National Farm Products Council

Conseil national des produits agricoles

Canada's Poultry and Egg Industry 2003

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Cat. No. A99-1/6-2003E
ISBN: 0-662-34725-0

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Introduction

Welcome to the second edition of *Canada's Poultry and Egg Industry* handbook. This reference guide uses data obtained from industry and government, and tells a tale of success in meeting Canadians' needs for high-quality, reasonably priced poultry meat and eggs.

This success can be measured in millions of kilograms of poultry meat and in millions of eggs. It can also be measured in jobs and incomes. Thousands of Canadians earn their living in producing and processing chicken, turkey, and eggs. The industry creates opportunities for Canadians in every region.

Nationally, the system is run by four marketing agencies–the Canadian Egg Marketing Agency, the Canadian Turkey Marketing Agency, the Chicken Farmers of Canada and the Canadian Broiler Hatching Egg Marketing Agency.

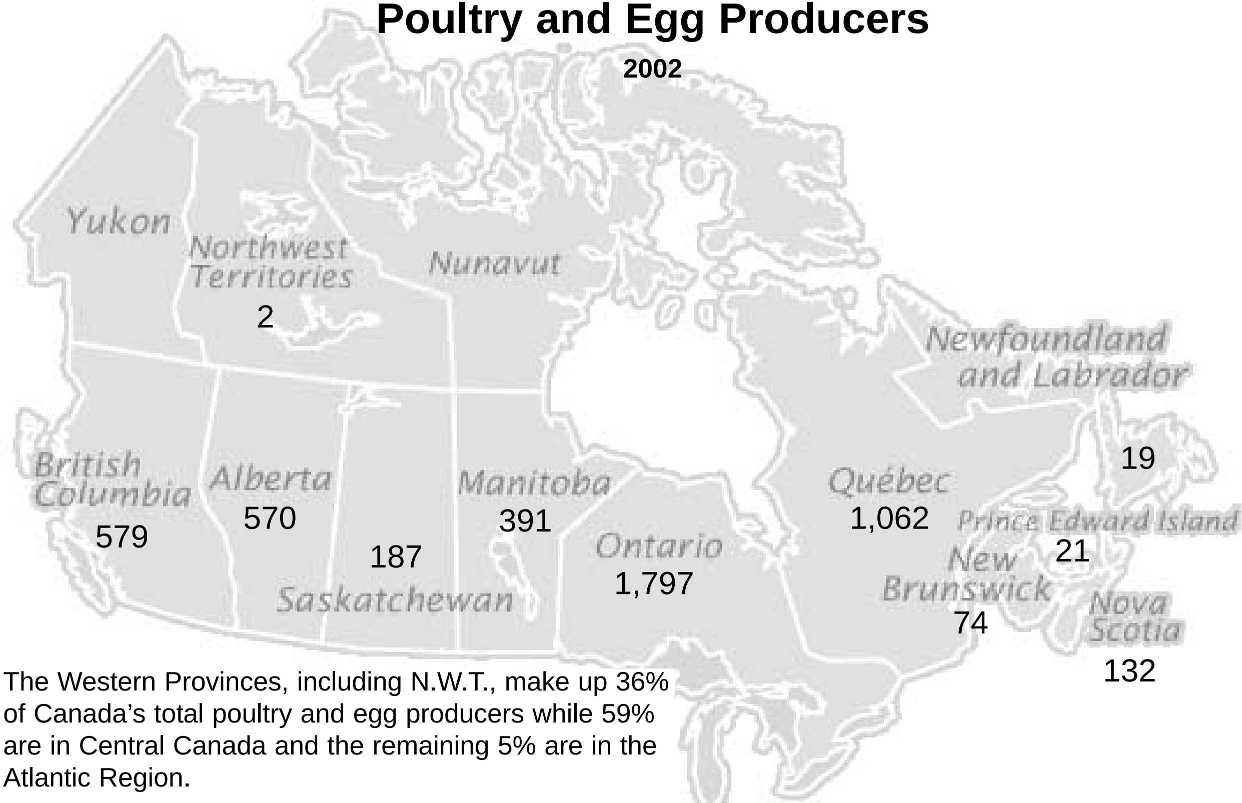
The National Farm Products Council (NFPC) oversees the four marketing agencies to ensure that they operate in the balanced interest of producers and consumers. The NFPC reviews agency orders and regulations, hears complaints about agency decisions, and provides advice about the agencies to the Minister of Agriculture and Agri-food.

At the provincial/territorial level, commodity marketing boards which represent producers are supervised by their governments.

Please feel free to contact us should you require additional copies of this handbook or have any questions. The Government of Canada, through the National Farm Products Council, is a strong supporter of our poultry and egg producers and processors.

Poultry and Egg Producers

2002



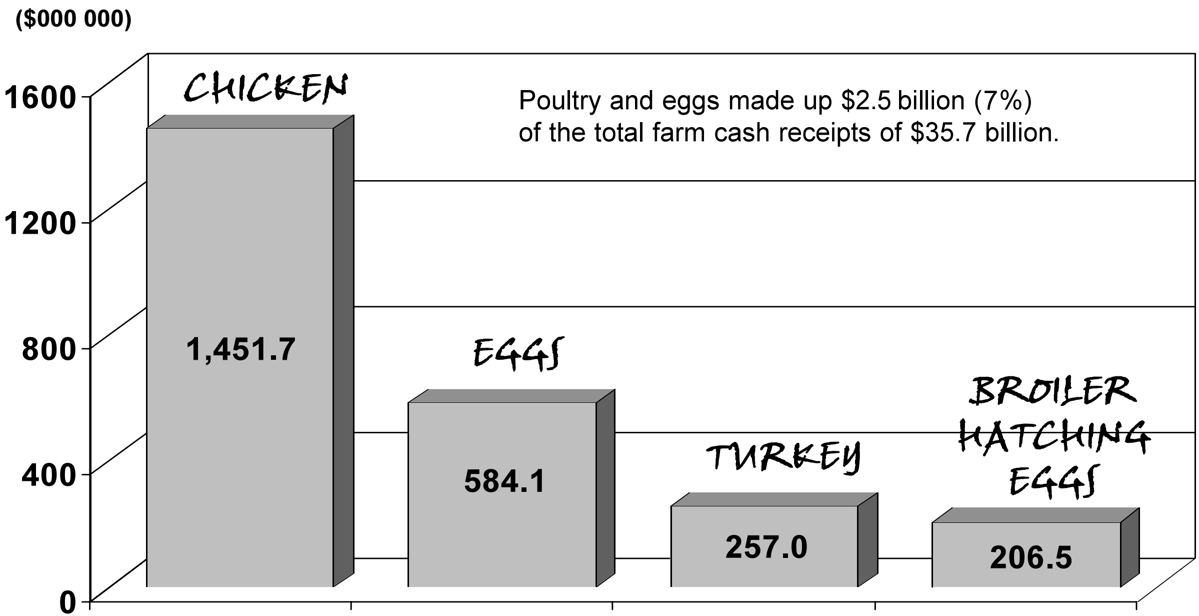
The Western Provinces, including N.W.T., make up 36% of Canada’s total poultry and egg producers while 59% are in Central Canada and the remaining 5% are in the Atlantic Region.

