

# Canadian Turkey Industry

## For the Period Ending: August 2022

August 2022 turkey disappearance was 11.1 Mkg, up 26% (+2.3 Mkg) compared to August 2021, bringing August year-to-date disappearance to 69.1 Mkg, 2.5% higher compared to the same period in 2021. Disappearance in the control period to date was 32.0 Mkg, 0.3% higher than the 2020/2021 control period. Per capita disappearance by the end of August was 1.78 kg per person, 0.7% higher than the 2021 level.

Production in the control period to date was 51.0 Mkg, down 6.1% (-3.3 Mkg) from the same period in 2020/2021. August year-to-date production totaled 99.2 Mkg, 4.8% higher compared to the same period in 2021.

Since the end of 2020, stocks have been trending along the low end of the 5-year range. Stocks of frozen turkey were at 27.7 Mkg at the start of September, 4.4% (-1.3 Mkg) lower than the same period last year, setting a new 5-year low for September stocks. By October 1st, stocks decreased as a result of the Thanksgiving holiday. October 1st stocks were at 20.3 Mkg, 1.2% higher than October 2021, but 36% lower compared to the corresponding 5-year average.

2022 TRQ volume has been set at the WTO bound of 5.6Mkg. TRQ utilization is occurring at a slow pace so far this year. Slower utilization is partially due to the impact of Avian Influenza on production in the U.S market. Lower U.S. supply has impacted availability and price for turkey products. Global TRQ permit issuance up to the week ending November 5th, 2022, was 3.1 Mkg, 36.9% (-1.8 Mkg) below 2021 and 39% below pro-rata.

August year-to-date imports in actual weight totaled 3.7 Mkg, down 14% (-0.6 Mkg) lower than the same period last year. Meanwhile, August year-to-date exports were at 12.5 Mkg, 5.4% (+0.6) higher than the same period last year. Decreased imports over this period were mostly from the United States, and attributed to lower volumes of boneless parts. For exports, the increase was driven by whole carcasses and boneless parts destined for the United States.

The Ontario live price for turkeys (6.2 to 8.5 kg) has been steadily increasing so far this year. The average price in November rose slightly for the second consecutive month to \$2.53/kg setting a new 5-year high. The November live price was 16% and 27% higher than the same month last year and corresponding 5-year average respectively.

Similarly, prices for turkey remains high at the wholesale and retail level this year. Wholesale prices for whole birds has been trending above the 5-year average, while wholesale prices for cuts have been setting new 5-year monthly highs. Meanwhile, retail prices for thigh meat and frozen turkeys are setting a new five-year highs, with fresh whole birds and breast meat trending within the 5-year range. For the four week period ending October 9th, 2022, whole frozen turkeys were retailed at \$7.26/kg, 85% higher than the same period last year.

Ontario landed prices have been steadily rising so far this year. The impacts of avian influenza on the U.S. turkey market has resulted in low supply south of the border. The increases to landed price are tied to high U.S. wholesale prices for turkey and turkey products.

### SUPPLY AND DISPOSITION

TURKEY SUPPLY AND DISPOSITION											
000 kg (evis.)	August			Year to Date			Control Period: May to August			Annual	
	2022	2021	% chg	2022	2021	% chg	2021/2022	2020/2021	% chg	2021	2020
Opening Stocks	26,181	26,501	-1.2%	9,219	11,908	-22.6%	15,465	26,508	-41.7%	11,908	18,851
Production	13,848	12,669	9.3%	99,220	94,677	4.8%	50,943	54,251	-6.1%	150,104	157,970
Imports	272	273	-0.5%	2,565	3,740	-31.4%	1,289	1,898	-32.1%	5,495	6,108
Fresh Supply	14,119	12,942	9.1%	101,785	98,418	3.4%	52,231	56,149	-7.0%	155,599	164,078
<b>Total Supply</b>	<b>40,301</b>	<b>39,442</b>	<b>2.2%</b>	<b>111,004</b>	<b>110,326</b>	<b>0.6%</b>	<b>67,697</b>	<b>82,657</b>	<b>-18.1%</b>	<b>167,507</b>	<b>182,930</b>
Exports <sup>1</sup>	1,525	1,664	-8.4%	14,153	13,904	1.8%	6,695	10,459	-36.0%	19,932	28,542
Ending Stocks	27,703	28,975	-4.4%	27,703	28,975	-4.4%	28,975	41,043	-29.4%	9,219	11,908
Disposition	29,227	30,639	-4.6%	41,856	42,879	-2.4%	35,670	51,502	-30.7%	29,151	40,451
<b>Disappearance</b>	<b>11,073</b>	<b>8,803</b>	<b>25.8%</b>	<b>69,148</b>	<b>67,447</b>	<b>2.5%</b>	<b>32,026</b>	<b>31,155</b>	<b>2.8%</b>	<b>138,356</b>	<b>142,479</b>
<b>Per Capita (Kg)</b>	<b>0.28</b>	<b>0.23</b>	<b>23.5%</b>	<b>1.78</b>	<b>1.76</b>	<b>0.7%</b>	<b>0.84</b>	<b>0.82</b>	<b>2.4%</b>	<b>0.84</b>	<b>0.84</b>

