

2024 BC Turkey General Order & Regulations Review Survey



Prepared
September 2024

Introduction

The BC Turkey Marketing Board (BCTMB) conducted the review of its General Orders & Regulations (GOR), with a goal to streamline and clarify the rules and regulations for the BC turkey industry, ensuring they reflect the current and future state of the sector and best practices.

Respondents were asked to be candid and open as possible, in their responses.

This report has been prepared using data collected between August 24th, 2024, and September 12th, 2024.

The initial invitation to participate was electronically distributed to growers, hatcheries, processors, and other industry partners on August 24th, 2024. Electronic reminders were sent on September 3rd and 9th, with a final reminder sent on September 11th.

In all there were 197 questionnaires distributed and 26 responses: 13.2% of potential responses.

There were a variety of quantitative questions with varied scaled responses along with a variety of qualitative questions. A word cloud is shown for each qualitative question which represent key of ideas for the variety of responses, along with the corresponding written responses. To preserve the integrity of the answers and avoid unintentionally altering the intended meaning by the respondent, no corrections were made to any text which may have been misspelled or grammatically incorrect. Written answers were also shuffled for each question to further protect the respondents' anonymity.

Respondents were reminded at the start of the questionnaire to review the General Orders if they were not familiar with them.

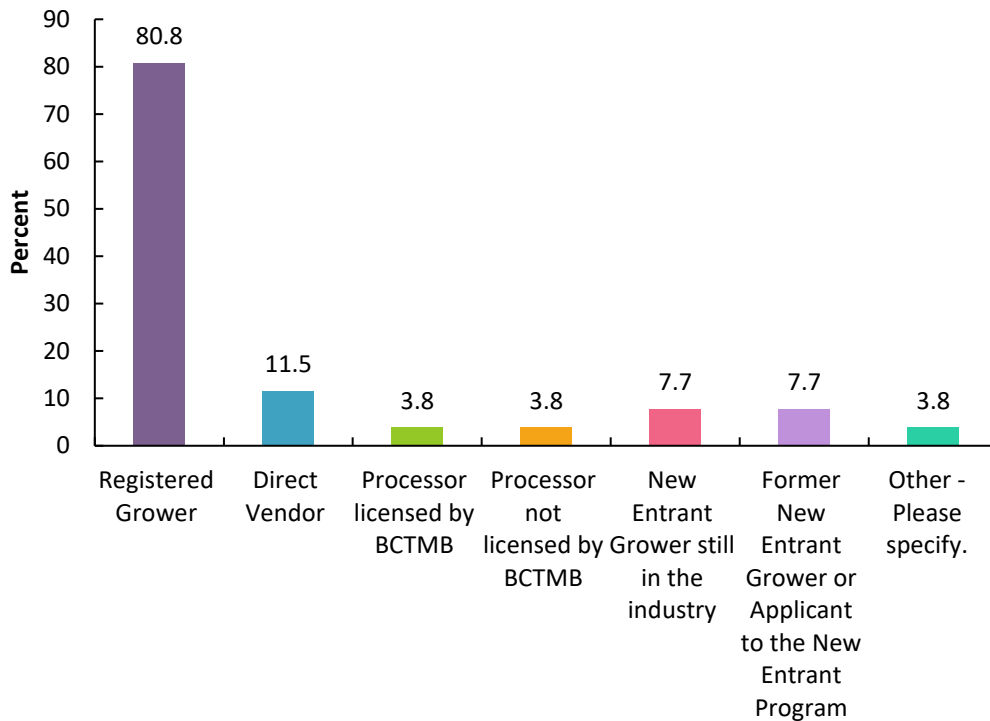
Responses

Response Counts



Section I: Respondent Information

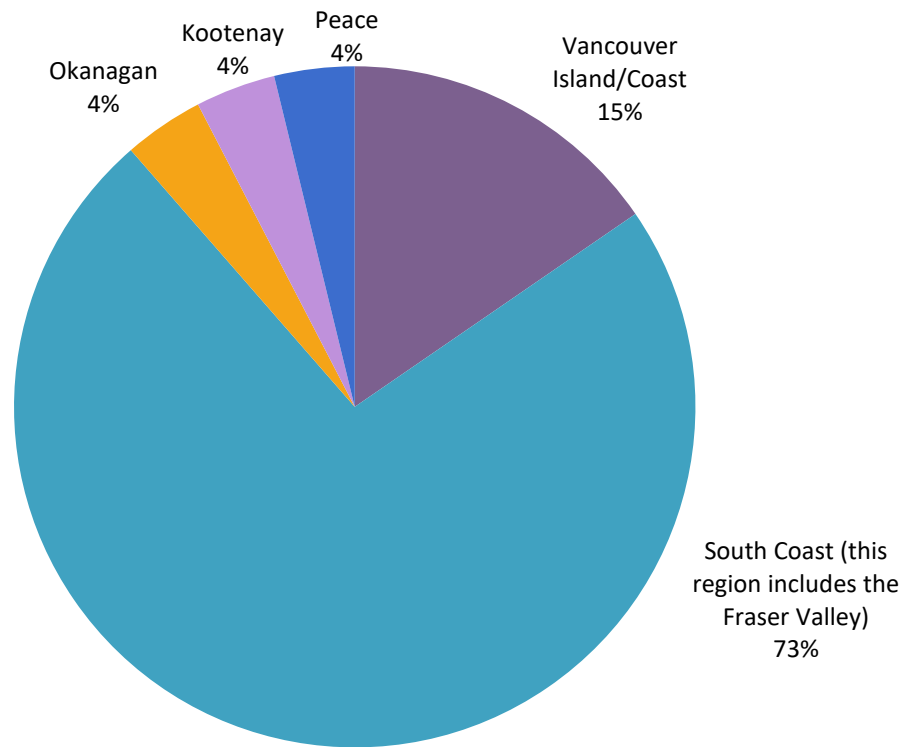
1.1 What category best describes your involvement in the BC turkey industry?
Select all that apply.



