supply	30.0	28.8	27.9	29.6	29.2	29.9	30.9
Total Disappearance	27.9	27.6	26.3	27.2	27.5	28.9	29.4
Exports	0.1	0.0	0.1	0.0	0.3	0.4	0.4
Domestic Disappearance	27.8	27.6	26.1	27.2	27.2	28.5	29.0
Closing Stocks	2.1	1.2	1.7	2.4	1.7	0.9	1.5
PCC	0.73	0.72	0.66	0.67	0.66	0.683	0.691
Stock to Use %	7.7%	4.2%	6.4%	8.7%	6.1%	3.3%	5.1%
FP Production	95.6	97.4	95.7	100.0	98.4	102.5	108.2
Wholesale Price**	\$9.57	\$11.39	\$14.03	\$12.30	\$9.97	\$11.16	\$11.23

*Forecast

** Prices are adjusted for inflation to 2024 dollars

Demand Forecast: Despite a tight supply for 2025/2026, domestic disappearance for FP has continued to grow since the 2022/2023 Control Period, from 26.1 mkg to a forecast 28.5 mkg in 2025/2026. TMAC believes that this reaffirms that there is demand and growth opportunity for the FP market. TMAC forecasts a domestic disappearance of 29.4 mkg for 2026/2027, an increase of 0.5 mkg from 2025/2026. This increase reflects the shift from WB to FP to adequately supply the market, while ensuring healthy wholesale prices with a stock to use ratio of 5.1%.

Import Forecast: For breast meat imports, TMAC is forecasting imports of 1.5 mkg for 2026/2027, based on a slow return to full utilisation of the WTO TRQ and no imports under the CPTPP.

Production Forecast: To support forecast demand considering forecast opening stocks of 0.9 mkg, higher imports and higher closing stocks, 28.4 mkg of breast meat production will be needed. To generate 28.4 mkg of breast meat, eviscerated production of 108.2 mkg is required. After conditional utilizations, a quota utilization rate of 98.3% and the calendar adjustment are taken into account, **the TMAC forecast is that 95.6 mkg of commercial allocation is required for FP production.**

FEED PRICE FORECAST

TMAC recommends that a Feed Price Forecast tool be developed to supplement discussions on margins between live price and wholesale prices. TFC received a proposal from Kevin Grier to develop a metric for TMAC that includes:

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- Live Turkey Price Forecasting to assess:
 - The correlation between turkey feed prices and the live turkey price;
 - The correlation between cash and futures prices for corn and soymeal versus turkey feed prices; and
 - The efficacy of corn and soymeal futures prices as a forecasting tool for live turkey.
- U.S. Market Conditions that include:
 - The correlation between U.S. and Canadian wholesale turkey prices.
 - The price spreads between U.S. and Canadian wholesale turkey prices;
 - The correlation between U.S. production set against Canadian production and imports; and
 - The correlation between U.S. and Canadian wholesale turkey price spreads and Canadian imports.

The proposal sets a budget of \$16,150.

SUMMARY OF TMAC DISCUSSIONS

As noted, a commercial allocation of 136.9 mkg is recommended. However, significant shifts in the WB market make it more challenging to forecast the end of the 2025/2026 Control Period and the 2026/2027 Control Period. TMAC believes this best addresses the market conditions with the information at hand. TMAC recommends that a quota be established in December so that producers can plan placements and that the Committee is prepared to recommend an adjustment to the commercial allocation in early 2026 should it be required.

AGENDA NO. 2b

Appendix IV



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

Turkey Market Review

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

284th TFC Meeting – December 3 - 4, 2025

1

1

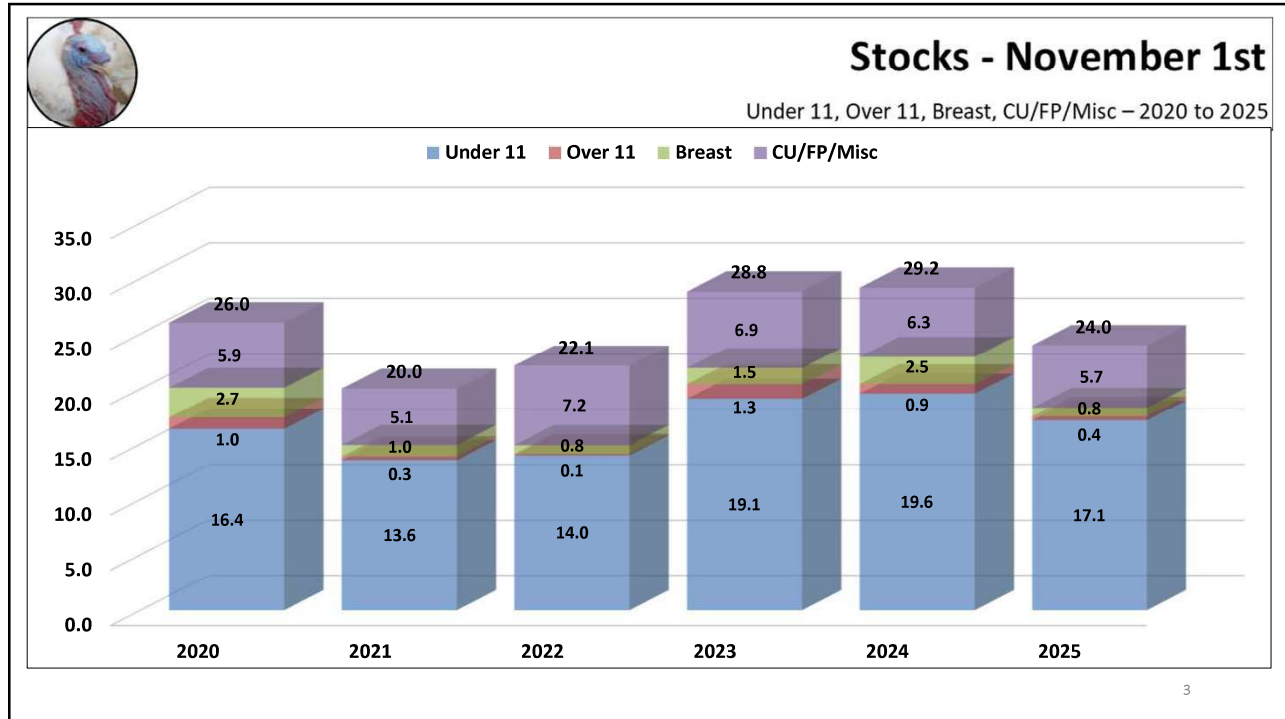


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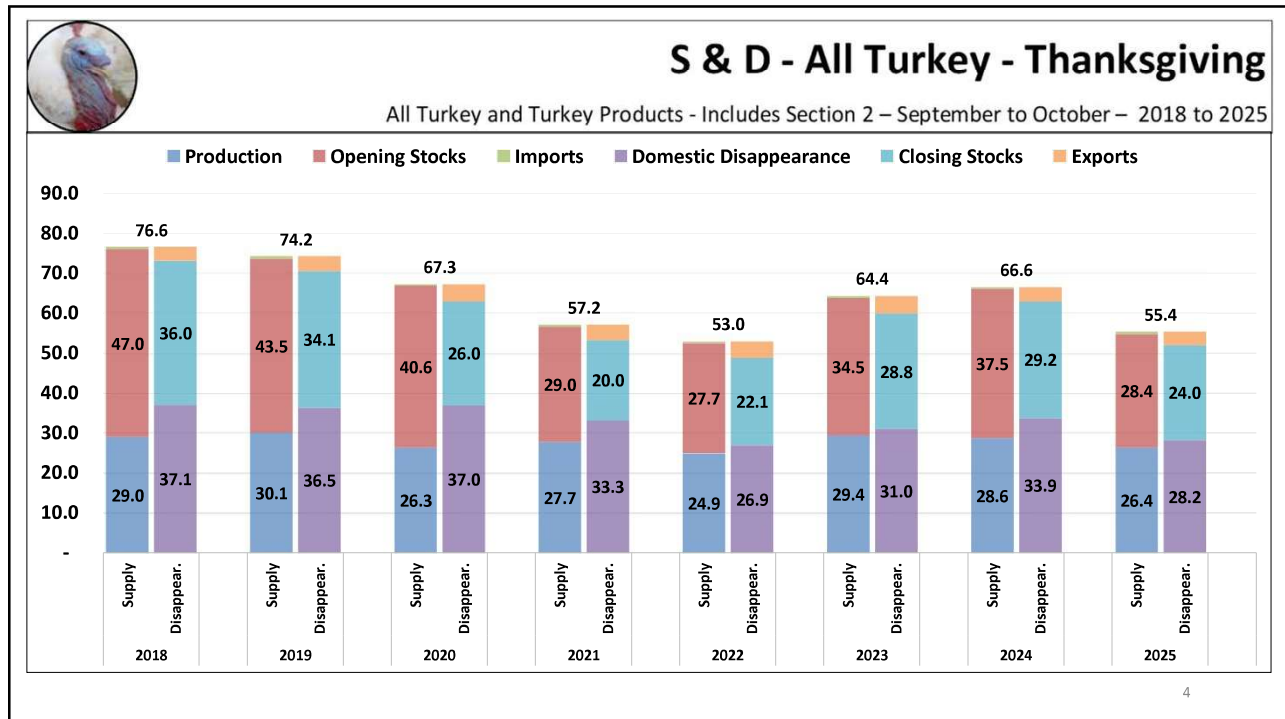
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- 2. Further Processed**
- 3. Whole Bird**
- 4. Additional Background**