Source: AAFC - Market Information Section and CFIA

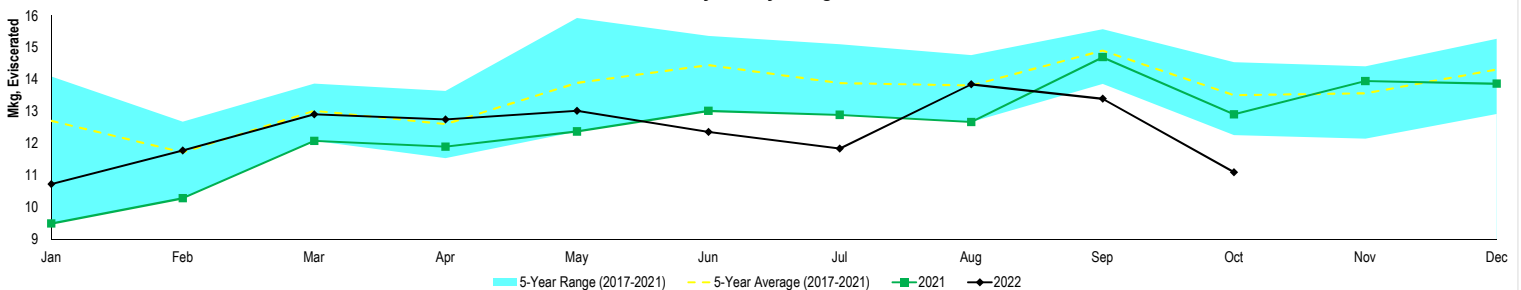
<sup>1</sup> 2022 export data may be incomplete due to reporting lag.

### SLAUGHTER

TURKEY SLAUGHTER*											
Kg (eviscerated)	August			Year to Date			Control Period: May to August			Annual	
	2022	2021	% chg	2022	2021	% chg	2021/2022	2020/2021	% chg	2021	2020
<b>West</b>	<b>4,148,246</b>	<b>3,802,124</b>	<b>9.1%</b>	<b>28,196,169</b>	<b>27,857,991</b>	<b>1.2%</b>	<b>15,753,575</b>	<b>16,691,052</b>	<b>-5.6%</b>	<b>46,250,253</b>	<b>46,918,955</b>
Ontario	6,677,873	6,014,726	11.0%	47,129,378	43,386,960	8.6%	23,431,850	25,050,228	-6.5%	68,331,711	71,563,588
Quebec & Atlantic	3,021,719	2,851,786	6.0%	23,894,078	23,432,493	2.0%	11,757,232	12,509,346	-6.0%	35,522,389	39,487,343
<b>East</b>	<b>9,699,592</b>	<b>8,866,513</b>	<b>9.4%</b>	<b>71,023,456</b>	<b>66,819,454</b>	<b>6.3%</b>	<b>35,189,082</b>	<b>37,559,574</b>	<b>-6.3%</b>	<b>103,854,100</b>	<b>111,050,932</b>
<b>TOTAL CANADA</b>	<b>13,847,837</b>	<b>12,668,637</b>	<b>9.3%</b>	<b>99,219,625</b>	<b>94,677,444</b>	<b>4.8%</b>	<b>50,942,657</b>	<b>54,250,626</b>	<b>-6.1%</b>	<b>150,104,353</b>	<b>157,969,887</b>