Value	Percent	Count
Registered Grower	80.8%	21
Direct Vendor	11.5%	3
Processor licensed by BCTMB	3.8%	1
Processor not licensed by BCTMB	3.8%	1
New Entrant Grower still in the industry	7.7%	2
Former New Entrant Grower or Applicant to the New Entrant Program	7.7%	2
Other - Please specify.	3.8%	1

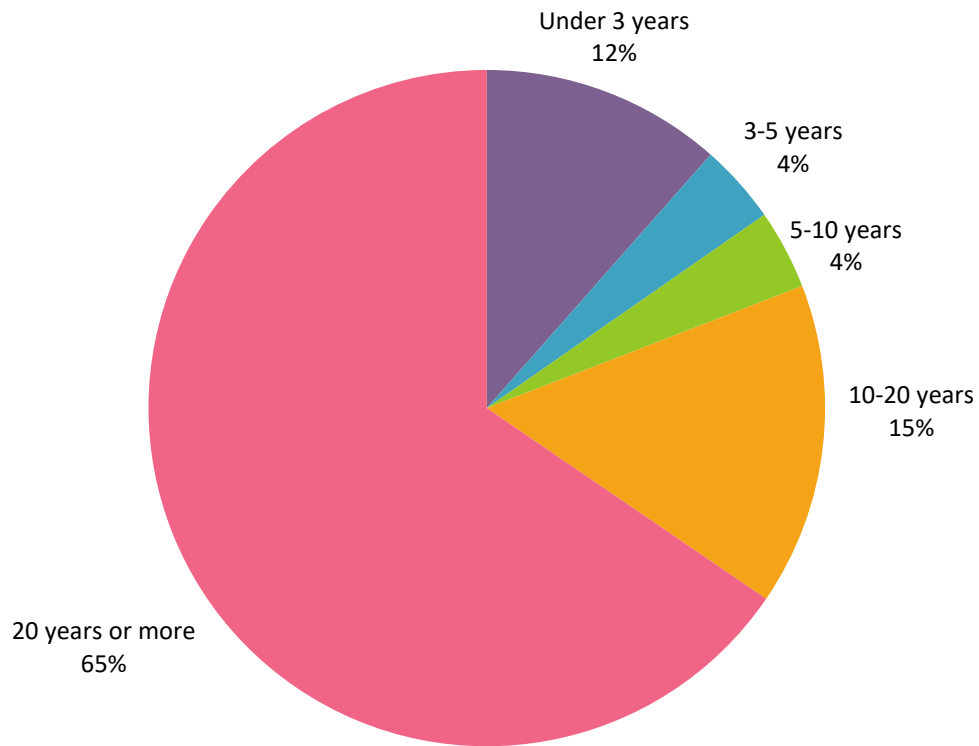
Other - Please specify.	Count
Wanting to be a new grower	1

1.2 What region of BC do you primarily conduct your turkey industry business in?



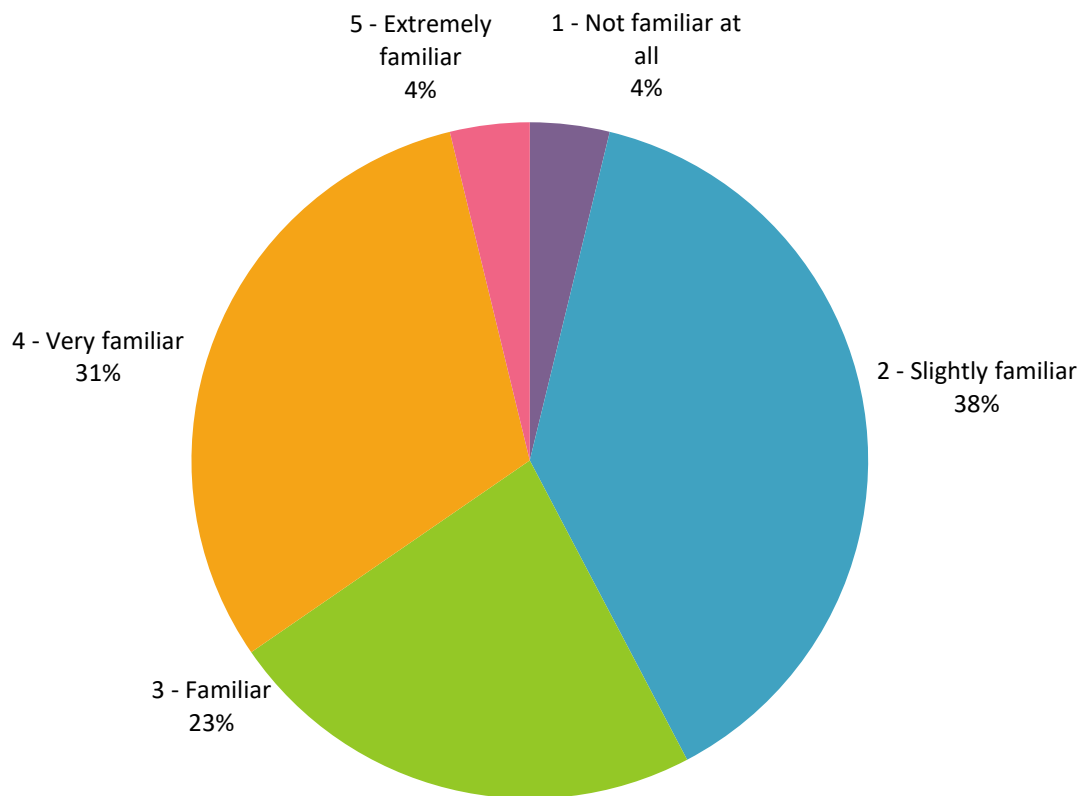
Value	Percent	Count
Vancouver Island/Coast	15.4%	4
South Coast (this region includes the Fraser Valley)	73.1%	19
Okanagan	3.8%	1
Kootenay	3.8%	1
Peace	3.8%	1
	Totals	26