2

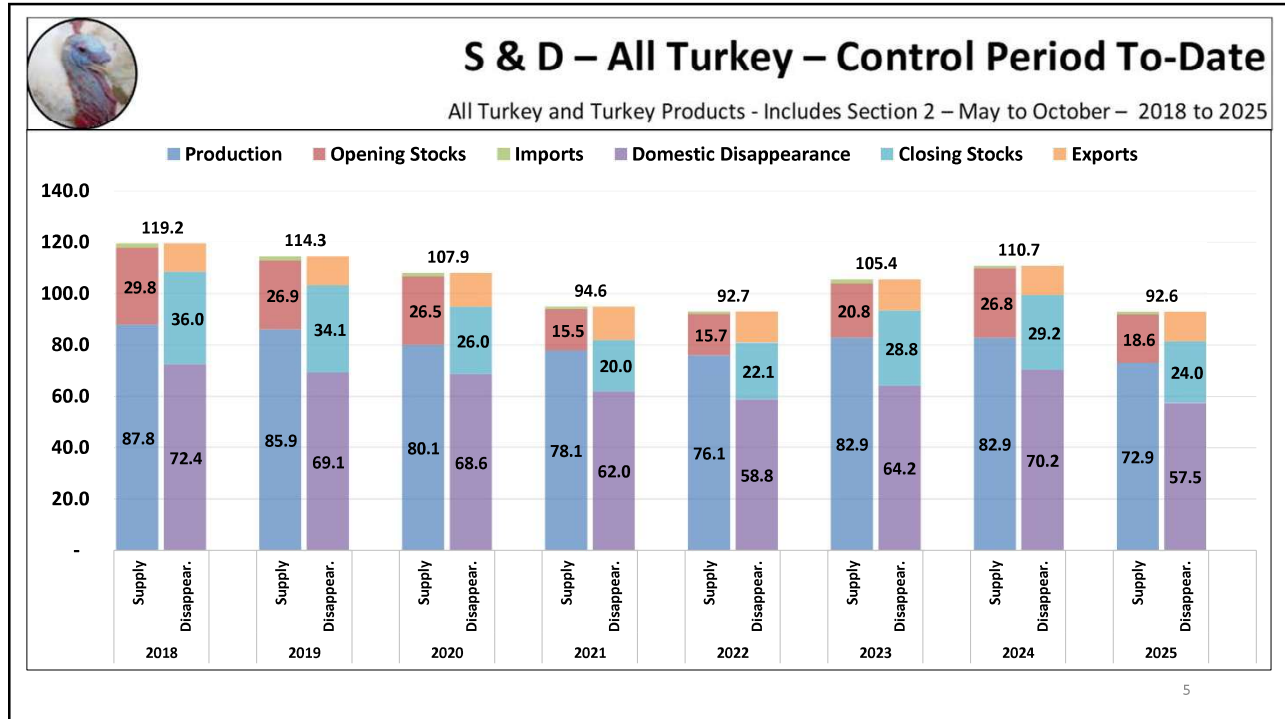
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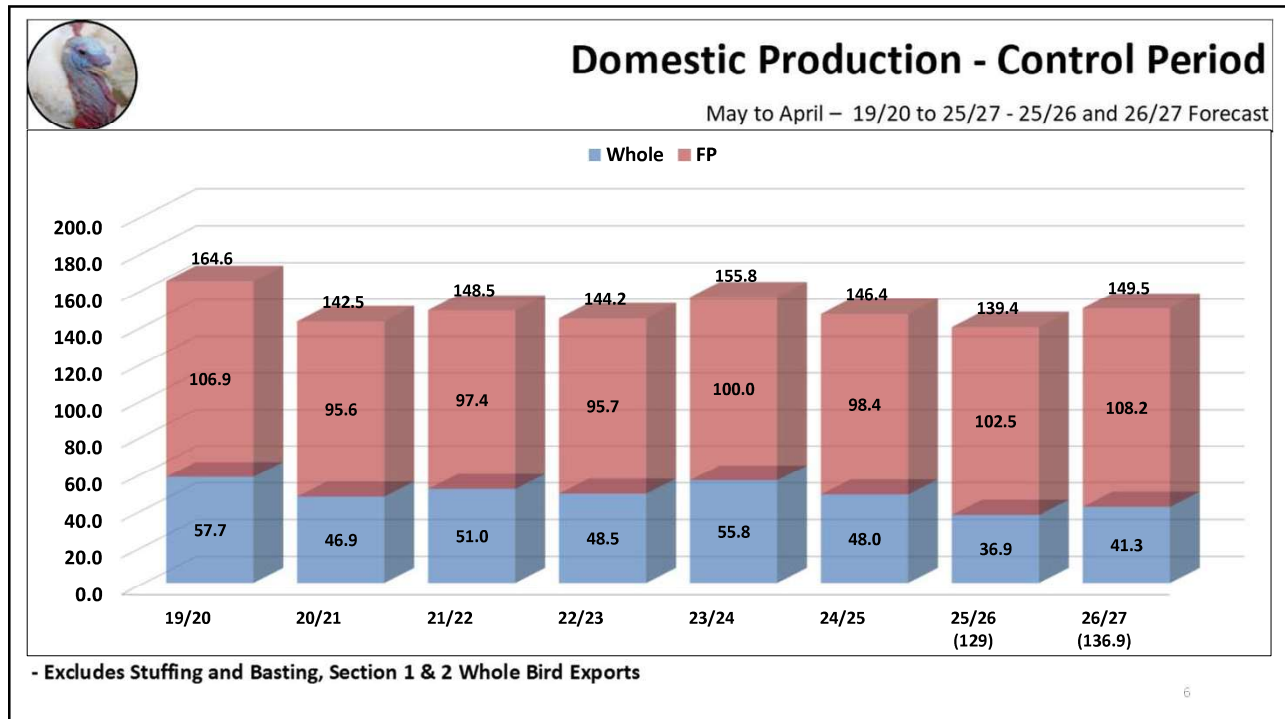
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Further Processed Summary

Key Assumptions – 2025/2026:

- Domestic Disappearance for 2025/26 Forecast at 28.5 mkg.
- Conditional Utilizations:
 - Export Policy Section 1 = 11.4 mkg
 - Net Carry-forward = 0 mkg
 - Breeder Utilisations = 2024/2025
- 92.1 mkg of Commercial Quota used for FP

Key Assumptions – 2026/2027:

- Domestic Disappearance for 2026/26 Forecast at 29.0 mkg..
- For 2026, it is assumed that WTO TRQ usage will go back to normal and 0 kg for CPTPP.
- Conditional Utilizations:
 - Section 1 = 11.4 mkg
 - Net Carry-forward = 0 Mkg
 - Breeder Utilisations = 2024/2025

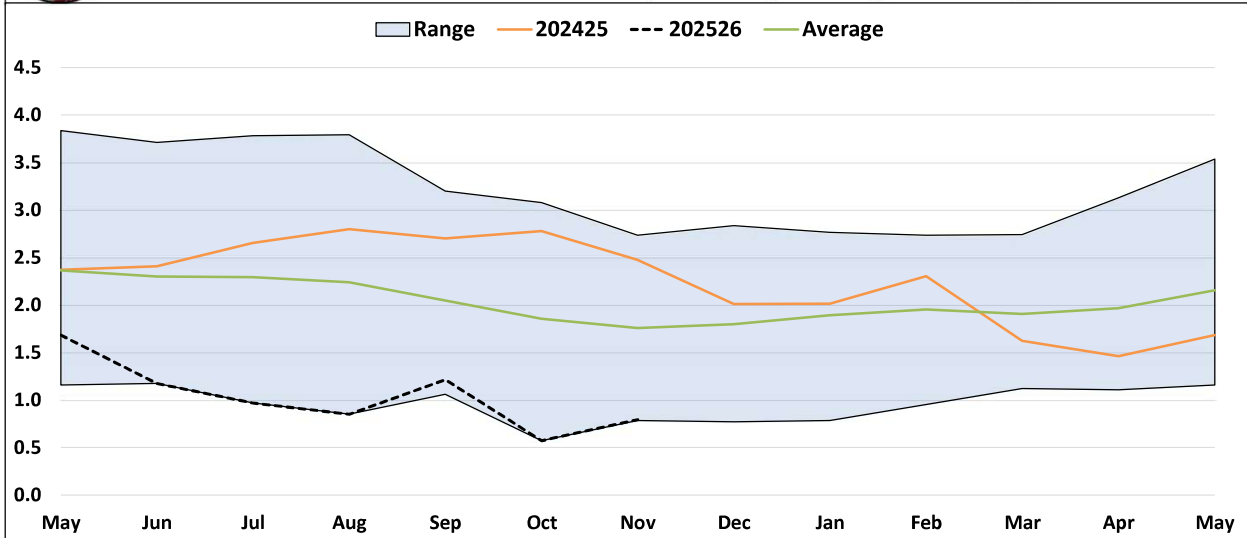
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Breast Meat Stocks - Monthly

2018/19 to 2025/26 - Range and Average from 2018 to 2026



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8




Breast Meat S & D

2023/24 to 2025/26 May-Oct and Nov-Apr (2025/26 Forecast)