Source: Federally and/or provincially inspected establishments

### Monthly Turkey Slaughter

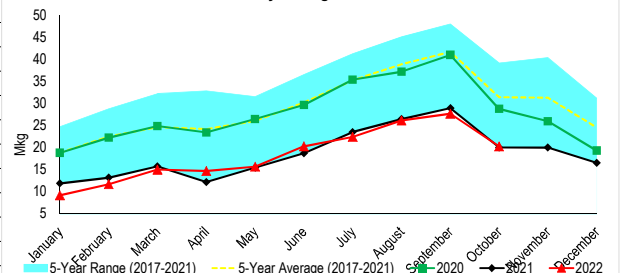


### STORAGE STOCKS

TURKEY STORAGE STOCKS					
Kg (actual weight)	1-Sep-22	1-Sep-21	% chg	1-Aug-22	% chg
5 kg and Under	3,720,541	4,075,008	-8.7%	3,486,460	6.7%
Over 5 kg but not more than 7 kg	10,029,335	11,610,830	-13.6%	9,290,919	7.9%
Over 7 kg but not more than 9 kg	4,391,774	4,400,626	-0.2%	4,000,685	9.8%
Over 9 kg but not more than 11kg	550,575	1,511,612	-63.6%	436,043	26.3%
Over 11 kg	137,642	295,301	-53.4%	124,311	10.7%
<b>Total Whole Turkey</b>	<b>18,829,867</b>	<b>21,893,377</b>	<b>-14.0%</b>	<b>17,338,418</b>	<b>8.6%</b>
Boneless skinless breasts	1,059,769	1,339,640	-20.9%	1,176,608	-9.9%
Other	3,440,482	2,291,696	50.1%	3,519,776	-2.3%
<b>Total Cut-Up</b>	<b>4,500,251</b>	<b>3,631,336</b>	<b>23.9%</b>	<b>4,696,384</b>	<b>-4.2%</b>
<b>Further Processed</b>	<b>2,650,793</b>	<b>2,273,180</b>	<b>16.6%</b>	<b>2,303,147</b>	<b>15.1%</b>
<b>Miscellaneous</b>	<b>1,721,817</b>	<b>1,177,321</b>	<b>46.2%</b>	<b>1,843,268</b>	<b>-6.6%</b>
<b>TOTAL</b>	<b>27,702,728</b>	<b>28,975,214</b>	<b>-4.4%</b>	<b>26,181,217</b>	<b>5.8%</b>

Source: AAFC - Market Information Section

### Turkey Storage Stocks

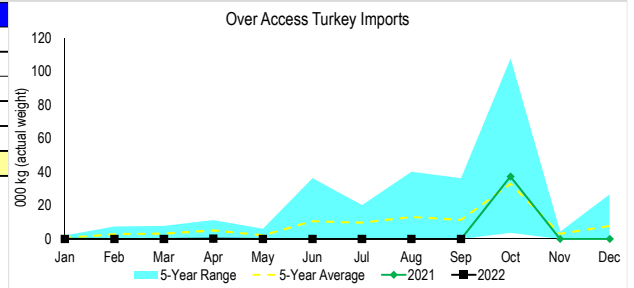


# TARIFF RATE QUOTA PERMIT ISSUANCE & OVER ACCESS

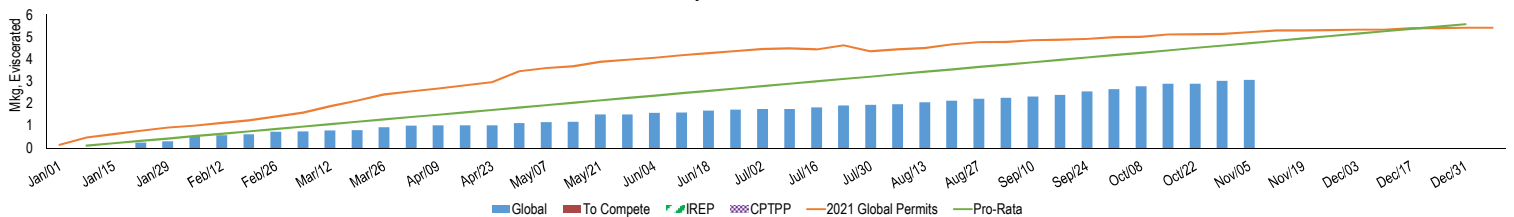
## TURKEY TRQ PERMIT ISSUANCE - Up to November 05, 2022

