

Estimated Impact of Converting Nova Scotia's Further Processed (FP) Allocation to Whole Birds (WB) in 2016/17

| What Happened | 15/16 | 16/17 | 17/18 | 18/19 | 19/20 |
|-------------------------------------|------------------|------------------|------------------|------------------|------------------|
| Whole Bird Reference Quota | 2,666,126 | 2,666,126 | 2,666,126 | 2,666,126 | 2,666,126 |
| Change from Reference | - 110,450 | - 375,241 | - 378,418 | - 569,264 | - 569,264 |
| Nova Scotia Adjustment Reference | | 1,706,420 | 1,813,097 | 1,813,097 | 1,813,097 |
| Change from NS Adjustment Reference | | - 240,168 | - 257,344 | - 387,129 | - 387,129 |
| Whole Bird Quota | 2,555,676 | 3,757,137 | 3,843,461 | 3,522,830 | 3,522,830 |
| Further Processing Reference Quota | 1,344,081 | | | | |
| Further Processing Requests | 362,339 | | | | |
| One-Time FP Allocation | 40,396 | | | | |
| Further Processing Quota | 1,746,816 | | | | |
| Total Commercial Allocations | 4,302,492 | 3,757,137 | 3,843,461 | 3,522,830 | 3,522,830 |
| What Would Have Happened | 15/16 | 16/17 | 17/18 | 18/19 | 19/20 |
| Whole Bird Reference Quota | 2,666,126 | 2,666,126 | 2,666,126 | 2,666,126 | 2,666,126 |
| Change from Reference | - 110,450 | - 383,766 | - 387,553 | - 583,006 | - 583,006 |
| Whole Bird Quota | 2,555,676 | 2,282,360 | 2,278,573 | 2,083,120 | 2,083,120 |
| Further Processing Reference Quota | 1,344,081 | 1,344,081 | 1,450,758 | 1,450,758 | 1,450,758 |
| Further Processing Requests | 362,339 | 466,586 | 384,813 | 441,857 | 441,857 |
| One-Time FP Allocation | 40,396 | | | | |
| Further Processing Quota | 1,746,816 | 1,810,667 | 1,835,571 | 1,892,615 | 1,892,615 |
| Total Commercial Allocations | 4,302,492 | 4,093,027 | 4,114,144 | 3,975,735 | 3,975,735 |
| Difference - kg | - | - 335,890 | - 270,683 | - 452,905 | - 452,905 |
| Difference - % | 0.0% | -8.2% | -6.6% | -11.4% | -11.4% |

Reference Allocations and Adjustment to Nova Scotia

| | TOTAL | BC | AB | SK | MB | ON | QC | NB | NS |
|----------------------------------|--------------------|-------------------|-------------------|------------------|------------------|-------------------|-------------------|------------------|------------------|
| Reference Whole + NS Adjust Ref | 76,924,780 | 11,955,435 | 6,559,649 | 3,388,090 | 8,871,676 | 22,009,349 | 18,160,427 | 1,500,931 | 4,479,223 |
| FP | 67,665,752 | 7,603,677 | 7,105,520 | 1,893,122 | 854,846 | 34,142,488 | 14,275,353 | 1,790,746 | |
| Total Reference | 144,590,532 | 19,559,112 | 13,665,169 | 5,281,212 | 9,726,522 | 56,151,837 | 32,435,780 | 3,291,677 | 4,479,223 |
| % Share | 100.00% | 13.53% | 9.45% | 3.65% | 6.73% | 38.84% | 22.43% | 2.28% | 3.10% |
| Percentage of Reference | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| 2021/2022 Commercial | 139,000,000 | 18,408,362 | 13,200,337 | 4,794,904 | 8,844,806 | 55,450,698 | 31,474,318 | 3,226,036 | 3,600,539 |
| % Share | 100.00% | 13.24% | 9.50% | 3.45% | 6.36% | 39.89% | 22.64% | 2.32% | 2.59% |
| % of Reference | 96.1% | 94.1% | 96.6% | 90.8% | 90.9% | 98.8% | 97.0% | 98.0% | 80.4% |
| Adjustment to Nova Scotia | | | | | | | | | 452,905 |
| Adjusted Allocation | 139,452,905 | 18,408,362 | 13,200,337 | 4,794,904 | 8,844,806 | 55,450,698 | 31,474,318 | 3,226,036 | 4,053,444 |
| % Shares | 100.0% | 13.2% | 9.5% | 3.4% | 6.3% | 39.8% | 22.6% | 2.3% | 2.9% |
| % of Reference | 96.4% | 94.1% | 96.6% | 90.8% | 90.9% | 98.8% | 97.0% | 98.0% | 90.5% |

MINUTES

Turkey Farmers of Canada
Directors, Alternates and Managers' Web Conference
August 25, 2022

Appendix VI

ATTENDANCE:

| | | |
|----------------|------------------|------------------|
| D. Ference | Chair | TFC |
| C. McBain | Vice Chair | TFC |
| J. Wiersma | Executive Member | TFC |
| S. Heppell | Director | British Columbia |
| D. Etsell | Alternate | British Columbia |
| S. Olson | Director | Alberta |
| D. Mandel | Alternate | Alberta |
| M. Alting-Mees | Manager | Saskatchewan |
| C. Wiersma | Manager | Saskatchewan |
| M. Reimer | Director | Manitoba |
| L. Loewen | Alternate | Manitoba |
| H. Wheddon | Manager | Manitoba |
| M. Steele | Director | Ontario |
| D. Dietrich | Alternate | Ontario |
| J-M Falconer | Manager | Ontario |
| J. Paquet | Alternate | Québec |
| M-È. Tremblay | Manager | Québec |
| M. Volpe | Director | New Brunswick |
| L. Martin | Manager | New Brunswick |
| S. Eadie | Director | Nova Scotia |
| M. de Graaf | Alternate | Nova Scotia |
| S. Lorette | Manager | Nova Scotia |
| D. Hart | Director | CPEPC |
| M. Pépin | Director | CPEPC |
| T. Tavares | Alternate | CPEPC |
| N. Paillat | Manager | CPEPC |
| A. Power | Director | FPPAC |
| N. Zylstra | Manager | FPPAC |
| Observers – | | |
| R. Bonnett | FPCC | |
| B. Douglas | FPCC | |
| M. Kotipelto | FPCC | |
| C. Gendron | FPCC | |
| K. Cressman | TFO | |

P.-L. LeBlanc ÉVQ
J. Paquet ÉVQ

Interpreters – M. Brun del Re, P. Tellier

Staff – P. Boyd, A. Goldman, S. Ramkissoonsingh, J. Sheldon.

D. Ference, Chair, called the teleconference to order at 10:04 a.m. (EST). The notice of the teleconference was given in accordance with TFC By-Law #1. Attendance was confirmed by roll call.

S. Olson was recognized as speaking and voting for AB.

APPROVAL OF AGENDA:

MOVED by J. Wiersma (SK) and SECONDED by M. Volpé (NB)
to approve the agenda as published.

CARRIED

QUOTA REGULATION 2022/2023

S. Ramkissoonsingh highlighted the main points of the Consideration of Proclamation Criteria memo included in the meeting kit. As the meeting discussions ensued, the two other memos in the meeting kit, "2022/23 Commercial Allocation – Distribution of 143.0 mkg (i.e., 4.0 mkg increase)" and "Conditional Over 9 kg Eviscerated Allocation Proposal" was also highlighted.

S. Heppell – we are meeting the Criteria out of the Proclamation following the process laid out in the memo. Pro-rata allocation respects investments by farmers and processors in their farms and plants. Population is a critical criteria component in the formula as it fluctuates and changes, reflecting different growth rates in the provinces and regions. FIPI feed component reflects the highest single production cost and is a good relevant measurement. The Nielsen data measures the sales in the different provinces, and although not a complete data set, it is still a good proxy for what is happening in the marketplace. Agrees the extensive detail in the memo reflects the discussions that have taken place.

S. Olson – Sums up the discussion that has occurred in recent years.

J. Wiersma – the memo accurately reflects the past years' discussions. Pro rata reflects the existing production infrastructure and agrees with feed, population, and Nielsen data as components for the formula. Population is where turkey is consumed and provides labour input. Nielsen is third-party data on consumption.