	2023/24			2024/25			2025/26		
	May-Oct	Nov-Apr	Total	May-Oct	Nov-Apr	Total	May-Oct	Nov-Apr	Total
Opening Stocks	1.7	1.5	1.7	2.4	2.5	2.4	1.7	0.8	1.7
Production	13.1	13.1	26.2	13.8	12.0	25.8	13.4	13.5	26.9
Imports	0.8	0.8	1.6	0.5	0.5	1.0	0.6	0.7	1.3
Total Supply	15.6	15.4	29.6	16.7	15.0	29.2	15.6	15.0	29.9
Total Disappear.	14.1	13.1	27.2	14.2	13.3	27.5	14.9	14.1	28.9
Exports	0.0	0.0	0.0	0.0	0.3	0.3	0.2	0.3	0.4
Dom. Disappear.	14.1	13.1	27.2	14.2	13.0	27.2	14.7	13.8	28.5
Closing Stocks	1.5	2.4	2.4	2.5	1.7	1.7	0.8	0.9	0.9
Avg \$ (In 2024 \$)	\$ 13.14	\$ 11.52	\$ 12.30	\$ 11.16	\$ 9.22	\$ 9.97	\$ 10.70		\$ 11.16
FP Production	49.9	50.0	100.0	52.7	45.7	98.4	51.1	51.4	102.5

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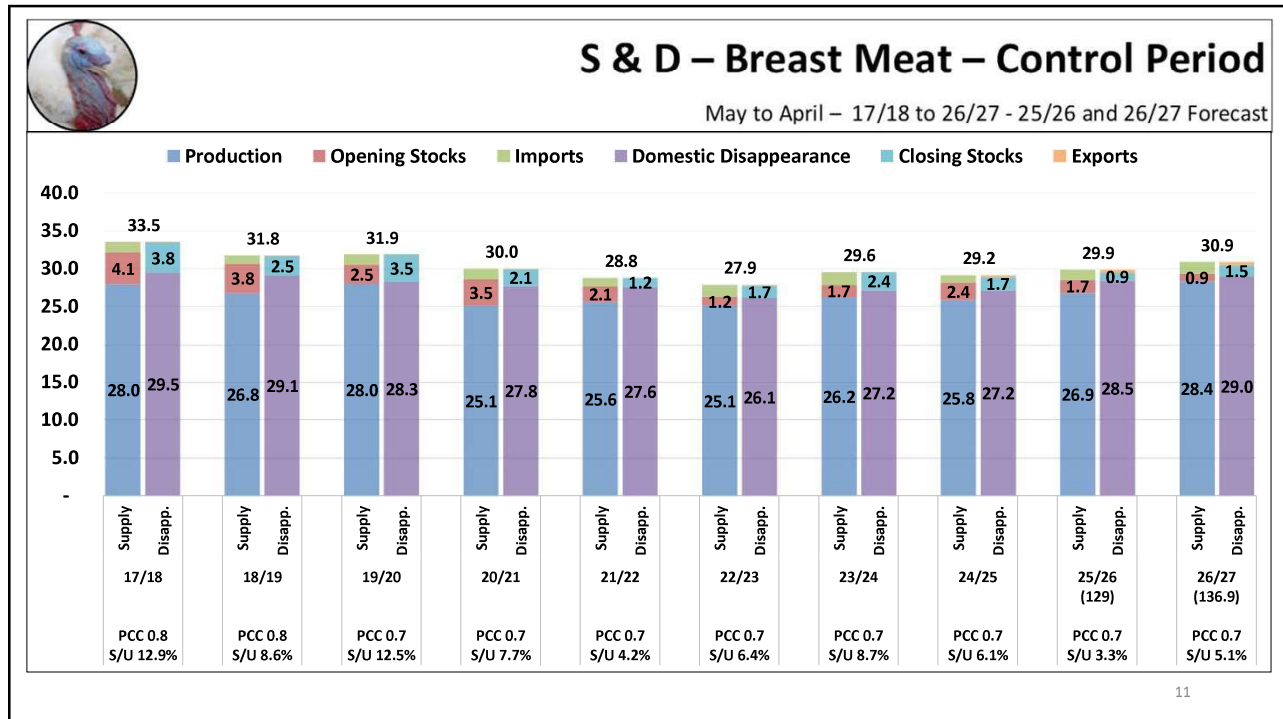
Breast Meat S & D

2019/20 to 2026/27 - 2025/26 (129) and 2026/27 (136.9) Forecast

	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129)	26/27 (136.9)
Opening Stocks	2.5	3.5	2.1	1.2	1.7	2.4	1.7	0.9
Production	28.0	25.1	25.6	25.1	26.2	25.8	26.9	28.4
Imports	1.3	1.4	1.1	1.7	1.6	1.0	1.3	1.5
Total Supply	31.9	30.0	28.8	27.9	29.6	29.2	29.9	30.9
Total Disappear.	28.3	27.9	27.6	26.3	27.2	27.5	28.9	29.4
Exports	0.0	0.1	0.0	0.1	0.0	0.3	0.4	0.4
Dom. Disappear.	28.3	27.8	27.6	26.1	27.2	27.2	28.5	29.0
Closing Stocks	3.5	2.1	1.2	1.7	2.4	1.7	0.9	1.5
Population (Nov 1)	37.9	38.0	38.5	39.4	40.6	41.5	41.7	41.9
PCC	0.75	0.73	0.72	0.66	0.67	0.66	0.68	0.69
S/U	12.5%	7.7%	4.2%	6.4%	8.7%	6.1%	3.3%	5.1%
Avg \$ (In 2024 \$)	\$ 9.67	\$ 9.57	\$ 11.39	\$ 14.03	\$ 12.30	\$ 9.97	\$ 11.16	\$ 11.23
FP Production	106.9	95.6	97.4	95.7	100.0	98.4	102.5	108.2

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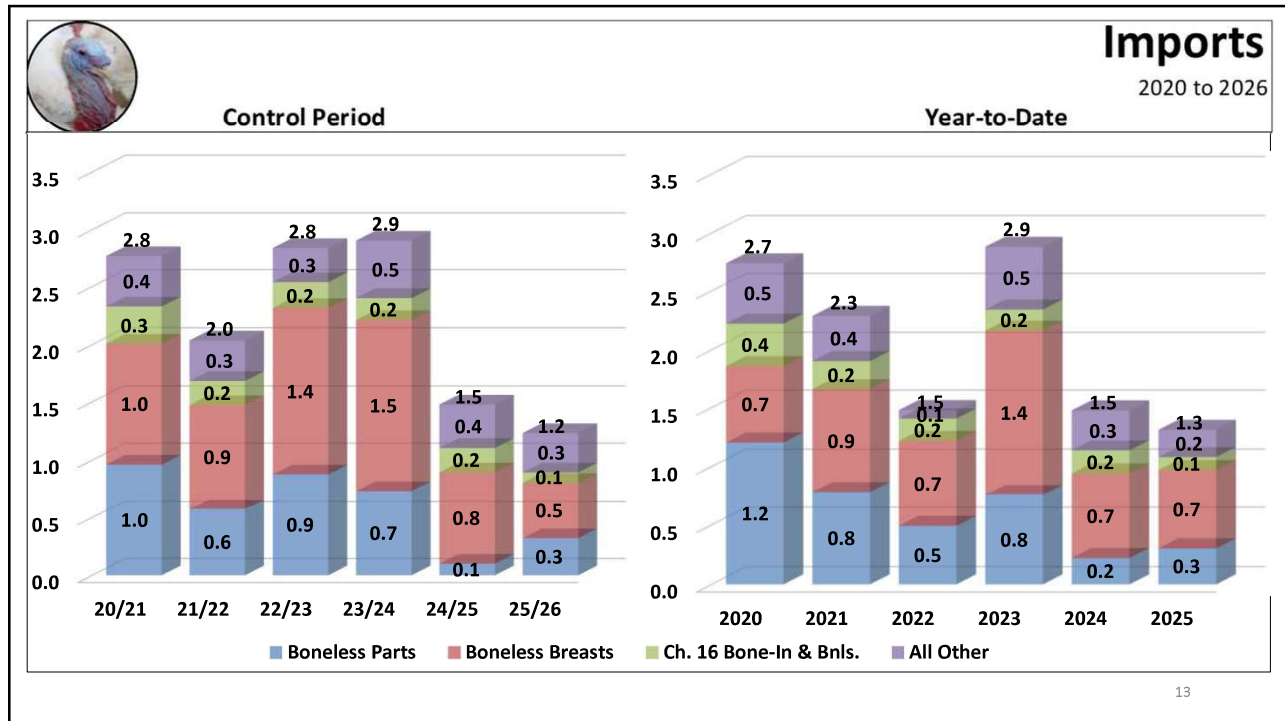
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FP Production Sources
2019/20 to 2026/27 - 2025/26 (129) and 2026/27 (136.9) Forecast