1.3 How long have you been involved in the BC your turkey industry?



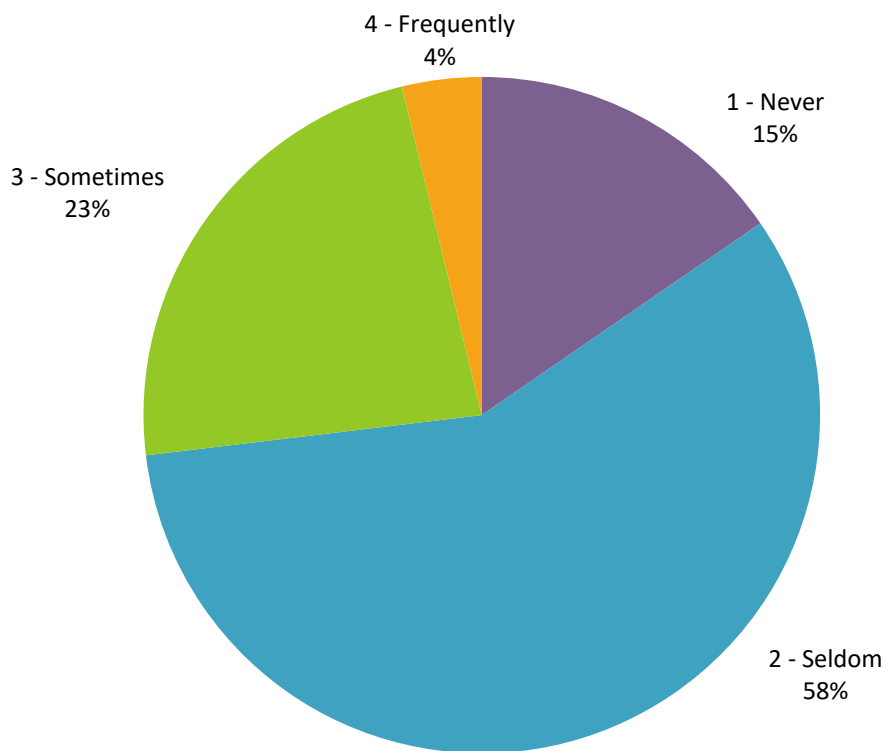
Value	Percent	Count
Under 3 years	11.5%	3
3-5 years	3.8%	1
5-10 years	3.8%	1
10-20 years	15.4%	4
20 years or more	65.4%	17
	Totals	26

1.4 Please rate your familiarity with BCTMB's General Orders and Regulations (GOR). Note: if you are not familiar with the General Orders, you are encouraged to review them before completing this survey.



Value	Percent	Count
1 - Not familiar at all	3.8%	1
2 - Slightly familiar	38.5%	10
3 - Familiar	23.1%	6
4 - Very familiar	30.8%	8
5 - Extremely familiar	3.8%	1
	Totals	26

1.5 How often do you refer to or consult the GOR?

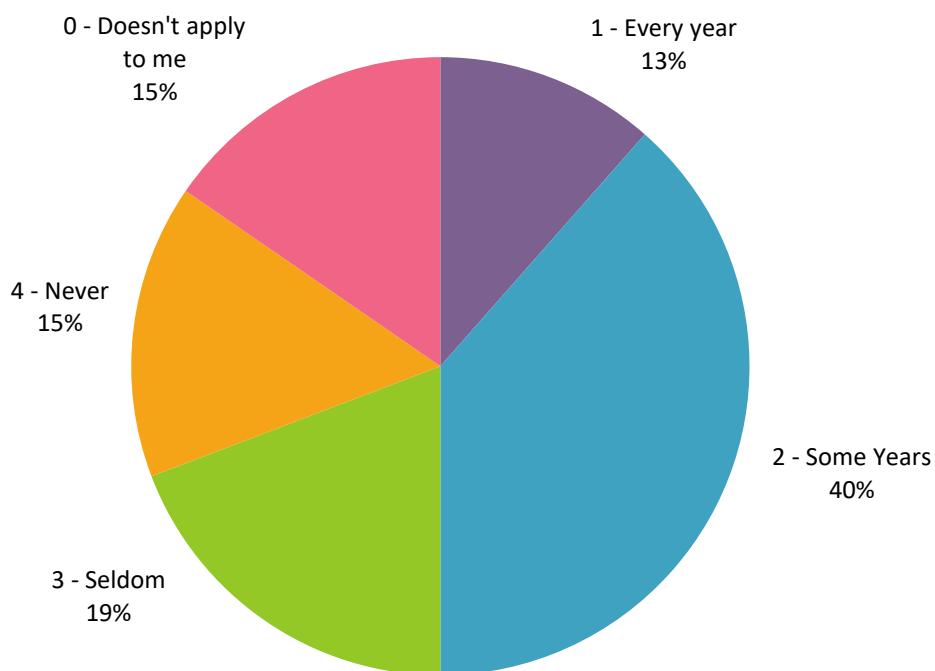


Value	Percent	Count
1 - Never	15.4%	4
2 - Seldom	57.7%	15
3 - Sometimes	23.1%	6
4 - Frequently	3.8%	1
	Totals	26

Section II: Quota System

The GOR currently allows Registered Growers to lease their allocation, or any portion thereof, for a maximum of two consecutive quota years. This is consistent with the Board's policy that allocation leasing is to be temporary or short-term arrangement rather than a longer-term solution.

2.1 How often does your farm lease **IN** quota from other farms? I.E., you produce more turkeys than your allocation allows by leasing in another grower's allocation.

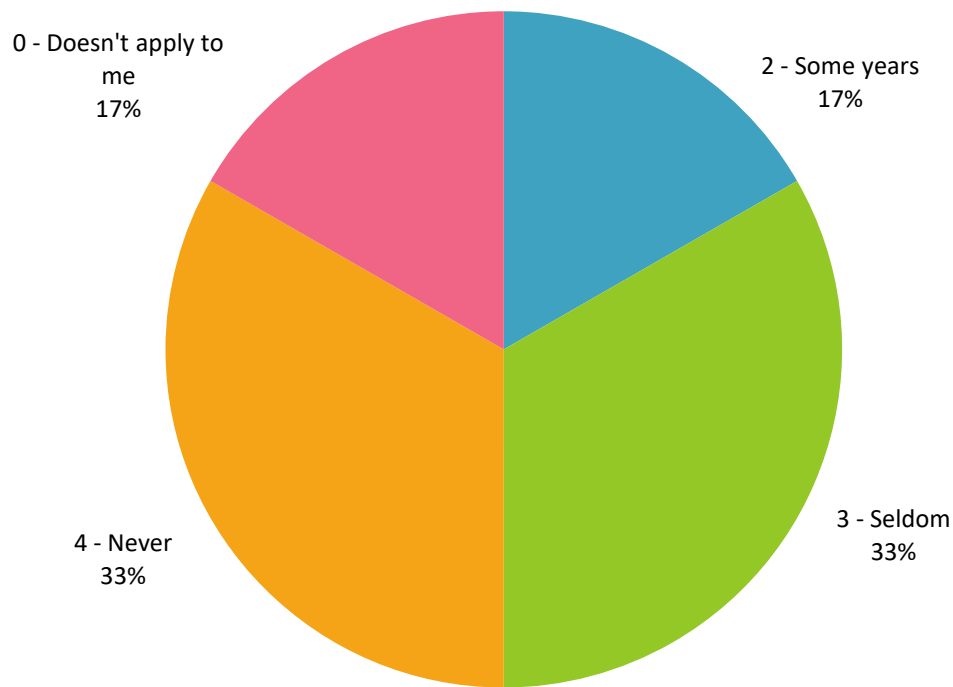


Value	Percent	Count
1 - Every year	11.5%	3
2 - Some Years	38.5%	10
3 - Seldom	19.2%	5
4 - Never	15.4%	4
0 - Doesn't apply to me	15.4%	4
	Totals	26

