

Poultry and Egg Processing

HD9505

.C3

I5

1990-91

P11 c.2

IC



Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada

I
N
D
U
S
T
R
Y

P
R
O
F
I
L
E

Business Service Centres / International Trade Centres

Industry, Science and Technology Canada (ISTC) and International Trade Canada (ITC) have established information centres in regional offices across the country to provide clients with a gateway into the complete range of ISTC and ITC services, information products, programs and expertise in industry and trade matters. For additional information contact any of the offices listed below.

Newfoundland

Atlantic Place
Suite 504, 215 Water Street
P.O. Box 8950
ST. JOHN'S, Newfoundland
A1B 3R9
Tel.: (709) 772-ISTC
Fax: (709) 772-5093

Prince Edward Island

Confederation Court Mall
National Bank Tower
Suite 400, 134 Kent Street
P.O. Box 1115
CHARLOTTETOWN
Prince Edward Island
C1A 7M8
Tel.: (902) 566-7400
Fax: (902) 566-7450

Nova Scotia

Central Guaranty Trust Tower
5th Floor, 1801 Hollis Street
P.O. Box 940, Station M
HALIFAX, Nova Scotia
B3J 2V9
Tel.: (902) 426-ISTC
Fax: (902) 426-2624

New Brunswick

Assumption Place
12th Floor, 770 Main Street
P.O. Box 1210
MONCTON, New Brunswick
E1C 8P9
Tel.: (506) 857-ISTC
Fax: (506) 851-6429

Quebec

Tour de la Bourse
Suite 3800, 800 Place Victoria
P.O. Box 247
MONTREAL, Quebec
H4Z 1E8
Tel.: (514) 283-8185
1-800-361-5367
Fax: (514) 283-3302

Ontario

Dominion Public Building
4th Floor, 1 Front Street West
TORONTO, Ontario
M5J 1A4
Tel.: (416) 973-ISTC
Fax: (416) 973-8714

Manitoba

8th Floor, 330 Portage Avenue
P.O. Box 981
WINNIPEG, Manitoba
R3C 2V2
Tel.: (204) 983-ISTC
Fax: (204) 983-2187

Saskatchewan

S.J. Cohen Building
Suite 401, 119 - 4th Avenue South
SASKATOON, Saskatchewan
S7K 5X2
Tel.: (306) 975-4400
Fax: (306) 975-5334

Alberta

Canada Place
Suite 540, 9700 Jasper Avenue
EDMONTON, Alberta
T5J 4C3
Tel.: (403) 495-ISTC
Fax: (403) 495-4507

Suite 1100, 510 - 5th Street S.W.
CALGARY, Alberta
T2P 3S2
Tel.: (403) 292-4575
Fax: (403) 292-4578

British Columbia

Scotia Tower
Suite 900, 650 West Georgia Street
P.O. Box 11610
VANCOUVER, British Columbia
V6B 5H8
Tel.: (604) 666-0266
Fax: (604) 666-0277

Yukon

Suite 301, 108 Lambert Street
WHITEHORSE, Yukon
Y1A 1Z2
Tel.: (403) 668-4655
Fax: (403) 668-5003

Northwest Territories

Precambrian Building
10th Floor
P.O. Bag 6100
YELLOWKNIFE
Northwest Territories
X1A 2R3
Tel.: (403) 920-8568
Fax: (403) 873-6228

ISTC Headquarters

C.D. Howe Building
1st Floor East, 235 Queen Street
OTTAWA, Ontario
K1A 0H5
Tel.: (613) 952-ISTC
Fax: (613) 957-7942

ITC Headquarters

InfoExport
Lester B. Pearson Building
125 Sussex Drive
OTTAWA, Ontario
K1A 0G2
Tel.: (613) 993-6435
1-800-267-8376
Fax: (613) 996-9709

Publication Inquiries

For individual copies of ISTC or ITC publications, contact your nearest Business Service Centre or International Trade Centre. For more than one copy, please contact

For Industry Profiles:

Communications Branch
Industry, Science and Technology
Canada
Room 704D, 235 Queen Street
OTTAWA, Ontario
K1A 0H5
Tel.: (613) 954-4500
Fax: (613) 954-4499

For other ISTC publications:

Communications Branch
Industry, Science and Technology
Canada
Room 208D, 235 Queen Street
OTTAWA, Ontario
K1A 0H5
Tel.: (613) 954-5716
Fax: (613) 954-6436

For ITC publications:

InfoExport
Lester B. Pearson Building
125 Sussex Drive
OTTAWA, Ontario
K1A 0G2
Tel.: (613) 993-6435
1-800-267-8376
Fax: (613) 996-9709

Canada

1990-1991

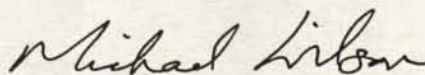
POULTRY AND EGG PROCESSINGINDUSTRY, SCIENCE AND
TECHNOLOGY CANADA
LIBRARY

APR - 1992

FOREWORDBIBLIOTHÈQUE
INDUSTRIE, SCIENCES ET
TECHNOLOGIE CANADA

In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.

Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990-1991 series represents an updating and revision of the series published in 1988-1989. The Government will continue to update the series on a regular basis.



Michael H. Wilson
Minister of Industry, Science and Technology
and Minister for International Trade

Structure and Performance**Structure**

The poultry processing industry consists of firms that eviscerate and process chickens and turkeys into whole or cut-up products. Some firms further process these products into a broad range of formed poultry meat products such as nuggets, fingers and patties. Firms involved in the further processing of poultry into high-value-added products such as frozen TV dinners and chicken Kiev, for example, represent an increasingly important manufacturing activity in the industry. Egg processing involves the conversion of shell eggs into albumen, egg yolk, and frozen, dried and liquid eggs. These two industries link poultry and egg production at the farm level with the wholesale and retail levels of the food sector.

In 1990, there were an estimated 105 federally inspected establishments in the poultry processing industry in Canada, employing approximately 12 300 people. In the same year, domestic shipments for the poultry industry were estimated at just over \$2 billion. Statistics for the egg processing industry are not published separately, but ISTC estimates that there are 13 egg processing establishments in Canada, employing approximately 1 300 people.

The eight largest poultry processing companies, two of which are foreign-controlled, account for about 54 percent of domestic shipments, while the eight largest egg processing firms account for more than 65 percent of domestic requirements. In the United States, the comparable distribution is approximately 57 percent and 47 percent, respectively. These figures suggest that the Canadian sector has a higher ownership concentration ratio, relative to the U.S. level, in egg processing but not in poultry processing.

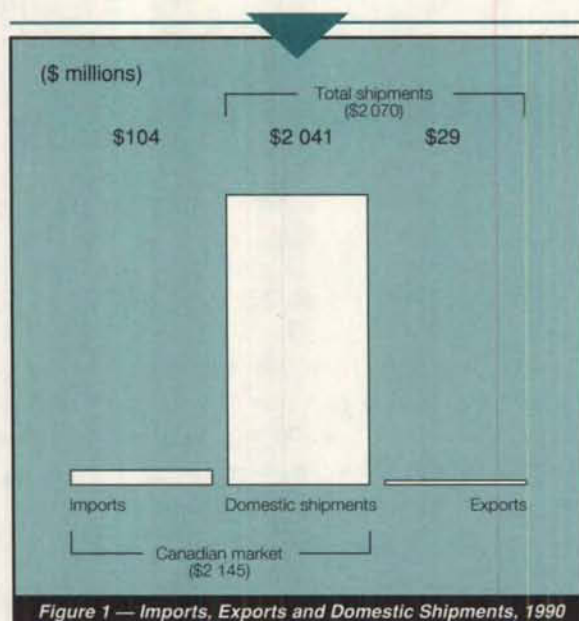


Figure 1 — Imports, Exports and Domestic Shipments, 1990

Canadian firms operate within the parameters imposed by a national poultry and egg supply management structure. Supply management boards were introduced in the provinces during the 1960s, and marketing agencies were established nationally under the 1972 *Farm Products Marketing Agencies Act*. These institutions influence the poultry and egg processing industries to a great extent. Each provincial producer board is authorized to regulate the price, quantity and any interprovincial movement of production quota and live birds.

