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Report Highlights:

Chicken meat production is forecast one percent higher in 2026, based on stable demand, adequate domestic supply, and steady imports. The overall 2026 import TRQ volumes will approach 121,600 metric tons, with the United States expected to maintain more than 80 percent share of total Canadian chicken meat imports. In 2025, as the only country taking advantage of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) poultry tariff rate quota (TRQ) and as a new emerging supplier, Chile continued to gain import market share, a trend expected to continue into 2026.

Note Regarding Reporting Change:

This report provides *chicken meat* estimates and forecasts for 2024-2026. The prior *broiler meat* series has been discontinued and will not be revised or updated in the future.

Official USDA data is available via the [PSD database](#). The October 2018 data release included a historical *chicken meat* series back to 1999. The *broiler meat* series terminated with 2016 data.

Chicken meat is defined as meat of domestic fowl (*Gallus gallus/Gallus domesticus*) including all chickens: broiler, layer, hybrid, domestic breeds, spent hens, ex-breeding stock, etc.

Executive Summary

- FAS/Canada projects a one percent production growth for 2026, with chicken meat production forecast to reach 1.5 million metric tons (MMT). Demand for chicken meat remains solid, both in retail and food service sectors. The trend is primarily supported by sustained consumer preference for this type of protein, and by competitive chicken meat prices relative to other meat protein prices, especially beef and fish.
- FAS/Canada estimates 2025 chicken meat production at 1.48 MMT, up 3.5 percent from 2024. Facing sustained demand, a period of missed production targets¹ in the first half of the year, and increased import volumes to supply the market, production growth in 2025 became primarily a function of catching up with market requirements for chicken meat. Chicken producers decided to augment production volumes in the second half of the year to balance the market, while imports are expected to slow down.
- Following the July 1, 2020, entry into force of the United States-Mexico-Canada Agreement (USMCA), Canadian chicken meat imports are comprised of three tariff rate quotas (TRQs): the global TRQ, now based on the fixed market access volume negotiated at the World Trade Organization (WTO); the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) TRQ; and the USMCA TRQ. The combined market access volume for chicken meat under these three TRQs will reach nearly 121,600 metric tons (MT) in 2026.
- In addition to TRQ imports, Canadian poultry processing and further-processing companies are expected to import in 2026 an estimated 70,000 MT of chicken meat under Canada's two import for re-export programs. Nearly all the finished products produced under these programs would be exported to the United States. Overall, the United States is expected to supply over 80 percent of all chicken meat imported by Canada, both within, and outside of TRQs.

¹ As explained further in the report, Canada operates a supply management system for the chicken sector, thus controlling production levels via production quotas.

Poultry, CHICKEN MEAT

Table 1.

CANADA Meat CHICKEN	2024		2025		2026
	USDA Official Data	NEW Post Estimates	USDA Official Data	NEW Post Estimates	NEW Post Estimates
Beginning Stocks	73	73	65	60	60
Production	1,425	1,430	1,465	1,480	1,500
Total Imports	208	208	210	215	220
Total Supply	1,706	1,711	1,740	1,755	1,780
Total Exports	120	120	125	120	125
Total Dom. Consumption	1,521	1,531	1,555	1,575	1,595
Ending Stocks	65	60	60	60	60
Total Distribution	1,706	1,711	1,740	1,755	1,780

NOTES: "NEW Post" data reflects Post's assessments and are NOT official USDA data.

All data in 1,000 metric tons, carcass weight equivalent

Except for trade data, other supply and disposition data for 2024 remain an estimate, as Statistics Canada switched to a two-year reporting cycle (the 2024 data will become available in May 2026).

Chicken Meat Production

FAS/Canada forecasts minimal growth in chicken meat production for 2026, rising just over one percent to 1.5 million metric tons (MMT), as both retail and foodservice demand is anticipated to remain solid, supported by competitive prices for chicken among other sources of animal protein. The food service sector is expected to consistently contribute to chicken demand, especially through the quick-service segment where customer traffic is resilient and constantly attracted by new menu items.