2.2 When you lease **IN** quota, what is your primary reason for leasing?

nearing full production and others have available quota
I have extra room
N/A
To help equalize kgs between farms.
assuring stay in sleeve
to help some one that is short for the year
For over production
Haven't - but bad accident left me unable to much now going into year 4 just started limited tractor use again would in the future
Crop problems like AI
I lease in quota due to various industry challenges affecting other producers. Given the set allocation, i have additional space to lease in kg's when others needs their quota filled.
Over production - usually as a result of mortality being less than projected
over producing
1. Helping to balance B.C.'s production 2. Maximizing barn space
Over produced
Overproduced
Over production for the quota year that falls outside of the sleeve
Help another grower grow their allotment for the year.
Over production throughout the year based on my flock schedules.
over production

2.3 How often does your farm lease **OUT** quota to other farms? I.E., you are producing less than your allocation allows by leasing your allocation to another grower.



Value	Percent	Count
2 - Some years	16.7%	4
3 - Seldom	33.3%	8
4 - Never	33.3%	8
0 - Doesn't apply to me	16.7%	4
	Totals	24

2.4 When you lease **OUT** quota, what is your primary reason for leasing?

Trying to retire
Does not apply
Due to Avian Influenza or Blackhead problems the allocated production could not be produced. Also weather changes have affected production, such as the "heat dome" a few years ago.
To help out a grower who has over produced
Underproduced
To balance B.C.'s production
excessive loss because of blackhead so i didnt use all my allocation
Disease
Overproduction of product
Haven't always sell out of allowable production
For under production
i had a problem on my farm and was short for the year
disease issue
To help equalize Kgs between farms.
N/A
Unable to to fill quota due to unforeseen circumstances such as AI

2.5 What situations, if any, might occur for a grower to need to lease out quota for more than two consecutive years?

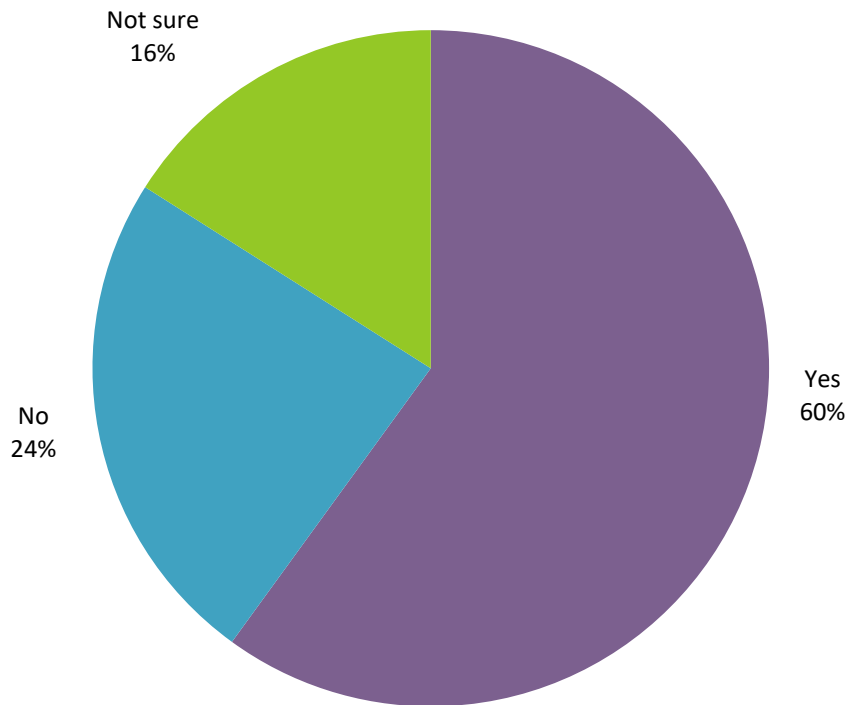
AI infected flocks or blackhead.
None
blackhead issues, avian flu issues
To balance B.C.'s production
n/a
Market conditions or supply issues or farm upgrades that takes longer than anticipated. Disease outbreaks.
In the past few years disease issues have shown to be very problematic. Drug treatments and medications are becoming increasingly limited.
There should be no reason for this, if this is the case that quota should be sold to an active producer.
We would like the quota to stay on the island so we have to wait until a person on the island wants to buy quota.
It would most likely be something very severe like a fire or a flood that would require a producer to rebuild fully. That being said, i don't think two consecutive years would be required to get back into production.
disease
barn buildings and disease control, and lack of funds for building ne barns
Accident poor health
repeated infections, loss of barn due to fire.
N/A
Disease
same
barn fire or collapse personal medical issues
Illness, rebuilding the farm, selling the farm, etc.

2.6 Do you have any suggestions on how allocation leasing can be improved?

no
It works fine as it is.
no
I think putting a cap on the length of time consecutive leasing can occur is a good thing. Our industry needs to encourage producers to continue producing and not only producing on paper.
My only comment is a question - is it being monitored and enforced?
no
N/A
no
How about leaving it alone? Let the farmer decide if he wants to lease it out? Maybe try expanding the market so that there is some growth so that there is some demand for quota and guys might sell instead of leasing it out? why put more barriers up?
Grandfather existing contracts, and allow flexibility to balance B.C.'s production
Must be used for yearend adjustments, new barn build or act of God. Should not be used as an annual way to deal with lack of space
No
The current system seems to work.
Not really, I'm too new to the industry to know enough about this.