M. Reimer to S. Ramkissoonsingh – Regarding the Farm Input Price Index – Feed (FIPI Feed), is this calculation based on the 3-year change as it is not clearly reflected in the memo?

S. Ramkissoonsingh to M. Reimer – The memo was produced before the 3-year offset was discussed; it is not included in this memo but is considered in all calculations and other memos included in the kit.

M. Reimer – in support of pro-rata allocation. It is one of the most critical pieces for this, as it supports Provincial Board levy revenue and if any stakeholder struggles to finance operations then the system is impacted. Okay to recognize population as there is a synergy between population and production. Nielsen is not a complete data set, but it is our best one. Do not support FIPI feed as other components are better but can support using it this year at a low weighting.

M. Steele – Are we relating the components included in the memo back to the criteria?

P. Boyd to M. Steele – these are the four elements noted in the criteria that could serve as the base for setting the allocation for the 2022/2023 allocation period.

M. Steele – Asked if the conditional over 9 kg proposal will be discussed and considered after this discussion? Any variation in market size used to be captured by the request process. Under some of these components, we are using a substandard substitute for the request process, which may be contrary to the objects of the Agency. The Nielsen retail data is a means to achieve this, but it has some inadequacy. Ontario encourages the Agency to look at the ability of provinces to market their allocations. Transportation needs to be considered as well. Innovative requests to satisfy the principle of comparative advantage. The feed calculation satisfies the comparative advantage principle but disagrees with using the standardized score in the calculation. Existing production and storage facilities don't see anything that satisfies that criterion in this approach. The transport of raw meat is ignored.

S. Ramkissoonsingh to M. Steele – Regarding transportation cost: the topic has not been raised by any members of the Allocation Policy Review Committee (APRC) over the years. The topic can be introduced to the committee for discussion.

M. Steele – from our view, it has been brought up by our province in the subcommittee and TFO proposal that was considered over the last couple of years. It might not have been explicit.

C. McBain – The provincial marketing shares, comparative advantage, and the population shares are variables; the Nielsen data as a third-party data is essential and maybe needs to be weighted less as it does not include data from all retailers. Feed needs to be part of the formula and feels it meets the Proclamation.

J. Paquet noted that QC is comfortable and satisfied with the elements included. Also comfortable with how the Agency has previously treated transportation.

M. Volpé – Pro rata is a good criterion as it brings stability to the system and population. Nielsen data might not be perfect, but it is a link to the market and needs to be included. Understands the reasoning for feed, but it isn't easy to include for NB as all NB feed comes from QC. NB agrees with feed being in the formula but not rated very high.

S. Eadie – the memo accurately summarizes the discussions over the last months. Agrees that Pro rata needs to be high, and that Nielsen and feed needs to be included. Supply management is for all provinces to grow; it is only as good as its weakest link.

D. Hart – Has a slightly different view on all of this. Where the Agency has landed are four reasonable pillars, even though none are perfect. Pro rata speaks to the capacity within a province to complete the task at hand; population and Nielsen recognize changes in the market. ON needs to take a half step back and consider the implication of what they are asking and to consider that it may not be possible for the Agency to be as granular in its analysis as had been suggested. For example, Costco will not share data with Nielsen. Detailed information on freight and feed information may be proprietary, and the firms that have this information may not be willing to share this information.

All the points M. Steele brought up might make better decision-making, but we have come up with what is possible given the limitations of the information.

M. Pépin – Doug made a lot of good points. We must also remember that we are lucky to have supply management (SM). The system can be good sometimes to processors but not good at other times.

A. Power – the four points of consideration in this memo can be used to meet the 2022/2023 Quota Regulation criteria. The under-marketing point and freight might be considered for the broader policy, but not the 2022/2023 allocation. Pro-rata production may be better than pro-rata allocation to capture under-production.

M. Steele to D. Hart – agrees with some of the comments but thinks this approach is deficient. ON made some proposals on a market-driven approach that met the criteria of the Proclamation.

S. Olson – In terms of how the components meet the Proclamation: pro rata allocation respects the established business; population promotes production where the people are, the Neilson data provides consumption patterns, and feed is the most significant input for turkey, so it meets comparative advantage.

S. Ramkissoonsingh spoke to memo #2, which talks about the distribution of the 4 million kg for 2022/2023, followed by memo #3. Both memos are included in the meeting kit.

T. Tavares noted that there is no denying a breast meat (BM) shortage today. The other key point is that losses due to AI will be produced at a later date than initially planned. If the allocation is increased, we will have the allocation we would have had, the caught-up kg, and a potential increase. To ON, most processors do not support an increase, and more products will not resolve the issue. An increase will not put the turkey in the hands of the people that could not find turkey in the past months. If you decide to move forward with an increase, please ensure that it does not increase carry forward into next control period. To ON, the decision by the TFO to increase production at the provincial level is an unprecedented power move that is not supported by most primary processors in ON.

J-M Falconer to T. Tavares – ON expressed the need for an increase in our letter of June 20, 2022. ON took into account the replacement of AI losses and regrow into the calculations before asking for the increase, all based on our processors' needs.

M. Reimer, regarding the conditional over nine allocations, there are a couple of critical principles that do not favour the calculation used. In the calculations used regarding production in the past, we can't distinguish if that production was bound for export or if there were breeder-select outs. I am not in favour of the data components used. It may not be possible to grow this production, as producers in all provinces are facing a tight poult supply. Will it end up in breast meat? In November, TMAC called for an allocation of 144.8 mkg and wants to remind everyone that we all voted in favour of a lower number.

M. Steele – to be clear, are we discussing the two memos and the conditional tom proposal?

D. Ference – yes, we have both pieces in the discussion.

M. Steele – about the tom conditional proposal, ON feels that the tom proposal discussed with the Directors comes closer to meeting the comparative advantage and transportation criteria. I would like to hear from the other Directors about how it relates to the criteria.

P. Boyd suggested going back to the methodology and dealing with the market needs after the methodology. We want to keep a step-by-step process for clarity, and hopefully, it will guide us to a quota regulation.

J. Wiersma – still supports the NS adjustment of the 452,905 kg and the over nine conditional policy. For the record, this is the first meeting where transportation has been brought up. Has no objection to the four pieces in the memo.

S. Olson – In favour of the NS adjustment and the four pieces. Not in favour of the over 9 allocation.

S. Heppell – NS was very much disadvantaged and for that reason it needs to be restored. With SM, we need to ensure that our smallest provinces are viable. Disagrees with the over nine proposal as he has an issue with a national agency allocating based on weight as it is a provincial/processor issue. This is a conditional policy based on another conditional policy, such as the Export Policy. On the use of the four pieces, he spoke previously and favoured them.

S. Eadie – In favour of the four elements and NS adjustment, but not in favour of the over nine allocations.

M. Volpé – Agrees with the NS adjustment and the four elements but does not believe that conditional is what we need right now, and is not in favour of it. If a province needs more kg, it needs to engage in conversation with the processors. The size of birds grown is a processor/producer issue.

J-M Falconer – to S. Heppell for clarity, when TFO allocates the volume is divided between light and heavy. The light allocation was not increased as the whole bird supply was adequate.

M. Steele – ON has strong regional processors and further independent processors and TFO is trying to strengthen their places in the market. These players have less access to TRQ than other processors. On the conditional allocation they will be young toms. Breeders are excluded from the calculation in the proposal. Sections 1 whole and 2 are not capped and everyone can participate in those policies.

Regarding the NS adjustment, ON will support it as it is a sustainability piece. But, we would like to discuss what is sustainable in the long run by province, at some point in the future. On the four components, they do provide stability but it doesn't necessarily meet the object of the Agency and believes does not adhere to the criteria. The conditional allocation comes closer to meeting the criteria. Believes a supply crisis exists for some segments of the processor industry and supports the conditional tom allocation.

C. McBain – In favour of the NS adjustment. For the over nine conditional, QC does not favour that as it will be challenging to allocate it to the producers. Previously spoke in favour of the four pieces.

