

4.1.6 Canada

4.1.6.1 Demographics

Of Canada's 15,162 poultry farms, 34%, or 5,223 were small duck farms or other poultry farms and 34% are small, household chicken farms. The 2,175 commercial chicken farms comprised 14% of poultry operations in Canada and the 2,690 turkey farms (294 commercial turkey farms) account for 18% of Canada's poultry farms. Even though duck and household chicken farms make up 52% of poultry farms in Canada, they only account for 2.5% of total poultry inventory in Canada (Figure 39). Duck farms in Canada had on average, 286 ducks. Turkey farms had an average 2,120 turkeys. A commercial chicken operation, in Canada, had 47,310 chickens compared to 595 chickens on the average household or micro-producer chicken operation.

Poultry production and consumption are both rising in Canada. Poultry production in 2021 totaled 1.46 million metric tons. Poultry consumption in 2021 was 1.51 million metric tons. Poultry production has increased 21% since 2010. Consumption of poultry in Canada has increased 24% (Figure 40).

Canada's poultry inventory consisted of 178.9 million head in 2020 with 96% of inventory being chickens, 3% being turkeys, and less than 1% being ducks (see Table 7). Since 2010, Canada's chicken stocks increased 4%, duck stocks increased 15%, and turkey stocks increased 6% since 2010.

