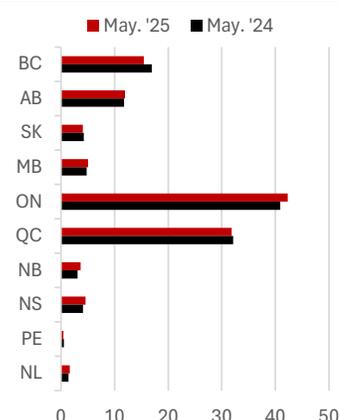




Strong demand despite muted population growth, as well as underproduction in A-194 and A-195, have made the chicken market very tight with record strength seen in wholesale prices and TRQ utilization. The underlying cause of recent underproduction is an avian influenza-related chick shortage and related chick quality issues impacting broiler performance. CFC has now approved two strong allocations for the second half of 2025, which if realized will result in a more than 5% increase in total production compared to the same time last year. This should help to make up for reduced TRQ availability in the second half of 2025. Storage stock levels are currently at what may be an operational minimum, with a build-up in the Miscellaneous category driving this month's small increase.

Monthly* Production in May (Mkg)					Jan-May '25 vs '24 & Allocation			
	May. '25	May. '24	Mkg	%	YTD '25	YTD '24	% yr.	vs. Alloc.
BC	15.4	16.9	-1.5	-8.8%	78.5	81.5	-3.7%	-2.7
AB	11.9	11.8	0.2	1.6%	56.9	56.9	0.2%	-1.6
SK	4.1	4.3	-0.2	-4.2%	19.4	20.6	-6.1%	-0.5
MB	5.0	4.8	0.3	5.5%	23.3	23.1	0.9%	0.5
ON	42.3	40.9	1.4	3.4%	204.7	201.2	1.7%	-2.6
QC	31.9	32.1	-0.3	-0.8%	154.0	152.6	0.9%	-0.4
NB	3.6	3.1	0.6	18.4%	15.5	15.2	2.2%	0.2
NS	4.6	4.1	0.5	11.9%	19.2	19.4	-1.4%	0.0
PE	0.4	0.5	-0.1	-15.4%	2.2	2.2	-1.3%	0.0
NL	1.6	1.4	0.2	16.1%	7.7	7.4	3.5%	0.2
Canada	120.9	119.8	1.1	0.9%	581.4	580.2	0.2%	-6.9

Source: CFC, AAFC *calculated from weekly data



TRQ Imports to Jun. 14 2025 (Mkg)					
	2025	2024	Mkg	% v 24	v pro rata
CUSMA	32.41	22.50	9.91	44.0%	6.64
Evis.	0.31	0.33	-0.01	-3.8%	
Bone-in	19.79	10.80	8.99	83.2%	
Boneless	7.85	4.46	3.39	76.1%	
Processed	4.46	3.33	1.13	33.8%	
WTO	22.50	16.23	6.27	38.6%	4.49
Bone-in	8.53	6.22	2.31	37.2%	
Boneless	1.91	1.40	0.51	36.7%	
Processed	12.06	8.62	3.45	40.0%	
CPTPP	12.09	8.20	3.89	47.4%	1.25
Bone-in	0.58	0.48	0.09	19.3%	
Boneless	11.00	6.60	4.40	66.7%	
Processed	0.51	1.12	-0.61	-54.1%	
Total	67.00	46.93	20.07	42.8%	12.38

Source: GAC

Storage Stocks as of 01 Jun. 2025 (Mkg)					
	Jun-25	May-25	Jun-24	% mth	% yr
Whole	0.62	0.70	0.48	-11.1%	28.5%
Cut-up	22.31	22.92	25.93	-2.7%	-14.0%
Further Proc.	31.16	31.21	35.14	-0.2%	-11.3%
Misc.	2.75	1.62	2.91	69.9%	-5.4%
Total	56.83	56.45	64.46	0.7%	-11.8%

Source: AAFC

EMI Wholesale Prices to Jun. 15 2025			
	2025	2024	%
Market Composite	530.89	460.22	15.4%
Whole Bird Complex	549.75	486.88	12.9%
Breast Complex	802.74	657.72	22.0%
Wing Complex	609.00	534.88	13.9%
Leg Complex	405.67	373.55	8.6%