Number of Poultry and Egg Producers - 2002

	Chicken	Turkey	Eggs	Broiler Hatching Eggs	Total
B.C.	336	48	133	62	579
Alta.	290	63	169	48	570
N.W.T.	-	-	2	-	2
Sask.	93	17	66	11	187
Man.	124	66	171	30	391
Ont.	1,123	181	408	85	1,797
Que.	752	140	111	59	1,062
N.B.	35	18	18	3	74
N.S.	84	23	24	1	132
P.E.I.	7	-	14	-	21
Nfld.	7	-	12	-	19
Canada	2,851	556	1,128	299	4,834

Source: CFC, CTMA, CEMA, CBHEMA

Farm Cash Receipts
2002



Source: Statistics Canada, CBHEMA

Farm Cash Receipts (FCR) - 2002

($000 000)

	Chicken	Turkey	Eggs	Broiler Hatching Eggs *	Total	Poultry and Egg vs Total Provincial FCR (%)
B.C.	231.1	26.5	75.2	33.5	366.3	16.7
Alta.	122.8	21.1	42.4	22.5	208.7	2.5
Sask.	46.9	8.9	23.2	4.8	83.8	1.3
Man.	61.2	17.0	64.9	9.4	152.5	4.1
Ont.	471.8	116.6	223.2	65.1	876.7	10.3
Que.	404.4	56.1	102.8	55.0	618.3	11.3
N.B.	37.1	4.4	14.5	16.2 *	x	N/A
N.S.	50.9	6.2	23.4	x	x	N/A
P.E.I.	x	x	3.5	x	x	N/A
Nfld.	x	x	11.1	x	x	N/A
Canada	1,451.7	257.0	584.1	206.5	2,499.3	7.0

Source : Statistics Canada except for Hatching Eggs where FCR are calculated by CBHEMA.

* N.B. and N.S. combined due to confidentiality

Note : Statistics Canada does not publish FCR for the N.W.T.

x - confidential

Poultry and egg receipts totalled $2.5 billion in 2002, making up 7% of total agricultural receipts. The three largest provinces, Quebec, Ontario and British Columbia, accounted for almost three quarters of poultry and egg receipts. Chicken receipts made up 63% of the total in 2002. Feed purchases by the poultry and egg industry were valued in excess of $1 billion.

Production by Province and Territory - 2002

	Chicken (000 kg)	Turkey (000 kg)	Eggs (000 dozen)	Broiler Hatching Eggs (000 eggs)	
B.C.	147,266	15,403	59,421	113,764	
Alta.	83,970	11,509	39,413	74,104	
N.W.T.	-	-	2,447	-	
Sask.	30,022	4,664	19,873	15,999	
Man.	38,860	9,714	54,777	30,649	
Ont.	303,548	67,005	185,624	213,826	
Que.	262,147	31,155	93,562	184,874	
N.B.	25,827	2,544	10,501	53,136	*
N.S.	31,939	3,695	17,924	*	
P.E.I.	3,343	-	3,031	-	
Nfld.	12,014	-	7,580	-	
Canada	938,936	145,689	494,153	686,352	

Source : CFC, CTMA, CEMA, CBHEMA

* For Broiler Hatching Eggs, production for N.B. and N.S. is shown under N.B.

The top producing provinces, for all commodities, are Ontario, Quebec and British Columbia.

Hatcheries, Processing Plants and Grading Stations

	Poultry		Eggs		
	Hatcheries	Primary Processing *	Egg Stock Hatcheries	Grading Stations	Egg Processing
B.C.	6	12	2	40	1
Alta.	9	8	8	53	3
N.W.T./Yukon	0	0	0	2	0
Sask.	4	2	2	27	0
Man.	10	6	2	36	2
Ont.	27	65	9	94	9
Que.	16	21	6	43	4
N.B.	2	3	3	18	0
N.S.	3	6	2	15	0
P.E.I.	0	1	0	7	0
Nfld.	1	7	0	6	0
Canada	78	131	34	341	19

* Primary Processing includes federally and provincially registered establishments but excludes Hutterite colonies.

Source: Agriculture and Agri-Food Canada, National Farm Products Council

Hatcheries incubate fertilized chicken and turkey eggs to produce chicks and poults. The day-old birds are then raised by producers into either meat-producing or egg-laying birds. Primary processing plants slaughter birds and prepare the meat for the retail market. Birds may be sold whole or in parts, or further processed into consumer-ready products such as pot pies, dinners or deli meat. Egg grading stations prepare eggs for the table market. Egg processing plants (or "breakers") process eggs into liquid and dried form, as well as for pharmaceutical and industrial uses.

Value of Exports and Imports

($000 000)

	Chicken		Turkey		Eggs and Egg Products		Hatching Eggs & Broiler Chicks	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
2002	151.6	353.4	17.1	26.5	41.7	31.5	*	35.2
2001	131.7	341.4	18.2	23.8	30.7	30.7	*	36.3
2000	87.6	294.3	13.2	18.7	26.1	29.9	*	28.9
1999	68.9	272.0	10.1	21.1	25.3	34.2	*	33.1
1998	81.2	300.1	10.4	14.9	21.4	36.6	*	52.0

Source: Statistics Canada

* Exports for broiler hatching eggs are minimal.

There is an import for re-export program for poultry meat and eggs, under which these products can be imported into Canada for processing into value-added products. These products must subsequently be re-exported. The above exports and imports include meat and egg products of both domestic and foreign origin.

Exports

Poultry and egg exports were valued at $210.4 million in 2002, up 86% from five years ago. Chicken has consistently accounted for 72% of the total in the last five years and increased by 86% as well. Turkey exports made up 8% of the total, and egg products 20% in 2002. Most egg exports are not "in the shell", but consist of liquid and dried products.

The U.S. is our number one market for poultry and egg products (55% of total), ranking first for chicken and egg products and second for turkey. Our second largest market is Russia, which ranks first for turkey and third for chicken.

Imports

Imports of poultry and eggs were valued at $446.6 million in 2002, up 11% from five years ago. Chicken made up 80% of the total, turkey 6%, eggs 7% and hatching eggs 7%. The U.S. was the source for almost all poultry and egg imports (99.5%). Thailand was the next largest supplier (0.4%). Imports from the U.S. were predominantly fresh chicken parts (breasts and wings) and further processed products such as chicken and turkey dinners.

Import permits for poultry and eggs are administered by the Department of Foreign Affairs and International Trade (DFAIT) under a Tariff Rate Quota (TRQ) system. For each commodity, a level of within-quota access is established according to commitments made under multi-lateral and bi-lateral trade agreements. This product may enter at a zero or minimal tariff rate, depending on the agreement.

Per Capita Protein Consumption

	Beef (kg)	Chicken (kg)	Pork (kg)	Turkey (kg)	Table Eggs & Egg Products (dozen)
2002	30.0	30.6	28.1	4.3	15.4
2001	30.6	30.4	28.9	4.2	15.8
2000	31.9	29.0	28.6	4.2	15.7
1999	32.5	27.7	30.0	4.2	15.2
1998	31.8	26.1	28.6	4.3	15.1

Source : Statistics Canada

Chicken consumption has increased by 17.2% in the last 5 years. Beef consumption, traditionally the largest meat category, has now been replaced by chicken. Pork consumption has been stable for the past 5 years. As a result, consumption of the top three meats is now almost equally split. Turkey consumption has remained unchanged. Egg consumption, while declining slightly in 2002, has been recovering steadily after falling during the 1980's.