M. Reimer – Supported the components and discussed how it meets the criteria. Supports 100% of the NS adjustment. Does not support the conditional over 9 allocation.

A Power – Supports the NS adjustment and the four elements. As we are struggling with the conditional allocation, he would like to see an increase to the commercial allocation of a similar size as breast meat needs are not being satisfied.

D. Hart – Fine with the NS adjustment and the four elements but does not support the conditional allocation on any increase above 143 mkg.

M. Pépin – In favour of the NS adjustment, has reservations with the four elements. Against the over nine. Nielsen data only represents a small part of the market, so have some concerns with this component.

M. Steele to C. McBain – all provinces can utilize the conditional over 9 kg pool, provided they grow over 9 kg birds.

P. Boyd to J. Wiersma and S. Olson regarding their comments to NS – Council found the criteria in the last quota order to not be sufficient regarding the NS adjustment.

J. Wiersma, S. Olson, C. McBain and M. Reimer in response to P. Boyd – the logic of the NS adjustment is to keep the province viable. Supportive and agree the rationale set out in the memo captures the members' consideration and discussions.

P. Boyd noted that the weighting for the conditional pool concept has shifted from previous discussions. What are the members' views on the weightings of the four components?

C. McBain proposed an allocation be based on 35% pro rata 2021/2022 commercial allocation, 35% provincial population, 15% Nielsen volumes and 15% FIPI Feed (35/35/15/15). Pro-rata allocation is a more constant element.

M. Steele to C. McBain – stated that he would be fine with an equal weighting of 25% each as a sustainability-based approach.

J. Wiersma agrees with the proposal by C. McBain.

M. Reimer believes that the pro rata portion should be higher. Feels that for 2020/2023, 35/35/15/15, for reasons stated earlier, is sufficient to meet the criteria and enhance stability. S. Olson believes the four components meet the Proclamation and agrees with 35/35/15/15.

S. Heppell believes that the proposal represents the criteria well and agrees with the percentages.

M. Steele does not think the components satisfy the Proclamation and would like a 25/25/25/25 allocation. It could be beneficial as a policy down the road but prefer the 25% weightings today.

D. Hart agrees with the proposal for now and wants the Directors to remember that the percentages might change going forward.

M. Pépin – agrees with the proposal.

A. Power – supports the proposal.

S. Eadie noted that he does not agree entirely but will support it for 2022/23 as we need an allocation.

M. Volpé – yes can support the proposal as it should provide more stability.

J. Sheldon reviewed the TMR report shared earlier this week with the Directors. The report noted that year-to-date imports to the end of July and use of TRQ to August 13 are down sharply from year earlier. CPTD production to the end of July was 35.7 mkg, down from 36.3 mkg in the same period a year ago. As the allocation is higher than a year ago, a smaller % of 2022/2023 production has occurred than at the same point in 2021/2022.

J-M Falconer noted that from the presentation, there are two markets: WB and FP. One of the markets needs an adjustment. To keep that in mind when setting the allocation.

D. Hart – central Canada needs to recognize that for years producers in western Canada have been cutting up birds under nine kg. The weight category of production does not necessarily mean cut up or bagged.

M. Volpé – NB Board will meet with the processors to see how it will allocate.

MOVED and SECONDED, that the allocation methodology for any increase in the commercial allocation for the 2022/23 control period, above the 2021/22 commercial allocation of 139 mkg, be allocated based on the TFC memo dated August 25, 2022, and titled 2022/23 Commercial Allocation – Distribution of 143.0 mkg (i.e., 4.0 mkg increase), using the following component weightings:

15% provincial shares of Nielsen retail turkey sales, 15% Farm Input Price Index (FIPI) for Commercial Feed, 35% provincial shares of provincial population, and, 35% provincial market shares of the 2021/22 commercial allocation.

CARRIED
(10 in favour – 1 opposed)

S. Heppell – concerned about how much product will come in period three. Sees an allocation of 146 mkg as necessary.

S. Olson – Will be comfortable with 145 mkg.

J. Wiersma – Comfortable with 146 mkg.

M. Reimer – Cautious, prefers 145 mkg as we need a slight increase.

M. Steele – 4 million national increase is appropriate. We see higher foodservice sales; competing proteins are also expensive, and the supply from the US will probably not recover quickly. US prices will remain high. Ontario alone needs 2.1 mkg to 2.7 mkg, and this will not add to stocks. So, an additional 4.0 mkg is conservative, so can support 147 mkg.

C. McBain – agrees with an increase to 147 mkg, as the ending stock-to-use ratio is forecast at 3.3%, and due to demand that is currently not being filled, this increase will not end up going into inventory.

M. Volpé – has a more conservative view and do not want to create the market situation that occurred going back a couple of years. TMAC numbers are closer to 145 mkg.

S. Eadie – leaning towards 147 mkg, with the main reason being the need to supply the market.

A Power – the TMAC demand is understated, and there is a lack of promotion at the retail level. Supports 147 mkg.

D. Hart – not in favour of anything above 143 mkg.

M. Pépin – Page #9 on TMR, how do you explain an increase of regarding further processing birds? Next year the imports will start to enter the market.

In response, J. Sheldon noted that the TMR, shows production for May to July by weight category, which does not necessarily indicate how the birds were processed.

M. Pépin noted that the market is short due to factors beyond our control, but increasing now will not solve the shortage in the past.

C. McBain – The supply is very tight and I can move from 147 mkg to 146 mkg in order to get a regulation.

M. Reimer – asked the Directors to reconsider and to be cautious.

S. Olson – more comfortable to do the increase in the next control period, but considering the need for a quota regulation, will be in favour.

S. Eadie – echoes S. Olson's comment and will be willing to vote in favour of 146 mkg.

M. Steele strongly believes we need an increase of 4 million so it will stay at 147 mkg.

M. Volpé would like to wait until the next control period for an increase but would go up to 146 mkg.

A Power is struggling with the number and understands we need an increase. Will support 146 mkg.

MOVED and SECONDED that the commercial allocation for the 2022/2023 control period be set at 146.0 million kg.

CARRIED
(8 in favour – 3 opposed)

A Power left the meeting at 1.49 p.m. N. Zylstra will be voting on behalf of FPCC.

MOVED and SECONDED that the Commercial Quota of 146,000,000 kg agreed to at the TFC Web Conference of August 25, 2022, be allocated for the 2022/2023 control period as follows:

| | |
|--------------------|---------------|
| • Nova Scotia | 4,247,715 kg |
| • New Brunswick | 3,388,138 kg |
| • Québec | 32,852,397 kg |
| • Ontario | 58,102,386 kg |
| • Manitoba | 9,170,501 kg |
| • Saskatchewan | 5,015,198 kg |
| • Alberta | 13,920,916 kg |
| • British Columbia | 19,302,749 kg |

CARRIED
(8 in favour-3 opposed)

MOVED and SECONDED that the total 2022/2023 federal quota for interprovincial and export trade be established at 181,410,931 kg eviscerated, and be comprised of the following components:

Commercial Quota: 146,000,000 kg
Multiplier Breeder Quota: 2,810,043 kg
Primary Breeder Quota: 2,098,080 kg
Conditional Export Quota: 30,502,808 kg

CARRIED
(8 in favour- 3 opposed)

MOVED and SECONDED that the 2022/2023 federal quota for interprovincial and export trade be allocated to the provinces as reviewed during the TFC Directors, Alternates and Managers' Web Conference of August 25, 2022, as follows:

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

**CARRIED
(8 in favour-3 opposed)**

MOVED and SECONDED to direct staff to prepare and submit the 2022/2023 Quota Regulation reflecting the allocations approved during the TFC Directors, Alternates and Managers' Web Conference of August 25, 2022 for blue stamping by the Justice Department and prior-approval by FPCC subject to Members' approval, and to prepare an amended Schedule A to the Promotion Agreement.

**CARRIED
(8 in favour-3 opposed)**

There being no further business, it was MOVED by M. Reimer to adjourn the teleconference at 2:13 p.m.

