



The market remains tight according to the various indicators below. Wholesale prices have reached new record highs in many cases, while TRQ has been utilized at the strongest pace in many years. Recent administrative adjustments on the part of the hatching egg and broiler industries may alleviate some pressure, but for the time being supplies are being constrained largely due to issues with chick availability and quality. The underlying factors are avian influenza's impact on the Canadian and U.S. broiler breeder flocks (Canada sources 20% of its broiler hatching eggs from U.S. suppliers), and long-term trends in broiler performance that may ultimately be genetics- or facilities-related. Due to the leap year and an early Easter in 2024, the slaughter days as of the end of the first quarter are equal to last year.

Monthly* Production in March (Mkg) & YTD

	Mar. '25	Mar. '24	Mkg	%	YTD '25	YTD '24	% yr.	
BC	16.25	16.03	0.22	1.4%	47.33	47.83	-1.0%	
AB	12.01	11.33	0.68	6.0%	34.08	33.53	1.6%	
SK	4.07	4.15	-0.08	-1.9%	11.33	12.24	-7.5%	
MB	4.89	4.66	0.23	5.0%	13.65	13.61	0.3%	
ON	42.70	40.56	2.14	5.3%	122.55	119.76	2.3%	
QC	31.02	30.77	0.25	0.8%	91.70	90.02	1.9%	
NB	3.07	2.99	0.09	2.9%	8.96	8.88	0.9%	
NS	3.82	3.94	-0.12	-3.1%	11.28	11.65	-3.2%	
PE	0.45	0.50	-0.05	-10.7%	1.29	1.29	0.3%	
NL	1.54	1.57	-0.02	-1.5%	4.55	4.59	-0.8%	
Canada	119.83	116.49	3.34	2.9%	346.74	343.40	1.0%	

Source: CFC, AAFC *calculated from weekly data

TRQ Imports to Apr. 12 2025 (Mkg)

	2025	2024	Mkg	% v 24	v pro rata
CUSMA	19.21	12.82	6.39	49.9%	3.28
Evis.	0.16	0.15	0.01	5.9%	
Bone-in	11.82	5.53	6.29	113.9%	
Boneless	4.53	2.26	2.27	100.5%	
Processed	2.71	2.14	0.57	26.8%	
WTO	12.82	11.22	1.60	14.3%	1.68
Bone-in	5.54	3.66	1.88	51.3%	
Boneless	0.82	0.98	-0.16	-16.0%	
Processed	6.46	6.58	-0.12	-1.8%	
CPTPP	6.12	5.38	0.74	13.8%	-0.58
Bone-in	0.43	0.34	0.09	25.2%	
Boneless	5.38	4.52	0.86	19.0%	
Processed	0.31	0.51	-0.20	-39.7%	
Total	38.15	29.41	8.74	29.7%	4.39

Source: GAC

Storage Stocks as of 01 Apr. 2025 (Mkg)

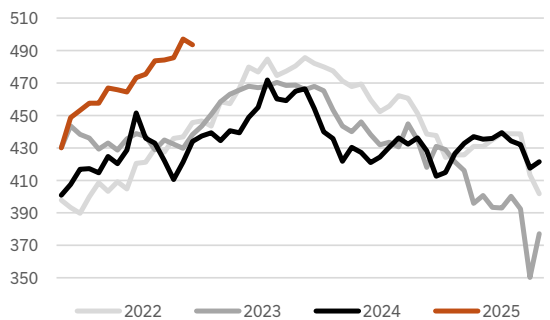
	Apr-25	Mar-25	Apr-24	% mth	% yr
Whole	0.71	0.68	0.71	4.3%	-0.8%
Cut-up	22.45	22.56	28.56	-0.5%	-21.4%
Further Proc.	32.68	31.12	34.29	5.0%	-4.7%
Misc.	1.73	2.37	2.99	-26.8%	-41.9%
Total	57.58	56.73	66.56	1.5%	-13.5%

Source: AAFC

EMI Wholesale Prices to Apr. 13 2025

	2025	2024	%
Market Composite	493.59	434.06	13.7%
Whole Bird Complex	512.00	469.25	9.1%
Breast Complex	735.52	591.68	24.3%
Wing Complex	597.38	517.75	15.4%
Leg Complex	390.00	349.80	11.5%

Market Composite



Source: EMI