National supply management advisory committees representing producers, processors, retailers, consumers and federal/provincial interests make recommendations on periodic and yearly production quotas to producer-operated national supply management agencies. The national marketing agencies in turn set and allocate the national quota among the provinces using a formula based largely on provincial historical shares. The provincial boards then allocate the provincial quota to individual producers who are required to produce the quantities of chicken, turkey and eggs demanded at administered prices. Each week or month, depending on the commodity in question or on the provincial board, prices for these commodities are revised using a cost-of-production formula that takes into account, among other things, the cost of chicks, feed and labour as well as overhead and marketing costs, depreciation and a fixed producer return. Feed and chick expenses represent by far the largest input costs, accounting for approximately 58 to 72 percent of total production costs.

The provincial marketing boards control poultry and egg production units by establishing the maximum size of units

any one producer may operate, by setting the rules governing the allocation, retention and transfer of production quotas, and also by setting minimum prices to be paid to producers. The system ensures that each province maintains a portion of the Canadian poultry and egg production industries and attempts to control the concentration of ownership. However, provincial market shares no longer reflect an exact balance between production allocations, provincial consumer demand or provincial processing capacity. Shifts in the population since national market sharing was established and the corresponding concentration of processing capacity in more populated provinces are the principal reasons for this imbalance, which is an ongoing issue with the national agencies. Formulas have been developed to address changes in markets and the comparative advantages of production. However, agencies have seldom achieved mutually satisfactory shares.

Generally speaking, the poultry and egg processing industries are not involved in international trade (Figure 1), although some exceptions do exist. Exports are not significant, with the exception of further processed egg products, for which international demand has been steadily increasing. Under a supply management system, import quotas are established for each regulated product (chicken, turkey, eggs). Additional imports may be permitted from time to time under supplemental permits to meet temporary market shortages. The supplemental permit system was put into place as a safety valve to deal with a period of general shortages and not with a shortage of a particular product.

Performance

The poultry and egg processing industries have benefited from growing consumer demand in recent years relative to firms in the red meat sector. Increased throughput, maintaining domestic market share, efficient processing equipment, good management and labour practices, and a reliable inspection system have kept most plants profitable.

Employment in the poultry processing industry increased by approximately 29 percent between 1983 and 1990 (Figure 2). The number of establishments increased by approximately 13 percent, from 93 in 1983 to 105 in 1990. During that period, shipments increased by approximately 65 percent, while gross domestic product (in constant 1981 dollars) increased steadily by a total of 58 percent from 1983 to 1990. Export and import volumes are small relative to total domestic production. Imports of chicken and turkey in total averaged 4.8 percent (or 7 percent if live bird imports are included) of the Canadian market from 1983 to 1990. Exports represented 1.8 percent of shipments for the same period.

While the number of establishments in the poultry and egg processing industries has slowly increased, the mix or

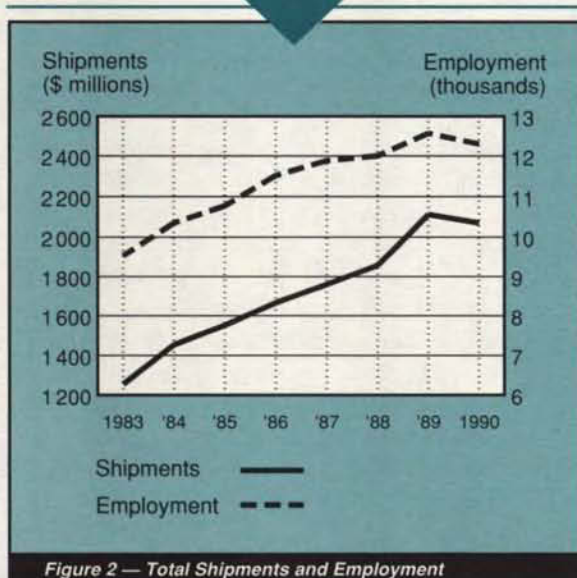


Figure 2 — Total Shipments and Employment

distribution of the components within the sector has changed. For example, there has been a shift from evisceration and primary processing towards further processing. Consequently, the number of primary processing plants has actually decreased while the number engaged in further processing has increased.