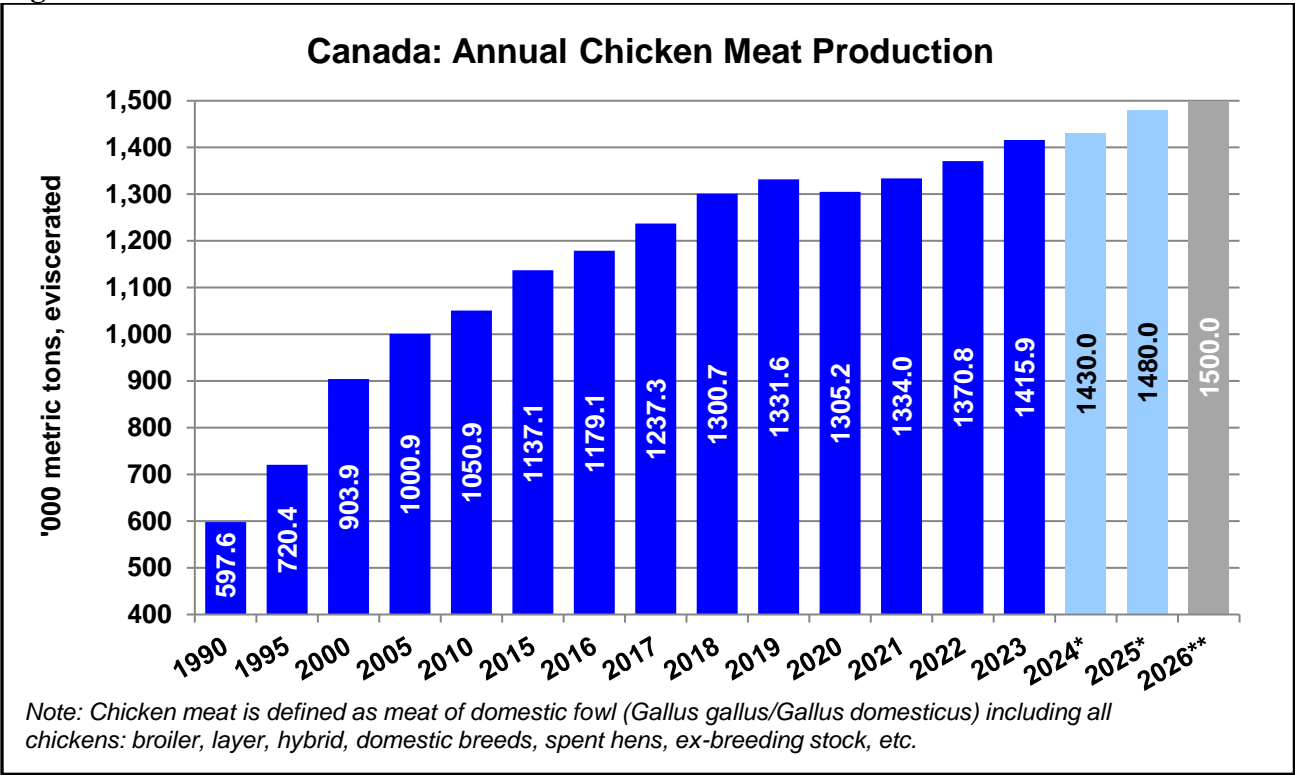
FAS/Canada estimates 2025 chicken meat production at 1.48 MMT, up 3.5 percent from 2024. Oversupply concerns at the end of 2024 that led to production reduction decisions turned out unjustified. The first half of 2025 was marked by missed production targets, largely due to an undersupply of day-old chicks, caused in turn by lower egg-hatchability and higher chick mortality as consequences of HPAI outbreaks. These factors contributed to lower domestic chicken meat production, leading to increased imports to boost supply, while stocks remained depressed. For the second half of the year, chicken producers received clear signals to raise production levels and meet market requirements. Imports are expected to slow down towards the end of the year and remain within the market access levels established under various TRQs.

In Canada, the chicken meat market consists primarily of broiler meat, which represents between 97 and 98 percent of the market. The balance is comprised of other chicken meat, mostly spent fowl (also called stewing/mature hens). Under Canada's supply management system, poultry farmers are not vertically integrated into the processing and further processing industries. A large number of independent chicken farmers, often relatively small family operations, supply live birds to processing companies.

Chicken production is tightly controlled through a quota system. Representatives of chicken producers, poultry processors, poultry further-processors, and the foodservice sector make production decisions jointly, considering current and forecast data on various economic indicators, including imports, stocks,

retail and foodservice sales, wholesale and retail prices, competing protein prices, world production conditions, feed prices, exchange rates, and domestic macroeconomic indicators. Every 8-week production cycle, the Chicken Farmers of Canada (CFC), established under the [Farm Products Agencies Act](#) in 1979, makes a decision on national production volume. This national chicken volume is then allocated to each of the ten producing provinces, where provincial-level organizations further allocate the production quota to individual producers based on the producer’s share of the total production quota.

Figure 1.



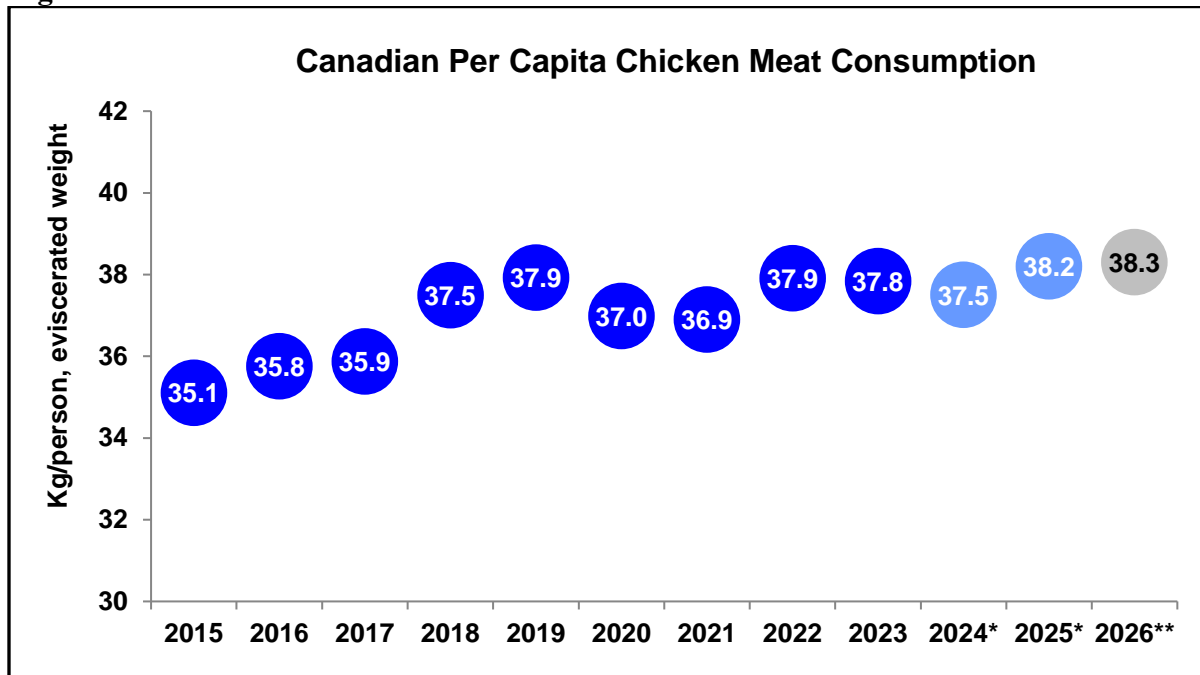
Source: Statistics Canada / FAS/Canada *estimate ** forecast

