

Turkey Primary Processing Sector

Date	Time	Location
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Thursday October 2, 2025	10:00AM – 3:00PM	Westin Hotel, Calgary Bow Valley Room (Lower Level)
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Purpose of Meeting

Regular October sector meeting

Title	Name
Chair	Jeff McDowell
Staff contact	Nicolas Paillat (nicolas@cpep-tvoc.ca)
Guest(s)	TFC, FPCC, AAFC, Associate members

Notes

MS Team Link: <https://tinyurl.com/CPEPTurkey20251002>

Hospitality Suite: Room 1222

WIFI Network: Westin Meetings

WIFI Password: CPEP

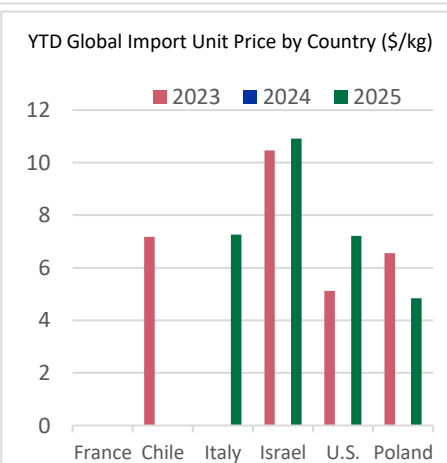
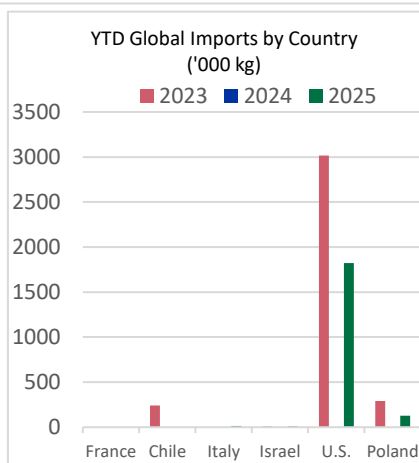
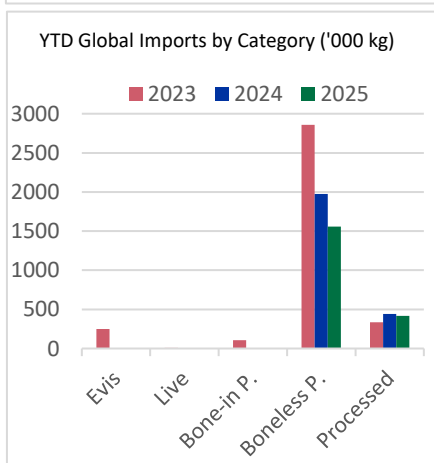
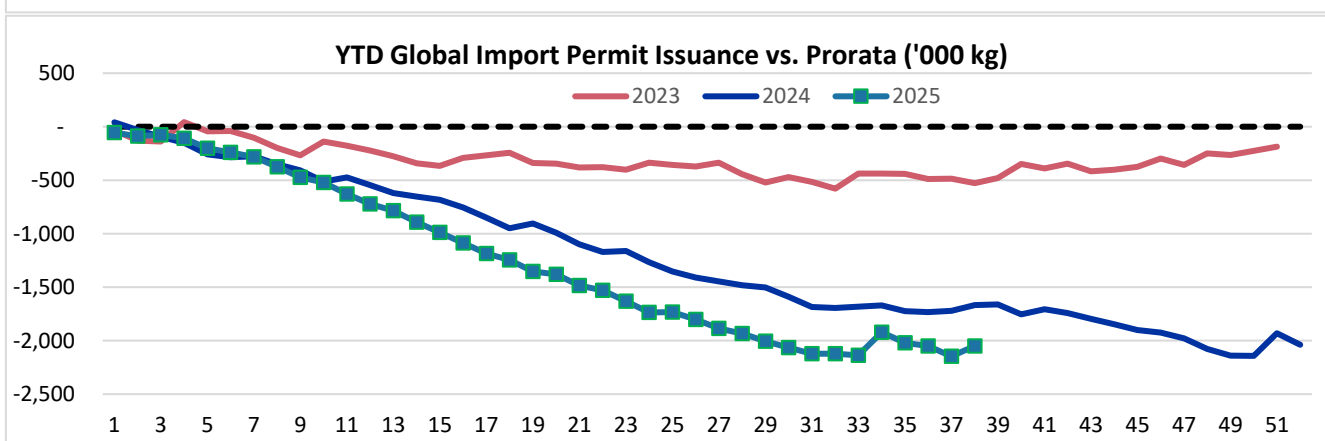
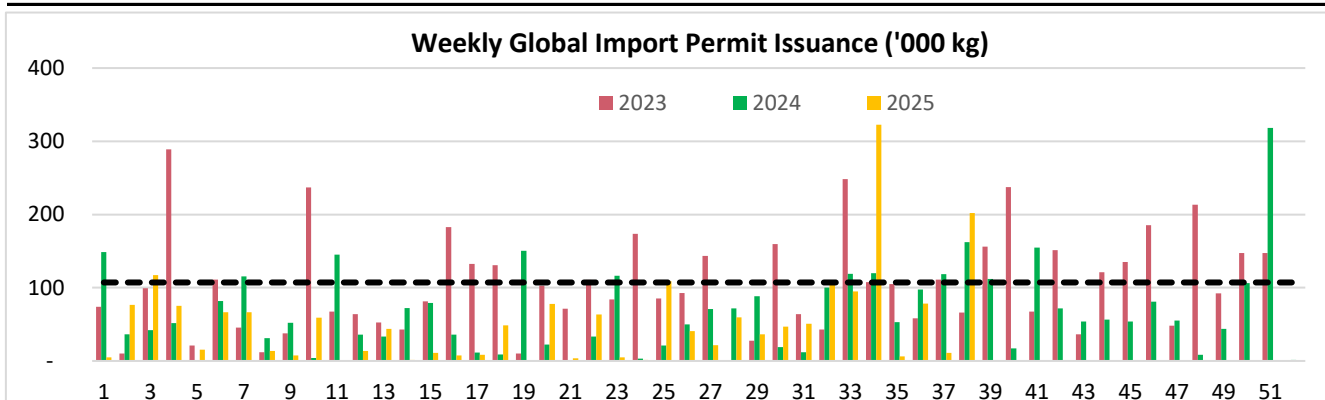
Lunch will be provided in the meeting room