There has also been a steady increase in processing capacity as a result of plant expansions, modernization, consolidation and buy-outs. Plant expansions and modernization have been undertaken to meet the growing demand, chiefly from the food service industry, for value-added products such as nuggets, chicken Kiev, chicken fingers and other similar items. The plant consolidations and company buy-outs are the result of competition among firms for domestic market share, assured supply of raw material and improved profitability.

The poultry processing industry competes with the beef, pork and fish products industries for the consumer food dollar. Strong consumer demand for poultry — arising from perceived health concerns (such as cholesterol levels in other meats), demographics, greater disposable income, changing lifestyles favouring more convenience food products and competitive pricing vis-à-vis red meats — has resulted in an increase in annual Canadian per capita consumption of chicken from 12.31 to 23.90 kilograms between 1960 and 1989. This trend is expected to continue; indeed, poultry is soon expected to compete with pork as the second most popular meat consumed in Canada after beef. Per capita consumption projections show poultry (chicken and turkey combined) increasing from 26.53 kilograms in 1990 to 28.61 kilograms in 1995. Pork consumption is projected to decrease from 30.33 kilograms in 1990 to 29.67 kilograms in 1995.

The rapid growth in demand for the higher-value-added chicken products, which are primarily sold through food service companies (hotel, restaurant and trade institutions but not supermarket chains), has resulted in new investment. This market now accounts for approximately 40 percent of the chicken consumed in Canada, compared with 55 percent in the United States. While profitability data on the industry are not publicly available (fragmentary data show return on sales ranging from 1 percent to 15 percent, depending on the commercial activity performed), this shift parallels developments in the United States, where companies are placing greater emphasis on value-added products, which offer more stable and profitable returns.

Economic factors that have had to be considered by the poultry and egg processing industries include the repeal of the federal manufacturers sales tax (MST) and the introduction of the 7 percent goods and services tax (GST) which was implemented on 1 January 1991, as well as the actual and expected changes in agricultural trade policy as a result of bilateral and multilateral trade negotiations (BTNs and MTNs). Examples are the gradual phasing out of tariffs under the Canada-U.S. Free Trade Agreement (FTA) and current negotiations of the Uruguay Round of MTNs concerning Article XI of the General Agreement on Tariffs and Trade (GATT).

Strengths and Weaknesses

Structural Factors

Within the context of a managed domestic market, the sector enjoys certain strengths. The number of primary chicken processing plants increased until the late 1980s largely because of strong consumer demand. However, as consumer demand began to shift towards further-processed products and after two foreign-owned firms began operations in Canada, some consolidation of the primary chicken processing subsector began to occur, while some firms added further processing operations. This situation has resulted in higher capacity utilization rates and new investment in state-of-the-art technology and processing equipment. Poultry slaughtered per plant in 1983 was 5 566 tonnes on average, rising in 1989 to 6 655 tonnes, an increase of nearly 20 percent. In contrast, the number of plants in the United States has also been increasing, but total throughput has increased even faster at 49 percent over the same period.

Import quotas affect a variety of processed poultry products such as whole and cut-up birds, chicken nuggets, processed eggs and others. However, products containing poultry and eggs among their ingredients, such as TV dinners, pot pies and canned turkey meat, are not subject to import quotas.



Regulation of the Canadian poultry industry has resulted to some extent in the balkanization of the national market, with regional markets served by smaller primary processing firms rather than larger vertically integrated firms whose economies of scale are geared for a national market. These Canadian firms generally operate facilities that cannot achieve the economies of scale available to the larger U.S. operators who serve large national markets. The U.S. industry, of course, has had a different historical development whereby consolidation and vertical integration have reflected a more open and competitive national market.

Trade-Related Factors

Under Article XI of the GATT, Canada has authority to impose supply management for certain agricultural products. For chicken, Canada maintains a global import restriction, or quota, equal to 7.50 percent of the previous year's domestic production. For turkey, the quota is 3.50 percent of the current year's domestic production. Shell egg imports are limited to 1.647 percent of the previous year's domestic production. The import limit for egg products, based on the previous year's domestic production of shell eggs, is 1.740 percent for liquid and frozen products combined, and 0.627 percent for egg powder. When global imports are not sufficient for the market's needs (for example, when new products such as chicken nuggets suddenly became popular and imports were required), applications can be made by the industry for supplemental import permits.