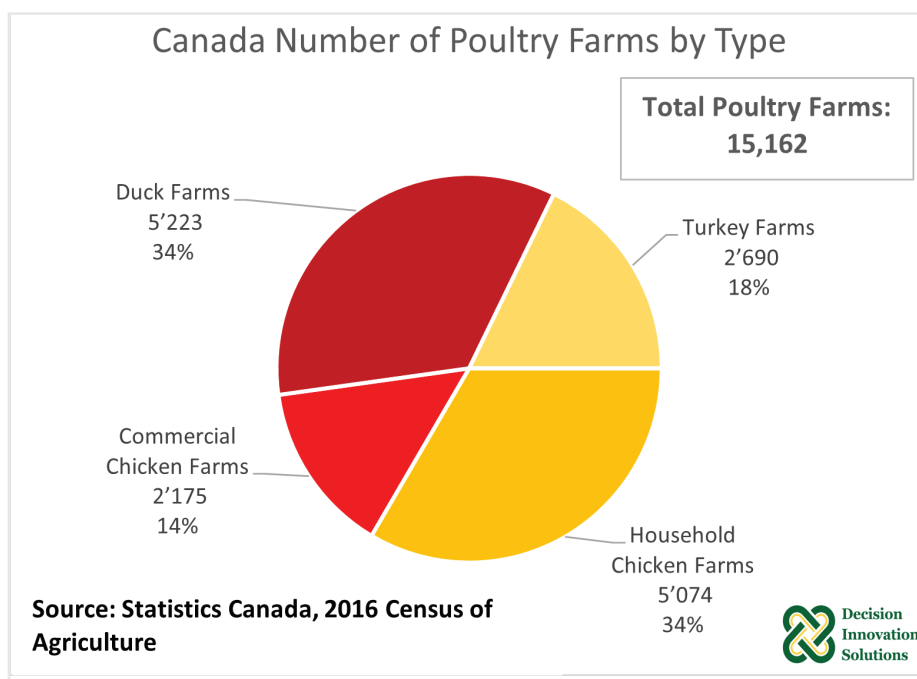


Figure 39. Canada number of poultry farms by type

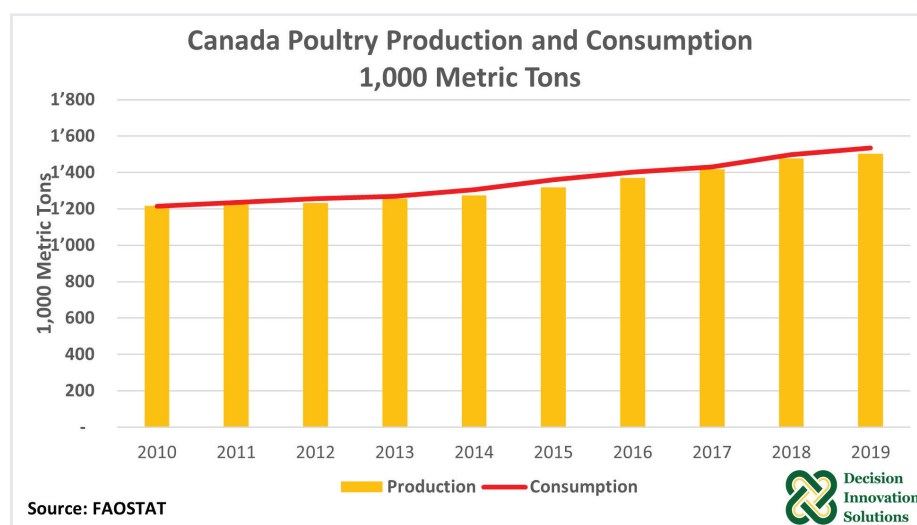


Figure 40. Canada poultry production & consumption

CANADA STOCKS, SLAUGHTER, AND PRODUCTION					
	1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	171'718	1'496	5'703		178'917
Producing Animals/Slaughtered	754'946	4'484	18'732		778'162
Production (1,000 MT)	1'305	9	158		1'472
Sources: FAO, 2020					

Sources: FAO, 2020

Table 7. Canada poultry stocks, slaughter & production

Canada's poultry slaughter totaled 778.2 million head in 2020. Approximately, 97% or 754.9 million head of poultry slaughter was chickens. More than 18.7 million head were turkeys, which accounted for 2% of Canada's poultry slaughter. Ducks were the smallest share of poultry slaughter with 4.5 million head and less than 1% of total poultry slaughter. Turkey production Canada's chicken slaughter increased 18%, duck slaughter increased 21%, and turkey slaughter decreased 9% from 2010.

Canada's poultry production in 2020 included 1.3 million metric tons of chicken, 158,000 metric tons of turkey, and 9,000 metric tons of duck. Since 2010, chicken production increased 24%, duck production increased 20%, and turkey production increased 82%.

4.1.6.2 GDP and Value of Production

For Canada, the GDP was an estimated \$1.6 trillion in 2020 (Figure 41). The agricultural production of crops and red meat contributed a combined 3% of the total. Crop production was estimated at \$26.4 billion and was 2% of the total GDP. Red meat production was nearly \$10.2 billion or 1% of the total. Other livestock products were valued at \$6.4 billion. Although chicken production contributed less than 1% to the total GDP, it was valued at \$2.5 billion. Turkey and duck production followed with \$369.6 million and \$30.2 million, respectively.

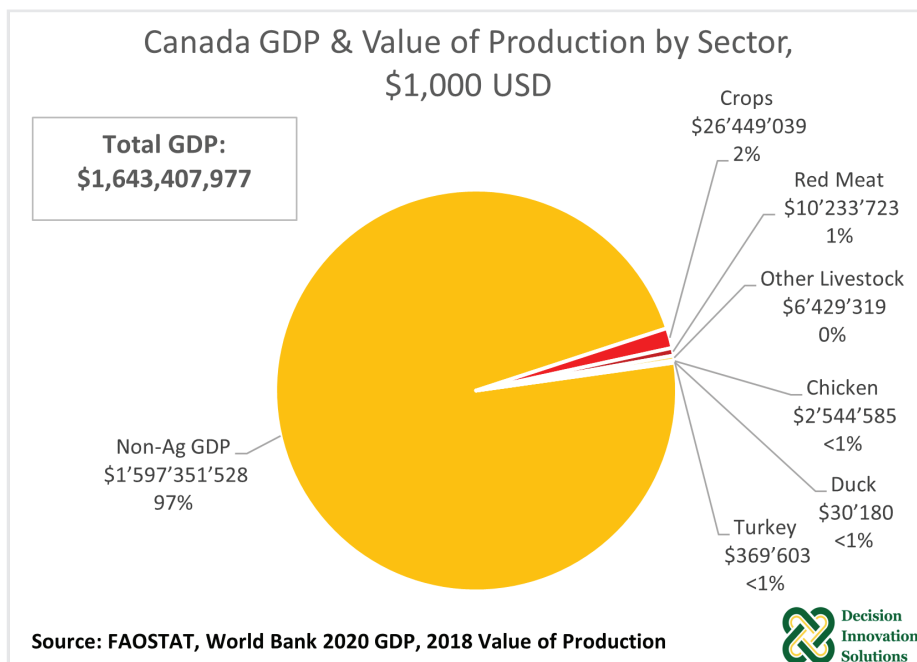


Figure 41. Canada GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Canada are estimated to be \$99.9 billion. Of this amount, \$7.3 billion comes from the poultry industry, with \$6.3 billion from chicken meat production, \$75 million from duck production, and \$915 million from turkey production. Agriculture pays a net value of \$617 million in taxes, \$33 million of which is estimated to be from the poultry industry (Table 8).