Kg (eviscerated)	Evis. Pack	Live	Bone in Parts	Boneless Parts	Processed	Total
Total TRQ	0	12,251	35,819	2,608,033	418,766	3,074,869
Supplementary	0	0	0	0	0	0
YTD 2022	0	12,251	35,819	2,608,033	418,766	3,074,869
YTD 2021	0	0	109,019	4,151,978	613,251	4,874,248
% Variation	-	-	-67.1%	-37.2%	-31.7%	-36.9%
Special Suppl.	To Compete	IROP				
2022	0	0				
2021	0	0				
% chg	-	-				

Source: Global Affairs Canada (GAC) - Export and Import Control Bureau, compiled by AAFC - Poultry Section



## Turkey TRQ Permit Issuance

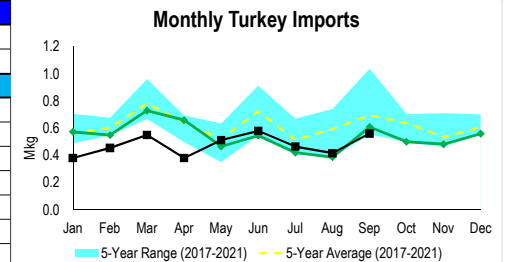


Source: Global Affairs Canada (GAC) - Export and Import Control Bureau, compiled by AAFC - Poultry Section

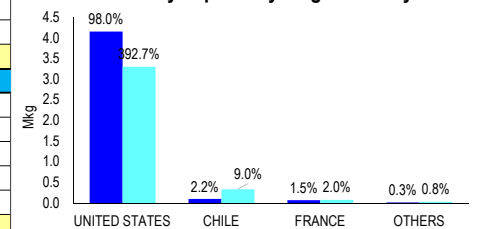
Note: weekly information between the entry into force of CUSMA and August 22, 2020 is not available for display in this graph.

## TOTAL TRADE

Kg (actual weight)	TURKEY IMPORTS					
	August			Year to Date		
	2022	2021	% chg	2022	2021	% chg
<b>WHOLE CARCASS AND PARTS</b>						
Live (Evis. Wt.)	0	0	-	0	0	-
Whole Carcass	0	0	-	0	0	-
Bone in Breasts	0	0	-	0	0	-
Bone in Parts	0	0	-	36,109	109,506	-67.0%
Boneless Breasts	36,335	18,455	96.9%	654,085	616,855	6.0%
Boneless Parts	72,628	57,204	27.0%	248,716	692,187	-64.1%
Total Parts	108,963	75,659	44.0%	938,910	1,418,548	-33.8%
Bone in Others	0	18,149	-100.0%	0	185,139	-100.0%
Boneless Others	0	0	-	18,260	34,922	-47.7%
MSM*	0	0	-	0	0	-
Total Others	0	18,149	-100.0%	18,260	220,060	-91.7%
SUB-TOTAL	108,963	93,807	16.2%	957,170	1,638,608	-41.6%
<b>FURTHER PROCESSED</b>						
Chapter 16 Bone in Parts	1,797	200	797.7%	55,382	26,646	107.8%
Chapter 16 Boneless Parts	506	25,391	-98.0%	72,616	131,831	-44.9%
Chapter 16 Others	101,484	129,309	-21.5%	1,194,448	1,242,484	-3.9%
Chapter 19	69,000	45,056	53.1%	405,826	269,075	50.8%
Chapter 21	135,728	93,819	44.7%	1,058,815	1,026,570	3.1%
SUB-TOTAL	308,514	293,775	5.0%	2,787,087	2,696,606	3.4%
TOTAL	417,477	387,582	7.7%	3,744,257	4,335,214	-13.6%