Existing Canadian tariffs on processed poultry and eggs from countries having Most Favoured Nation (MFN) status with Canada vary for each product from free to 20 percent. For whole or cut-up chicken and turkey, the rate is 12.50 percent ad valorem but not less than 11.20 cents per kilogram nor greater than 22.05 cents per kilogram in specific customs duties. The rate for dried egg, for example, is 20 percent, while the rate for prepared poultry meals is 17.50 percent.

Under the FTA, duties on poultry products originating in either country are being removed in 10 equal, annual stages, starting 1 January 1989 and ending 1 January 1998. As of 1 January 1991, the Canadian tariffs on imported product are 30 percent less than the MFN rates.

U.S. tariffs range from 11 cents per kilogram on whole and cut-up chicken to 10 percent on prepared poultry meals. As of 1 January 1991, the rates are 30 percent less for Canadian products, as specified by the FTA.

The European Community (EC) restricts imports through its Common Agricultural Policy (CAP), which allows subsidies for domestic production. Furthermore, EC tariffs are high, ranging from 17 to 22 percent, plus a variable levy to compensate for cheaper feed costs of foreign competitors and other financial incentives or subsidies.

Japan's tariffs range from zero to 20 percent. The Japanese Livestock Industry Promotion Corporation (LIPC) is still actively involved in market intervention. It has monopoly powers over imports of some poultry products such as live birds and eviscerated products. Import quotas and minimum-maximum import prices are used to regulate entry of products.

Trade in poultry and egg products is also strongly influenced by non-tariff measures. These include the inspection and certification of processing plants engaged in export trade to ensure that they meet foreign import requirements, which are especially stringent in the case of Japan, as well as labelling requirements.

Growing export markets for poultry products exist in the Middle East and Japan. Canadian products, however, are generally not cost-competitive with those of suppliers in the United States, the EC or Brazil. This cost disadvantage is further compounded by the export subsidy programs used by these countries.

Technological Factors

The Canadian poultry and egg processing sector compares favourably with its international counterparts in the use of state-of-the-art technology. However, because of the smaller and fragmented Canadian market, processing plants do not enjoy the same economies of scale found in larger American and European plants. Lower economies of scale result in a higher price being charged to the next trade level. The sector's smaller size also affects spending on research and development (R&D) for new equipment. Canadian industry R&D expenditures are relatively less than amounts spent in the United States, the EC and Japan.

Several countries are conducting research into waste water treatment, automatic or computerized inspection of birds during slaughter and computerized environmental systems. Once these international advances are developed, they become commercially available worldwide to the poultry and egg industries.

Productivity within the Canadian poultry industry has increased considerably with the use of technology at all levels of production. Genetic engineering has resulted in improved strains of birds with better feed conversion, viability and disease resistance. Growing units are highly automated and, wherever possible, use labour-saving devices such as self-feeding and watering, waste disposal and product harvesting, as well as energy conservation technologies. Processing plants are becoming increasingly automated to permit quicker line speeds. Vertically integrated operations, which account for approximately 25 to 30 percent of production in Canada, compared with 85 to 90 percent in the United States, derive the greatest benefit from these combined productivity gains.



Other Factors

The poultry processing industry is highly regulated. Inspection is carried out by provincial or federal officials, depending on the jurisdiction in which the processing plant is registered. Agriculture Canada administers the *Humane Slaughter of Food Animals Act*, the *Meat Inspection Act* and the *Canada Agricultural Products Standards Act* to ensure that slaughter, inspection, grading and product standards are maintained. Consumer and Corporate Affairs Canada administers the *Food and Drugs Act* and the *Consumer Packaging and Labelling Act* to ensure proper labelling of food ingredients. Health and Welfare Canada administers sections of the *Food and Drugs Act* dealing with product safety, consumer health and freedom from adulteration. External Affairs and International Trade Canada administer the *Export and Import Permits Act* by ensuring that regulated products on the Import Control List come into Canada within specified quotas.

Evolving Environment

The FTA will have an impact on the higher value-added poultry and egg product processors. It is expected that Canadian processors will target some of their production to market niches in the United States to take advantage of the FTA and to increase production runs.