Agenda Item	Time	Attachment	Type			Presenter
Turkey Sector Meeting – October 2025			Information	Discussion	Decision	
1. Welcome / Call to order / Introductions	10:00 am		●			Jeff
2. Adoption of the agenda					●	Jeff
3. Approval of June 9 and 10, 2025 meeting minutes		#3			●	Jeff
4. Action Plan from previous meetings		#4	●			Nicolas
5. TFC Update	10:05 am					TFC
6. Generic Marketing Update	10:15 am					TFC/Zeno
7. Market Conditions						
a) Market Indicators	10:45 am	#7.1-7.2	●	●		Nicolas/All
b) Roundtable						
c) Perspective for 2026/27						
8. Live Price Update	11:15am	#8	●	●		Nicolas
9. TFC initiatives and policies						
a) Turkey Summit and Next steps						
b) Control Period Dates						
c) Interprovincial Quota Lease	11:20 am	#9	●	●		TFC/CPEP
d) Innovation Policy						
e) Export Study						
f) Wholesale Price forecast tool						
Lunch Break	12:00 pm					
Closed session for processor members only						
10. Follow up discussions from open session						
a) TFC Initiatives and Policies	1:00 pm	#10.1-10.2		●	●	Nicolas
b) Other						
11. KMI	2:00 pm	#11.1-11.2	●	●	●	Nicolas
12. 2026/27 Allocation Process	2:30 pm		●	●		Nicolas
13. Sector Governance Rules	2:45 pm	#13	●	●	●	Nicolas
14. Additional representative on TFC Supply Policy Committee		#14			●	Nicolas
15. Other						
16. Review of action items and decisions	2:55 pm		●			Nicolas
17. Adjournment	3:00 pm				●	Jeff