The GOR states that the maximum holding size for each grower or group of associated growers shall not exceed 5% of the total quota on issue to growers in BC. This has historically equated to 1,375,000kg of quota.

2.7 Do you think the current maximum holding size is appropriate?



Value	Percent	Count
Yes	60.0%	15
No	24.0%	6
Not sure	16.0%	4
	Totals	25

2.8 If you answered No or Not Sure, please explain.

This is not a large farm if growers are to be fulltime growers they need to be at least 1 mil kgs this leaves little room to grow or expand. especially when the percentages of what can be grown of existing quota is reducing each year. If larger growers are capped out from purchasing who will buy quota from the growers who are retiring?

I don't think there should be any limiting amount to quota holdings. Those that do a good job and are seriously invested and involved in the industry should be able to expand as much as they want.

As a Direct Vendor, this does not apply to us.

land values have sky rocketed and you need more production on a piece of land to be profitable, comparing to the chicken industry there max KG is around 5 million KG. these are the people we have to bid against in buying land and they have a massive advantage to making there land efficient

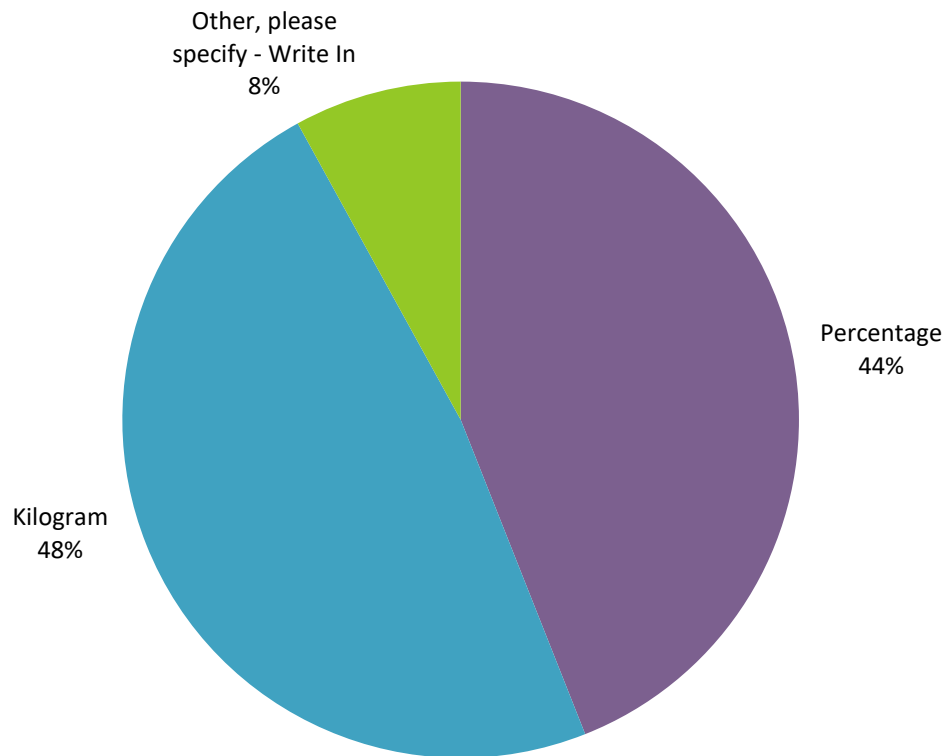
land is too expensive to restrict the size of a grower, 10% would be better.

I would like to see the maximum increased given volatility in allocation. one of the challenges is that farms have built to accommodate 100% of their quota holdings. If the allocation decreases, farmers may need to buy additional quota to keep their barns full. The 5% would limit producers to maintain on farm efficiency.

Due to land restrictions, it might be advantageous to consolidate with possible family members.

If there is a farmer out there that wants to expand let them do so. And its not that hard to find a work around. just set up a new company. follow me for more tips.

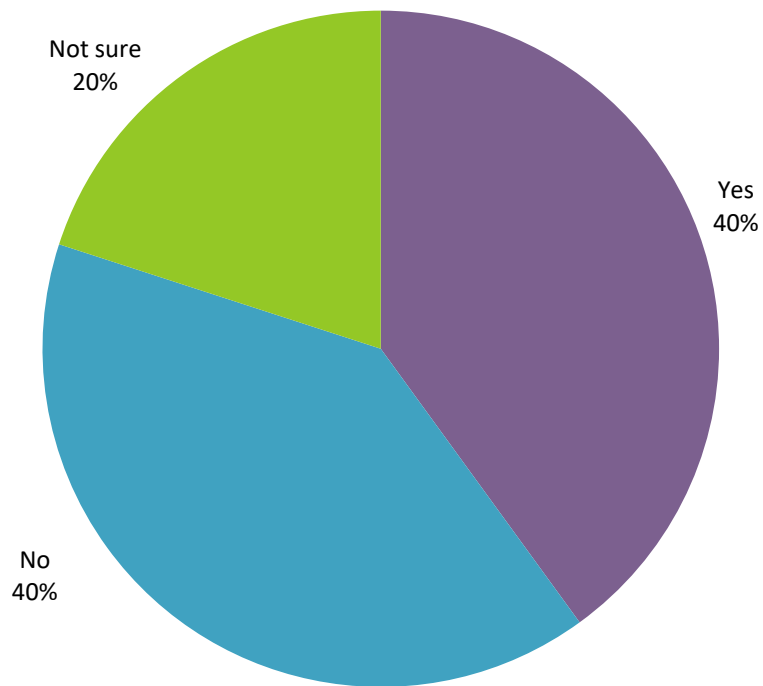
2.9 Do you think the maximum quota holdings should be listed as a percentage of total quota on issue in BC (as currently is done) or a set kilogram amount?



Value	Percent	Count
Percentage	44.0%	11
Kilogram	48.0%	12
Other, please specify - Write In	8.0%	2
	Totals	25

Other, please specify - Write In	Count
none. get rid of it	1
there should be a set max farm location amount, 10% of the industry. i think this is a exaggerated concern. it will self regulate to what makes economical sense as things change	1
Totals	2

2.10 Do you think the maximum quota holdings should be assessed per farm (Turkey Production Unit) rather than per Registered Grower?