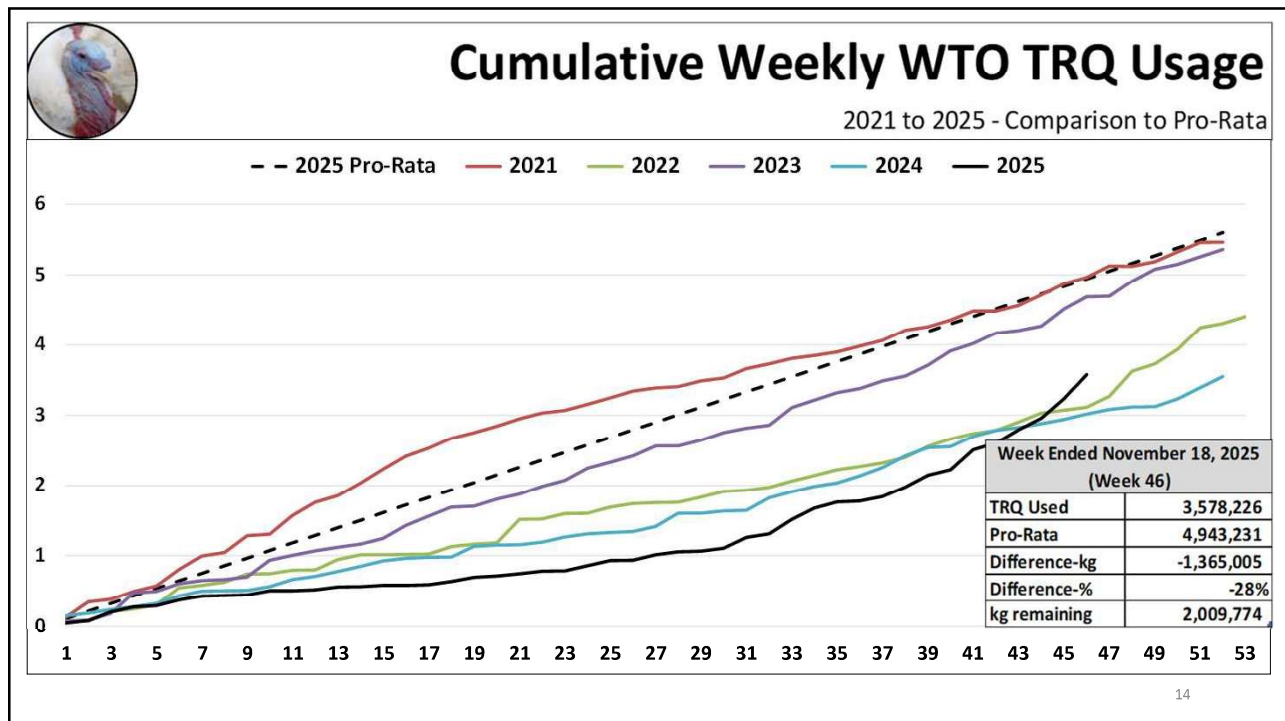
	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129)	26/27 (136.9)
FP Production	106.9	95.6	97.4	95.7	100.0	98.4	102.5	108.2
FP Utilization Rate	99.9%	98.5%	94.9%	86.8%	97.3%	97.6%	96.2%	98.3%
Adj. Util. and FP Allc.	106.9	97.1	102.7	110.3	102.8	100.8	106.5	110.1
Calendar Adjustment	100.8%	100.4%	98.0%	100.0%	100.8%	100.4%	100.4%	100.4%
Total of Util. and FP Allc.	106.1	96.7	104.7	110.3	102.0	100.3	106.1	109.6
Multiplier Breeder Util.	1.9	1.8	1.4	0.2	0.5	0.7	0.7	0.7
Primary Breeder Util.	0.3	1.0	1.3	1.0	1.4	1.9	1.9	1.9
Export – Section 1	15.8	14.2	14.2	11.7	14.6	12.1	11.4	11.4
Carry-Forward	- 0.7	0.5	- 0.2	- 0.6	- 0.2	0.9	0.0	0.0
FP Allocation	88.9	79.1	88.0	98.0	85.7	84.7	92.1	95.6

12

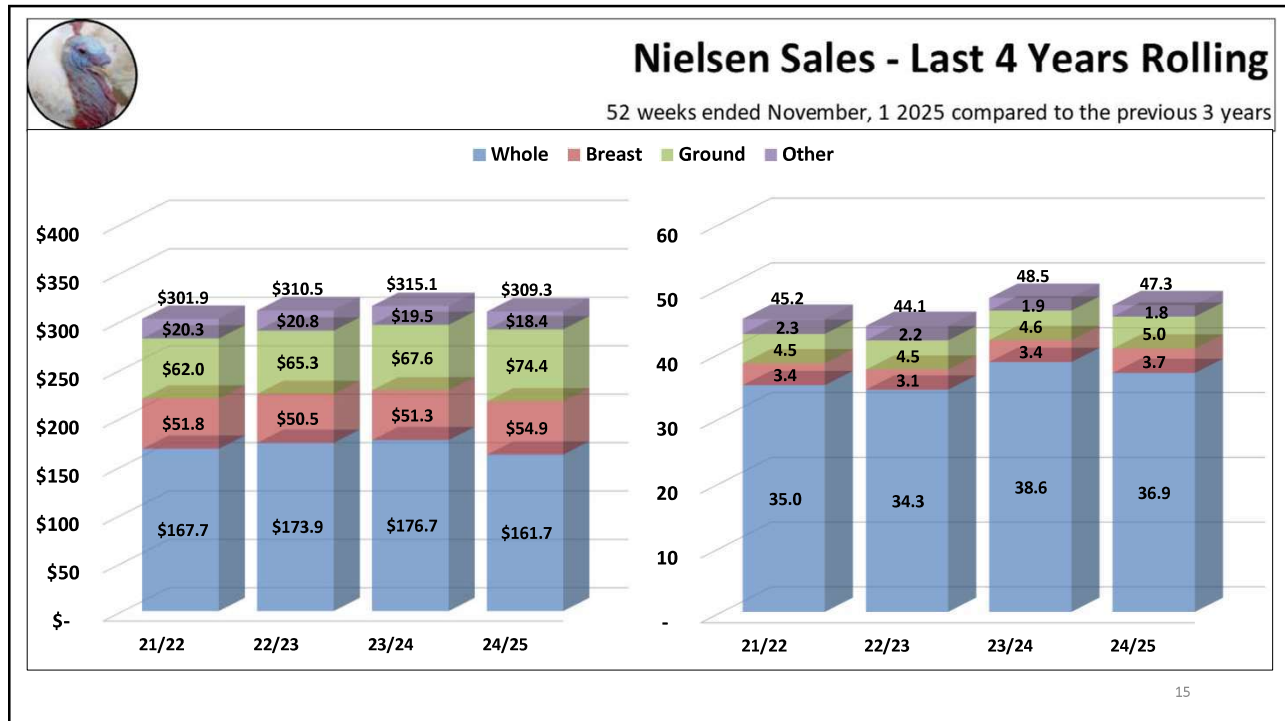
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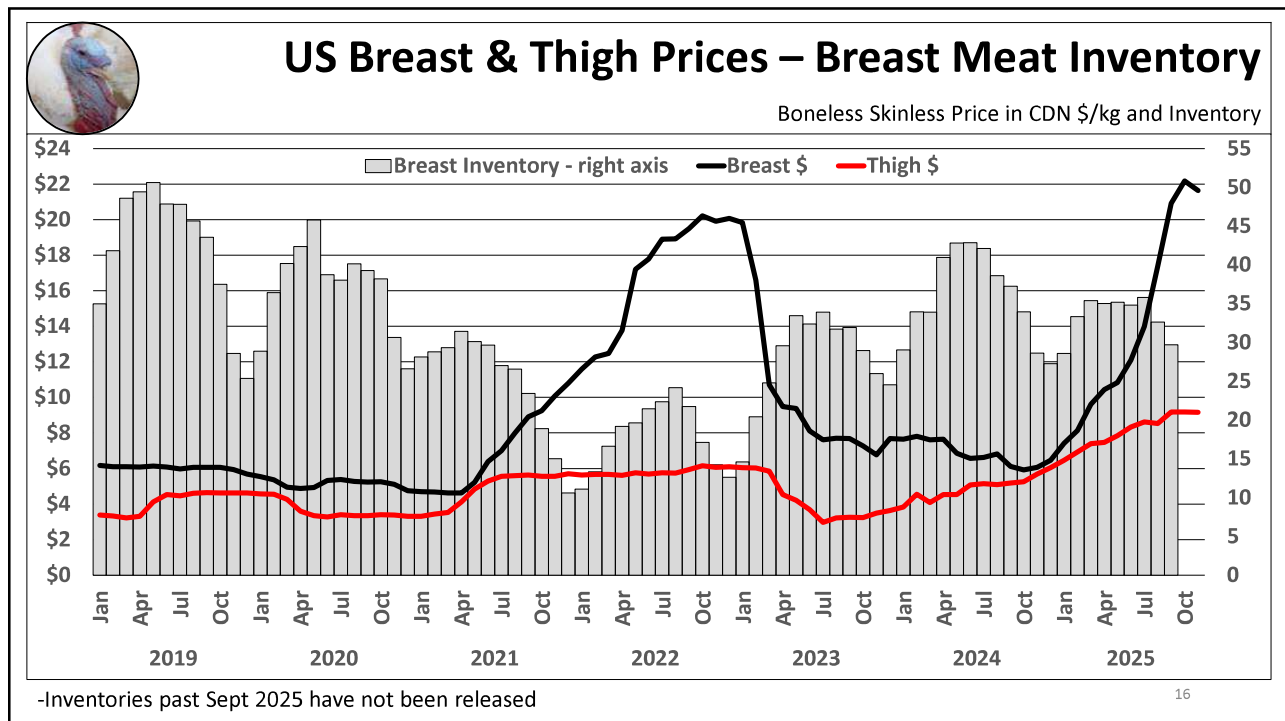
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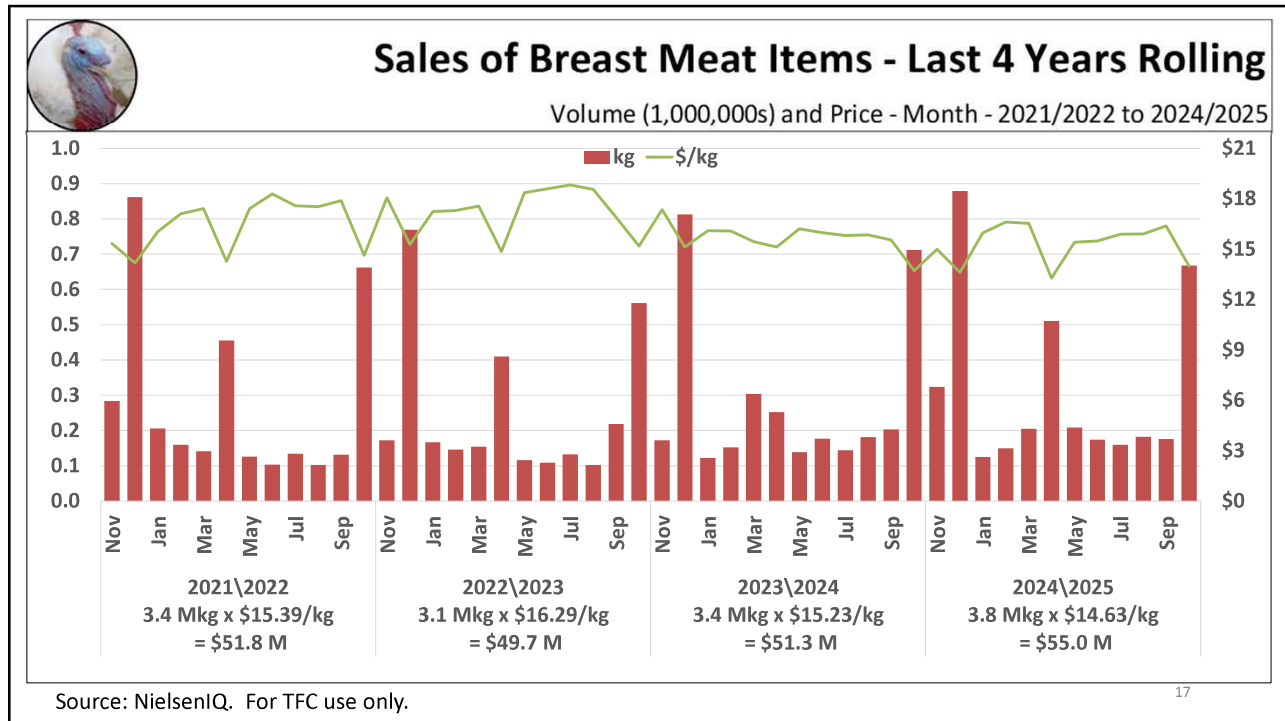
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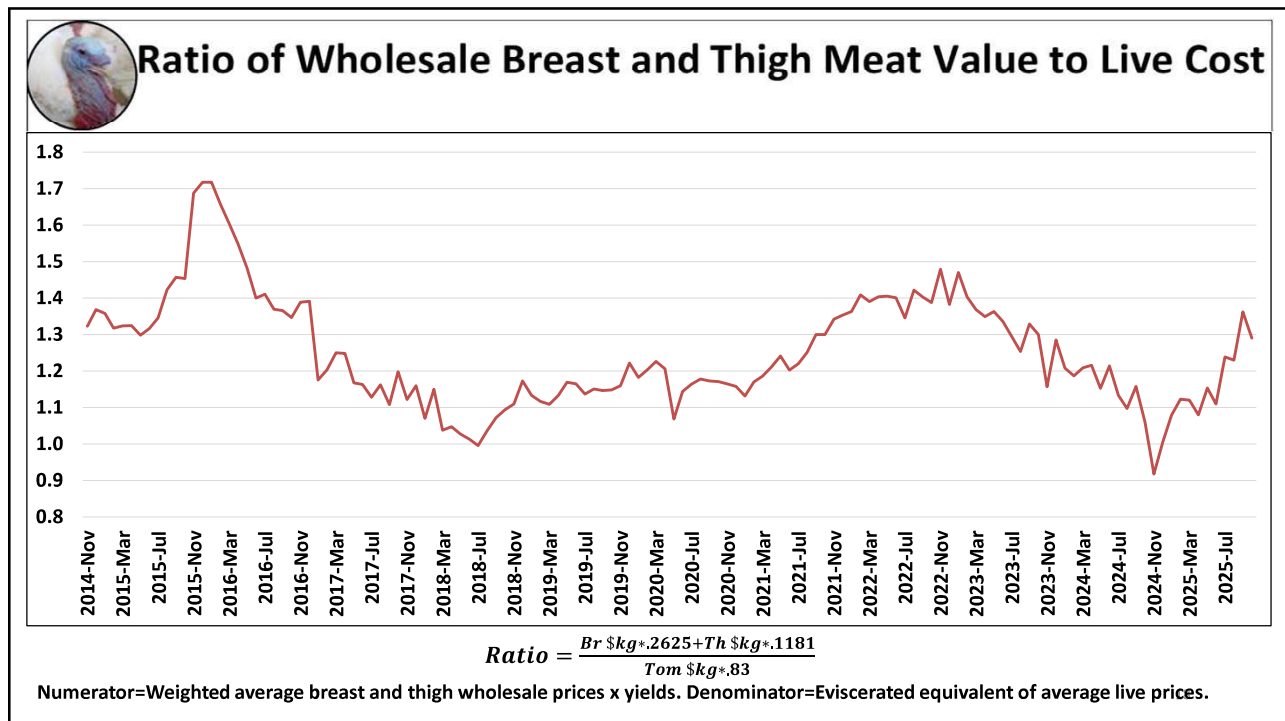
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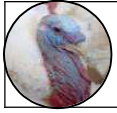
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18