The prices at which chicken farmers sell their live birds to processors vary from province to province and are typically established based on a cost of production formula. The two major input costs are feed and day-old chicks. The goal of Canada’s supply management system, which is based on production controls and cost-based prices, is to insulate Canadian chicken farmers from fluctuating input costs and to stabilize farm income.

Consumption

After a dip in per capita chicken meat consumption during the COVID-19 pandemic, Canada’s decades-long, steady increase trend eventually bounced back, and at 38.2kg/person and 38.3kg/person, FAS/Canada projects the respective 2025 and 2026 per capita chicken consumption levels to exceed pre-pandemic levels.

Figure 2.



Source: Statistics Canada / Post *estimate ** forecast

Total chicken meat consumption in Canada has nearly tripled over the last 35 years, due in part to the country's steady population growth. In 2023, according to Statistics Canada official [estimates](#), Canada's population reached the 40 million mark, a 44 percent increase since 1990, when the population totaled nearly 28 million. Additionally, 2023 was the first time in Canadian history when population grew by over 1 million people in a single year, and the highest annual population growth rate on record since the 1950s. This significant population growth continued into 2024, when Canada's population reached 41.3 million people. Recent federal government immigration policies to bring population growth in line with historical trends are expected to result in more modest population increases for the near future, with the 2025 population estimated to reach only 41.6 million people. Population growth in Canada is primarily attributed to both permanent and temporary immigration (as opposed to births), which in turn is mostly comprised of ethnic groups that tend to share similar positive preferences when it comes to chicken meat consumption.

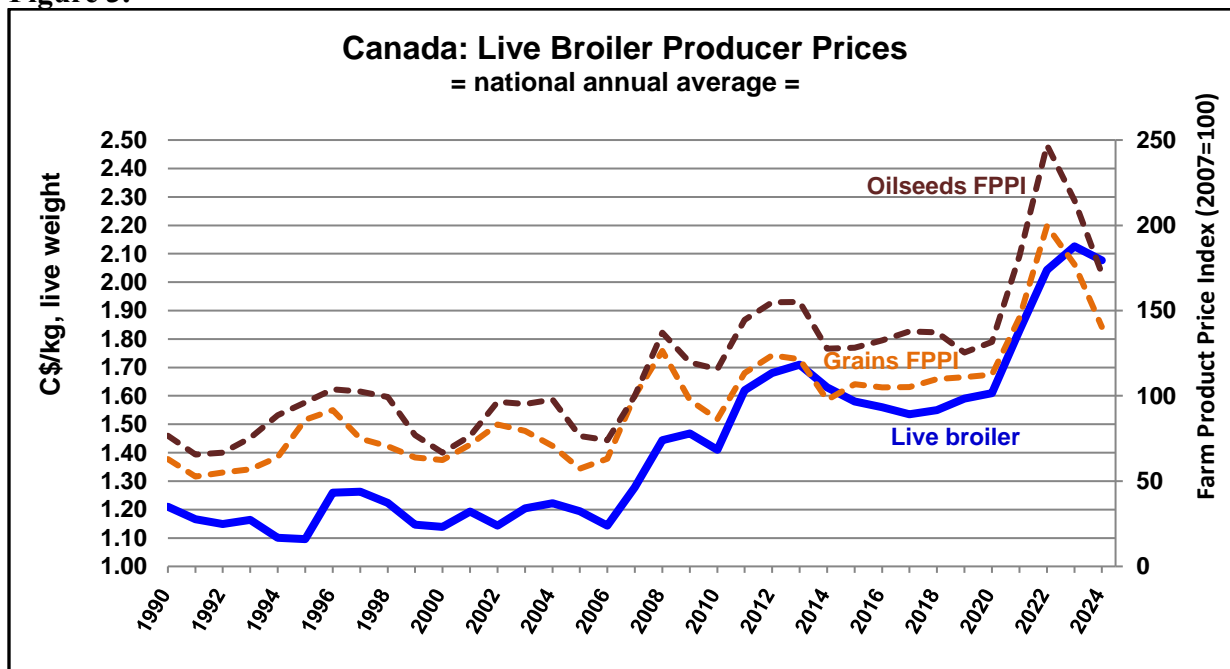
It is no surprise that the ever-increasing popularity of chicken as a versatile, affordable protein drives the upward consumption trend. Chicken meat, competitively priced and consistently available, is an attractive and resilient substitute for red meat proteins, which are typically higher-priced, and at times in short supply. Additionally, chicken meat has benefited from an increase in consumer health awareness, and the perception that chicken is leaner, and therefore healthier, than other meats. Finally, increased chicken consumption can also be attributed to the proliferation of chicken-based quick-service offerings, as well as Canada's changing ethnic composition. Presently, nearly 1 in 4 Canadians were born in another country, and Canada's immigrant population increasingly originates from countries with stronger dietary preferences for chicken rather than beef or pork. Rising diversity has also expanded the range of foodservice outlets offering chicken-based dishes. As in the United States, chicken's popularity in foodservice and at retail is indisputable.

