Market Update

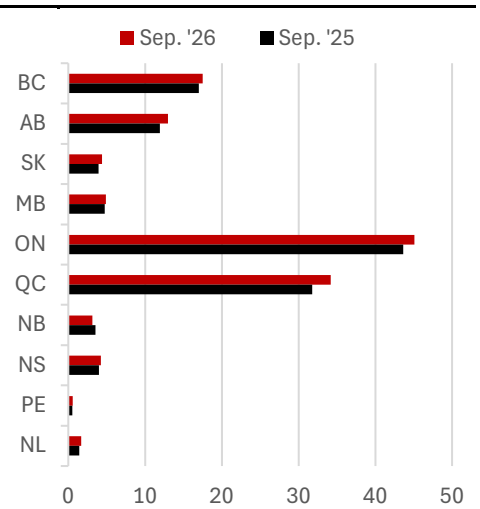
October 2026

Production during September was 5.0% or 6.2 Mkg above the same month last year. This makes for a 5.1% increase in the third quarter and a year-to-date increase of 5.8%, nearly 62 Mkg more chicken than last year or 1.5 kg more per Canadian. Market signals indicate a seasonal shift from the peak summer demand season. Wholesale prices are all below seasonal highs, with the market composite nearly the same as last year. Legs and whole birds are both higher than a year ago, but wings have fallen to multi-year lows and breasts are just 0.5% higher. TRQ utilization has slowed as the end of the year approaches; it now appears that some CPTPP permits may remain unused in 2026. Storage stocks built up broadly during September, currently 4.0% above last month and 5.7% above last year.

Monthly* Production in September (Mkg evis.)

	Sep. '26	Sep. '25	Mkg +/-	%	YTD '26	YTD '25	% yr.
BC	17.5	17.0	0.5	3.0%	155.7	146.6	6.2%
AB	13.0	11.9	1.0	8.8%	113.3	105.1	7.8%
SK	4.4	3.9	0.4	11.3%	37.4	35.5	5.2%
MB	4.9	4.7	0.2	3.4%	44.9	43.3	3.8%
ON	45.1	43.6	1.5	3.4%	397.5	377.0	5.4%
QC	34.2	31.8	2.4	7.6%	297.4	282.5	5.3%
NB	3.2	3.5	-0.4	-11.1%	29.6	28.4	4.2%
NS	4.2	4.0	0.3	6.3%	38.6	35.4	8.9%
PE	0.6	0.5	0.0	7.6%	4.2	3.9	8.5%
NL	1.7	1.4	0.3	17.9%	14.6	13.8	5.9%
Canada	**128.7**	**122.5**	**6.2**	**5.0%**	**1133.3**	**1071.5**	**5.8%**

Year-to-date 2026 vs. 2025



Source: CFC, AAFC **calculated from weekly data*

TRQ Imports to Oct. 17 2026 (Mkg)

	2026	2025	Mkg +/-	% v 25	v pro rata
CUSMA	49.07	51.23	-2.15	-4.2%	3.33
Evis.	*0.25*	*0.39*	*-0.14*	*-35.9%*	
Bone-in	*30.31*	*31.15*	*-0.84*	*-2.7%*	
Boneless	*10.53*	*12.00*	*-1.47*	*-12.2%*	
Processed	*7.99*	*7.70*	*0.29*	*3.8%*	
WTO	33.47	34.24	-0.77	-2.2%	1.82
Bone-in	*11.10*	*12.14*	*-1.05*	*-8.6%*	
Boneless	*2.71*	*4.31*	*-1.60*	*-37.1%*	
Processed	*19.67*	*17.79*	*1.88*	*10.5%*	
CPTPP	17.78	21.81	-4.03	-18.5%	-1.46
Bone-in	*2.04*	*1.15*	*0.89*	*77.1%*	
Boneless	*15.22*	*19.76*	*-4.54*	*-23.0%*	
Processed	*0.52*	*0.90*	*-0.38*	*-42.4%*	
Total	**100.32**	**107.28**	**-6.96**	**-6.5%**	**3.69**

Source: GAC

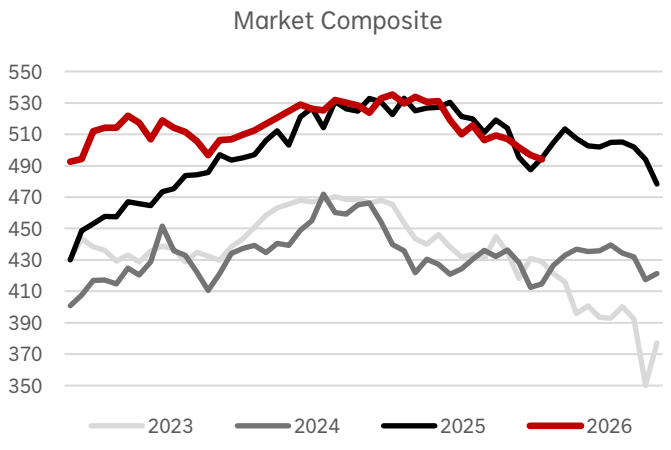
Storage Stocks as of 01 Oct. 2026 (Mkg)

	Oct-26	Sep-26	Oct-25	% mth	% yr
Whole	1.86	1.68	0.96	11.0%	93.6%
Cut-up	25.24	23.70	26.52	6.5%	-4.8%
Further Proc.	31.55	31.17	29.60	1.2%	6.6%
Misc.	4.96	4.62	3.12	7.4%	58.7%
Total	**63.61**	**61.16**	**60.21**	**4.0%**	**5.7%**

Source: AAFC

EMI Wholesale Prices to Oct. 18 2026

	2026	2025	%
Market Composite	494.18	494.90	-0.1%
Whole Bird Complex	543.13	527.88	2.9%
Breast Complex	693.36	690.03	0.5%
Wing Complex	484.13	555.00	-12.8%
Leg Complex	403.97	393.37	2.7%



Source: EMI