Value	Percent	Count
Yes	40.0%	10
No	40.0%	10
Not sure	20.0%	5
	Totals	25

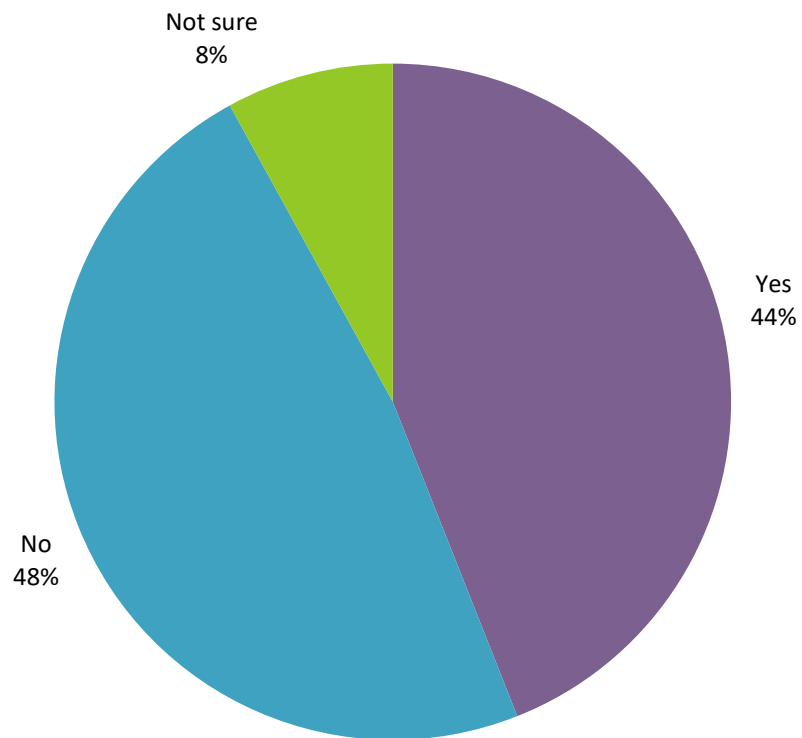
2.11 Do you have any additional thoughts on Maximum Quota Holdings to share?

<p>There are registered license from historical events, passing from older federation, it should be respected.</p>
<p>Too complicated</p>
<p>I guess it depends on if it's family owned and they are working on succession planning with kids.</p>
<p>The reason it should NOT be assessed on a per farm basis is that a registered grower, as associated growers, may operate multiple farms.</p>
<p>The current maximum on quota holding is appropriate - the higher the quota holding the more disruptive it is when something goes wrong.... for example, A.I. However, smaller units pose a greater risk in terms of spread. The current balance between the two we feel is appropriate.</p>
<p>Leave room for growers to grow their operations there is little demand for turkey quota the past few years</p>
<p>Maximum quota holdings should be set up so the total BC quota cannot end up in the hands of a few quota holders. But large enough for farmers to make a viable living.</p>

2.12 Do you have any comments on this part of the GOR?

Face it many growing without any permit or quota
its not necessary
It's appropriate
no
no
ok
seems ok
The quota on issue to the grower should have an actual facility tied to it to prevent farmers from holding quota on paper and leasing to other growers as sharecroppers.
This is fine.
This should align with other poultry sector regulations. Match the broiler industry.
Yes I agree
Yes, I think this is a good program.

2.13 In your opinion, does quota for organic growers need to be categorized separately from quota for commercial growers?



Value	Percent	Count
Yes	44.0%	11
No	48.0%	12
Not sure	8.0%	2
	Totals	25

2.14 In your opinion, would there be disadvantages to combining organic and commercial quota into one category? If so, what would those be?

yes...when one sector loses market share then both category have to suffer
We have gone organic and free range diff customers
Response
Our opinion is: organic and commercial quota should be kept in separate categories as they are raised and sold as different products
Organic quota was formed to promote the market at the time and was valued differently than commercial quota. It needs to remain separate for this reason.
Organic growing is much more difficult and they should get all breaks possible.
Organic - as pasture-raised turkeys, for that matter - are a differentiated product and should not considered the same as commercial quota. The demand for these niche market products is increasing (insatiable, really) while the demand for commercial quota is declining. I think it would be disadvantageous to combine these numbers and dilute the ability to track these unique production methods.
no this would help organic farms transition when needed
no disadvantage
no
no
No
It has competing market share so it should be treated equally other than the certification process. Otherwise it is not efficient in regulatory equality for all growers, and for disease control.
i thought you combined the 2 in the past. isn't an organic turkey an oxymoron?
I need more information before I could answer this. However they are still selling into the same market as commercial growers and their production should be part of the provincial allocation.
I don't think so, chicken doesn't have one for organic or regular quota, it's up to the processor to decide what they want and who's interested in growing it.
I don't see any concern.
I believe these are two totally different markets so splitting them makes sense to me.

Section III: Advisory & Consultation

The GOR currently outlines the Terms of Reference for the “New Entrants and Specialty Markets Advisory Committee”. It also provides the Board with the option to establish other Advisory Committees from time-to-time to provide it with advice and recommendations on market trends and requirements, production standards, policies, etc.