According to an older Agriculture and Agri-Food Canada (AAFC) estimate, retail chicken purchases accounted for approximately 60 percent of Canada's total chicken food availability, while quick-service restaurants constituted 25 percent, full-service restaurants 10 percent, and hotels and institutions accounted for roughly 5 percent of sales. While this data has yet to be updated and to confirm the expectation that nowadays retail purchases represent about 55 percent of chicken availability while quick-serve restaurants' share increased to 30 percent, AAFC maintains a [website](#) providing various, more current statistics related to the chicken sector.

Prices

Under the supply management system, chicken producers receive a fixed price for their live birds, which is based on production costs and determined for every 8-week production cycle. Ontario is the largest chicken producing province in Canada, accounting for about one-third of the market, and therefore Ontario live bird prices are the basis for the calculation of prices in other provinces. Due to the supply management system, producer prices have remained relatively stable over time, typically tracking changes in feed prices, which represent the largest component in the cost of production.

Figure 3.



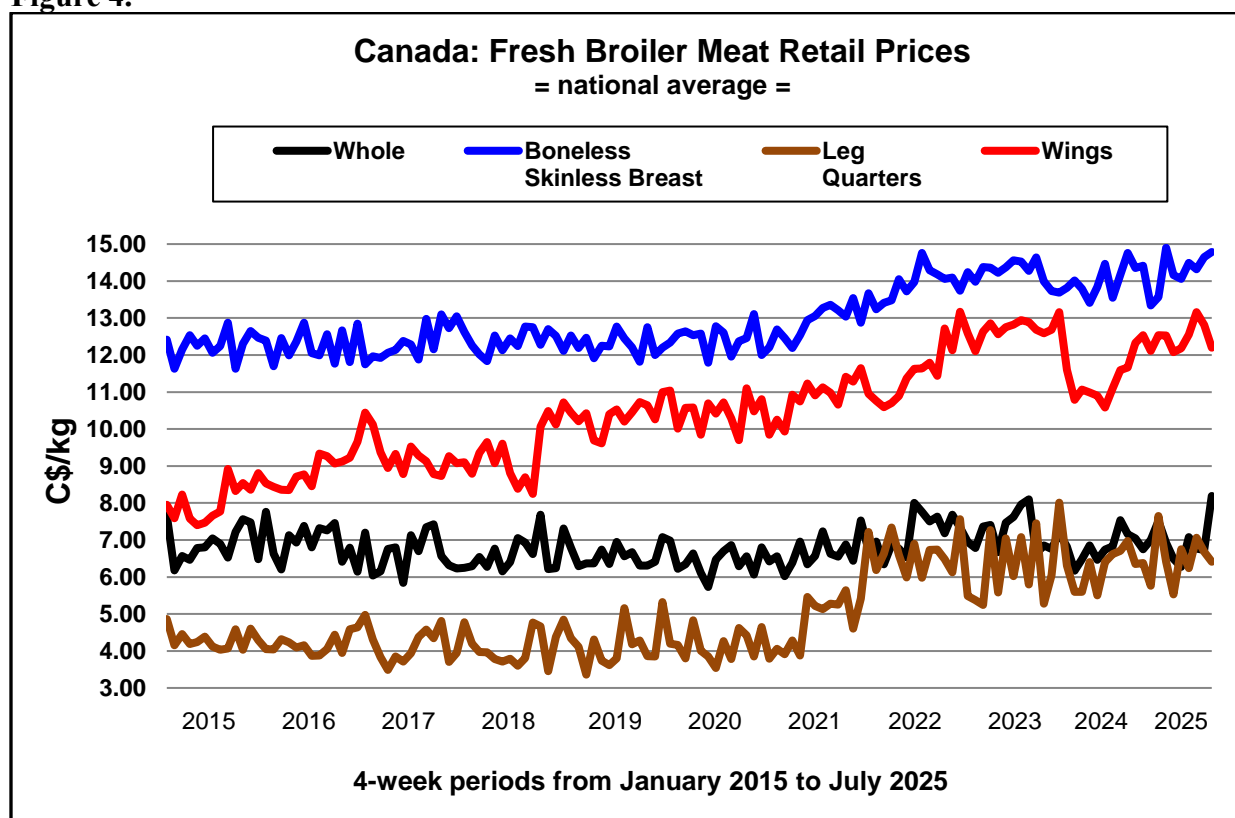
Source: Statistics Canada / Chicken Farmers of Canada

The Canadian supply management system only guarantees prices for producers. Wholesale and retail chicken meat prices are usually reflective of market conditions in terms of supply and demand, as well as consumer preferences for various chicken cuts, quality, and degree of transformation.

Traditionally, Canadian consumer preferences have skewed heavily towards white meat (chicken breasts and wings) over dark meat (chicken legs and thighs), but these preferences have shifted gradually over the last decade, to now balance out the two types of chicken meat. While leg quarters had

long been the least expensive chicken cut in grocery stores, greater consumption of ‘ethnic cuisine’ and consumer price sensitivity have supported increased demand. The 2022 inflationary boost propelled leg quarters to a new price level and confirmed the new place dark meat has in consumer preference. Along with leg quarters, consumers have especially transitioned towards the most expensive dark meat cut, boneless skinless thighs, which currently directly compete with fresh boneless skinless breast meat for the preferred barbecue item for Canadians. However, boneless skinless breast remains the most expensive chicken cut, which is widely and dominantly used in restaurants. Wings are particularly popular during the winter hockey season and other sporting events, and demand has remained solid over the years.