Consumer Price Index (1992=100)

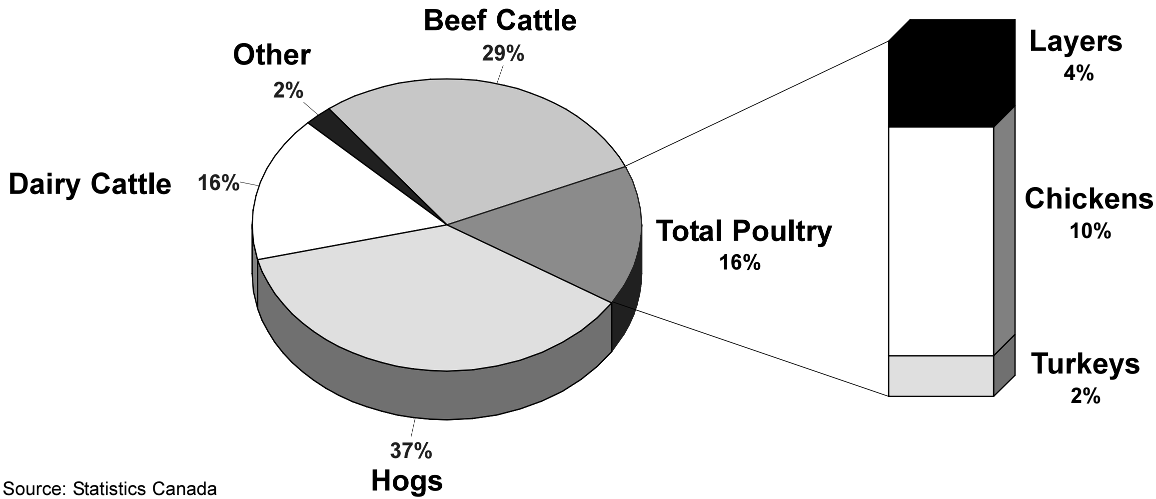
	Chicken	Turkey	Eggs	Beef	Pork	All Foods
2002	116.7	131.4	133.9	132.8	118.8	120.3
2001	116.2	128.4	129.3	128.2	122.4	117.2
2000	110.6	123.9	124.0	111.3	112.1	112.2
1999	110.4	118.5	122.3	104.4	105.4	110.7
1998	108.2	111.1	123.2	102.2	111.6	109.3

Source : Statistics Canada

The Consumer Price Index (CPI) compares, in percentage terms, current prices to prices in the official base period of 1992=100.

For example, the price of all foods in 2002 was 20.3% higher than it was in 1992.

Livestock Grain-Based Feed Requirements
2001



Source: Statistics Canada

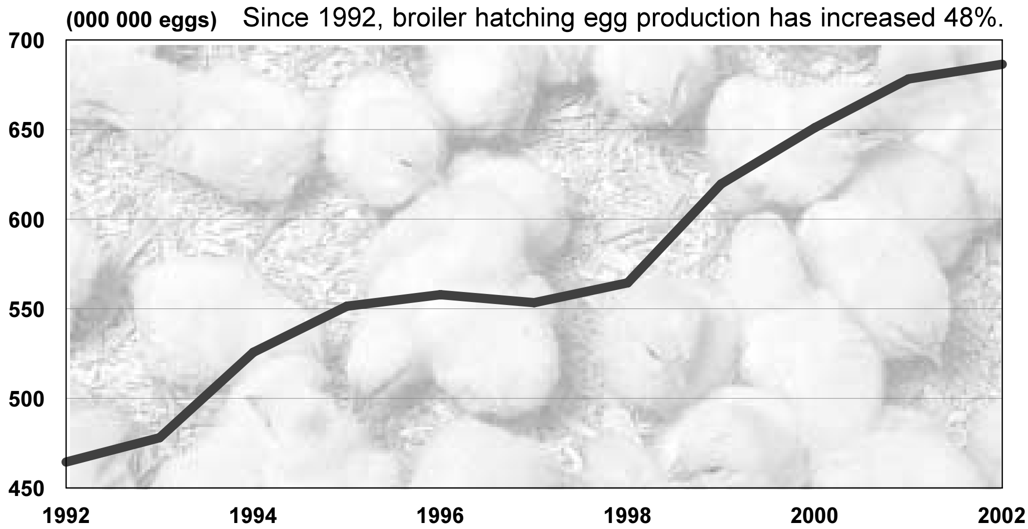
The Canadian livestock and poultry industry used 24.3 million tonnes of complete grain-based rations in 2001. Of this, 16% was fed to chickens, layers and turkeys.

BROILER HATCHING EGGS

Broiler Hatching Egg Highlights Canadian Broiler Hatching Egg Marketing Agency (CBHEMA) established in 1986	2002	2001	2000	1999	1998
Number of Producers	299	300	300	299	299
Farm Cash Receipts ($000 000)	206.5	205.2	195.4	183.5	163.6
Production (000 000 eggs)	686.4	678.4	651.1	619.6	564.5
Imports - Hatching Eggs ($000 000)	27.4	28.3	23.4	26.2	41.7
Imports - Broiler Chicks ($000 000)	7.8	8.0	5.5	6.9	10.3

Broiler Hatching Egg Production

1992 - 2002



Source : CBHEMA

Broiler Hatching Egg Production - 2002

	Production (000 eggs)	Market Share %
B.C.	113,764	16.6
Alta.	74,104	10.8
Sask.	15,999	2.3
Man.	30,649	4.5
Ont.	213,826	31.2
Que.	184,874	26.9
N.B. and N.S.*	53,136	7.7
Canada	686,352	100.0

West	234,516	34.2
Central	398,700	58.1
East	53,136	7.7

Source : CBHEMA

*combined due to confidentiality

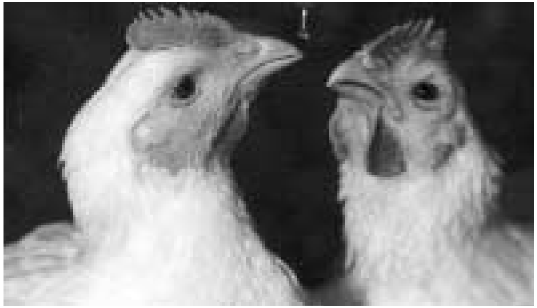
Hatching Egg Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Broiler Hatching Egg Market %	Broiler Hatching Egg FCR vs Total FCR %
B.C.	33,509	16.2	1.5
Alta.	22,460	10.9	0.3
Sask.	4,849	2.3	0.1
Man.	9,376	4.5	0.2
Ont.	65,099	31.5	0.8
Que.	55,035	26.7	1.0
N.B. and N.S.*	16,177	7.8	1.3
Canada	206,505	100.0	0.6
West	70,194	34.0	0.3
Central	120,134	58.2	0.9
Atlantic	16,177	7.8	1.3

