



November's total production increased by 6.2% over last year; daily average production volume reached a record high of 4.1 Mkg. Annual production is now 2.0% higher than a year ago, or 2.3% when adjusting 2024 for the same number of days. As the year comes to a close, TRQ weekly volumes have slowed, but 2025 looks like it may be the first year with full CPTPP utilization. Wholesale prices remain historically strong. Especially legs have retained strength, counter to typical seasonal trends. Storage stocks unexpectedly built up during November by 3% due to a significant increase in further processed product inventories in Ontario (AAFC is reviewing this increase). This was partly cancelled out by a decline in this category in Quebec. +2kg whole birds also built up significantly.

	Monthly* Production in November (Mkg)				Jan-Nov '25 vs '24 & Allocation				
	Nov. '25	Nov. '24	Mkg +/-	%	YTD '25	YTD '24	% yr.	vs. Alloc.	
BC	16.5	15.4	1.1	6.9%	180.4	180.9	-0.3%	-3.9	
AB	12.1	11.0	1.1	9.6%	130.2	125.6	3.6%	-4.4	
SK	3.9	3.9	0.0	0.7%	43.7	44.8	-2.4%	-1.2	
MB	4.5	4.6	0.0	-0.3%	52.6	51.3	2.4%	0.6	
ON	44.5	41.6	2.8	6.8%	466.0	452.4	3.0%	-2.6	
QC	32.8	31.3	1.6	5.0%	348.3	342.2	1.8%	-1.0	
NB	3.4	2.9	0.5	16.6%	34.7	34.0	2.1%	0.1	
NS	3.9	4.0	-0.1	-2.9%	43.5	43.3	0.4%	0.1	
PE	0.4	0.4	0.0	9.3%	4.7	4.5	4.4%	0.0	
NL	1.7	1.4	0.3	22.0%	17.0	16.3	4.4%	0.0	
<b>Canada</b>	<b>123.7</b>	<b>116.5</b>	<b>7.2</b>	<b>6.2%</b>	<b>1321.1</b>	<b>1295.4</b>	<b>2.0%</b>	<b>-12.3</b>	
					'24 Adj.	1291.5	2.3%		

Source: CFC, AAFC \*calculated from weekly data

TRQ Imports to Dec. 13 2025 (Mkg)

	2025	2024	Mkg +/-	% v 24	v pro rata
CUSMA	55.83	53.38	2.45	4.6%	1.64
Evis.	0.39	0.53	-0.15	-27.7%	
Bone-in	33.68	28.42	5.26	18.5%	
Boneless	12.60	17.35	-4.75	-27.4%	
Processed	9.16	7.07	2.08	29.5%	
WTO	38.54	36.96	1.57	4.3%	0.66
Bone-in	13.94	14.85	-0.91	-6.1%	
Boneless	4.85	4.74	0.11	2.4%	
Processed	19.68	17.38	2.31	13.3%	
CPTPP	23.62	18.69	4.93	26.4%	0.83
Bone-in	1.21	0.84	0.37	44.0%	
Boneless	21.41	15.43	5.98	38.7%	
Processed	1.00	2.42	-1.42	-58.5%	
<b>Total</b>	<b>117.98</b>	<b>109.03</b>	<b>8.95</b>	<b>8.2%</b>	<b>3.12</b>

Source: GAC

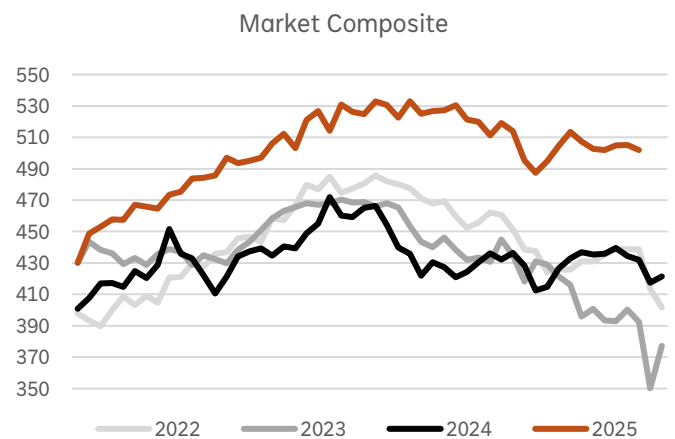
Storage Stocks as of 01 Dec. 2025 (Mkg)

	Dec-25	Nov-25	Dec-24	% mth	% yr
Whole	1.26	0.81	0.74	55.4%	70.4%
Cut-up	25.90	26.86	24.54	-3.6%	5.5%
Further Proc.	32.20	29.60	33.68	8.8%	-4.4%
Misc.	3.03	3.29	2.56	-7.8%	18.5%
<b>Total</b>	<b>62.39</b>	<b>60.56</b>	<b>61.53</b>	<b>3.0%</b>	<b>1.4%</b>

Source: AAFC

EMI Wholesale Prices to Dec. 14 2025

	2025	2024	%
Market Composite	501.92	432.03	16.2%
Whole Bird Complex	539.25	474.50	13.6%
Breast Complex	675.17	590.41	14.4%
Wing Complex	606.25	553.38	9.6%
Leg Complex	403.70	323.44	24.8%



Source: EMI