Figure 4.



Source: Agriculture and Agri-Food Canada

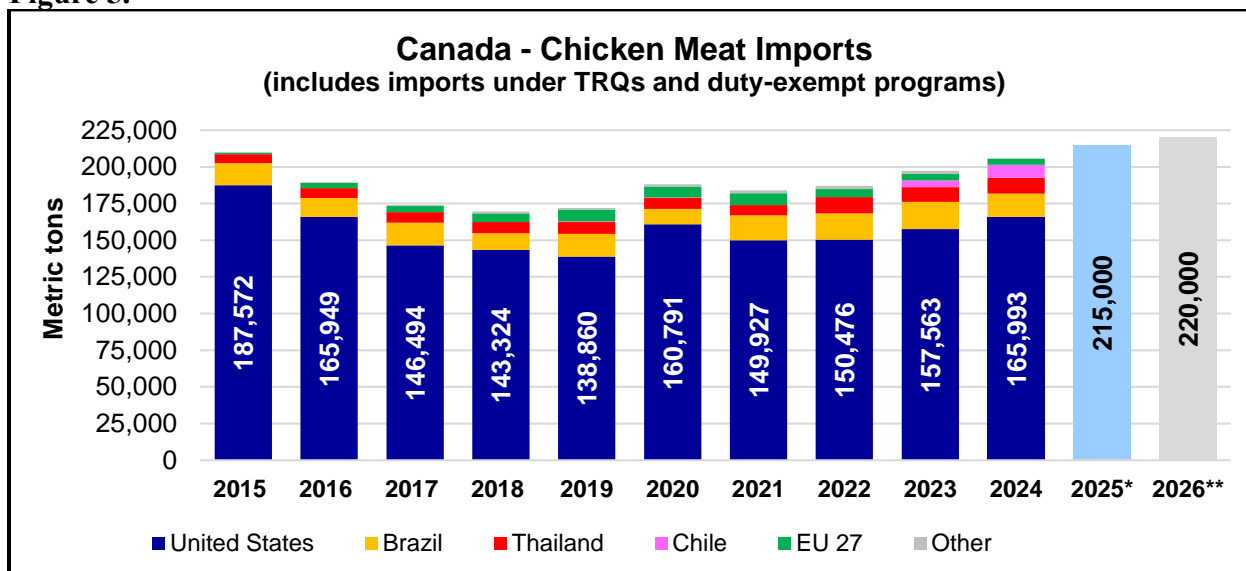
Trade

Imports

FAS/Canada forecasts total chicken meat imports at 220,000 MT in 2026, up 5,000 MT from the estimated level of 215,000 MT for 2025. As discussed in the policy section, most chicken meat imports are controlled and subject to several TRQs. Additional imports of products subject to TRQs are concentrated under two import-for-re-export programs, which require re-exporting of the imported chicken volumes. Canada also imports chicken products that are not import-controlled, such as spent fowl, and certain further-processed chicken products. Market conditions in the United States play a

significant role in import decisions as there continues to be a large price differential between lower U.S. wholesale chicken meat prices and higher Canadian prices, and this price difference, together with the opportunity of purchasing fresh cuts (as opposed to frozen cuts from other supplying countries), creates a strong incentive for importers to source U.S. chicken meat, especially under programs that provide a customs duty exemption (i.e., the import-for-re-export programs).

Figure 5.



Source: Trade Data Monitor / FAS/Canada *estimate ** forecast

The decline in imports observed until the COVID-19 pandemic year has been largely attributed to border enforcement measures by the federal authorities which uncovered imports of broiler meat (subject to TRQs) wrongfully labeled as spent fowl (not subject to import controls). Additionally, federal authorities conducted enforcement activities under the import-for-re-export programs, resulting in the delisting of noncompliant companies. In the last three years, however, imports of spent fowl as well as imports under duty-exempt programs have picked up, leading to renewed scrutiny from the domestic industry and federal authorities.

Table 2.

Canada: Chicken Meat Imports, January - June (metric tons)							
	Quantity			% Market Share			% Change 2025/2024
	2023	2024	2025	2023	2024	2025	
World	94,633	96,098	120,135	100.0	100.0	100.0	25.0%
United States	77,709	76,755	92,898	82.1	79.9	77.3	21.0%
Brazil	7,138	7,349	8,949	7.5	7.7	7.5	21.8%
Thailand	4,750	4,961	7,528	5.0	5.2	6.3	51.7%
Chile	1,551	3,875	6,805	1.6	4.0	5.7	75.6%
Hungary	1562	1223	1,329	1.65	1.27	1.1	8.7%
Ukraine	585	186	1,227	0.62	0.19	1.0	559.7%
Germany	449	760	699	0.5	0.8	0.6	-8.0%
Other countries	889	989	700	0.9	1.0	0.6	-29.2%

Source: Trade Data Monitor

Typically, Canada imports chicken wings and chicken breasts. Wings are primarily destined for the foodservice sector, while breast meat is utilized in various distribution channels, including further processing, foodservice, and retail. The United States is Canada's largest supplier of chicken meat, typically commanding around 80-85 percent of the import market, followed by Brazil and Thailand. Some Canadian importers are discouraged from importing Brazilian chicken, despite its lower cost, because it cannot be re-exported to the United States.