Approved by:

D. Ference, Chair

A. Goldman, Secretariat

Dated: _____, 2020

2022/2023 Commercial Allocation - August 25, 2022

- 1 - Make NS adjustment first, then allocate:
 - 35% of remaining 6,547,095 kg based on pro-rata % shares at 139 mkg
 - 35% of 6,547,095 kg based on pro-rata % shares of population
 - 15% of 6,547,095 kg based on 2021 Nielsen Sales
 - 15% of 6,547,095 kg based on Feed Farm Input Price Index (FIPI)

| | TOTAL | BC | AB | SK | MB | ON | QC | NB | NS |
|--|------------------|------------|------------|-----------|-----------|------------|------------|-----------|-----------|
| Starting Allocation | a | 18,408,362 | 13,200,337 | 4,794,904 | 8,844,806 | 55,450,698 | 31,474,318 | 3,226,036 | 3,600,539 |
| % shares of Allocation | b=% of a | 13.243% | 9.497% | 3.450% | 6.363% | 39.893% | 22.643% | 2.321% | 2.590% |
| Increase to Allocate | c | | | | | | | | |
| Nova Scotia Adjustment | d | | | | | | | | 452,905 |
| 35% of Remainder to Allocate on Share of 139 | e=(c-d)x35% b | 303,471 | 217,614 | 79,046 | 145,811 | 914,132 | 518,869 | 53,183 | 59,357 |
| Population (October 1, 2021) | f | 5,249,635 | 4,464,170 | 1,180,867 | 1,386,333 | 14,915,270 | 8,631,147 | 794,300 | 998,832 |
| % shares of Population | g=% of f | 13.954% | 11.866% | 3.139% | 3.685% | 39.647% | 22.943% | 2.111% | 2.655% |
| 35% of Remainder Allocated by Pop. Share | h=(c-d)x35% g | 319,757 | 271,914 | 71,927 | 84,442 | 908,495 | 525,728 | 48,381 | 60,839 |
| Nielsen Sales (kg - 2021)* | i | 6,634,371 | 6,907,451 | 1,784,767 | 1,720,735 | 20,468,601 | 5,030,636 | 1,811,865 | 2,278,420 |
| % shares of Nielsen | j=% of i | 14.226% | 14.811% | 3.827% | 3.690% | 43.889% | 10.787% | 3.885% | 4.885% |
| 15% of Remainder Allocated by Nielsen % | k=(c-d-e-h)xj | 139,704 | 145,455 | 37,583 | 36,235 | 431,021 | 105,934 | 38,154 | 47,978 |

| | | TOTAL | BC | AB | SK | MB | ON | QC | NB | NS |
|---|--------------------|-------------|------------|------------|-----------|-----------|------------|------------|-----------|-----------|
| FIPI Feed (2018, Q4) | I | 101.4 | 110.1 | 106.8 | 116.8 | 114.6 | 90.5 | 93.9 | 98.2 | 101.2 |
| FIPI Feed (2021, Q4) | m | 131.6 | 137.7 | 147.1 | 157.6 | 152.9 | 112.6 | 116.0 | 126.4 | 124.7 |
| FIPI Feed (2021/2018 or 2018=100) | $n=m/I$ *100 | 129.8 | 125.1 | 137.7 | 134.9 | 133.4 | 124.4 | 123.5 | 128.7 | 123.2 |
| Adjustment Factor | $o=1/(n/total\ n)$ | | 1.038 | 0.942 | 0.962 | 0.973 | 1.043 | 1.051 | 1.008 | 1.053 |
| Standardized Score | $p=b \times o$ | 1.027 | 0.137 | 0.089 | 0.033 | 0.062 | 0.416 | 0.238 | 0.023 | 0.027 |
| Adjusted % | $q=\%$ of p | 100.0% | 13.386% | 8.716% | 3.232% | 6.029% | 40.531% | 23.170% | 2.279% | 2.657% |
| 55% of Remainder Allocated by FIPI Feed | $r=total \times q$ | 982,065 | 131,455 | 85,596 | 31,738 | 59,207 | 398,040 | 227,548 | 22,384 | 26,097 |
| Total Allocation | $s=(a+d+e+h+k+r)$ | 146,000,000 | 19,302,749 | 13,920,916 | 5,015,198 | 9,170,501 | 58,102,386 | 32,852,397 | 3,388,138 | 4,247,715 |
| % Shares | $t=\%$ of s | 100% | 13.221% | 9.535% | 3.435% | 6.281% | 39.796% | 22.502% | 2.321% | 2.909% |
| Marginal Increase | $u=(e+h+k+r)$ | 6,547,095 | 894,387 | 720,579 | 220,294 | 325,695 | 2,651,688 | 1,378,079 | 162,102 | 194,271 |
| % Share of Marginal Increase | $v=\%$ of u | 100% | 13.661% | 11.006% | 3.365% | 4.975% | 40.502% | 21.049% | 2.476% | 2.967% |

* NB and NS Nielsen volumes allocated by population less PEI.



MEMO

DATE: June 6, 2022

TO/ À: Directors, Alternates and Managers

FROM/ DE: Turkey Market Advisory Committee (TMAC)

RE/ OBJET: TMAC Report – Based on May 1, 2022 Inventories

TMAC met by video conference on May 30th to review the final supply and disappearance data for the 2021/2022 Control Period based on May 1st inventories and to review the whole bird (WB) and breast meat (FP) market requirements for the 2022/2023 Control Period. Set out below is an overview of the Committee's discussions and forecasts for 2022/2023.

General Market Environment

1. The unemployment rate is forecast to be stable at 5.2% (i.e., the economy is at full employment) for the 2022/2023 Control Period.
2. Inflation (all items) is expected to gradually decline to 3.5% by the first quarter of 2023. However, household incomes are not expected to keep pace with current inflation, which will have an impact on total consumer demand and is expected to result in a shift in consumer spending behaviour.
3. 2022/2023 U.S. corn production is projected to decline by 4.3 percent from the 2021/2022 estimate. Lower production projections are expected to result in tighter supplies and reduced use (minus 3% in the U.S.) for the year. Ending stocks are forecast at 9.3% stock-to-use ratio (1,360 million bushels), down from 9.6%. The season-average farm price for corn in 2022/2023 is projected at \$6.75 per bushel, compared with the current 2021/2022 estimate of \$5.90.
4. World wheat production for 2022/2023 is forecast at 775.0 million metric tonnes, roughly the same as 2020/2021 and down from 779.0 mmt in 2021/2022. Total supply is expected at 1,055.0 mmt down from 1,071.0 mmt last year and 1,074.0 mmt in 2020/2021.
5. Prior to 2021, beef had significant or even dominant share of feature space in supermarket flyers for festive holidays. This added space often took share away from turkey. These beef ads began to notably decline during 2021 due to high beef costs. Furthermore, the competition from beef for retail featuring for the rest of

2022 is expected to continue to be significantly less at festive times, relative to the last few years. Again, this is due to higher beef prices. This should provide opportunity for featuring of lesser cost meat proteins. It should also provide increased opportunities for turkey to regain flyer share.

6. Falling COVID-19 caseloads and easing/removal of public health restrictions should assist the recovery of the foodservice sector. Statistics Canada data for March 2021 (latest) shows total sales were 5% more than March 2019. Data from OpenTable.com, shows that customer traffic levels through the end of May are now significantly exceeding 2019 levels, which is a base year for comparison. Anecdotal information from foodservice distributors indicates that traffic levels have recovered to normal levels.

Turkey-Specific Matters

7. Live turkey prices as of the week of May 23rd were 22.0 cents per kg higher on toms versus the same time last year (2021), and approximately 50.0 cents per kg higher than in 2020. These price increases have a flow through impact on the break-even cost for boneless skinless breast and thigh meat (i.e., every 1 cent increase in the live price results in additional breast meat cost of approximately 5.0 cents per kg, keeping all other factors constant).
8. Compared to the last TMAC meeting in March, it appears that production for the domestic market was 4.1 mkg lower (- 2.7%) than expected, due to avian influenza and quota utilization. As all the data for the 2021/2022 Control Period has not yet been submitted by all Provincial Boards, this figure may change slightly.