Source : Estimated by CBHEMA

* combined due to confidentiality

CHICKEN

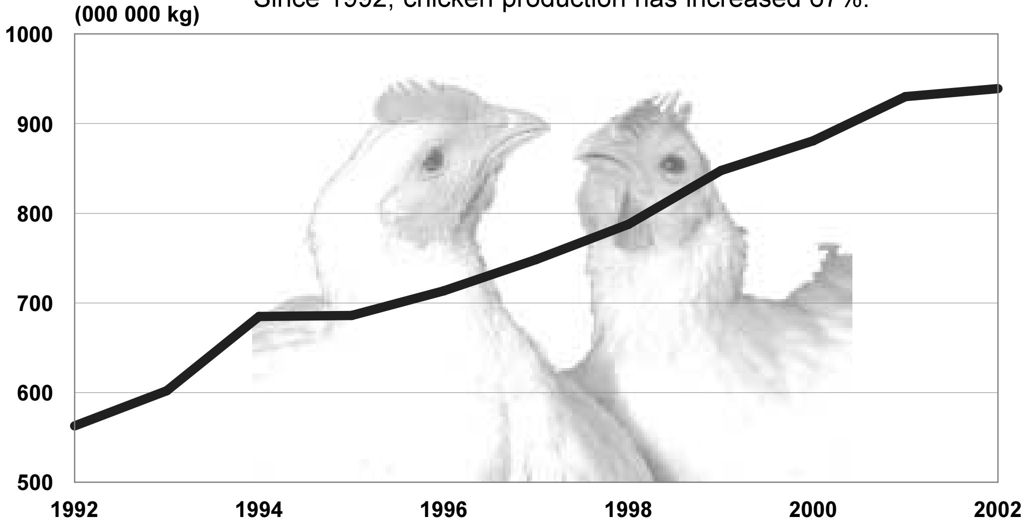


Chicken Highlights Chicken Farmers of Canada (CFC) established in 1978	2002	2001	2000	1999	1998
Number of Producers	2,851	2,815	2,817	2,859	2,797
Farm Cash Receipts ($000 000)	1,451.7	1,508.1	1,361.7	1,320.3	1,352.5
Production (000 000 kg)	938.9	930.1	880.7	847.6	787.8
Per Capita Consumption (kg)	30.6	30.4	29.0	27.7	26.1
Consumer Price Index (1992=100)	116.7	116.2	110.6	110.4	108.2
Share of Meat Consumption (%)	31.6	31.0	29.7	28.1	27.5
Exports ($000 000)	151.6	131.7	87.6	68.9	81.2
Imports ($000 000)	353.4	341.4	294.3	272.0	300.1

Chicken Production

1992 - 2002

Since 1992, chicken production has increased 67%.



Source : 1992-1997 Agriculture and Agri-Food Canada
1998-2002 CFC

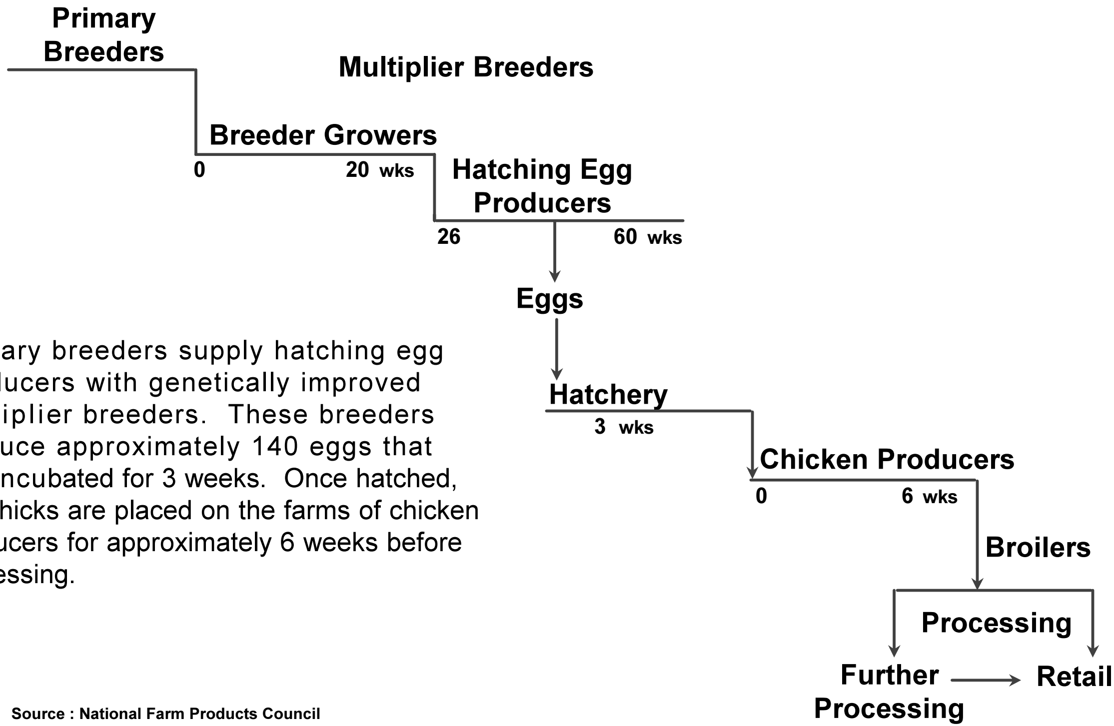
Chicken Production - 2002

	Production (000 kg)	Market Share %
B.C.	147,266	15.7
Alta.	83,970	8.9
Sask.	30,022	3.2
Man.	38,860	4.1
Ont.	303,548	32.3
Que.	262,147	27.9
N.B.	25,827	2.8
N.S.	31,939	3.4
P.E.I.	3,343	0.4
Nfld.	12,014	1.3
Canada	938,936	100.0

West	300,118	32.0
Central	565,695	60.2
East	73,123	7.8

Source : CFC

Chicken Production Timeline



Primary breeders supply hatching egg producers with genetically improved multiplier breeders. These breeders produce approximately 140 eggs that are incubated for 3 weeks. Once hatched, the chicks are placed on the farms of chicken producers for approximately 6 weeks before processing.

Source : National Farm Products Council

Chicken Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Chicken Market %	Chicken FCR vs Total FCR %
B.C.	231,141	15.9	10.5
Alta.	122,799	8.5	1.5
Sask.	46,852	3.2	0.7
Man.	61,189	4.2	1.6
Ont.	471,795	32.5	5.6
Que.	404,422	27.9	7.4
N.B.	37,094	2.6	8.7
N.S.	50,932	3.5	12.5
P.E.I.	x	x	x
Nfld.	x	x	x
Canada	1,451,691	100.0	4.1
West	461,981	31.8	2.3
Central	876,217	60.4	6.3
East	113,493	7.8	8.8

Source : Statistics Canada

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Chicken Exports

	2002 ($000 000)	2002 (000 000 kg)	1998 ($000 000)	1998 (000 000 kg)
United States	92.7	20.8	19.3	5.3
China	12.0	14.0	12.6	11.6
Russia	9.0	12.0	1.9	1.6
South Africa	7.5	9.0	1.9	1.6
Cuba	7.2	7.3	29.5	26.4
Hong Kong	2.8	3.5	10.4	9.3
Others	20.4	25.4	5.6	6.4
Total	151.6	92.0	81.2	62.2

Source : Statistics Canada

Over the last five years, the U.S. has become Canada's dominant market for chicken exports, accounting for over 60% of exports by value in 2002. In contrast, the U.S. accounts for only 23% of the total volume. This is because most exports (58%) to the U.S. are prepared foods such as cooked, seasoned chicken wings, breast filets and dinners.

Exports to China have remained constant over the period, in both value and quantity. Russia has become our third-largest market, replacing Cuba. Our largest market five years ago, Cuba's purchases of chicken have fallen by 75%. Meat imported for re-export is included in the above figures.