Canadian processors have begun to enhance their quality and cost-competitiveness. These improvements are especially necessary for further processed products, which were protected by relatively high tariffs prior to the FTA. New product development in Canada and the United States is being encouraged by the trend towards further processed products and may well result in new marketing opportunities.

At the time of writing, the Canadian and U.S. economies were showing signs of recovering from a recessionary period. During the recession, companies in the industry generally experienced reduced demand for their outputs, in addition to longer-term underlying pressures to adjust. In some cases, the cyclical pressures may have accelerated adjustments and restructuring. With the signs of recovery, though still uneven, the medium-term outlook will correspondingly improve. The overall impact on the industry will depend on the pace of the recovery.

Competitiveness Assessment

The competitiveness of the poultry and egg processing industries will continue to be largely determined by the structure and performance of producers under supply management. Canada is competitive in the area of raising turkey poults and

chicks. In the past, however, the virtual lack of foreign trade in the Canadian poultry market has not induced industry rationalization and modernization at the processing level. However, under the FTA, increasing competitive pressures will require producers as well as primary and further processors within the Canadian poultry industry to readjust their industry linkages if the latter are to maintain and enhance their North American market share.

The government is working to help the industry adjust to the changing environment. Under the Agriculture Policy Review sponsored by Agriculture Canada, the Poultry Task Force made a number of recommendations that were referred in 1991 to a federal/provincial steering committee for review and implementation.

It is still too early to assess the impact of other international developments on the Canadian poultry processing industry. Examples of such developments include the proposed free trade agreement between Canada, the United States and Mexico, the economic integration of Europe after 1992, the economic realignment of the former Soviet Union and Eastern Europe, as well as the emergence of the new "Tigers" of Asia. The ongoing MTNs under the GATT may have an impact on the future competitiveness of the industry. Issues being examined during the current round include the operation of import restrictions (supply management provisions) as defined by Article XI of the GATT as well as production and export subsidies for agricultural products.

For further information concerning the subject matter contained in this profile, contact

Food Products Branch
Industry, Science and Technology Canada
Attention: Poultry and Egg Processing
235 Queen Street
OTTAWA, Ontario
K1A 0H5
Tel.: (613) 954-2941
Fax: (613) 941-3776



PRINCIPAL STATISTICS^a

	1983	1984	1985	1986	1987	1988	1989	1990
Establishments	93	95	96	101	100	104	105	105 ^b
Employment	9 530	10 349	10 771	11 515	11 881	12 000	12 568	12 300 ^b
Shipments (\$ millions)	1 256	1 454	1 551	1 666	1 760	1 858	2 112	2 070 ^b
GDP ^c (constant 1981 \$ millions)	214.6	229.7	291.1	296.2	326.2	330.1	331.0	340.0
Investment ^d (\$ millions)	15.4	27.3	30.4	42.3	49.6	47.1	41.3	37.7

^aFor establishments, employment and shipments, see *Food Industries*, Statistics Canada Catalogue No. 32-250, annual (SIC 1012, poultry products industry).

Data are for poultry only. Eggs and egg products, collected under SIC 1099, other food products industries not elsewhere classified, are not accounted for separately and therefore are not included.

^bISTC estimates.

^cSee *Gross Domestic Product by Industry*, Statistics Canada Catalogue No. 15-001, monthly.

^dSee *Capital and Repair Expenditures, Manufacturing Subindustries, Intentions*, Statistics Canada Catalogue No. 61-214, annual. Data include capital expenditures only.

TRADE STATISTICS^a

	1983	1984	1985	1986	1987	1988 ^b	1989 ^b	1990 ^b
Exports (\$ millions)	24	29	28	26	35	29	35	29
Domestic shipments (\$ millions)	1 232	1 425	1 523	1 640	1 725	1 829	2 077	2 041
Imports (\$ millions)	53	86	80	90	91	75	91	104
Canadian market (\$ millions)	1 285	1 511	1 603	1 730	1 816	1 904	2 168	2 145
Exports (% of shipments)	1.9	2.0	1.8	1.6	2.0	1.6	1.7	1.4
Imports (% of Canadian market)	4.1	5.7	5.0	5.2	5.0	3.9	4.2	4.8

^aSee *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly; and *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly. Data include various egg products reported under SIC 1099. Values are therefore not fully compatible with data shown for shipments.