Whole Bird (WB) Market

2021/2022 Control Period

In March, TMAC was forecasting WB domestic disappearance for 2021/2022 at 53.5 mkg. Actual disappearance came in at 52.9 mkg (lower by 0.6 mkg or 1.1%). The lower disappearance is likely attributable to lower-than-expected production. Production was forecast at 59.4 mkg and came in at 57.5 mkg (lower by 1.9 mkg or 3.2%). Closing stocks at 9.9 mkg is lower than expected in March (11.4 mkg) by 1.5 mkg or 13.2%.

TMAC is of the view that WB domestic disappearance in 2021/2022 was likely curtailed due to the timing of production (i.e., the late quota adjustment in July of 2021), the Omicron variant at Christmas and other supply related issues (e.g., B.C. flooding and avian influenza). This, therefore, needs to be factored in when forecasting the 2022/2023 Control Period.

The key summary point is that the lower domestic disappearance was not due to decreased demand; instead, the problem was reduced product availability for the market.

2022/2023 Control Period Forecast

TMAC has opted to keep the WB domestic disappearance forecast for 2022/2023 at 54.0 mkg or 1.39 kg per capita.

- As noted in February, based on the long run decline in WB domestic disappearance of approximately 2.5 mkg per year, and using 2019/2020 as a reference point prior to COVID (62.1 mkg), TMAC would expect disappearance in the 54.0 to 55.0 mkg range for 2022/2023.
- The WB supply situation in 2021 may have dampened disappearance last year.
- Due to price, the featuring of beef is expected to be less frequent this fall.
- As a percentage of total WB external sales, commodity WB sales now represent 36% of sales down from 60% in 2015/2016.
 - The sale of value-added turkeys (basted, stuffed, fresh, etc.) has increased by 31.6% (+7.0 mkg or 29.0 mkg) since 2015/2016 (22.0 mkg). As the price point for these turkeys are higher than commodity birds, demand may not be as sensitive to price increases.
 - Based on the wholesale price and movement data provided by CPEPC, wholesale prices for commodity WB's increased by 28% between 2020/2021 and 2021/2022; while sales fell by 38%. However, over the same period value-added sales increased in volume by 14%.

The table below illustrates TMAC's WB forecasting for 2022/2023, relative to the March forecast and final 2021/2022 Control Period data.

Based on a total production figure of 54.9 mkg and less exports and basting and stuffing for value-added birds, the **commercial allocation required for domestic WB production is forecast at 48.9 mkg.**

Regarding Easter 2022, TMAC had previously forecasted March/April domestic disappearance at 8.1 mkg and 9.4 mkg for January to April. Actual March/April disappearance came in at 7.5 mkg and 8.9 mkg for January to April.

Table 1

| | 19/20 | 20/21 | March 21/22* | 21/22 final | 22/23* |
|---------------------------|-------|-------|-----------------|----------------|--------|
| | Total | Total | Total | Total | Total |
| Opening Stocks | 18.2 | 17.3 | 7.5 | 7.5 | 9.9 |
| Production | 61.6 | 51.5 | 59.4 | 57.5 | 54.9 |
| Imports | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Supply | 79.8 | 68.8 | 66.9 | 65.0 | 64.7 |
| Total Disappearance | 62.5 | 61.3 | 55.5 | 55.1 | 56.0 |
| Exports | 0.4 | 1.1 | 2.0 | 2.2 | 2.0 |
| Domestic Disappearance | 62.1 | 60.2 | 53.5 | 52.9 | 54.0 |
| Closing Stocks | 17.3 | 7.5 | 11.4 | 9.9 | 8.8 |
| PCC | 1.64 | 1.58 | 1.39 | 1.37 | 1.39 |
| Stocks to Use % | 27.7% | 12.2% | 20.3% | 17.9% | 15.6% |

*Forecasts. Note: for 2022/2023, a total production figure of 54.9 mkg, less 2.0 mkg for exports and less 7.5% (4.0 mkg) for basting and stuffing equals a domestic commercial allocation requirement of 48.9 mkg.

Further Processed (Breast Meat) Market

2021/2022 Control Period

In March, TMAC was forecasting breast meat domestic disappearance for 2021/2022 at 28.2 mkg. Actual disappearance came in at 27.7 mkg (lower by 0.5 mkg or 1.8%). The lower disappearance is likely attributable to lower-than-expected live production (i.e., under production). Breast meat production was forecast at 26.2 mkg and came in at 25.6 mkg (lower by 0.6 mkg or 2.3%). Closing stocks at 1.2 mkg is slightly lower than expected in March (1.3 mkg).

TMAC is of the view that breast meat domestic disappearance in 2021/2022 was likely curtailed due to lower-than-expected live production. Total eviscerated production that was expected in March to be used for FP in 2021/2022 was 99.8 mkg. Actual production was 97.6 mkg, a difference of 2.2 mkg (2.2%), equivalent to 0.6 mkg of breast meat.

2022/2023 Control Period Forecast

TMAC has opted not to modify the 2022/2023 domestic disappearance forecast of breast meat of 29.5 mkg, from either its February or March reports.

- As noted above, disappearance was likely curtailed in 2021/2022 due to under production.

- There appears to be increased demand for breast meat. Domestic disappearance for the control period, despite lower supply, held steady at considerably higher wholesale prices, +\$2.27 per kg or +30%.
 - Frozen breast meat in 2021/2022 traded at higher wholesale prices (+\$2.40 per kg or +35%) on slightly higher volumes (+3%).
- Foodservice sales (volumes, seating) are all well above 2019 benchmarks, which should provide opportunity to move more turkey.
- Higher priced beef should also provide opportunity for turkey.
- Concern expressed that if turkey is not readily available, it will not be featured or placed on menus.

TMAC spent some time discussing the import situation. Given the impact of Avian Influenza (AI) in the U.S. and the very low utilization of Tariff Rate Quota (TRQ) to date (27.2%) relative to last year at this time (54%), the breast meat import forecast is now 0.7 mkg, down from the March forecast of 1.2 mkg. Based on the above factors, the table below illustrates TMAC's breast meat forecasting for 2022/2023, relative to the March forecast and final 2021/2022 Control Period data.

Table 2

| | 19/20 | 20/21 | March 21/22* | 2021/22 Final | 2022/23* |
|------------------------------|-------|-------|-----------------|------------------|------------------|
| | Total | Total | Total | Total | TMAC Forecast |
| Opening Stocks | 2.5 | 3.5 | 2.1 | 2.1 | 1.2 |
| Production | 28.0 | 25.1 | 26.2 | 25.6 | 28.6 |
| Imports | 1.3 | 1.4 | 1.2 | 1.1 | 0.7 |
| Total Supply | 31.9 | 30.0 | 29.5 | 28.8 | 30.5 |
| Total Disappearance | 28.3 | 27.9 | 28.2 | 27.7 | 29.5 |
| Exports | 0.0 | 0.1 | 0.0 | 0.0 | 0.0 |
| Domestic Disappearance | 28.3 | 27.8 | 28.2 | 27.7 | 29.5 |
| Closing Stocks | 3.5 | 2.1 | 1.3 | 1.2 | 1.0 |
| PCC | 0.75 | 0.73 | 0.73 | 0.72 | 0.76 |
| FP Production | 106.8 | 95.6 | 99.8 | 97.6 | 108.8 |
| ¹ Stocks to Use % | 12.5% | 7.7% | 4.6% | 4.2% | 3.3% |

*Forecasts.

¹ A stocks-to-use ratio measures a commodity's inventory volume at a point in time (e.g., ending stocks for a given Marketing Year (MY)), expressed as a share of the volume of that commodity's total use in that same year.

Production Forecast: The above production forecast of 108.8 mkg of eviscerated production consists of:

- 16.0 mkg of conditional production under the Multiplier (1.8 mkg), Primary (1.0 mkg) and Export (13.2 mkg) policies; and **94.1 mkg of commercial allocation** being used in 2022/2023 for breast meat production.

Closing Stocks: The above forecast of domestic disappearance (29.5 mkg), production (28.6 mkg of breast from 108.8 mkg of eviscerated production) and imports (0.7 mkg), results in a forecast closing breast meat stock figure of 1.0 mkg.