In 2023, Chile was the first country to benefit from Canada's market access commitments under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) TRQ, and is currently viewed as an emerging supplier of chicken to Canada, potentially outpacing traditional suppliers like Brazil and Thailand. By the end of 2026, as business relationships continue to develop, it is expected that Chile could fill the entire CPTPP chicken TRQ, with exports to Canada potentially reaching over 20,000 MT annually.

At a much smaller scale than Chile, Mexico is another emerging supplier of chicken products to Canada, only in processed form, based on a model where food processing plants in Mexico use raw chicken inputs from the United States, and take advantage of lower labor costs. Finally, with the entry into force of the Comprehensive Economic and Trade Agreement (CETA) with the European Union (EU) in 2017, Canada started importing certain chicken meat products from EU countries (e.g., frozen wings, and processed products from Hungary and Germany), which, after a couple of years of decline, have picked up pace again, adding competitive pressure on traditional suppliers.

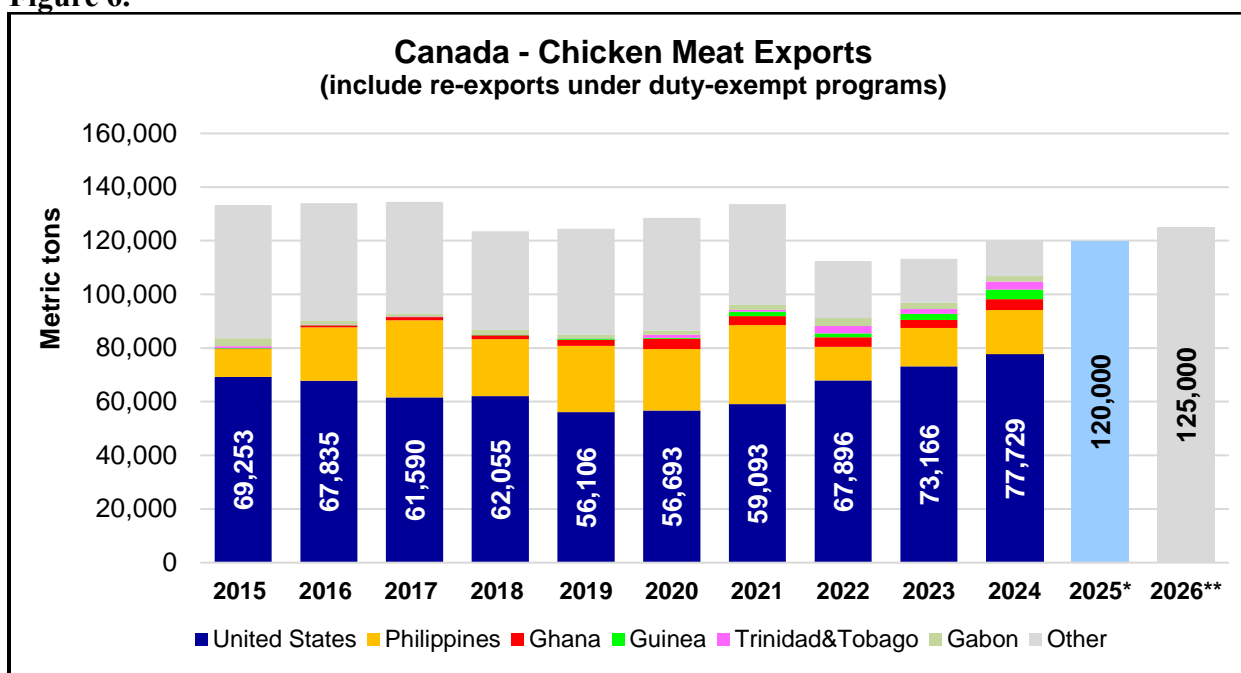
Product Control for Brazilian Poultry

Since USDA does not permit imports of Brazilian chicken meat, the Canadian Food Inspection Agency (CFIA) has strict import procedures to ensure Brazilian chicken meat imported into Canada does not enter the United States. Under CFIA regulations, chicken meat imported from Brazil may not be exported to the United States and may not be used in the manufacture of meat products exported to the United States. Canadian poultry slaughter and processing establishments that import chicken meat from Brazil are not eligible to export poultry meat products to the United States. In addition, chicken meat and meat products from non-eligible establishments must not enter Canadian establishments that have full export status for the United States. All Canadian establishments (including storage facilities) must segregate the meat on their premises by country of origin and destination.

Exports

FAS/Canada forecasts 2026 chicken meat exports at 125,000 MT, up 5,000 MT from the estimated 2025 export volume. In general, Canadian chicken exports fall into two broad categories. "Re-exports" under Canada's imports-for-re-export programs constitute roughly half of all export shipments, with most products destined for the United States. The remaining export volume is generally comprised of dark meat cuts for developing country markets. While market forces play a certain role in Canada's export levels, the timeframe for the re-export requirement under Canada's import-to-re-export programs also impacts the chicken meat export volumes in any given year. Additionally, as highlighted above, recent enforcement measures by federal authorities under import-to-re-export programs led to a decline in overall imports, which in turn translated into lower finished product volumes available for re-export.

Figure 6.



Source: Trade Data Monitor / FAS/Canada *estimate ** forecast

Table 3.