ECONOMIC EFFECTS - CANADA (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$46'056'449	\$53'789'470	\$99'854'919	\$617'418
Livestock	\$19'607'410	\$22'903'387	\$42'510'797	\$262'851
Poultry	\$2'944'368	\$4'342'943	\$7'287'311	\$32'622
Chicken	\$2'544'585	\$3'753'263	\$6'297'848	\$28'193
Duck	\$30'180	\$44'516	\$74'696	\$334
Turkey	\$369'603	\$545'164	\$914'767	\$4'095

Source: FAOSTAT, OECD Input-Output Tables. *taxes is equal to taxes on production net of subsidies

Table 8. Economic effects - Canada

4.1.6.3 Labor

The Canadian labor force numbered about 20.5 million people with an estimated 47% being female and 53 % being male.

The agricultural production labor force is estimated to be 285,582 people with 31% being female and 69% being male. Poultry production labor is estimated to be 20,750 people with 2,304 involved with chicken production, 188 in turkey production, and 18,257 reported to be working with other poultry production.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - CANADA			
	Total	Female	Male
Total Country Labor	20'492'683	9'650'490	10'842'193
Non-Agricultural Labor	20'207'101	9'562'814	10'644'287
Agricultural Labor	285'582	87'676	197'906
Total Non-Poultry Agricultural Labor	264'832		
Total Poultry Labor	20'750		
Chicken Labor	2'304		
Turkey Labor	188		
Other Poultry Labor	18'257		
		Wages (\$1,000 USD)	
Total Meat Processing Labor	68'469	\$2'420'832	
Livestock Processing Labor	53'171	\$1'879'948	
Poultry Processing Labor	15'298	\$540'884	

Source: ILO, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 9. Agricultural labor force characteristic - Canada

The meat processing sector in Canada employed 68,469 people in 2020 (Table 9). Total wages earned from meat processing were more than \$2.4 billion. Approximately, 78% or 53,171 meat processing jobs were from livestock meat processing. Wages earned from livestock meat processing was \$1.9 billion. An estimated 15,298 people worked in poultry processing. Wages earned from poultry processing totaled \$540.9 million.

4.1.6.4 Cost of Production

Data from the Chicken Farmers of Ontario provides some insight into relative cost of production in Canada. Data from quota periods A-169 through A-174 shows that feed cost averages 45.4% of total cost of production with the cost of day-old chicks making up 22.8% of cost, operational and capital costs being 29.8% of cost of production, other costs being 2%. These cost of production factors are used to calculate the Farm-Gate Minimum Live Price in Ontario (Figure 42).

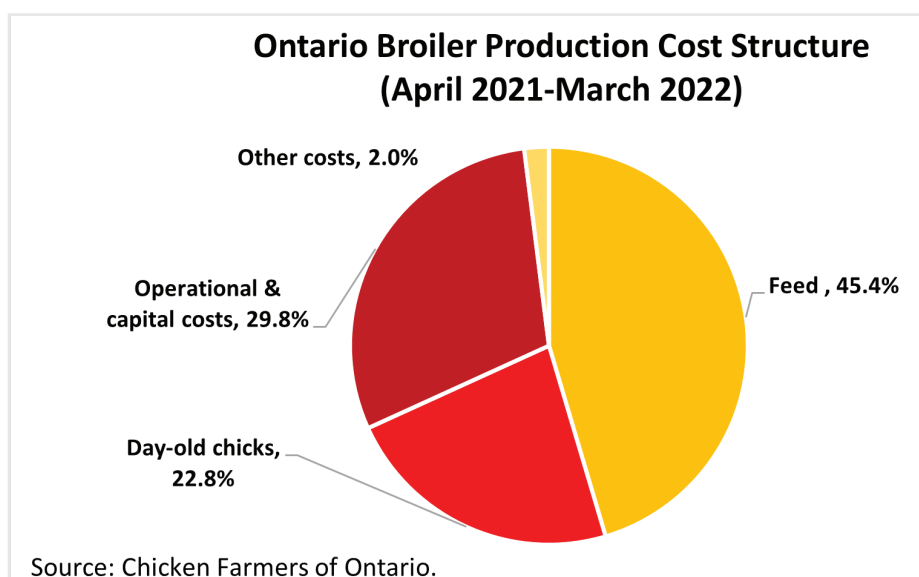


Figure 42. Ontario broiler production cost structure

4.1.6.5 Trade

The USA was the largest market for Canada's poultry meat, which were valued at \$350.6 million in 2020. Canada also exported \$14.3 million and \$5.3 million worth of poultry meat to the Philippines and South Africa, respectively. Note that Canada exported 20,404 MT of poultry products valued at \$16.8 million, which were shipped to "Other" Asia countries, which were not specified in the data (Figure 43 and Figure 44).