On the surface, this ending stock level appears low relative to 2021/2022 ending stocks and the discussion by TFC Directors in July 2021 around a 5% or 1.3 mkg stock-to-use ratio. TMAC would like to note the following:

- 1) The potential for higher imports in the last 4-months of the control period (i.e., new TRQ year starting January 1st, 2023).
- 2) Potential for the U.S. to recover more quickly from AI in 2022 (i.e., again for imports to be higher than forecast).
- 3) Depending on the direction of feed costs for the remainder of the year, this may increase breast meat cost and wholesale prices and, by extension, dampen demand.

Therefore, based on the above, TMAC believes there should be wiggle room in this forecast, *if breast meat demand is not as robust as 29.5 mkg*, for the industry to maintain stability with respect to inventory levels and pricing.

Whole Bird and Further Processed Commercial Allocation Requirement

With a forecast WB commercial allocation requirement of **48.9 mkg** and a FP commercial allocation requirement of **94.1 mkg**, TMAC is forecasting a total commercial allocation requirement of **143.0 mkg**. This figure of 143.0 Mkg is the same as the current commercial allocation established by the TFC Directors at the Agency's 268th Meeting of November 24-25, 2021.

Additional Insights

1. TMAC discussed the current availability of fresh breast meat. Breast meat is currently trading over \$12.00 per kilogram and is difficult to source for some further processors. While there was discussion about the possible need to increase the 2022/2023 allocation at this time to address this, it was agreed that as discussed elsewhere in this report, underproduction in 2021/2022, domestic losses from AI


and lack of imports from the U.S., are likely the main contributing factors to this situation.


2. Time was spent by the Committee discussing key “risks” to the cost of producing turkey meat (e.g., higher feed costs due to world events, drought, late plantings) and to demand (e.g., warm weather at Thanksgiving, inflation, fuel costs) over the next 12-months.
3. Due to AI domestically, approximately 1.9 mkg of eviscerated production has been impacted in the current 2022/2023 Control Period (i.e., through May, June and July).
4. As noted above at numerous points in this report, the reduced disappearance has been attributed to reduced availability, as opposed to weaker consumer demand. There has been concern expressed that reduced availability could in turn result in a decrease in consumer demand. That is, reduced availability leads to reduced featuring, reduced shelf space and menu offerings.

Attachments:

- 1) Turkey Market Review (TMR) Slides

Appendix IX





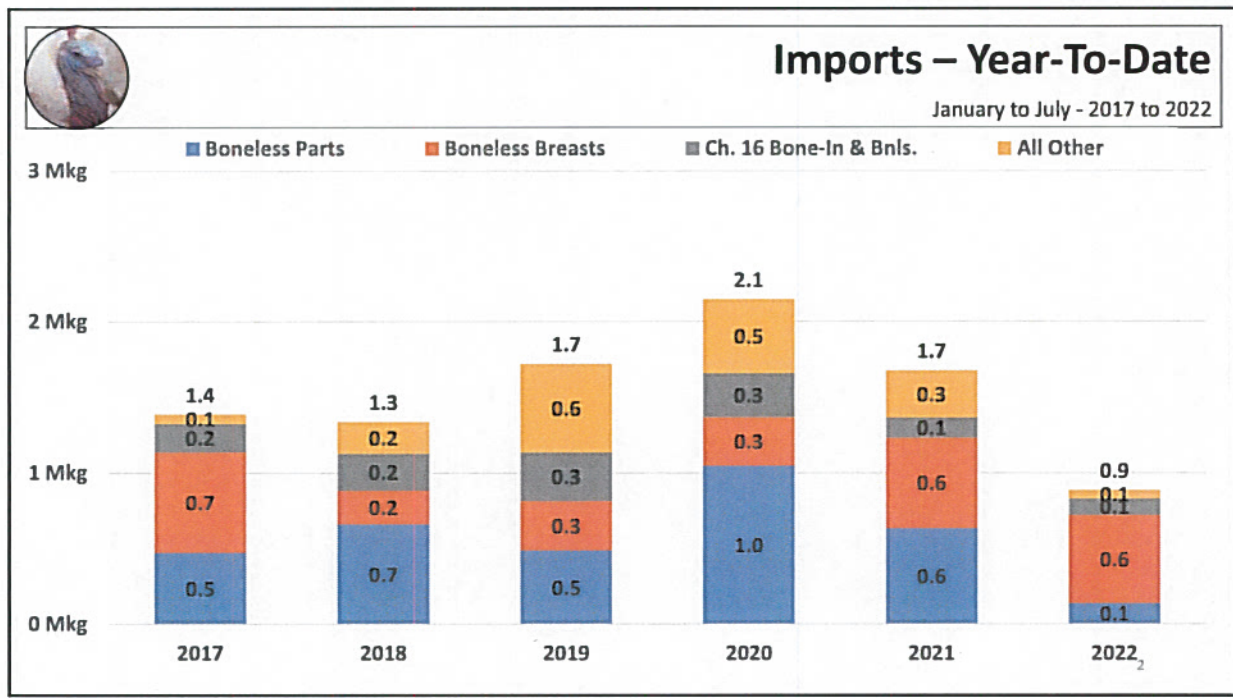
Turkey Market Review

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


DAM Meeting – August 25th, 2022

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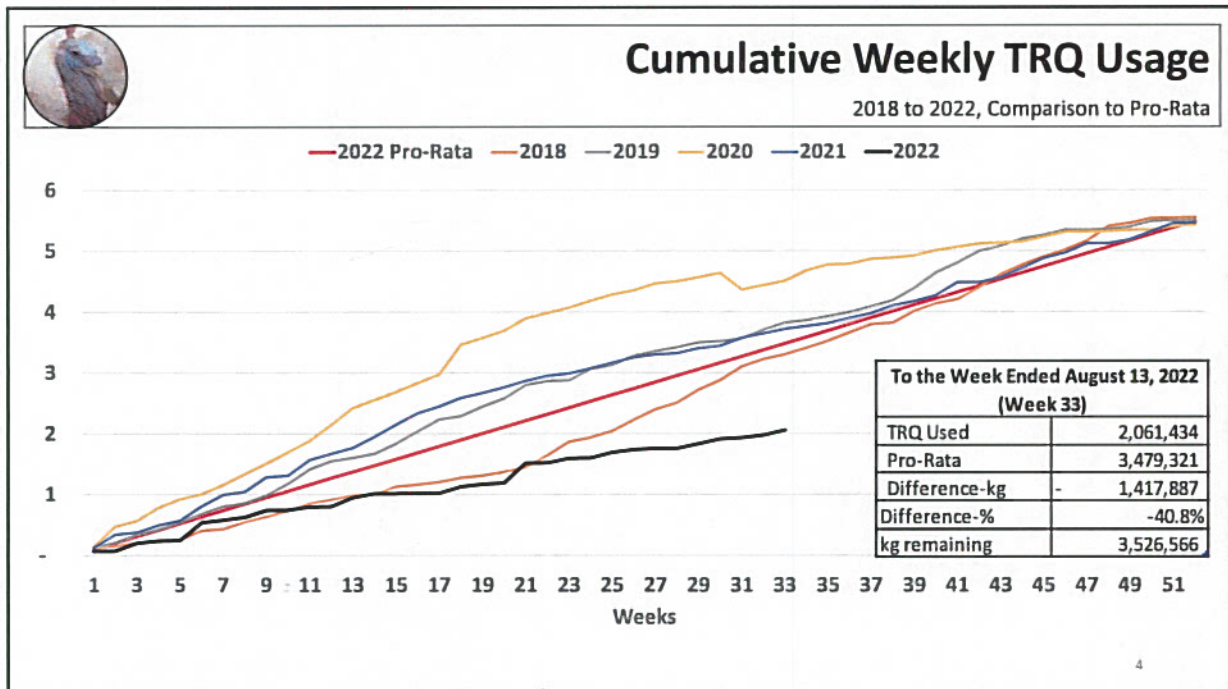
Kg and Year-Over-Year % Change of Imports by Part