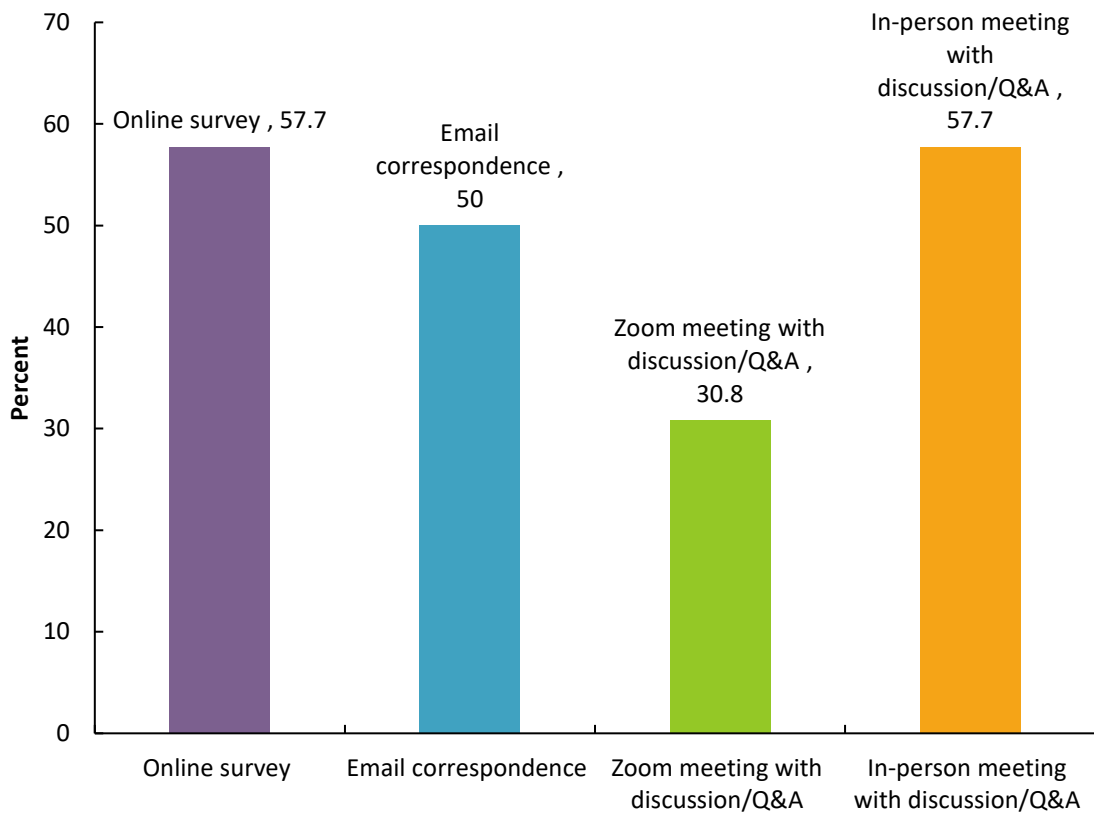
3.1 Please rank the following topics for BCTMB to consider when establishing its standing Advisory Committees (i.e., those that exist on an ongoing basis as opposed to those that are ad-hoc). Your highest ranked topic would be the one that you think is the most valuable topic for an Advisory Committee to be focused on. Number 1 is the 'highest ranked topic' and number 7 is the 'lowest ranked topic'. Each ranking can only be used once.

Item	Overall Rank	Score	Total Respondents
General Market Growth	1	138	23
Live Price	2	112	20
Processing	3	102	21
Specialty/Niche Marketing Growth (RWA, organic, etc.)	4	83	21
On-Farm Production	5	79	21
New Entrants	6	58	19
Other - please write in your topic below.	7	11	5

3.1.1 If you answered 'Other' in the question above, please write in your topic.

New entrance program is foolish.
I was on a new entrants program but I decided to decline the opportunity. I decline the offer for more financial reasons and the processing and marketing.
n/a

3.2 How do you like to engage in consultation on important regulatory and policy issues? Select all that apply.



Value	Percent	Count
Online survey	57.7%	15
Email correspondence	50.0%	13
Zoom meeting with discussion/Q&A	30.8%	8
In-person meeting with discussion/Q&A	57.7%	15

Other - Write In	Count
Totals	0

Section IV: New Entrant Program

The BCTMB New Entrant Program (NEP) allows the Board to allot 17,500kg of quota to prospective turkey growers who meet the program requirements. Full details of the program can be found in the GOR. The Board's New Entrant and Specialty Markets Advisory Committee has been tasked with a review of the NEP and would like your opinions/ideas on the following questions.

4.1 In your opinion, what role does the NEP serve in the BC turkey industry?

allows for young farmers to get started
Allows new farmers the opportunity to start.
As long as there is no industry growth - none - except for the 10% clawback on quota transfers.
Don't know
Great way to get people in not enough to earn living
Grooming the next quota holders
hard for our industry that is shrinking
helps out the specialty market
I don't see much interest in this. The NEP is meant for production outside the lower mainland but the problem is no processor wants to pick up the birds as they are too far away and trucking costs are too high. Also they would most likely be seasonal birds for Christmas which is more challenging with winter driving conditions.
It allows new growers into the system preventing a closed shop scenario which would be unhealthy for the industry.
it doesn't. the amount of quota is not near enough to make a go at it. you can see this because of the low success rate. people have their name on the list but when they get the opportunity they back away.
It gives people who would like to enter the industry a small chance of getting in and earning some valuable experience.
No how can we add new entrants when the industry is shrinking
No Opinion
None
none currently, turkey consumption and production is in decline, nobody wants to enter the turkey business
Promotes growth by assisting new growers to enter the turkey farming industry.
Response
Very important We have to encourage more young farmers
very little when we have a shrinking market, i think we are setting people up to fail or we are setting people to undermine existing small farms
yes new people new ideas

4.2 The Farm Industry Review Board (FIRB) has asked Commodity Boards to develop specific goals for their NEPs. Rate each of the following draft goals for the Turkey NEP on a scale of 1 to 5 with 1 being not important and 5 being very important.

	1 - Not important		2 - Slightly important		3 - Important		4 - Fairly important		5 - Very important		Responses
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count
Encourage new farmers to join the turkey industry	6	24%	3	12%	9	36%	1	4%	6	24%	25
Support the expansion of Direct Vendor operations	9	36%	7	28%	3	12%	2	8%	4	16%	25
Encourage production outside the Fraser Valley	7	28%	3	12%	5	20%	5	20%	5	20%	25
Ensure new turkey farms meet animal welfare, food safety, and biosecurity standards	2	8%	1	4%	5	19%	8	31%	10	39%	26

4.3 Do you have any additional NEP goals for the Board to consider?

Board should be receptive to a gradual meeting all the regulations and not impose financial stress on less important regulations.
have you ever thought about increasing the amount of quota that a new entrant is issued? Why would you encourage new farmers with something that doesn't work? Why do you keep trying to push the direct vendor operations when farmers who do this cant find processing?
How realistic the NEP program is for seasonal, pasture-based operations.
NEP should be pause/suspended for the time being.
no
No
Response

4.4 FIRB is also requiring the Boards to have metrics to measure the success of their NEP. Rate each of the following draft metrics for the Turkey NEP on a scale of 1 to 5 with 1 being not relevant and 5 being very relevant.