Volume of Chicken Imports

	2002 (000 000 kg)	%	1998 (000 000 kg)	%
Live	-	-	1.1	2.1
Whole Bird	0.5	0.6	0.4	0.8
Breasts	33.2	41.4	21.8	41.9
Legs	6.5	8.1	4.4	8.5
Wings	17.9	22.3	16.8	32.3
Others	22.1	27.6	7.5	14.4
Total	80.2	100.0	52.0	100.0

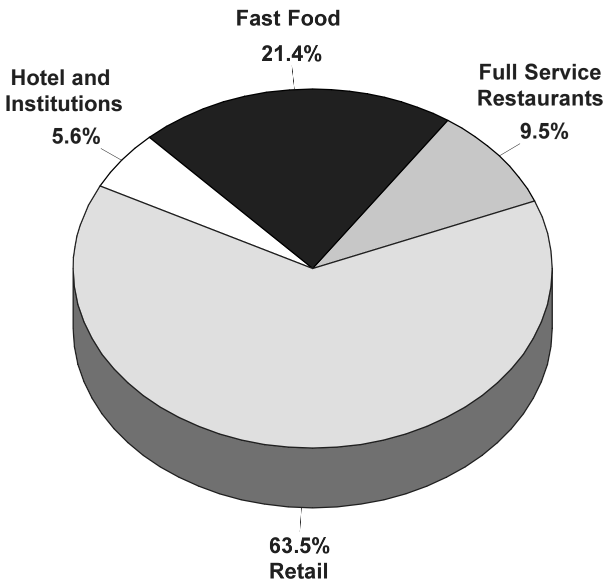
Source : Agriculture and Agri-Food Canada, actual weight.

The importation of chicken is based on a Tariff Rate Quota (TRQ) system with a NAFTA access level of 7.5% of the previous year's production. Supplementary permits may be issued over and above the TRQ access level. Virtually all of this additional product is for re-export.

Meat imported for re-export made up almost 30% of total imports in 2002. Prior to 2002, virtually all chicken meat imports originated in the U.S.. In 2002, for the first time, a small quantity was imported from Thailand. Total imports were valued at $353 million in 2002.

Chicken Consumption by Market Sector

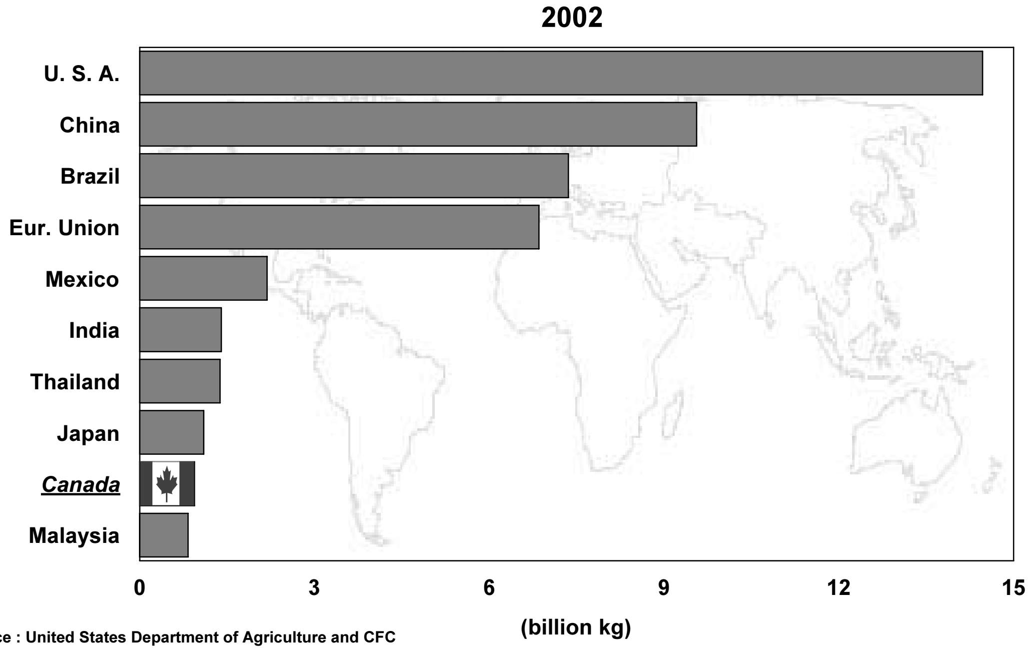
2002



	2002	2001	2000	1999	1998
			(000 000 kg)		
Retail	615	597	550	524	498
Fast Food	207	203	197	191	178
Full Service Restaurants	92	92	92	85	71
Hotel and Instutions	54	51	52	50	46
Total	968	943	891	850	793

Source : Further Poultry Processors Association of Canada

Largest Chicken Meat Producing Countries



Source : United States Department of Agriculture and CFC

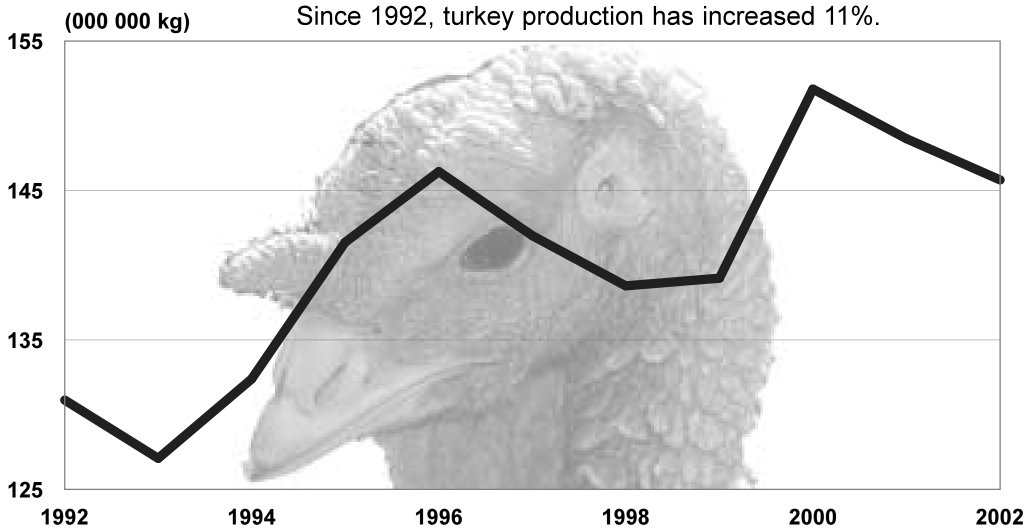
Notes

TURKEY

Turkey Highlights Canadian Turkey Marketing Agency (CTMA) established in 1974	2002	2001	2000	1999	1998
Number of Producers	556	542	545	551	558
Farm Cash Receipts ($000 000)	257.0	261.8	263.3	240.3	248.5
Production (000 000 kg)	145.7	148.5	151.8	139.1	138.6
Per Capita Consumption (kg)	4.3	4.2	4.2	4.2	4.3
Consumer Price Index (1992=100)	131.4	128.4	123.9	118.5	111.1
Share of Meat Consumption (%)	4.4	4.3	4.3	4.3	4.5
Exports ($000 000)	17.1	18.2	13.2	10.1	10.4
Imports ($000 000)	26.5	23.8	18.7	21.1	14.9