2017 to 2022 – Year to Date (Jan-July) – thousands of kg

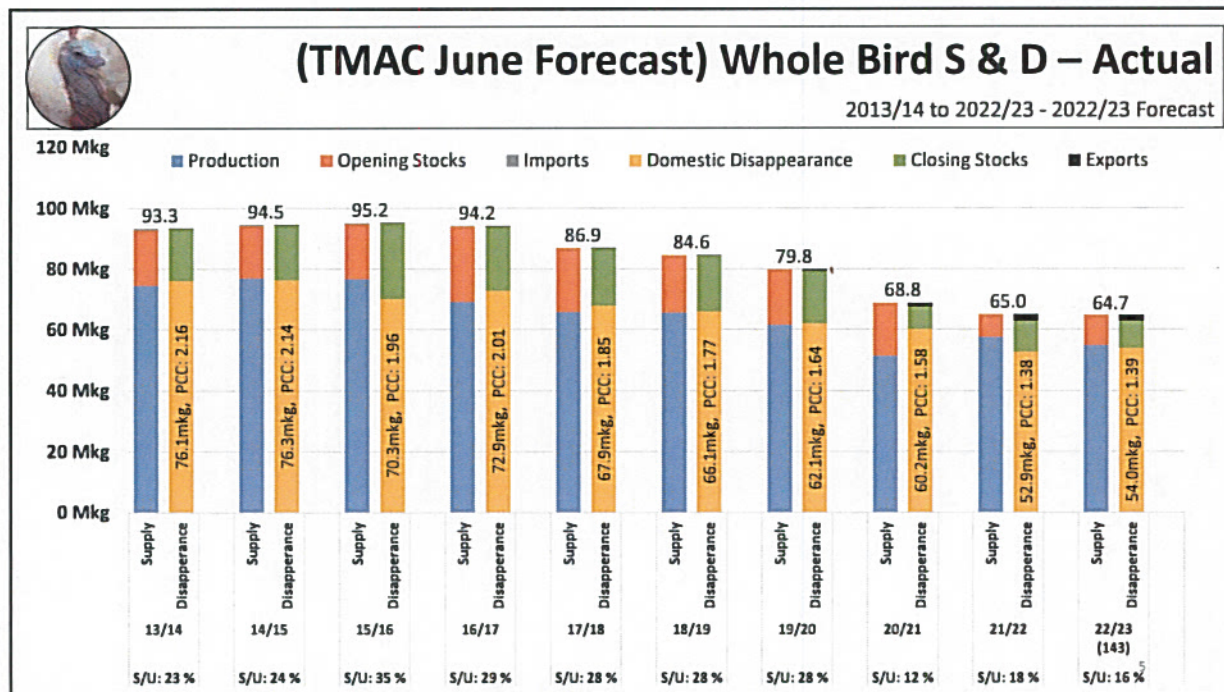
| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|--|----------|----------|----------|----------|----------|--------|
| Boneless Parts (other than breast) | 474.4 | 661.2 | 488.3 | 1,048.8 | 635.0 | 176.1 |
| | | 39% | -26% | 115% | -39% | -72% |
| Boneless Breast | 662.8 | 222.3 | 325.4 | 321.3 | 598.4 | 617.8 |
| | | -66% | 46% | -1% | 86% | 3% |
| All Other Imports | 60.5 | 212.1 | 586.2 | 485.9 | 311.4 | 54.4 |
| | | 251% | 176% | -17% | -36% | -83% |
| Chp 16 Bone-In & Boneless Parts | 191.1 | 243.6 | 322.7 | 291.1 | 132.9 | 125.7 |
| | | 27% | 32% | -10% | -54% | -5% |
| Total | 1,388.74 | 1,339.20 | 1,722.61 | 2,147.14 | 1,677.69 | 973.90 |
| | | -4% | 29% | 25% | -22% | -42% |

Note: kg in Thousands

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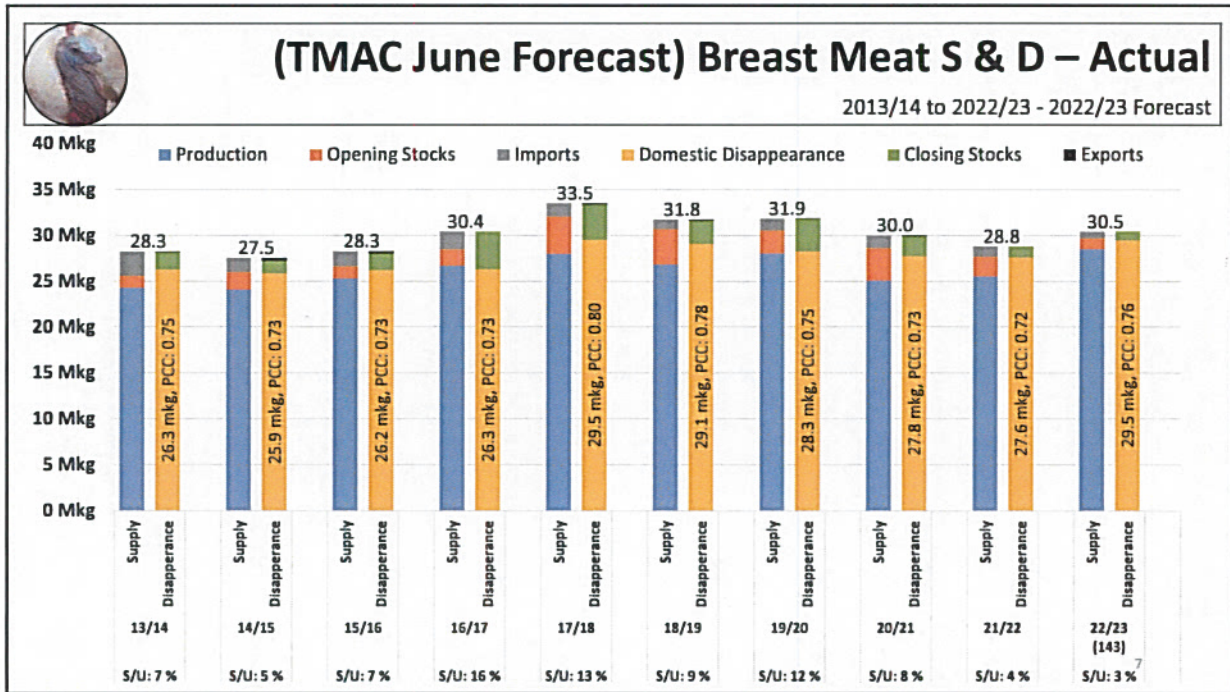


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| | 14/15 | 15/16 | 16/17 | 17/18 | 18/19 | 19/20 | 20/21 | 21/22 | 22/23-Fcst* |
|------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------------|
| Opening Stocks | 17.3 | 18.2 | 24.9 | 21.0 | 18.8 | 18.2 | 17.3 | 7.5 | 9.9 |
| Total Production | 77.0 | 76.7 | 69.3 | 65.9 | 65.7 | 61.6 | 51.5 | 57.5 | 54.9 |
| Imports | 0.3 | 0.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Supply | 94.5 | 95.2 | 94.2 | 86.9 | 84.6 | 79.8 | 68.8 | 65.0 | 64.7 |
| Total Disappear. | 76.3 | 70.3 | 73.1 | 68.0 | 66.3 | 62.5 | 61.3 | 55.1 | 56.0 |
| Exports | 0.0 | 0.0 | 0.3 | 0.1 | 0.2 | 0.4 | 1.1 | 2.2 | 2.0 |
| Dom. Disappear. | 76.3 | 70.3 | 72.9 | 67.9 | 66.1 | 62.1 | 60.2 | 52.9 | 54.0 |
| Closing Stocks | 18.2 | 24.9 | 21.0 | 18.8 | 18.2 | 17.3 | 7.5 | 9.9 | 8.8 |
| PCC (kg) | 2.14 | 1.96 | 2.01 | 1.85 | 1.77 | 1.64 | 1.58 | 1.37 | 1.39 |
| S/U Ratio | 23.9% | 35.4% | 28.8% | 27.7% | 27.5% | 27.7% | 12.2% | 17.9% | 15.6% |

*Production 22/23 = Commercial (48.9) + Stuffing & Basting (4.0) + Exports (2.0) = 54.9 mkg