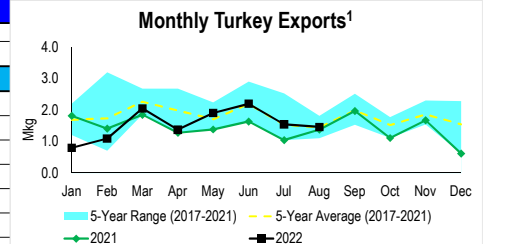
## YTD Turkey Imports By Origin Country



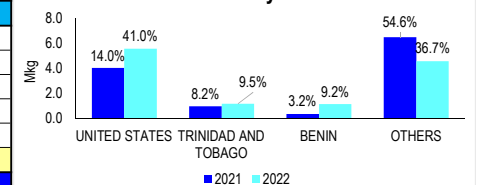
Kg (actual weight)	TURKEY EXPORTS <sup>1</sup>					
	August			Year to Date		
	2022	2021	% chg	2022	2021	% chg
<b>WHOLE CARCASS AND PARTS</b>						
Whole Carcass	134,756	110,573	21.9%	1,735,683	1,062,594	63.3%
Bone in Parts**	873,934	647,305	35.0%	6,565,122	5,903,011	11.2%
Boneless Parts**	39,636	230,367	-82.8%	1,291,191	1,717,661	-24.8%
Total Parts	913,570	877,672	4.1%	7,856,312	7,620,672	3.1%
Bone in Others	151,440	113,615	33.3%	969,027	824,693	17.5%
Boneless Others	99,990	199,372	-49.8%	420,504	631,411	-33.4%
MSM*	154,257	34,860	342.5%	1,079,486	1,350,237	-20.1%
Total Others	405,687	347,847	16.6%	2,469,018	2,806,342	-12.0%
SUB-TOTAL	1,454,013	1,336,092	8.8%	12,061,013	11,489,608	5.0%
<b>FURTHER PROCESSED</b>						
Chapter 16 Bone in Parts	0	10	-100.0%	6,814	4,370	55.9%
Chapter 16 Boneless Parts	15,518	0	-	394,384	346,183	13.9%
Chapter 16 Others	0	0	-	18,147	0	-
Chapter 19	0	0	-	0	0	-
Chapter 21	0	0	-	0	31	-100.0%
SUB-TOTAL	15,518	10	151003.3%	419,345	350,584	19.6%
TOTAL	1,469,531	1,336,102	10.0%	12,480,358	11,840,193	5.4%

Source: CFIA

<sup>1</sup> 2022 export data may be incomplete due to reporting lag.

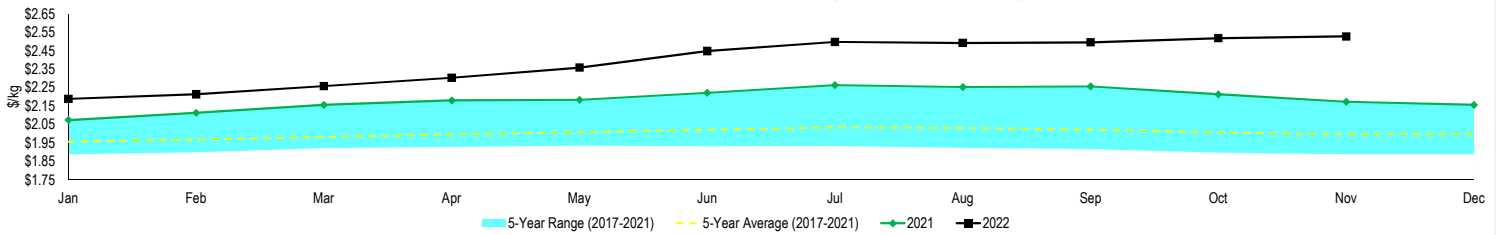


## YTD Turkey Exports By Destination Country<sup>1</sup>



## PRICES

### Ontario Live Price to Producers: Greater than 6.2 kg but not more than 8.5 kg



### LIVE PRICE TO PRODUCERS: OVER 6.2 KG BUT NOT MORE THAN 8.5 KG

\$/KG	BC	AB	SK	MB	ON	QC	NB	NS
August 2022	2.66	2.68	2.68	2.64	2.49	2.42	2.38	2.48
July 2022	2.65	2.67	2.67	2.67	2.50	2.42	2.38	2.48
% chg with previous month	0.4%	0.2%	0.2%	-0.8%	-0.2%	0.0%	-0.1%	-0.1%
August 2021	2.30	2.32	2.32	2.30	2.26	2.17	2.13	2.28
% chg with previous year	15.9%	15.5%	15.5%	15.1%	10.6%	11.7%	11.8%	8.7%

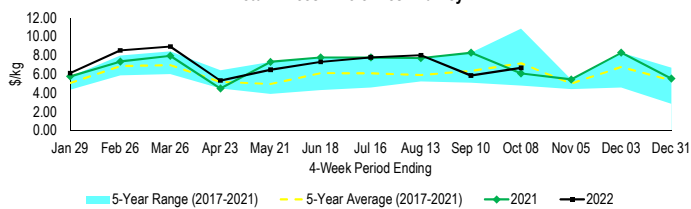
Source: Turkey Farmers of Canada (TFC), compiled by AAFC - Market Information Section