Turkey Production

1992 - 2002



Source :Agriculture and Agri-Food Canada

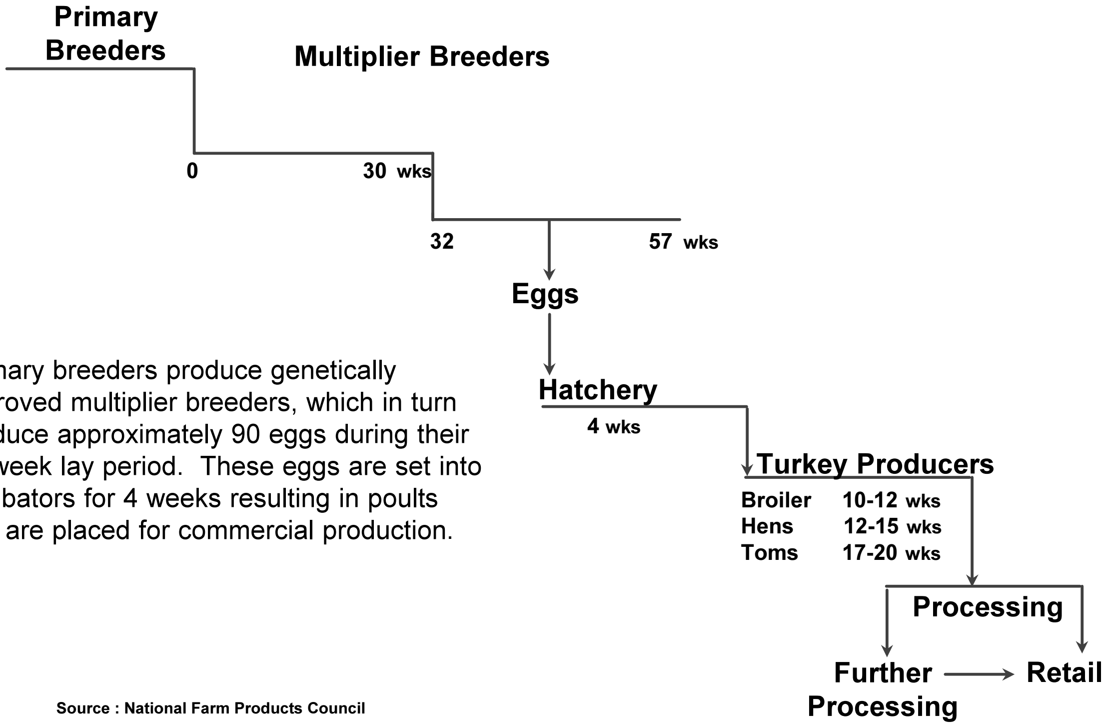
Turkey Production - 2002

	Production (000 kg)	Market Share %
B.C.	15,403	10.6
Alta.	11,509	7.9
Sask.	4,664	3.2
Man.	9,714	6.7
Ont.	67,005	46.0
Que.	31,155	21.4
N.B.	2,544	1.7
N.S.	3,695	2.5
P.E.I.	-	-
Nfld.	-	-
Canada	145,689	100.0

West	41,290	28.3
Central	98,160	67.4
East	6,239	4.3

Source : Agriculture and Agri-Food Canada

Turkey Production Timeline



Primary breeders produce genetically improved multiplier breeders, which in turn produce approximately 90 eggs during their 25 week lay period. These eggs are set into incubators for 4 weeks resulting in poults that are placed for commercial production.

Source : National Farm Products Council

Turkey Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Turkey Market %	Turkey FCR vs Total FCR %
B.C.	26,529	10.3	1.2
Alta.	21,069	8.2	0.3
Sask.	8,901	3.5	0.1
Man.	17,042	6.6	0.5
Ont.	116,634	45.4	1.4
Que.	56,126	21.8	1.0
N.B.	4,398	1.7	1.0
N.S.	6,204	2.4	1.5
P.E.I.	x	x	x
Nfld.	x	x	x
Canada	256,972	100.0	0.7
West	73,541	28.6	0.4
Central	172,760	67.2	1.2
East	10,671	4.2	0.8

Source : Statistics Canada

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Turkey Exports

	2002		1998	
	($000 000)	(000 000 kg)	($000 000)	(000 000 kg)
Russia	6.4	7.1	1.1	1.0
United States	4.4	0.9	1.6	0.6
South Africa	0.9	1.4	1.2	0.9
Philippines	0.5	0.8	0.7	1.1
Cuba	0.5	0.4	1.0	0.8
China	0.1	0.2	0.9	1.1
Others	4.3	5.0	3.9	4.4
Total	17.1	15.8	10.4	9.9

Source : Statistics Canada

The value and volume of turkey exports have increased by roughly 60% since 1998. Both Russia and the U.S. have shown substantial increases. In 2002, Russia became the leading destination, accounting for 37% of our exports by value, and 45% by volume.

Russia purchases almost entirely frozen cuts (97%). After ranking first in 2001, exports to the U.S. fell by 25% in 2002. The U.S. continues to be our best market for high value prepared foods such as dinners and deli meats, which made up 60% of their total purchases.

Volume of Turkey Imports

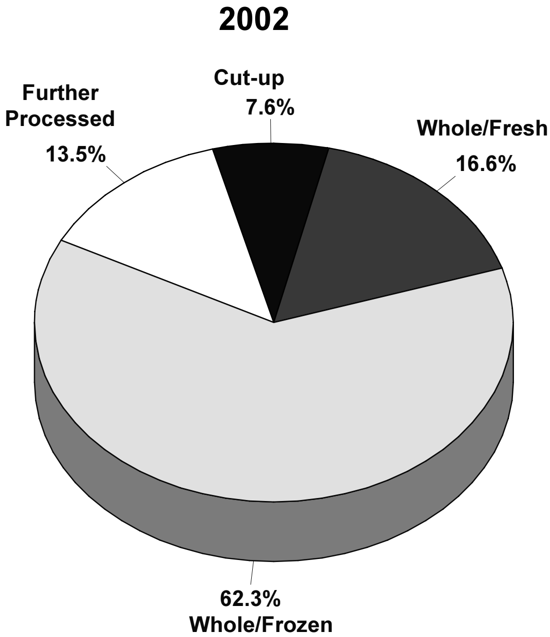
	2002 (000 000 kg)	%	1998 (000 000 kg)	%
Live	-	-	0.3	7.0
Boneless- Breasts	1.9	51.4	1.5	34.9
Boneless - Other	1.2	32.4	0.8	18.6
Boneless - Cooked	0.3	8.1	0.2	4.7
Bone-In Parts	0.2	5.4	0.8	18.6
Others	0.1	2.7	0.7	16.3
Total	3.7	100.0	4.3	100.0

Source : Agriculture and Agri-Food Canada, actual weight.

The importation of turkey is based on a Tariff Rate Quota (TRQ) system with a WTO access level of 5.6 million kg eviscerated weight basis. Supplementary permits may be issued over and above the TRQ access level.

Virtually all of this additional product is for re-export. Meat imported for re-export made up almost one quarter of total imports in 2002. To date, all turkey meat imports have originated in the U.S. These imports were valued at $26 million in 2002.