^bIt is important to note that data for 1988 and after are based on the Harmonized Commodity Description and Coding System (HS). Prior to 1988, the shipments, exports and imports data were classified using the Industrial Commodity Classification (ICC), the Export Commodity Classification (XCC) and the Canadian International Trade Classification (CITC), respectively. Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in shipment, export and import trends, but also changes in the classification systems. It is impossible to assess with any degree of precision the respective contribution of each of these two factors to the total reported changes in these levels.



SOURCES OF IMPORTS^a (% of total value)

	1983	1984	1985	1986	1987	1988	1989	1990 ^b
United States	97.8	98.0	98.5	98.4	97.4	97.4	97.4	97.3
European Community	0.9	1.2	0.5	0.5	1.7	—	0.5	—
Asia	1.3	0.8	1.0	1.0	0.8	0.9	1.0	1.1
Other	—	—	—	0.1	0.1	1.7	1.1	1.6

^aSee *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

^bISTC estimates.

DESTINATIONS OF EXPORTS^a (% of total value)

	1983	1984	1985	1986	1987	1988	1989	1990 ^b
United States	50.0	58.6	67.9	60.8	53.3	59.0	71.4	57.6
European Community	33.3	17.2	10.7	7.7	7.3	5.9	7.2	18.4
Asia	8.3	17.2	17.9	23.0	23.5	10.4	6.1	2.6
Other	8.4	7.0	3.5	8.5	15.9	24.7	15.3	21.4

^aSee *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

^bISTC estimates.

REGIONAL DISTRIBUTION^a (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	9	25	32	24	10
Employment (% of total)	X	26	42	X	8
Shipments (% of total)	X	25	44	X	9

^aSee *Food Industries*, Statistics Canada Catalogue No. 32-250, annual.

X: confidential



MAJOR FIRMS

Name	Country of ownership	Location of major plants
ACA Co-Operative Limited	Canada	Kentville, Nova Scotia
Burnbrae Farms Ltd.	Canada	Lyn, Ontario Saint-Zotique, Quebec
Coopérative fédérée de Québec, Division aviculture (Bexel)	Canada	Montreal, Quebec Bramalea, Ontario
Cuddy Food Products Ltd.	Canada	London, Ontario
Export Packers Company Limited	Canada	Winnipeg, Manitoba Brampton, Ontario
Hallmark Poultry Processors Ltd.	Canada	Vancouver, British Columbia
Hillsdown Holdings PLC	United Kingdom	Kentville, Nova Scotia Sussex, New Brunswick Aurora, Ontario Brantford, Ontario Toronto, Ontario Walkerton, Ontario Moose Jaw, Saskatchewan Saskatoon, Saskatchewan Edmonton, Alberta
Lilydale Co-Operative Limited	Canada	Edmonton, Alberta Vancouver, British Columbia
Maple Lodge Farms Ltd.	Canada	Norval, Ontario Saint-François-de-Madawaska, New Brunswick
Plains Poultry Ltd.	Canada	Wynyard, Saskatchewan
Port Colborne Poultry Ltd.	Canada	Port Colborne, Ontario
Sunrise Poultry Processors Ltd.	Canada	Surrey, British Columbia
Tyson Canada Inc.	United States	Montreal, Quebec Saint-Jean-sur-Richelieu, Quebec
Vanderpol's Eggs Ltd.	Canada	St. Mary's, Ontario Surrey, British Columbia



INDUSTRY ASSOCIATIONS

Canadian Poultry and Egg Processors Council (regional office)
Suite 309, One Eva Road
ETOBICOKE, Ontario
M9C 4Z5
Tel.: (416) 622-8621
Fax: (416) 621-8031

Canadian Poultry and Egg Processors Council (head office)
Suite 406, 2 Gurdwara Road
NEPEAN, Ontario
K2E 1A2
Tel.: (613) 224-0001
Fax: (613) 224-2023

Further Poultry Processors Association of Canada
Suite 500, 2319 St. Laurent Boulevard
OTTAWA, Ontario
K1G 4K6
Tel.: (613) 738-1175
Fax: (613) 733-9501

Printed on paper containing recycled fibres.