Whole Bird Summary

Key Assumptions – 2025/2026:

- Domestic Disappearance forecast at 43.0 mkg due to control period to-date results.
- 36.9 mkg of commercial quota used for whole as production is expected to be diverted to FP.

Key Assumptions – 2026/2027:

- Domestic Disappearance forecast at 44.0 mkg

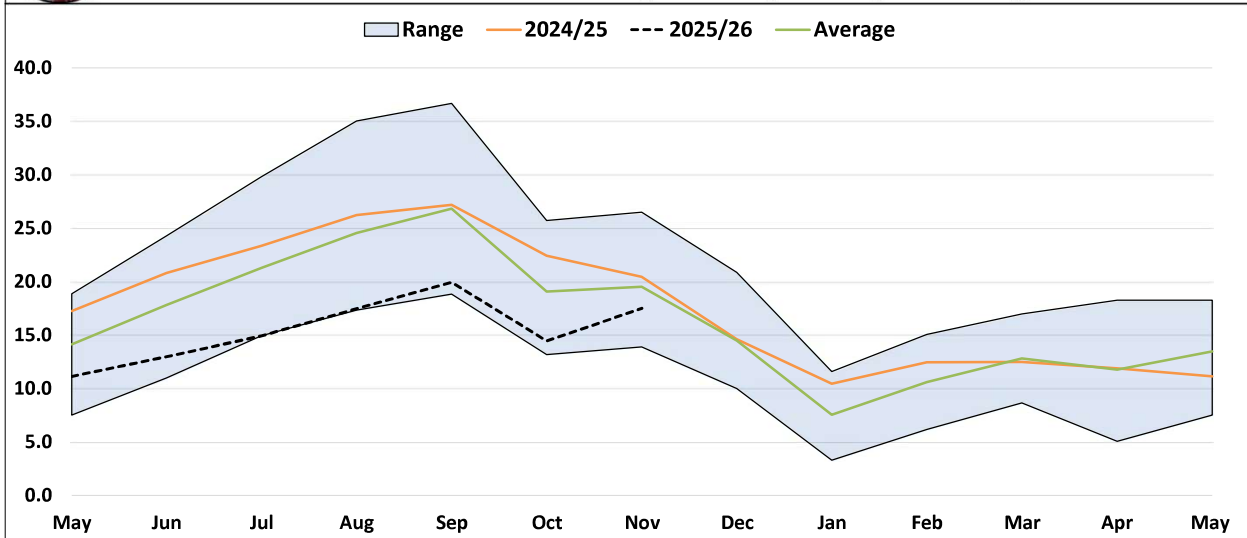
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Whole Bird Stocks - Monthly

2018/19 to 2025/26 - Range and Average from 2018 to 2026



20

20




Whole Bird Domestic Disappearance

2019/20 to 2025/26 - 2025/26 Forecast

	19/20	20/21	21/22	22/23	23/24	24/25	25/26	% Change
May-Jun	2.8	1.2	0.5	4.3	3.8	4.7	3.1	-33.9%
Jul-Aug	3.4	3.6	2.1	4.6	5.4	5.9	0.4	-94.0%
Sep-Oct	19.4	23.2	19.2	12.9	15.9	17.4	10.5	-39.9%
<i>Sub-Total</i>	25.7	28.0	21.8	21.8	25.0	28.1	14.0	-50.3%
Nov-Dec	26.2	22.7	22.2	19.9	22.9	19.8		
Jan-Feb	2.4	1.5	1.4	1.2	2.9	4.3		
Mar-Apr	7.7	8.0	7.5	7.4	6.7	6.9	<i>Forecast</i>	<i>Nov-Apr</i>
<i>Sub-Total</i>	36.4	32.2	31.1	28.5	32.4	30.9	29.0	-6.2%
Total	62.1	60.2	52.9	50.3	57.5	59.0	43.0	-27.2%

21

21



Whole Bird S & D


2023/24 to 2025/26 May-Oct and Nov-Apr (2025/26 Forecast)