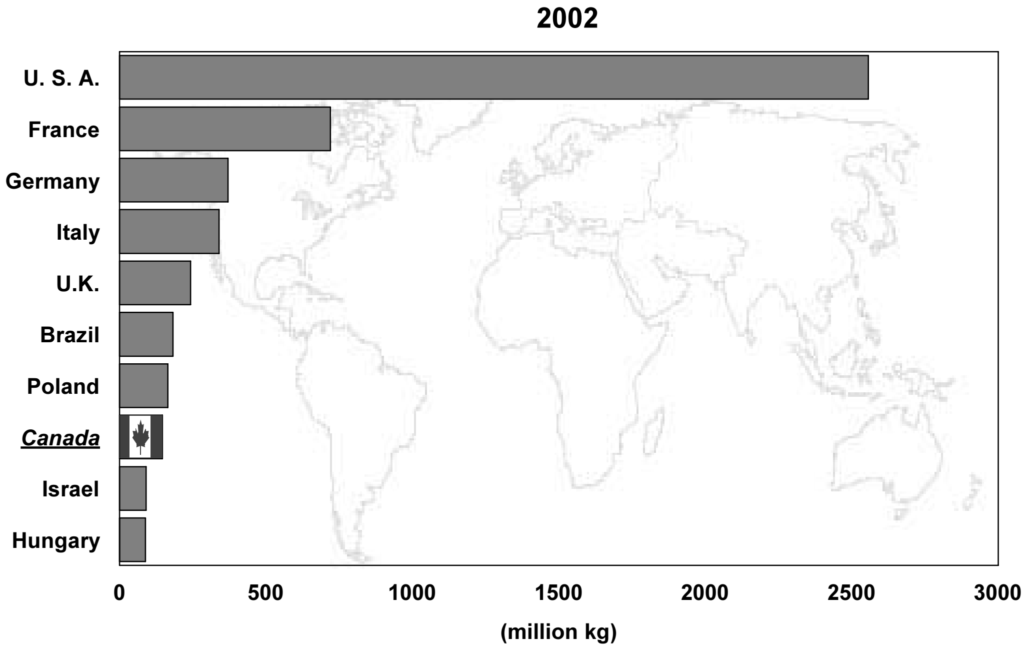
Retail Purchases of Turkey



	2002	2001	2000	1999	1998
			(000 000 kg)		
Whole/Frozen	49	49	41	39	43
Whole/Fresh	13	13	14	12	11
Cut-up	6	8	7	6	6
Further Processed	11	11	10	9	9
Total	79	80	71	67	69

Source : CTMA

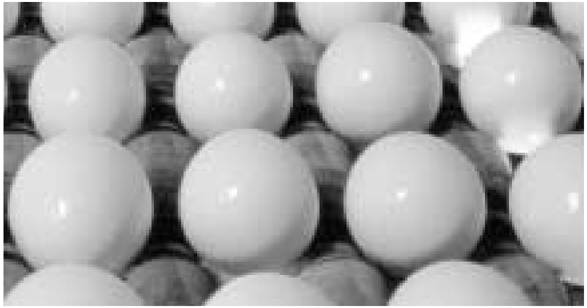
Largest Turkey Meat Producing Countries



Source : United States Department of Agriculture, Food and Agriculture Organization and Agriculture and Agri-Food Canada

Notes

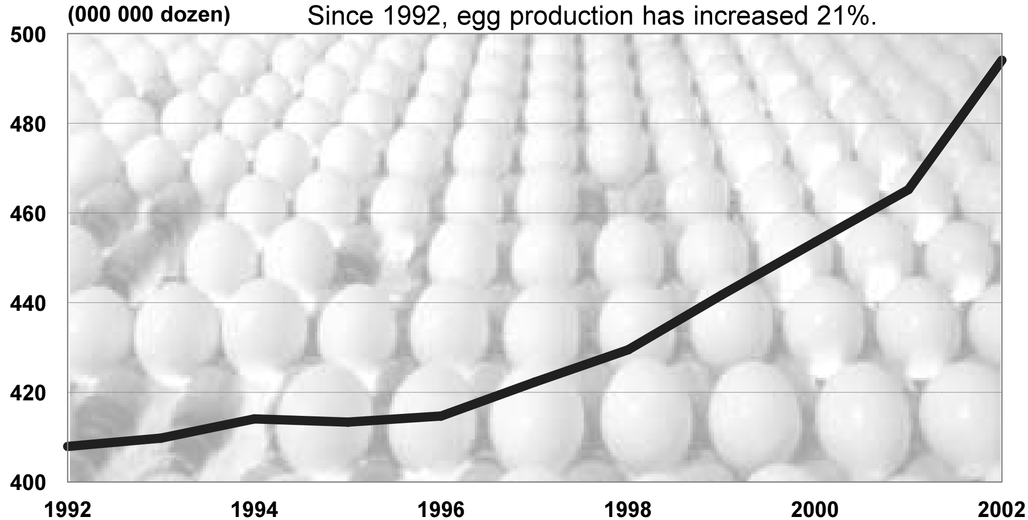
EGGS



Egg Highlights Canadian Egg Marketing Agency (CEMA) established in 1972	2002	2001	2000	1999	1998
Number of Producers	1,128	1,146	1,147	1,177	1,216
Farm Cash Receipts ($000 000)	584.1	565.4	513.6	484.1	473.2
Production (000 000 dozen)	494.2	467.7	454.9	441.7	429.5
Per Capita Consumption (dozen)	15.4	15.8	15.7	15.2	15.1
Consumer Price Index (1992=100)	133.9	129.3	124.0	122.3	123.2
Exports ($000 000)	41.7	30.7	26.1	25.3	21.4
Imports ($000 000)	31.5	30.7	29.9	34.2	36.6

Egg Production

1992 - 2002



Source : 1992-1993 : Agriculture and Agri-Food Canada
1994-2002 : CEMA

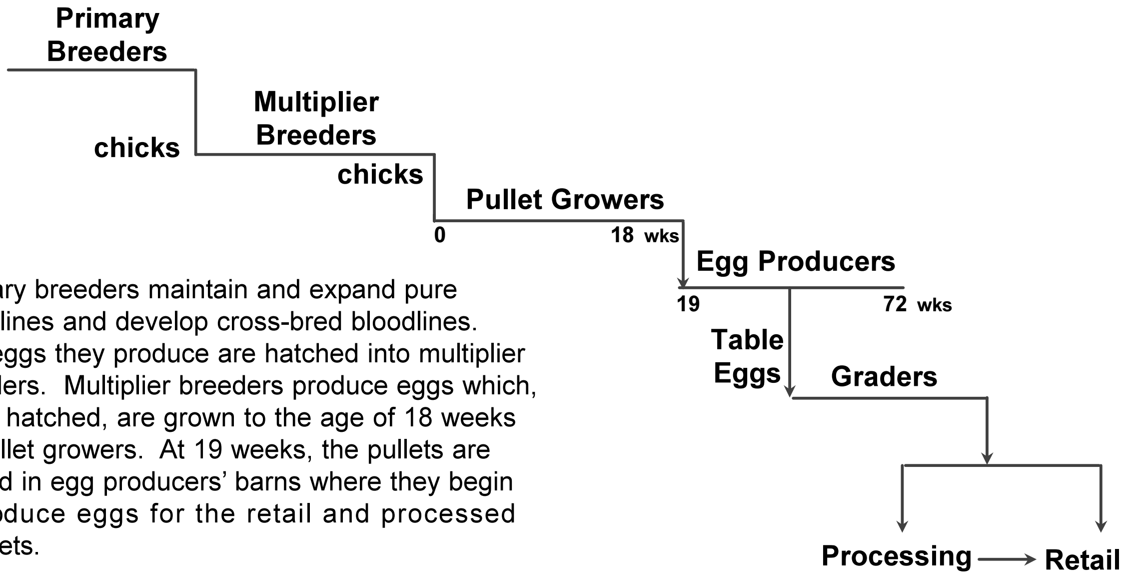
Egg Production - 2002

	Production (000 dozen)	Market Share %
B.C.	59,421	12.0
Alta.	39,413	8.0
N.W.T.	2,447	0.5
Sask.	19,873	4.0
Man.	54,777	11.1
Ont.	185,624	37.6
Que.	93,562	18.9
N.B.	10,501	2.1
N.S.	17,924	3.6
P.E.I.	3,031	0.6
Nfld.	7,580	1.5
Canada	494,153	100.0

West	175,931	35.6
Central	279,186	56.5
East	39,036	7.9

Source : CEMA

Egg Production Timeline



Primary breeders maintain and expand pure bloodlines and develop cross-bred bloodlines. The eggs they produce are hatched into multiplier breeders. Multiplier breeders produce eggs which, when hatched, are grown to the age of 18 weeks by pullet growers. At 19 weeks, the pullets are placed in egg producers' barns where they begin to produce eggs for the retail and processed markets.