Turkey and Turkey Products WTO TRQ Utilization - As of 2025-09-21

Period: 2025/01/01 - 2025/12/31
WTO Access Quantity 5,588,000

Week # 38	Current week	YOY Change	Year to date	YOY Change
Global	202,176	+39,768	1,975,334	-440,878
Pro-rata	107,167		4,026,422	
Difference from PR	+95,009		-2,051,088	
Supplementals				
Shortage	0	+0	0	+0
To Compete	0	+0	0	+0
IREP	0	+0	73,836	+73,836
Total Supplementals	0	+0	73,836	+73,836



Turkey Market Conditions Summary - Whole Birds

Storage Stocks (Mkg)						
Weight Cat.	Sept. 1	YOY Chan.	Change (%)	3-yr av.	Change	Change (%)
Under 11 kg	19.5	-7.0	-26%	23.1	-3.5	-15%
Over 11 kg	0.4	-0.2	-39%	0.5	-0.1	-15%
Total WB	19.9	-7.3	-27%	23.5	-3.6	-15%

Bagging (Mkg)						
Weight Cat.	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
Under 11 kg	2.5	-1.8	-42%	12.0	-7.8	-40%
Over 11 kg	0.1	-0.1	-58%	0.3	-0.5	-63%
Total WB	2.6	-1.9	-43%	12.3	-8.3	-40%
Difference From Prorata				-23.7		
2024/25 WB Component (inc. bast/stu				54.0		
Remaining Allocation				41.7		

Disappearance (Mkg)						
Weight Cat.	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
Under 11 kg	-0.1	-3.2	-103%	3.0	-6.5	-68%
Over 11 kg	0.2	-0.3	-53%	0.5	-0.6	-58%
Total WB	0.1	-3.4	-96%	3.5	-7.2	-67%

Wholesale Sales (Mkg)						
	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
Comm. A Fro <9 kg	1.2	0.1	8%	1.6	-0.9	-37%
Comm. U Fro <9 kg	0.2	-0.1	-27%	0.2	-0.2	-52%
Total Comm. WB	1.8	0.2	16%	2.3	-1.0	-30%
Total WB	2.9	1.1	58%	4.0	-0.4	-8%
% Comm. WB	60%	-22%		59%	-19%	

Wholesale Prices						
	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
Comm. A Fro <9 kg	4.08	0.87	27%	4.12	0.82	25%
Comm. U Fro <9 kg	3.83	0.59	18%	3.67	0.48	15%
Total Comm. WB	4.10	0.73	21%	4.16	0.66	19%

Source: AAFC, CPEPC KMI, CPEPC Calculations

Turkey Market Conditions Summary - FP

Storage Stocks (Mkg)						
Cat.	Sept. 1	YOY Chan.	Change (%)	3-yr av.	Change	Change (%)
BSBM	1.2	-1.5	-55%	1.8	-0.5	-31%
Total Cut-UP	2.9	-3.3	-53%	5.4	-2.5	-46%
FP	4.2	1.2	42%	2.7	1.4	53%
Total Turkey Exc. WB	8.5	-1.9	-18%	9.7	-1.2	-12%

BSBM Production (Mkg)						
	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
BSBM Production <11 kg	0.7	0.2	26%	3.2	0.9	41%
BSBM Production >11 kg	1.5	-0.0	-3%	5.8	-1.0	-14%
Total BSBM Production	2.3	0.1	5%	-3.6	-0.0	1%

Disappearance (Mkg)						
	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
BSBM Disappearance	2.0	-0.3	-15%	9.5	0.8	9%
Dis WB equivalent	7.5	-1.3	-15%	36.3	3.1	9%

Wholesale Sales ('000kg)						
	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
Fresh BSBM	72	20	37%	312	77	33%
Frozen BSBM	258	-6	-2%	1,075	-10	-1%
Fresh Thigh	172	-35	-17%	779	-79	-9%
Frozen Thigh	133	-149	-53%	487	-474	-49%

Wholesale Prices (\$/kg)						
	August	YOY Chan.	Change (%)	CP to date	Change	Change (%)
Fresh BSBM	10.75	0.12	1%	10.22	-1.10	-10%
Frozen BSBM	9.83	0.44	5%	8.77	0.16	2%
Fresh Thigh	7.34	2.05	39%	7.15	1.91	36%
Frozen Thigh	6.44	1.47	30%	6.82	1.96	40%

Source: AAFC, CPEPC KMI, CPEPC Calculations