Canada: Chicken Meat Exports, January - June (metric tons)							
	Quantity			% Market Share			% Change 2025/2024
	2023	2024	2025	2023	2024	2025	
World	56,392	59,896	56,138	100.0	100.0	100.0	-6.3%
United States	36,608	38,876	39,016	64.9	64.9	69.5	0.4%
Philippines	6,910	8,301	4,914	12.3	13.9	8.8	-40.8%
Trinidad and Tobago	1,432	1,525	2,054	2.5	2.6	3.7	34.7%
Guinea	1,316	632	1,868	2.3	1.1	3.3	195.6%
Ghana	1,088	1,600	1,866	1.9	2.7	3.3	16.6%
Gabon	858	1,235	1,274	1.5	2.1	2.3	3.2%
Mexico	780	1,666	1,100	1.4	2.8	2.0	-34.0%
Equatorial Guinea	556	759	657	1.0	1.3	1.2	-13.4%
Other countries	6,844	5,302	3,389	12.1	8.9	6.0	-36.1%

Source: Trade Data Monitor

Policy:

Tariff Rate Quotas (TRQs)²

Canada controls most chicken meat imports through TRQs. Until mid-2020, Canada applied the market access level negotiated under NAFTA to its global chicken TRQ (open to all trading partners), equal to 7.5 percent of the preceding year's domestic broiler production as reported by Statistics Canada. After the [USMCA](#) entered into force on July 1, 2020, Canada's market access under the global TRQ returned to the fixed volume negotiated under the [WTO](#), supplemented by a new USMCA TRQ exclusively for U.S. chicken products. In addition, a [CPTPP](#) TRQ for chicken products originating in CPTPP member countries³ has been in place since late 2018.

The market access levels in calendar year 2025 (January-December), under these various chicken meat TRQs are as follows:

- WTO TRQ: 39,800 MT
- USMCA TRQ: 57,000 MT
- CPTPP TRQ: 23,972 MT
 - **Total: 120,772 MT**

In calendar year 2026 (January-December), the chicken market access levels will be:

- WTO TRQ: 39,800 MT
- USMCA TRQ: 57,570 MT
- CPTPP TRQ: 24,212 MT
 - **Total: 121,582 MT**

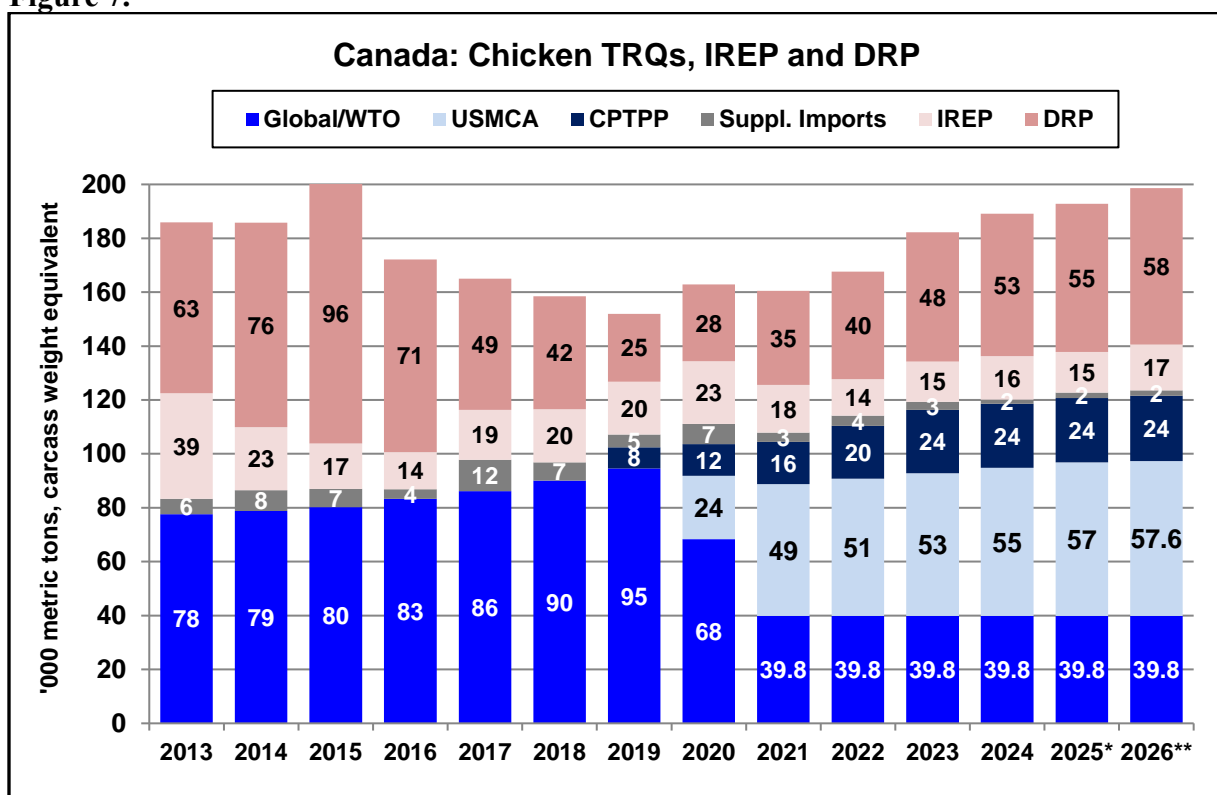
Traditionally, the global/WTO chicken TRQ has been filled at nearly 100 percent, and FAS/Canada expects this fill rate to continue in the future. Although the USMCA chicken TRQ is relatively new, FAS/Canada expects this TRQ to fill as well, given the long-standing business relationships established between Canadian importers and U.S. exporters under the global TRQ. While the CPTPP chicken TRQ stayed largely unfilled during the first years of implementation, Chile ratified the trade agreement in February 2023, and soon thereafter started exporting to Canada. It is expected that by the end of 2026 Chile could fill the full CPTPP TRQ volume, with exports to Canada in excess of 20,000 MT annually.