### TURKEY RETAIL PRICES

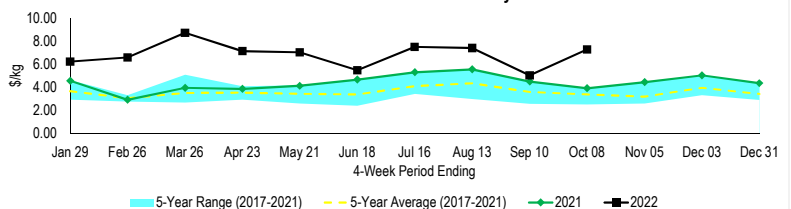
Dollars / kilogram	Whole Fresh Turkey	Whole Frozen Turkey	Turkey Breast	Turkey Thigh
Sep 11/22 to Oct 08/22	6.70	7.26	13.92	10.56
Sep 12/21 to Oct 09/21	6.10	3.92	14.18	9.53
% chg from prvs period	9.8%	85.2%	-1.8%	10.8%
Aug 14/22 to Sep 10/22	5.87	5.03	15.68	10.25
% chg Y/Y	14.1%	44.3%	-11.2%	3.0%

Source: Nielsen Company, compiled by AAFC - Market Information Section

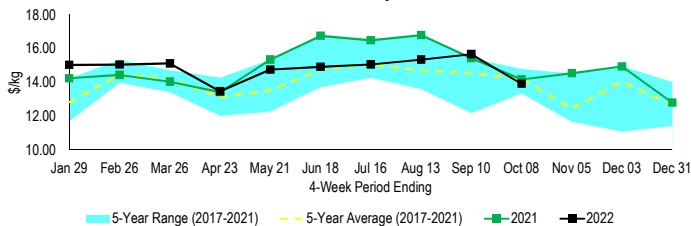
#### Retail Prices-Whole Fresh Turkey



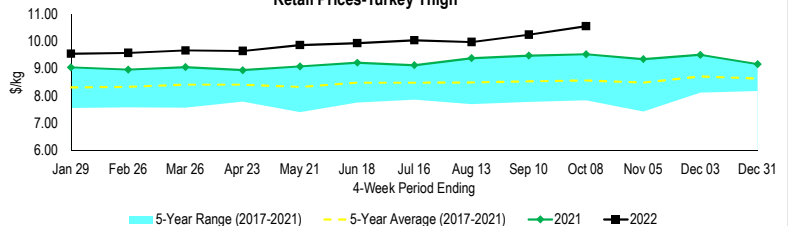
#### Retail Prices-Whole Frozen Turkey



#### Retail Prices-Turkey Breast



#### Retail Prices-Turkey Thigh



Source: Nielsen Company, compiled by AAFC - Poultry Section

## ONTARIO LANDED PRICE

### ONTARIO LANDED PRICE - US NATIONAL YOUNG TURKEY PARTS

Dollars per Kilogram	Frozen Hens		Frozen Toms		Fresh Hens		Fresh Toms		Breasts - B/S	
	2022	2021	2022	2021	2022	2021	2022	2021	2022	2021
January	9.28	8.26	9.28	7.97	10.72	8.75	10.72	9.57	29.67	12.60
February	9.30	8.10	9.43	8.10	10.76	8.71	10.75	9.01	32.51	12.56
March	9.71	8.06	9.79	7.88	10.27	9.41	10.27	9.28	33.12	12.46
April	9.89	8.11	9.91	7.83	10.21	9.78	10.14	9.40	33.80	12.40
May	10.14	8.28	10.24	8.17	11.15	9.73	11.15	8.97	44.55	13.01
June	10.69	8.41	10.39	8.41	11.25	9.33	11.19	9.27	46.60	16.70
July	11.52	8.93	11.52	8.73	12.80	9.39	13.01	9.80	50.10	18.34
August	11.57	9.33	11.78	9.26	13.04	9.36	13.21	10.50	50.39	20.36
September	12.49	10.45	12.48	9.29	14.17	9.39	14.06	10.78	52.12	23.40
October	12.96	9.47	15.19	9.42	14.89	9.57	15.58	10.74	55.83	23.42
November	13.95	10.13	13.94	9.99	14.47	9.91	14.36	10.56	53.28	26.62
December		9.47		9.42		9.88		10.73		28.22

Source: USDA, Devalk Consulting, Bank of Canada, CBSA, compiled by AAFC - Poultry Section

Prepared by: Dairy and Poultry Section, Agriculture and Agri-Food Canada

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