	2023/24			2024/25			2025/26		
	May-Oct	Nov-Apr	Total	May-Oct	Nov-Apr	Total	May-Oct	Nov-Apr	Total
Opening Stocks	12.9	20.4	12.9	17.2	20.5	17.2	11.1	17.5	11.1
Production	35.1	29.8	64.9	31.9	22.6	54.5	23.2	21.1	44.3
Imports	0.3	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Total Supply	48.2	50.2	78.0	49.2	43.0	71.8	34.3	38.5	55.4
Total Disappear.	27.8	33.0	60.8	28.7	31.9	60.6	16.9	30.0	46.8
Exports	2.8	0.6	3.3	0.6	1.0	1.6	2.9	1.0	3.8
Dom. Disappear.	25.0	32.4	57.5	28.1	30.9	59.0	14.0	29.0	43.0
Closing Stocks	20.4	17.2	17.2	20.5	11.1	11.1	17.5	8.6	8.6
Avg \$ (In 2024 \$)	\$ 4.83	\$ 4.24	\$ 4.50	\$ 3.81	\$ 4.26	\$ 4.02	\$ 4.31		\$ 4.99

25/26 Forecast Production = Commercial (36.9) + Stuffing and Basting (3.5) + Exports (3.8) = 44.3 Mkg (Numbers may not add up due to rounding)

22

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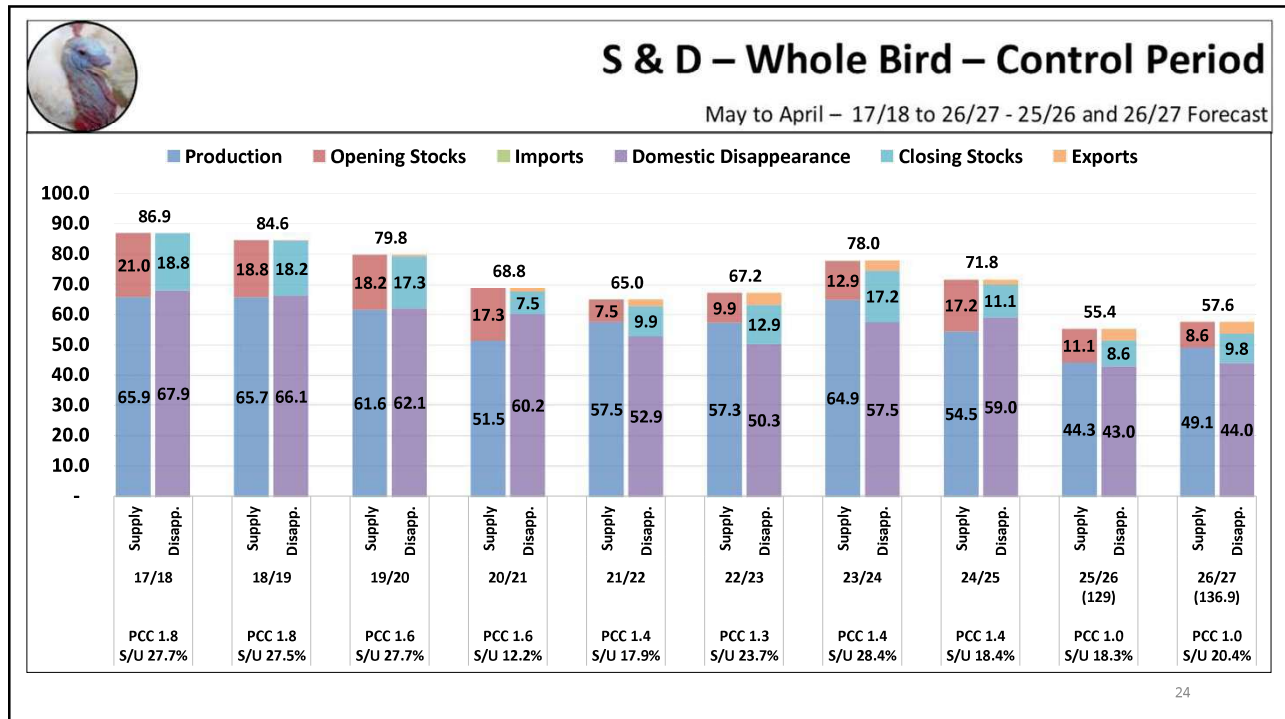


Whole Bird S & D

2019/20 to 2026/27 - 2025/26 (129) and 2026/27 (136.9) Forecast

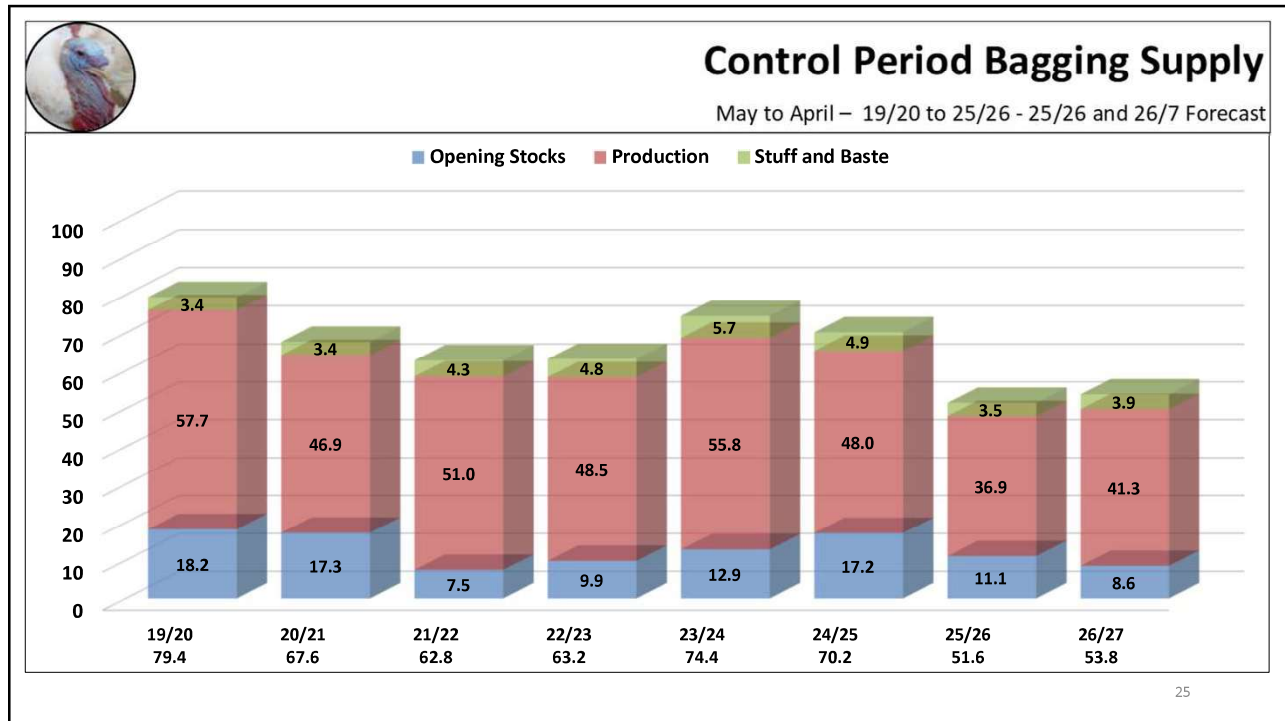
	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129)	26/27 (136.9)
Opening Stocks	18.2	17.3	7.5	9.9	12.9	17.2	11.1	8.6
Production	61.6	51.5	57.5	57.3	64.9	54.5	44.3	49.1
Imports	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0
Total Supply	79.8	68.8	65.0	67.2	78.0	71.8	55.4	57.6
Total Disappear.	62.5	61.3	55.2	54.3	60.8	60.6	46.8	47.8
Exports	0.4	1.1	2.2	4.0	3.3	1.6	3.8	3.8
Dom. Disappear.	62.1	60.2	52.9	50.3	57.5	59.0	43.0	44.0
Closing Stocks	17.3	7.5	9.9	12.9	17.2	11.1	8.6	9.8
Population (Nov1)	37.9	38.0	38.5	39.4	40.6	41.5	41.7	41.9
PCC	1.64	1.58	1.4	1.3	1.4	1.4	1.0	1.0
Stock to Use	27.7%	12.2%	17.9%	23.7%	28.4%	18.4%	18.3%	20.4%
Avg \$ (In 2024 \$)	\$ 4.42	\$ 4.69	\$ 5.41	\$ 5.60	\$ 4.50	\$ 4.02	\$ 4.99	\$ 4.84
Stuff & Baste	3.4	3.4	4.3	4.8	5.7	4.9	3.5	3.9
Quota	57.7	46.9	51.0	48.5	55.8	48.0	36.9	41.3