Under these TRQs, imports are subject to low "within access commitment" duty rates, while imports over the TRQ limit are subject to prohibitive "over access commitment" rates. Imports from the United States under either the WTO TRQ or the USMCA TRQ benefit from duty free treatment, while over-quota duties can reach 249 percent. For instance, within access imports of fresh boneless breasts from the United States enter Canada duty free, while over access imports would be subject to a 249 percent tariff. Comparatively, imports of frozen boneless breasts from Brazil within the WTO TRQ are subject to a 5 percent tariff, and over access imports face the same 249 percent tariff.

² The import volumes of chicken meat mentioned in this section are expressed in carcass weight equivalent, based on Canada's international trade commitments, according to which import permits are issued at a 1:1 ratio for bone-in chicken cuts and a 2:1 ratio for boneless cuts. Therefore, the import quantities mentioned in this section are not directly comparable with the import volumes mentioned in the rest of this report (which are expressed on a product-weight basis).

³ Of all CPTPP member countries, Chile is viewed as possibly the sole supplier of chicken under the CPTPP TRQ.

Figure 7.



Source: GAC, CBSA, Statistics Canada, FAS/Canada calculations / **FAS/Canada estimates
IREP is GAC's imports for re-export program, while DRP is CBSA's duties relief program.

Global Affairs Canada (GAC) issues supplementary import permits in the following situations:

- [Resale Due to Domestic Market Shortages](#) – no such permits were issued in 2021.
- [Dark Chicken Meat not Supplied by the Chicken Farmers of Canada's Domestic Supply Program](#) – no such permits were issued in 2021.
- [Import-to-Compete Program](#) – 3,432 MT of import permits were issued by GAC in 2021.
- [Import for Re-Export Program \(IREP\)](#) – 17,733 MT of import permits were issued by GAC in 2021.
- [Test Marketing](#) – no such permits were issued in 2021.
- [Extraordinary or Unusual Circumstances](#) – no such permits were issued in 2021.

Information on the chicken TRQs, supplementary imports, and the process for importing chicken meat into Canada is located on the [GAC website](#).

In addition to chicken TRQs, Canada also maintains TRQs for broiler hatching eggs and chicks. Under USMCA, the global TRQ (opened to all countries) provides for a combined level of global import quotas on broiler hatching eggs and chick products at a level no lower than 21.1 percent of the estimated Canadian domestic production of broiler hatching eggs for a given calendar year. This combined annual access level is further subdivided into two separate and distinct access levels:

- the annual access level for broiler hatching eggs is equivalent to 17.4 percent of Canadian domestic broiler hatching egg production, and
- the annual access level for egg-equivalent chicks is 3.7 percent of Canadian domestic broiler hatching egg production.

Although global, the only country supplying Canada with hatching eggs and chicks is the United States. Canada also opened a CPTPP broiler hatching eggs and chicks TRQ, which is currently unfilled.

Import for Re-Export Program

Traditionally, most supplementary imports have been comprised of imports under GAC's Import for Re-Export Program (IREP). The program requires that the resulting processed chicken product be exported, since diversion of product imported under IREP to the domestic Canadian market is prohibited.

IREP benefits Canadian poultry processors and further processors by providing access to lower priced imported chicken. Canadian proponents of the IREP program argue that it allows Canadian chicken processing and further processing plants to achieve economies of scale they could not otherwise achieve if restricted to available supplies of domestically produced chicken. IREP imports may be sourced from any country and re-exported to any country, but in practice almost the entire volume is imported from the United States and exported back to the U.S. market.

Duties Relief Program

2012 marked the emergence of increased utilization of the [Duties Relief Program](#) (DRP) managed by the Canada Border Services Agency (CBSA). While the DRP is similar to IREP, there are some differences that make DRP more appealing to importers. For instance, DRP requires the finished chicken meat products to be re-exported within four years, rather than the three-month limit under IREP. Imports of chicken under DRP peaked in 2015 and have since declined following a series of compliance verification activities by CBSA that revealed program non-compliance, resulting in several companies being delisted from the program. FAS/Canada estimates 2025 imports under IREP and DRP at 55,000 MT, down from the 2015 record level of 113,000 MT, due to closer scrutiny of program utilization and stricter compliance enforcement.

Supply Managed TRQ Consultation

In May 2019, GAC opened public consultations on the Canadian allocation and administration of its dairy, poultry, and eggs tariff rate quotas (TRQs). Given the recent free trade agreements concluded by Canada (CETA, CPTPP and USMCA), the number of supply managed import TRQs nearly tripled, significantly increasing the administrative burden of TRQ management. The consultation was meant to gather input from stakeholders as to how to best administer all the TRQs going forward. A second round of consultations was opened in February 2020, when GAC asked stakeholders to offer views on a set of policy options put forward for consideration. In May 2020, citing reasons related to the COVID-19 pandemic, GAC decided to temporarily suspend the consultation process. In January 2021, consultations were [resumed](#), with a closing deadline in March 2021, and a stated publication deadline for new policies of September 1, 2021. To date, GAC has not announced any new allocation policies.

Attachments:

No Attachments