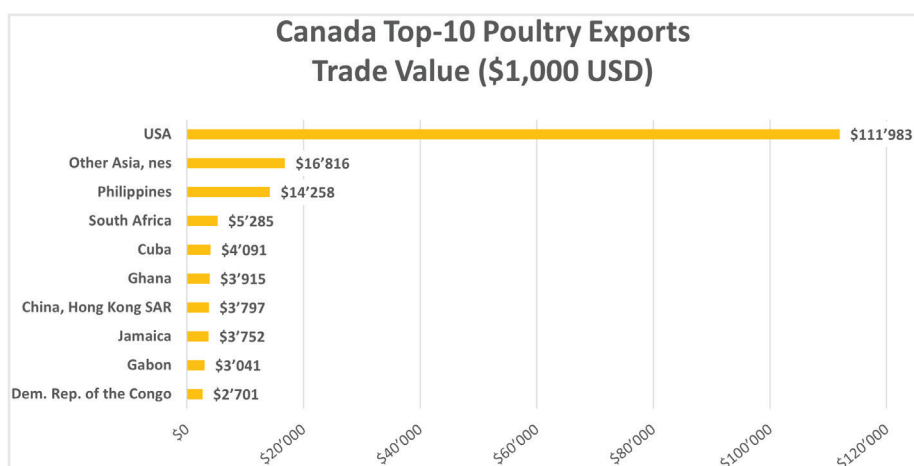


Figure 43. Canada top 10 poultry exports, trade value

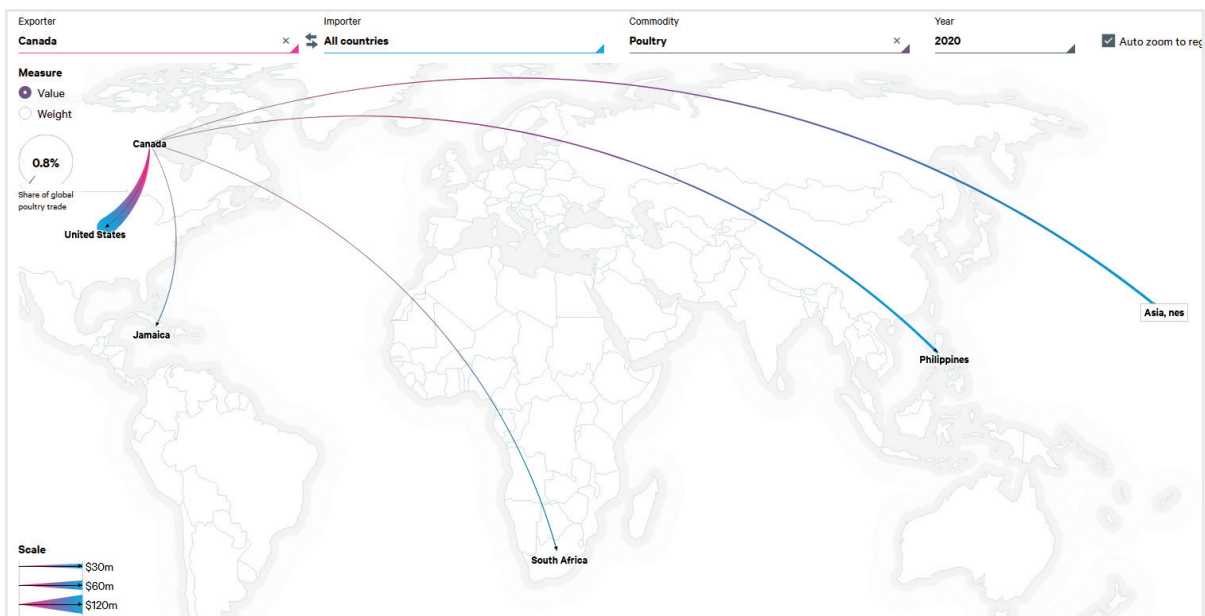
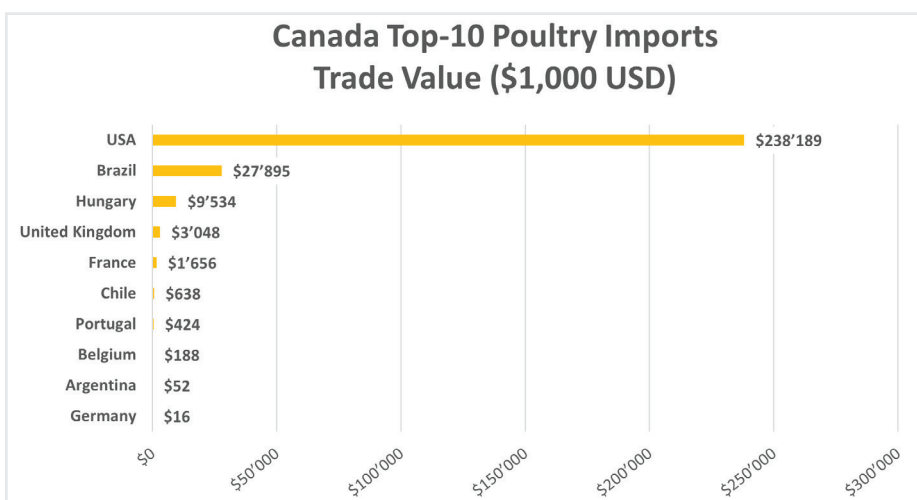