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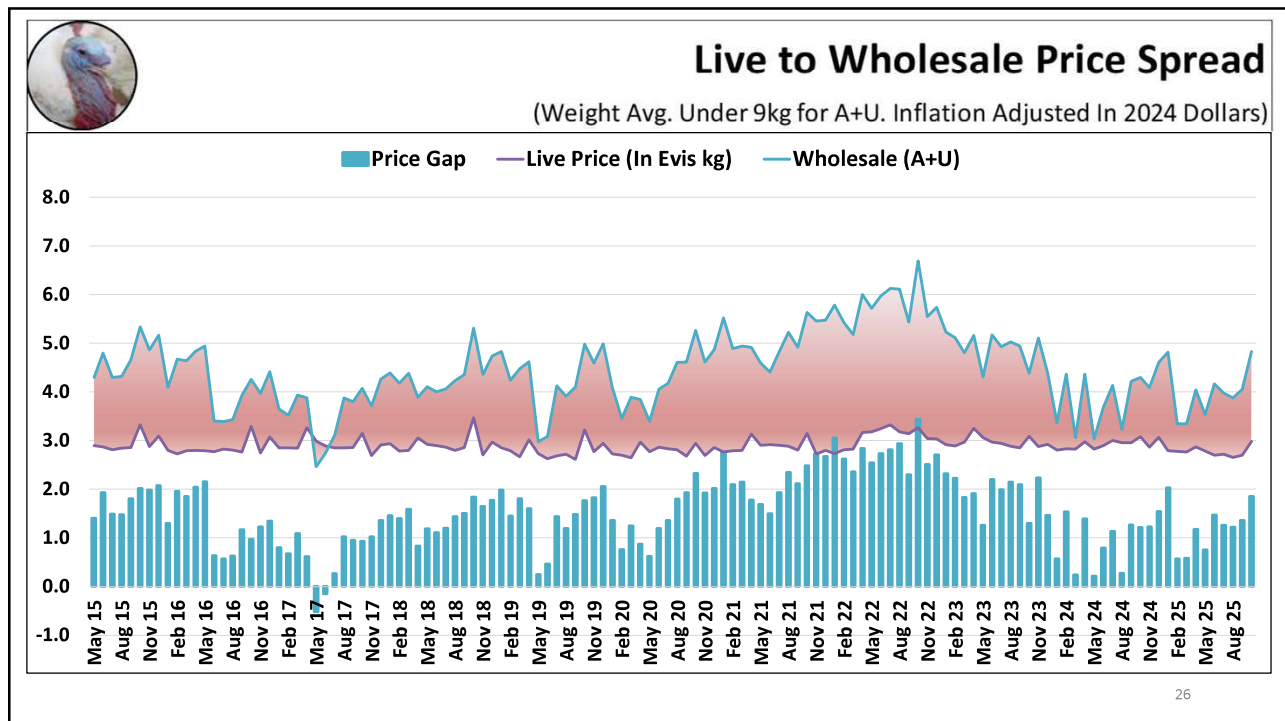


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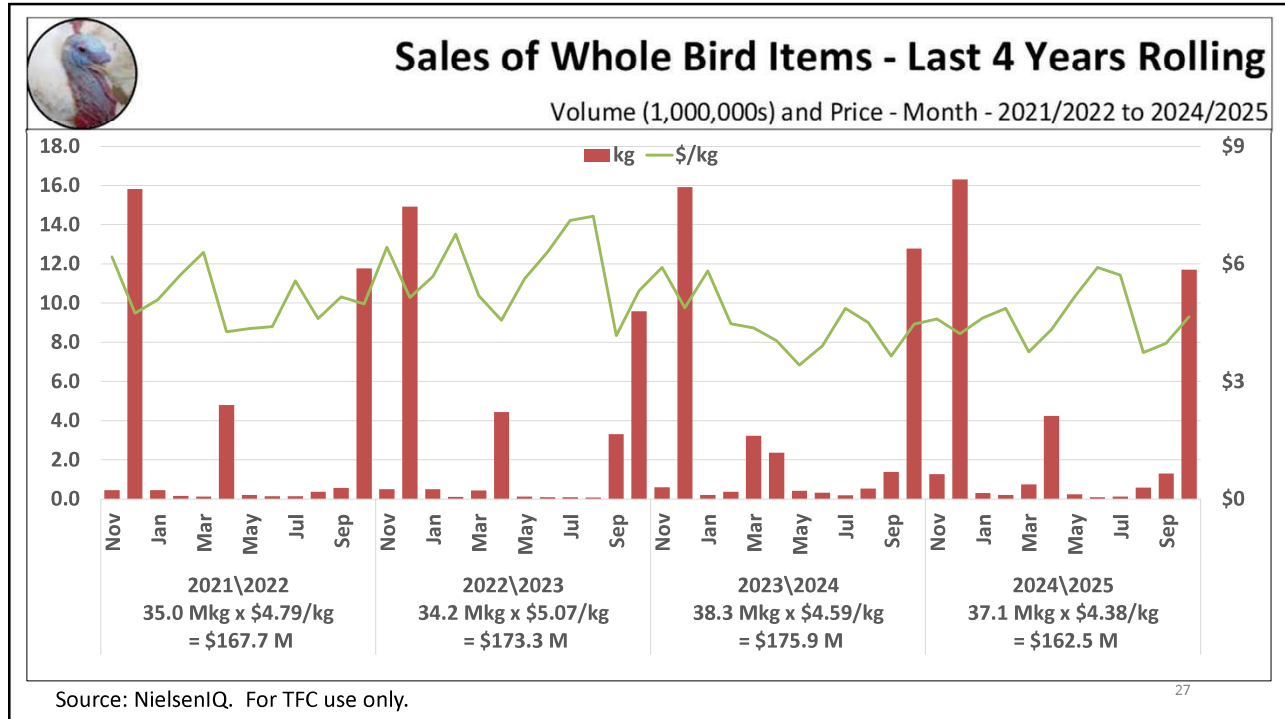
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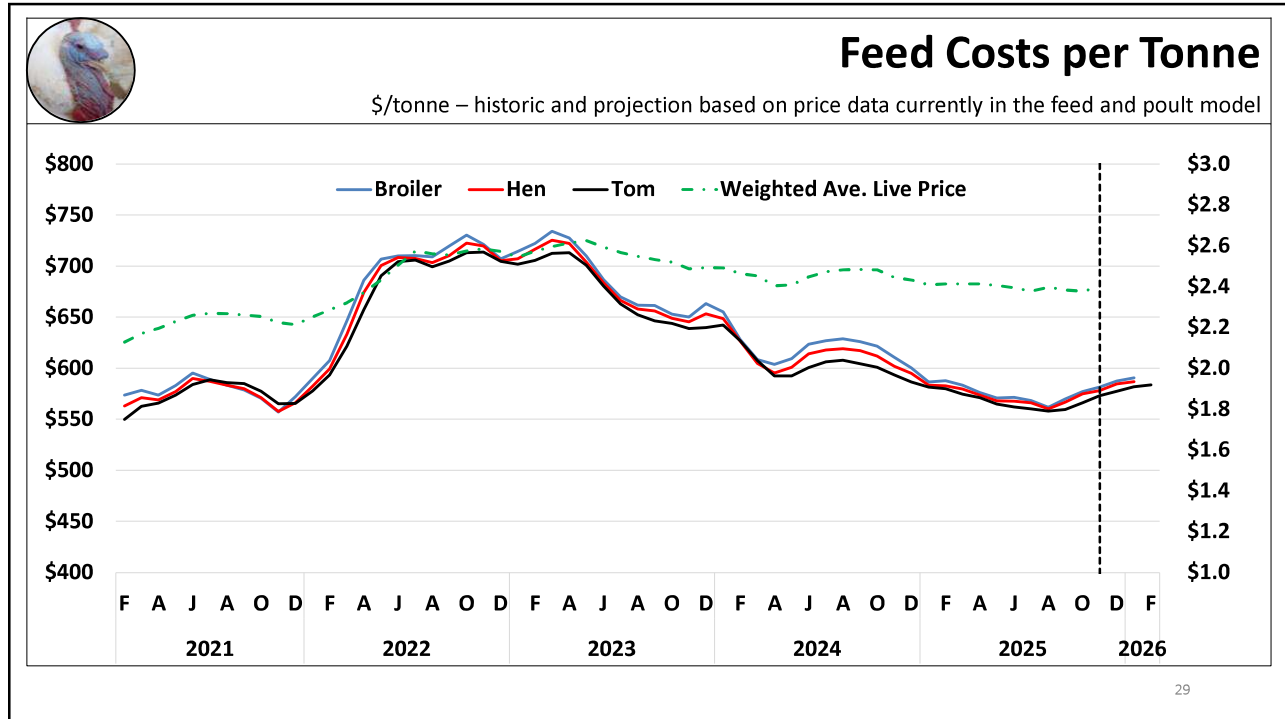
Commercial Allocation Overview
 2019/20 to 2026/27 - 2025/26 (129) and 2026/27 (136.9) Forecast

	19/20	20/21	21/22	22/23	23/24	24/25	25/26 (129)	26/27 (136.9)
Commercial Alloc.	146.6	126.0	139.0	146.5	141.5	132.7	129.0	136.9
Whole Bird Alloc.	57.7	46.9	51.0	48.5	55.8	48.0	36.9	41.3
Production	61.6	51.5	57.5	57.3	64.9	54.5	44.3	49.1
Exports	0.4	1.1	2.2	4.0	3.3	1.6	3.8	3.8
Stuffing and Basting	3.4	3.4	4.3	4.8	5.7	4.9	3.5	3.9
FP Alloc.	88.9	79.1	88.0	98.0	85.7	84.7	92.1	95.6
Other Utl.	17.2	17.6	16.7	12.2	16.3	15.6	14.0	14.0
FP and Calender Adj.	100.7%	98.9%	93.0%	86.8%	98.1%	98.0%	96.6%	98.7%
FP Production	106.9	95.6	97.4	95.7	100.0	98.4	102.5	108.2