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| | 13/14 | 14/15 | 15/16 | 16/17 | 17/18 | 18/19 | 19/20 | 20/21 | 21/22 | 22/23 (143) |
|------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------------|
| Opening Stocks | 1.3 | 1.9 | 1.3 | 1.8 | 4.1 | 3.8 | 2.5 | 3.5 | 2.1 | 1.2 |
| Total Production | 24.3 | 24.1 | 25.3 | 26.7 | 28.0 | 26.8 | 28.0 | 25.1 | 25.6 | 28.6 |
| Imports | 2.7 | 1.6 | 1.6 | 1.9 | 1.4 | 1.1 | 1.3 | 1.4 | 1.1 | 0.7 |
| Total Supply | 28.3 | 27.5 | 28.3 | 30.4 | 33.5 | 31.8 | 31.9 | 30.0 | 28.8 | 30.5 |
| Total Disappearance | 26.4 | 26.2 | 26.5 | 26.3 | 29.7 | 29.2 | 28.3 | 27.9 | 27.7 | 29.5 |
| Exports | 0.1 | 0.3 | 0.3 | 0.0 | 0.1 | 0.1 | 0.0 | 0.1 | 0.0 | 0.0 |
| Domestic Disappearance | 26.3 | 25.9 | 26.2 | 26.3 | 29.5 | 29.1 | 28.3 | 27.8 | 27.7 | 29.5 |
| Closing Stocks | 1.9 | 1.3 | 1.8 | 4.1 | 3.8 | 2.5 | 3.5 | 2.1 | 1.2 | 1.0 |
| Stock S/U % | 7.2% | 5.1% | 6.9% | 15.5% | 12.9% | 8.6% | 12.5% | 7.7% | 4.2% | 3.3% |
| FP Production | 92.5 | 91.8 | 96.4 | 101.7 | 106.7 | 102.3 | 106.8 | 95.6 | 97.6 | 108.8 |
| PCC (kg) | 0.75 | 0.73 | 0.73 | 0.73 | 0.80 | 0.78 | 0.75 | 0.73 | 0.72 | 0.76 |

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Over/Under 9 kg Production and Year-Over Year % Change

2017 to 2022 – Control Period to Date (May-July)

| | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|-------|-------|-------|-------|-------|-------|
| Under 9 kg Production | 19.5 | 19.5 | 17.8 | 16.0 | 16.4 | 17.6 |
| | | 0% | -9% | -11% | 3% | 7% |
| Over 9 kg Production | 24.7 | 23.1 | 22.6 | 23.2 | 19.9 | 18.1 |
| | | -7% | -2% | 3% | -14% | -9% |
| Total | 44.2 | 42.6 | 40.4 | 39.2 | 36.3 | 35.7 |
| | | -4% | -5% | -3% | -7% | -2% |
| CPTD Production as a % of Total Control Period | 26.9% | 26.7% | 25.1% | 27.3% | 24.4% | 22.8% |

Note: Excludes matures

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2022/2023 Allocation Worksheet - August 25, 2022

| | | Total | BC | AB | SK | MB | ON | QC | NB | NS |
|---|------------|-------------|------------|------------|-----------|------------|------------|------------|-----------|-----------|
| Section 1: Commercial Allocation | | | | | | | | | | |
| Final 2021/2022 Commercial | a | 139,000,000 | 18,408,362 | 13,200,337 | 4,794,904 | 8,844,806 | 55,450,698 | 31,474,318 | 3,226,036 | 3,600,539 |
| Basis for Allocation Above 139: - Adjust NS by 452,905 kg - Of the remaining 6,547,095 kg: - 35% by pro-rata % shares of 139 mkg - 35% by population - 15% by 2021 Nielsen Sales - 15% by FIPI Feed | b | 7,000,000 | 894,387 | 720,579 | 220,294 | 325,695 | 2,651,688 | 1,378,079 | 162,102 | 647,176 |
| Allocation of 146.0 Mkg | c = a+b | 146,000,000 | 19,302,749 | 13,920,916 | 5,015,198 | 9,170,501 | 58,102,386 | 32,852,397 | 3,388,138 | 4,247,715 |
| Section 2: Conditional Multiplier Breeder | | | | | | | | | | |
| Reference % | a | | | 1.62% | 0.60% | 3.28% | 2.13% | | | 1.75% |
| Reference Level | b=1c*a | 2,368,900 | - | 225,519 | 30,091 | 300,792 | 1,237,581 | 574,917 | - | - |
| Egg & Poulit Cap | c | 1,488,166 | | | | | 1,488,166 | | | |
| Reference Level Total | d=b+c | 3,857,066 | | 225,519 | 30,091 | 300,792 | 2,725,747 | 574,917 | | |
| Forecast Marketings | e | 6,336,582 | | | | 1,056,460 | 4,780,122 | 500,000 | | |
| Conditional Multiplier Allocation | f=e-d | 2,810,043 | | | | 755,668 | 2,054,375 | | | |
| 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 | 5,012,200 | | | | | 4,887,200 | 125,000 | | |
| Section 1 Carry-Forward | c | | | | | | | | | |
| Section 2 Placement for Export | d | 3,560,382 | | | | | 2,565,462 | 994,920 | | |
| Section 3 Live (evis. Equivalent) | e | 2,957,161 | | | | 2,957,161 | | | | |
| Conditional Export Policy Allocation | f=sum(a:e) | 30,502,808 | 1,292,411 | 1,557,377 | 603,252 | 4,090,887 | 18,707,236 | 3,410,448 | 370,726 | 470,471 |
| Section 5: Conditional Over 9 Allocation | a | | | | | | | | | |
| Section 6: 2021/2022 Overmarketings | a | | | | | | | | | |
| Section 7: Total Allocation for Consideration (1c+2f+3a+4f+5a-6a) | | 181,410,931 | 20,595,160 | 15,478,293 | 5,618,450 | 14,017,056 | 80,962,077 | 36,262,845 | 3,758,864 | 4,718,186 |

2022/2023 PROVINCIAL TURKEY ALLOCATIONS

Reflecting Decisions of the TFC Directors During the Web Conference of August 25, 2022

| | TOTAL | BC | AB | SK | MB | ON | QC | NB | NS |
|---|-------------|------------|------------|-----------|------------|------------|------------|-----------|-----------|
| A) Commercial Allocation | 146,000,000 | 19,302,749 | 13,920,916 | 5,015,198 | 9,170,501 | 58,102,386 | 32,852,397 | 3,388,138 | 4,247,715 |
| B) Multiplier Breeder | | | | | | | | | |
| 1) Reference % | | 1.62% | 0.60% | 3.28% | 2.13% | 1.75% | | | |
| 2) Reference Level (AxB1) | | 225,519 | 30,091 | 300,792 | 1,237,581 | 574,917 | | | |
| 3) Egg & Poult Cap | | | | | 1,488,166 | | | | |
| 4) Reference Level Total (B2+B3) | | 225,519 | 30,091 | 300,792 | 2,725,747 | 574,917 | | | |
| 5) Forecast Marketings | 6,336,582 | | | 1,056,460 | 4,780,122 | 500,000 | | | |
| 6) Conditional Allotment (B5-B4, or "0") | 2,810,043 | | | 755,668 | 2,054,375 | | | | |
| 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 | 5,012,200 | | | | 4,887,200 | 125,000 | | | |
| 3) Section 1 - Carry-Forward | 3,560,382 | | | | 2,565,462 | 994,920 | | | |
| 4) Section 2 - Placements for Export | 2,957,161 | | | 2,957,161 | | | | | |
| 5) Section 3 - Live (evis.) | | | | | | | | | |
| 6) Total Conditional Export Policy Allocations | 30,502,808 | 1,292,411 | 1,557,377 | 603,252 | 4,090,887 | 18,707,236 | 3,410,448 | 370,726 | 470,471 |
| E) Overmarketings | | | | | | | | | |
| F) Total Allocations (A+B+C+D+E) | 181,410,931 | 20,595,160 | 15,478,293 | 5,618,450 | 14,017,056 | 80,962,077 | 36,262,845 | 3,758,864 | 4,718,186 |
| 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 | 84,369,379 | 11,296,516 | 7,200,232 | 1,989,711 | 6,192,588 | 39,231,579 | 11,768,857 | 3,105,691 | 3,584,205 |