Figure 44. Canada poultry export flows



Canada's main supplier of poultry meat was the USA at \$331.5 million, equivalent to 166,129 MT in 2020. Thailand shipped to Canada 7,590 MT of poultry products (meat preparations) valued at \$33. 2 million. Canada also imported 10,657 MT from Brazil and 3,628 MT from Hungary, which consisted mostly of fresh poultry. Imports from those two countries were valued at \$27.9 million and \$9.5 million, respectively (see Figure 45 and Figure 46).

Figure 45. Canada top 10 poultry imports, trade value

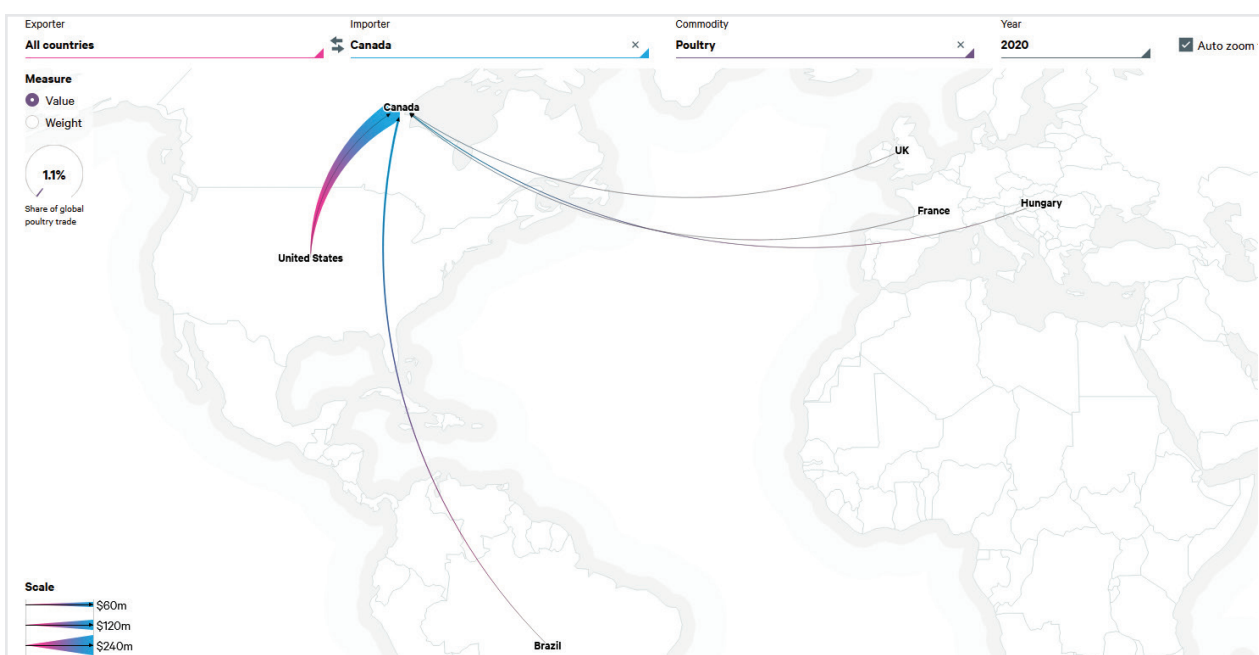


Figure 46. Canada poultry import flows