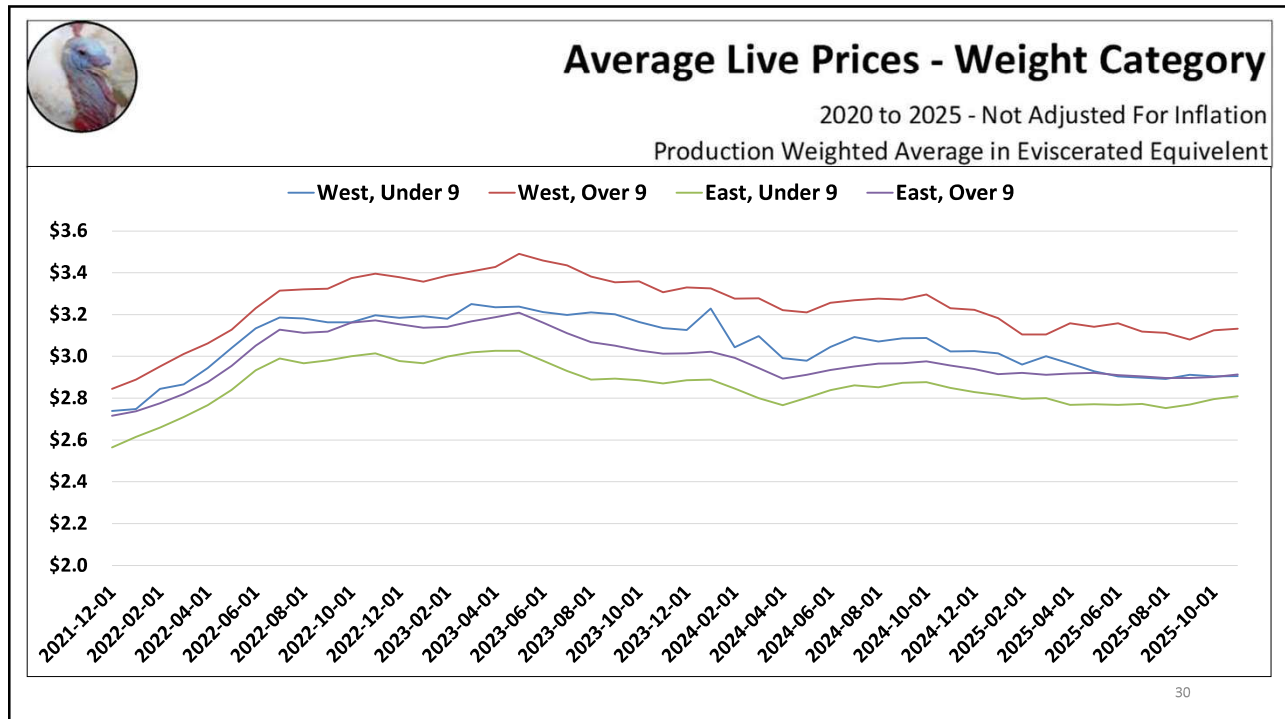
WB Allocation 26/27 (41.3) = Production (49.1) - Exports (3.8) - Stuffing and Basting (3.9)
 FP Allocation 26/27 (95.6) = FP Production (108.2)/FP and Calender Adj. (98.7%) - Other Utl. (14)

28

28



29



30

2026/2027 Allocation Worksheet - 284th - 14 Months

	Total	BC	AB	SK	MB	ON	QC	NB	NS
Section 1: Commercial Allocation									
Shares as per Policy	168,713,591	22,192,393	15,844,581	5,617,447	11,079,909	67,349,041	37,747,562	3,884,867	4,997,791
Adjustment +/- Starting Point	- 11,716,222	- 1,541,139	- 1,100,318	- 390,101	- 769,439	- 4,677,016	- 2,621,358	- 269,782	- 347,069
2026/2027 Commercial Allocation	156,997,369	20,651,254	14,744,263	5,227,346	10,310,470	62,672,025	35,126,204	3,615,085	4,650,722
Section 2: Conditional Multiplier Breeder									
Reference %			1.62%	0.60%	3.28%	2.13%	1.75%		
Reference Level	2,558,027	-	238,857	31,364	338,183	1,334,914	614,709	-	-
Egg & Poult Cap	1,736,194					1,736,194			
Reference Level Total	4,294,221	-	238,857	31,364	338,183	3,071,108	614,709	-	-
Forecast Marketings	6,321,196	-	-	-	1,042,054	4,894,142	385,000	-	-
Conditional Multiplier Allocation	2,526,905	-	-	-	703,871	1,823,034	-	-	-
Section 3: Conditional Primary Breeder									
a	2,447,760	-	-	-	-	2,447,760	-	-	-
Section 4: Conditional Export Policy									
Section 1 Parts	22,135,243	1,507,813	1,816,940	703,794	1,322,680	13,130,336	2,672,283	432,514	548,883
Section 1 Whole Bird	9,640,000	-	-	-	-	7,640,000	2,000,000	-	-
Section 1 Carry-Forward	-	-	-	-	-	-	-	-	-
Section 2 Placement for Export	9,197,376	-	-	-	-	8,247,376	950,000	-	-
Section 3 Live (evis. Equivalent)	3,733,333	-	-	-	3,733,333	-	-	-	-
Conditional Export Policy Allocation	44,705,952	1,507,813	1,816,940	703,794	5,056,013	29,017,712	5,622,283	432,514	548,883
Section 5: Special Conditional Request Quota									
a	-	-	-	-	-	-	-	-	-
Section 6: 2025/2026 Overmarketings									
a	-	-	-	-	-	-	-	-	-
Section 6: Total Allocation for Consideration (1c+2f+3a+4f+5a-6a)									
	206,677,986	22,159,067	16,561,203	5,931,140	16,070,354	95,960,531	40,748,487	4,047,599	5,199,605

2026/2027 PROVINCIAL TURKEY ALLOCATIONS - KILOGRAMS From Sunday, April 26, 2026 to Saturday, June 26, 2027

Reflecting decisions of the TFC Directors during the 284th meeting of December 3 and 4, 2025.

	TOTAL	BC	AB	SK	MB	ON	QC	NB	NS
A) Commercial Allocation	156,997,369	20,651,254	14,744,263	5,227,346	10,310,470	62,672,025	35,126,204	3,615,085	4,650,722
B) Multiplier Breeder									
1) Reference %			1.62%	0.60%	3.28%	2.13%	1.75%		
2) Reference Level (AxB1)			238,857	31,364	338,183	1,334,914	614,709		
3) Egg & Poult Cap						1,736,194			
4) Reference Level Total (B2+B3)			238,857	31,364	338,183	3,071,108	614,709		
5) Forecast Marketings					1,042,054	4,894,142	385,000		
6) Conditional Allotment (B5-B4, or "0")	6,321,196				703,871	1,823,034			
C) Primary Breeder	2,526,905					2,447,760			
D) Conditional Export Policy Allocations									
1) Section 1 - Upper Limit on Parts	22,135,243	1,507,813	1,816,940	703,794	1,322,680	13,130,336	2,672,283	432,514	548,883
2) Section 1 - Whole Bird Exports	9,640,000					7,640,000	2,000,000		
3) Section 1 - Carry-Forward									
4) Section 2 - Placements for Export	9,197,376								
5) Section 3 - Live (evis.)	3,733,333				3,733,333				
6) Total Conditional Export Policy Allocations	44,705,952	1,507,813	1,816,940	703,794	5,056,013	29,017,712	5,622,283	432,514	548,883
E) Special Conditional Request Quota									
F) Overmarketings									
G) Total Allocations (A+B+C+D+E+F)	206,677,986	22,159,067	16,561,203	5,931,140	16,070,354	95,960,531	40,748,487	4,047,599	5,199,605

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	109,636,434	12,860,423	8,283,142	2,302,401	8,245,886	54,230,033	16,254,499	3,394,426	4,065,624

2026/2027 PROVINCIAL TURKEY ALLOCATIONS - POUNDS

From Sunday, April 26, 2026 to Saturday, June 26, 2027

1 KG = 2.20462226

Reflecting decisions of the TFC Directors during the 284th meeting of December 3 and 4, 2025.

	TOTAL	BC	AB	SK	MB	ON	QC	NB	NS
A) Commercial Allocation	346,119,952	45,528,222	32,505,536	11,524,325	22,730,695	138,168,164	77,440,024	7,969,898	10,253,088
B) Multiplier Breeder									
1) Reference %			1.62%	0.60%	3.28%	2.13%	1.75%		
2) Reference Level (AxB1)			526,590	69,146	745,567	2,942,982	1,355,200		
3) Egg & Poult Cap						3,827,653			
4) Reference Level Total (B2+B3)			526,590	69,146	745,567	6,770,635	1,355,200		
5) Forecast Marketings	13,935,852				2,297,336	10,789,736	848,780		
6) Conditional Allotment (B5-B4, or "0")	5,570,870				1,551,769	4,019,101			
C) Primary Breeder	5,396,387					5,396,387			
D) Conditional Export Policy Allocations									
1) Section 1 - Upper Limit on Parts	48,799,858	3,324,159	4,005,667	1,551,600	2,916,010	28,947,436	5,891,376	953,530	1,210,080
2) Section 1 - Whole Bird Exports	21,252,562					16,843,317	4,409,245		
3) Section 1 - Carry-Forward									
4) Section 2 - Placements for Export	20,276,743								
5) Section 3 - Live (evis.)	8,230,590				8,230,590				
6) Total Conditional Export Policy Allocations	98,559,753	3,324,159	4,005,667	1,551,600	11,146,600	63,973,105	12,395,012	953,530	1,210,080
E) Special Conditional Request Quota									
F) Overmarketings									
G) Total Allocations (A+B+C+D+E+F)	455,646,962	48,852,381	36,511,203	13,075,925	35,429,064	211,556,757	89,835,036	8,923,428	11,463,168

Base Allocations (as per the proclamation)	213,940,000	20,500,000	18,250,000	8,000,000	17,250,000	92,000,000	54,000,000	1,440,000	2,500,000
Over Base Allocations	241,706,962	28,352,381	18,261,203	5,075,925	18,179,064	119,556,757	35,835,036	7,483,428	8,963,168