	1 - Not relevant		2 - Slightly relevant		3 - Relevant		4 - Fairly relevant		5 - Very relevant		Responses
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count
Number of applications to the NEP	8	32%	3	12%	8	32%	4	16%	2	8%	25
Number of applications approved to join the waitlist	7	27%	5	19%	7	27%	3	12%	4	15%	26
Average time applicants are on the waitlist	6	24%	7	28%	8	32%	2	8%	2	8%	25
Number of invitees to the NEP	7	28%	7	28%	1	4%	6	24%	4	16%	25
Number of invitees who successfully become New Entrants in the turkey industry	6	23%	3	12%	5	19%	4	15%	8	31%	26

4.5 Do you have any additional NEP metrics for the Board to consider?

To much issues or time people will work around
The turkey market has been static or negative for a number of years. Quota for the NEP comes directly from the production of existing growers. Our current production is 80.1% of our Quota holdings down from 83.3% last year. This focus on the NEP is causing further damage to the industry as a whole and is counterproductive. And it has become apparent that many times these NEP growers will sell their quota after the 10-year period is up. This could be solved if the quota was given back to the board should the new entrant leaves the industry, even after 10 years.
Number of years before invitees gain additional quota. Number of years invitees remain in the industry.
no
No
New entrants should not gain access to the industry at the expense of existing growers in a shrinking market year but perhaps a share of the increase when the market is expanding.
NEP should be paused/suspended for the time being, until we figured out the metrics to help the existing growers.
Industry growth, or unutilized quota sufficient to support to support a NEP.
In my opinion the first four statements don't matter at all. The only thing that matters is how many actually do the NEP. How many have done this since the inception? almost zero. I am not including the original people you issued quota right away that were producing turkey without quota.
How successful are the new entrants over a time period
how many NEPs are still active and increasing after 6 years. 6 years because an NEP can sell after 5
educate people so they actually know what they are signing up for not a pipe dream because they get free quota

4.6 How do you think the Board can encourage more qualified people to apply for the turkey NEP?

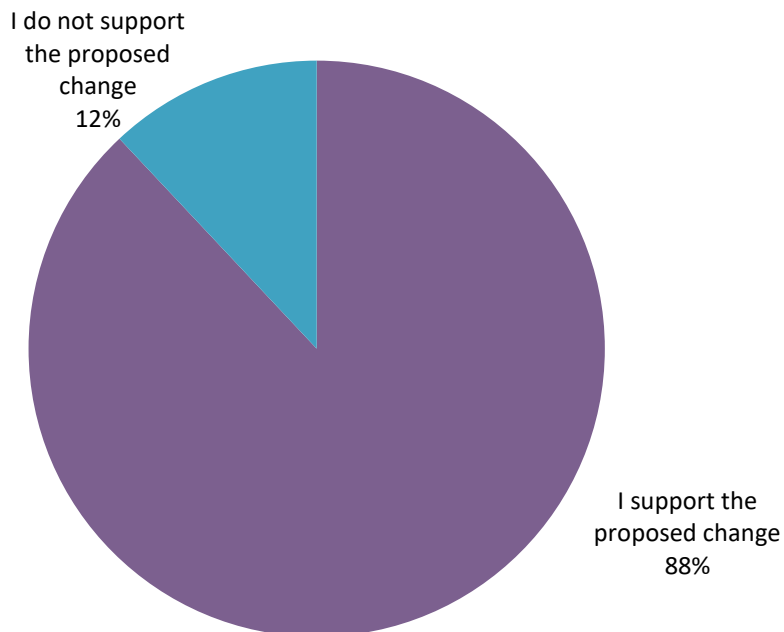
?
Advertising and actual marketing of this program. A lot of people do no know this program exists besides current growers
Amount given is quite minimal hard to attract good people with an amount that is not viable
get turkey production increases
grow the consumption of turkey
Have separate regulations for outside flocks. New entrances will most likely want to raise birds outside and the current regulations are often not applicable
I think the Board should not encourage ANY new applications other than the existing grower/families
increase the amount of new entrant quota to 125,000 kgs. stop trying to push the direct vendor. let people decide what they want to do but give them enough quota to do something with
Increase the Direct Vendor amount
Let the industry know when there is enough quota available for a new entrant to apply.
no
There would need to be some incentive for them to grow. I know of new entrants that have been signed up have sold or just aren't doing it anymore as it's not viable in their area.
Workshops mentors

4.7 Do you have any other suggestions for BCTMB to consider regarding the NEP?

Pause/Suspended NEP for the time being
no
no
If an NEP wants to quit after 5 years that the quota go to another NEP on the wait list.
I have been trying to bring attention to the lack of success of the NEP for 12 years. I have seen hardly any change, other than they stopped NEP from being allowed to rent which made success even less likely. Rental is the only reason I was able to farm this small amount of quota at all. Another change is that now that I am done my 10 years at being a new entrant grower I am considered a 'commercial grower' so if any changes are made they don't apply to me. I have tried to change the program while I was still a new entrant to no avail. It would be a pity if now things change and they don't apply to me.
Have patients with new entrance
Easier enters

Section V: Miscellaneous

5.1 In addition to the areas covered earlier in this survey, the Board is considering changing the annual license application deadline to January of each year instead of April 15th. The earlier date would allow for all Registered Growers and Direct Vendors to be licensed before any poulters for the upcoming quota year are placed.



Value	Percent	Count
I support the proposed change	88.0%	22
I do not support the proposed change	12.0%	3
	Totals	25

5.1.1 Do you have any concerns or suggestions related to this proposed change?

no
It has always been Jan 30th, as I can recall. It changed to April due to the AI out break...from what I understand.
I support the application deadline, but payment should remain at April 15th
no
No
Our operation was heavily dependent on the fresh market Christmas trade. To put more into that time frame would not be conducive to our business model.

5.2 Are there any other areas of the General Orders that you think should be revised? If yes, what are they? Please be specific.

Barn rentals
Help getting Cfia approved processing
no
Response
the ability for farms to change there corporate structure and shareholders with in family units with out triggering quota claw backs. when restructuring has to happen because government has changed tax laws, the farmer should not be penalized. this is also the most realistic way of getting new people into the industry. the only quota claw back we should have is the existing one we have if you sell quota in the 3 years after purchasing it, the 30-20-10
With the severity of disease outbreaks the ma sleeve should be increased to 30,000 to 40,000 kg. Do out of province Hatchery's come under these Orders?

Respectfully submitted,



Della Oberhoffner, General Manager
BC COUNCIL OF MARKETING BOARD

September 16, 2024