Source : National Farm Products Council

Egg Farm Cash Receipts (FCR) - 2002

	FCR ($000)	Share of Egg Market %	Egg FCR vs Total FCR %
B.C.	75,153	12.9	3.4
Alta.	42,376	7.3	0.5
Sask.	23,241	4.0	0.4
Man.	64,855	11.1	1.7
Ont.	223,198	38.2	2.6
Que.	102,756	17.6	1.9
N.B.	14,511	2.5	3.4
N.S.	23,432	4.0	5.7
P.E.I.	3,509	0.6	0.9
Nfld.	11,058	1.9	13.4
Canada	584,089	100.0	1.6
West	205,625	35.2	1.0
Central	325,954	55.8	2.3
East	52,510	9.0	4.1

Source : Statistics Canada

Note : Statistics Canada does not publish FCR for N.W.T.

Value of Egg Product Exports

	2002 ($000 000)	%	1998 ($000 000)	%
United States	19.7	47.2	4.8	22.4
Japan	16.2	38.8	13.5	63.1
Venezuela	1.3	3.1	0.2	0.9
Others	4.5	10.8	2.9	13.6
Total	41.7	100.0	21.4	100.0

Source : Statistics Canada

The U.S. is now Canada's major market for egg product exports, accounting for almost half by value. Traditionally, Japan has been the leading importer of Canadian processed egg products. In 2001 the value of exports into Japan equalled 52% of the total value of Canada's egg product exports while the value of exports into the United States was 25%.

The export data in the above table includes eggs and egg products imported for re-export. Canada exports virtually no shell eggs.

Value of Egg Product Exports - by Category

	2002 ($000 000)	%	1998 ($000 000)	%
Whole Egg - Liquid/Frozen	1.5	3.7	1.5	7.0
Whole Egg - Dried	9.3	22.3	1.6	7.7
Egg Albumen - Liquid/Frozen	2.1	5.0	0.8	3.8
Egg Albumen - Dried	12.4	29.7	10.8	50.7
Egg Yolks - Liquid/Frozen	6.6	15.8	1.4	6.8
Egg Yolks - Dried	8.5	20.4	4.7	22.2
Other	1.3	3.1	0.4	1.9
Total	41.7	100.0	21.4	100.0

Note : Exports of shell eggs are minimal

Source : Statistics Canada

The value of egg exports has increased by 95% since 1998. Dried egg albumen represents the largest share of export value.

However, the increase in dried egg albumen over the last five years was outpaced by the growth in dried whole eggs and liquid/frozen egg yolks.

Value of Egg Imports

	2002 ($000 000)	%	1998 ($000 000)	%
Whole Egg - Liquid/Frozen	4.2	13.3	2.5	6.8
Whole Egg - Dried	1.6	5.1	3.0	8.2
Egg Albumen - Liquid/Frozen	2.2	7.0	3.7	10.1
Egg Albumen - Dried	1.2	3.8	1.6	4.4
Egg Yolks - Liquid/Frozen	2.3	7.3	4.4	12.0
Egg Yolks - Dried	1.2	3.8	0.5	1.4
Egg Preparation	3.4	10.8	1.6	4.4
Shell Eggs	15.4	48.9	19.4	52.9
Total	31.5	100.0	36.7	100.0

Source : Statistics Canada

The import access level under Canada's WTO commitment is 21,370,000 dozen (egg equivalent).

In 2002, 19.6 million dozen shell eggs and 9.4 million kg of egg products were imported. With respect to egg product imports, 52% were imported for re-export.

CEMA's Industrial Product Volumes

(000 dozen)

	2002	1998
B.C.	13,250	7,949
Alta.	5,791	4,114
N.W.T.	2,239	- *
Sask.	3,381	3,120
Man.	26,028	24,163
Ont.	33,679	32,064
Que.	14,825	4,478
N.B.	2,867	1,607
N.S.	6,328	4,720
P.E.I.	1,354	787
Nfld.	2,859	1,946
Canada	112,601	84,948

Source : CEMA

* N.W.T. was not part of the national system in 1998.

Industrial product refers to eggs that are in excess of local or provincial requirements for the table market. These eggs are sold by CEMA to egg processors for the production of dried, liquid and cooked eggs. Since 1998, the quantity of eggs declared as industrial product has increased 33%, mainly due to increased demand for processed egg products.

Processed Egg Production

(000 kg liquid equivalent)

	2002	1998	% Change
Whole Egg	38,072	29,484	29.1
Yolk	15,637	8,022	94.9
Albumen	29,271	14,766	98.2
Total	82,980	52,272	58.7

Source : Agriculture and Agri-Food Canada

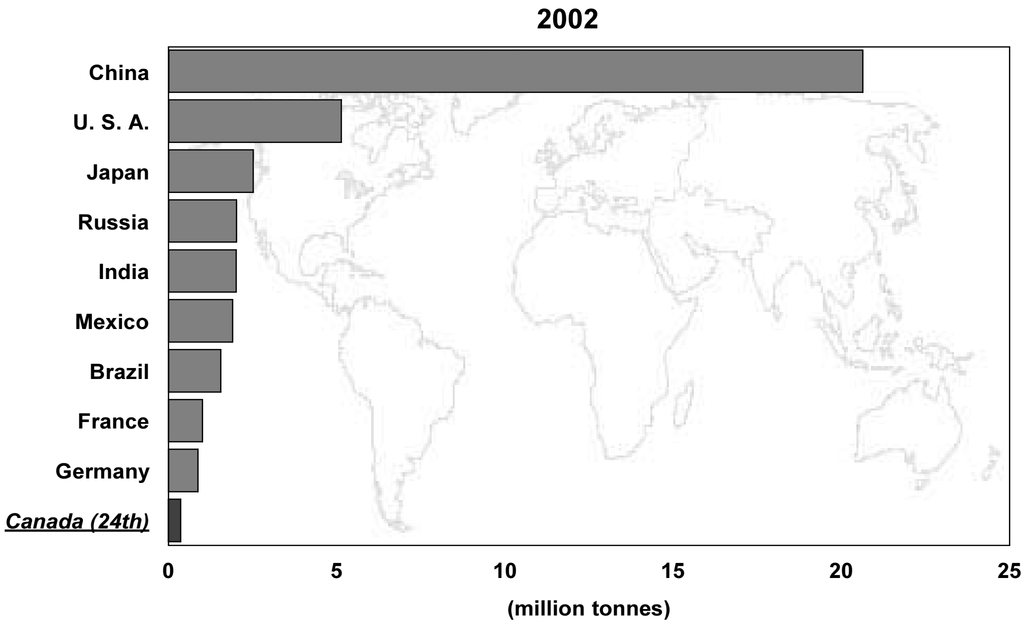
Eggs Broken for Processing

(000 Dozen)

	2002	1998	% Change
Eggs Broken	160,150	95,798	67.2

Source : Agriculture and Agri-Food Canada

Largest Egg Producing Countries



Source : Food and Agriculture Organization of the United Nations

Industry Contacts

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Fax: (905) 812-9326
Website: www.canadianturkey.ca
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Fax: (613) 238-1967
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Canadian Poultry and Egg Processors Council
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Fax: (613) 724-4577
Website: www.cpepc.ca
Contact: Mr. Robin Horel, President and CEO

Canadian Broiler Hatching Egg Marketing Agency
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Fax: (613) 232-5241
Website: www.cbhema.com
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Website: www.sympatico.ca/fppac
Contact: Mr. Robert DeValk, General Manager

Notes

NFPC CNPA