



August's national chicken production volume was a record high, the second month in a row that Canadian chicken farmers have grown more than ever before. Wholesale prices appear to have reached and retreated from their seasonal peak but are still well above year-ago levels. TRQ imports remain significantly above pro rata, but their pace has slowed in recent weeks. Storage stocks built up by 2.6 Mkg during August, mostly due to higher volumes of cut-up parts. Total stocks are now 10% higher than last year. Taking these items together, we can see that some pressure has come off the domestic chicken market and the supply situation, while still tight judging from wholesale prices, has apparently improved compared to earlier in the year.

| Monthly* Production in August (Mkg) | | | | | Jan-Aug '25 vs '24 & Allocation | | | | |
|--|--------------|--------------|------------|-------------|---------------------------------|--------------|-------------|--------------|--|
| | Aug. '25 | Aug. '24 | Mkg | % | YTD '25 | YTD '24 | % yr. | vs. Alloc. | |
| BC | 17.3 | 17.3 | 0.0 | 0.1% | 129.5 | 133.0 | -2.7% | -3.6 | |
| AB | 11.0 | 11.7 | -0.8 | -6.4% | 91.8 | 91.8 | 0.0% | -4.5 | |
| SK | 4.2 | 4.0 | 0.2 | 5.8% | 31.6 | 32.9 | -3.9% | -0.9 | |
| MB | 4.9 | 4.8 | 0.1 | 2.0% | 38.6 | 37.7 | 2.2% | 0.7 | |
| ON | 43.7 | 42.4 | 1.3 | 3.0% | 333.3 | 327.1 | 1.9% | -5.1 | |
| QC | 33.7 | 32.2 | 1.5 | 4.6% | 250.3 | 247.2 | 1.2% | -2.3 | |
| NB | 3.1 | 3.4 | -0.4 | -10.7% | 24.8 | 25.0 | -0.5% | -0.2 | |
| NS | 4.1 | 4.1 | 0.0 | -0.6% | 31.4 | 31.4 | 0.0% | 0.0 | |
| PE | 0.3 | 0.4 | -0.1 | -20.2% | 3.4 | 3.4 | -0.1% | -0.1 | |
| NL | 1.6 | 1.6 | 0.0 | -0.1% | 12.3 | 12.0 | 3.2% | 0.1 | |
| Canada | 123.8 | 122.0 | 1.9 | 1.5% | 946.9 | 941.4 | 0.6% | -16.0 | |
| Source: CFC, AAFC *calculated from weekly data | | | | | '24 Adj. 937.51 1.0% | | | | |

TRQ Imports to Sep. 13 2025 (Mkg)

| | 2025 | 2024 | Mkg | % v 24 | v pro rata |
|--------------|--------------|--------------|--------------|--------------|--------------|
| CUSMA | 47.66 | 31.68 | 15.98 | 50.4% | 7.68 |
| Evis. | 0.39 | 0.49 | -0.10 | -20.4% | |
| Bone-in | 29.46 | 20.41 | 9.05 | 44.4% | |
| Boneless | 11.17 | 8.62 | 2.55 | 29.6% | |
| Processed | 6.64 | 5.08 | 1.57 | 30.9% | |
| WTO | 31.68 | 25.57 | 6.11 | 23.9% | 3.73 |
| Bone-in | 11.06 | 9.81 | 1.25 | 12.7% | |
| Boneless | 4.06 | 2.88 | 1.18 | 41.1% | |
| Processed | 16.53 | 12.89 | 3.64 | 28.2% | |
| CPTPP | 20.50 | 13.17 | 7.33 | 55.7% | 3.69 |
| Bone-in | 0.97 | 0.59 | 0.38 | 64.1% | |
| Boneless | 18.66 | 10.98 | 7.68 | 70.0% | |
| Processed | 0.87 | 1.60 | -0.73 | -45.8% | |
| Total | 99.84 | 70.42 | 29.41 | 41.8% | 15.10 |

Source: GAC

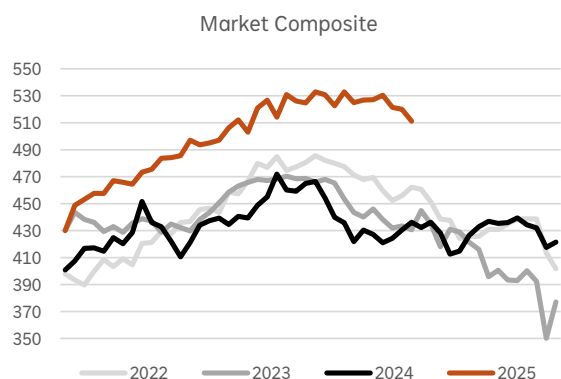
Storage Stocks as of 01 Sep. 2025 (Mkg)

| | Sep-25 | Aug-25 | Sep-24 | % mth | % yr |
|---------------|--------------|--------------|--------------|-------------|--------------|
| Whole | 0.83 | 0.68 | 0.76 | 21.4% | 9.4% |
| Cut-up | 28.23 | 25.76 | 23.99 | 9.6% | 17.7% |
| Further Proc. | 30.89 | 31.14 | 29.49 | -0.8% | 4.7% |
| Misc. | 2.92 | 2.70 | 2.75 | 8.2% | 6.3% |
| Total | 62.88 | 60.28 | 56.99 | 4.3% | 10.3% |

Source: AAFC

EMI Wholesale Prices to Sep. 14 2025

| | 2025 | 2024 | % |
|--------------------|--------|--------|-------|
| Market Composite | 511.20 | 436.22 | 17.2% |
| Whole Bird Complex | 546.63 | 471.63 | 15.9% |
| Breast Complex | 730.09 | 587.36 | 24.3% |
| Wing Complex | 578.75 | 527.63 | 9.7% |
| Leg Complex | 398.92 | 355.81 | 12.1% |



Source: EMI