

Required Report: Required - Public Distribution

Date: September 17, 2026

Report Number: CA2026-0024

Report Name: Poultry and Products Annual

Country: Canada

Post: Ottawa

Report Category: Poultry and Products

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Report Highlights:

Despite sluggish population growth, chicken meat production is forecast to be two percent higher in 2027, based on continued solid consumer demand. The overall 2027 import TRQ volumes will reach 122,400 metric tons, with the United States expected to maintain about 80 percent share of total Canadian chicken meat imports. As the only CPTPP supplier, Chile consolidates its position as a major source for chicken imports, while Ukraine emerges as a new player in the frozen chicken import market driving trade away from Brazil.

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 domesticated 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 two percent production growth for 2027, with chicken meat production forecast to exceed 1.5 million metric tons (MMT), despite stagnant population growth. 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 2026 chicken meat production at 1.485 MMT, up 2.4 percent from 2025. Facing sustained demand, a continued period of missed production targets¹, and stable import volumes to supply the market, production growth in 2026 (similar to 2025) became primarily a function of catching up with market requirements for chicken meat. Chicken producers continued to increase production allocation volumes, as the sector battles productivity challenges in terms of tight supplies of day-old chicks.
- 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 122,400 metric tons (MT) in 2027.
- In addition to TRQ imports, Canadian poultry processing and further-processing companies are expected to import in 2026 an estimated 95,000 MT of chicken meat under Canada's import for re-export programs. Most of 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	2025		2026		2027
	USDA Official Data	NEW Post Data	USDA Official Data	NEW Post Estimates	NEW Post Estimates
Beginning Stocks	60	59	60	62	60
Production	1,480	1,450	1,530	1,485	1,515
Total Imports	230	231	240	230	225
Total Supply	1,770	1,740	1,830	1,777	1,800
Total Exports	107	107	115	110	110
Total Dom. Consumption	1,603	1,571	1,655	1,607	1,630
Ending Stocks	60	62	60	60	60
Total Distribution	1,770	1,740	1,830	1,777	1,800

*NOTES: "NEW Post" data reflects Post's assessments and are NOT official USDA data.
All data in 1,000 metric tons, carcass weight equivalent*

Chicken Meat Production

FAS/Canada forecasts 2.0 percent growth in chicken meat production for 2027, rising to 1.515 MMT, as both retail and foodservice demand is anticipated to remain solid, supported by competitive prices for chicken among other sources of animal protein, while population growth remains sluggish. 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.

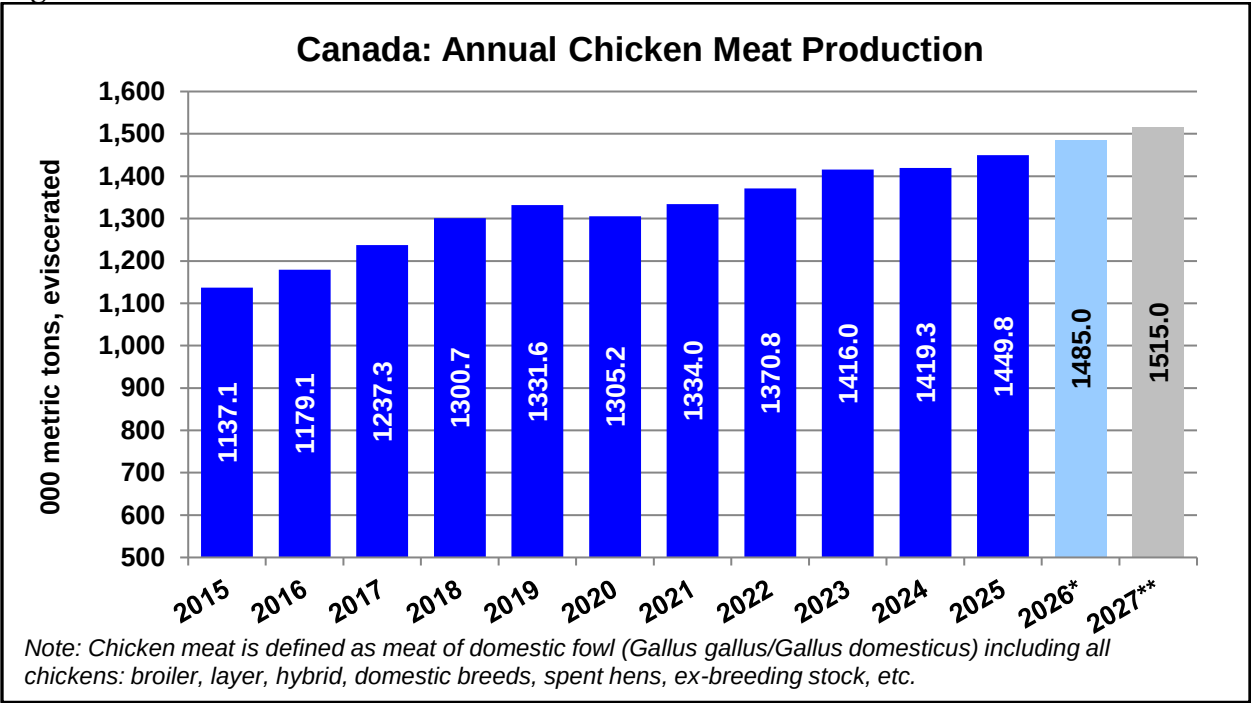
FAS/Canada estimates 2026 chicken meat production at 1.485 MMT, up 2.4 percent from 2025. Throughout 2026, the sector missed production targets, largely due to an undersupply of day-old chicks, caused in turn by lower egg-hatchability and higher chick mortality as consequences of HPAI outbreaks. These factors contributed to lower domestic chicken meat production compared to production allocation targets. Ambitious production quota allocation volumes clearly signaled chicken producers raising production levels and meeting market requirements.

In Canada, the chicken meat market consists primarily of broiler meat, which represents over 97 percent of the market. The balance consists 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. Many 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 food service sector make production decisions jointly. They consider 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.

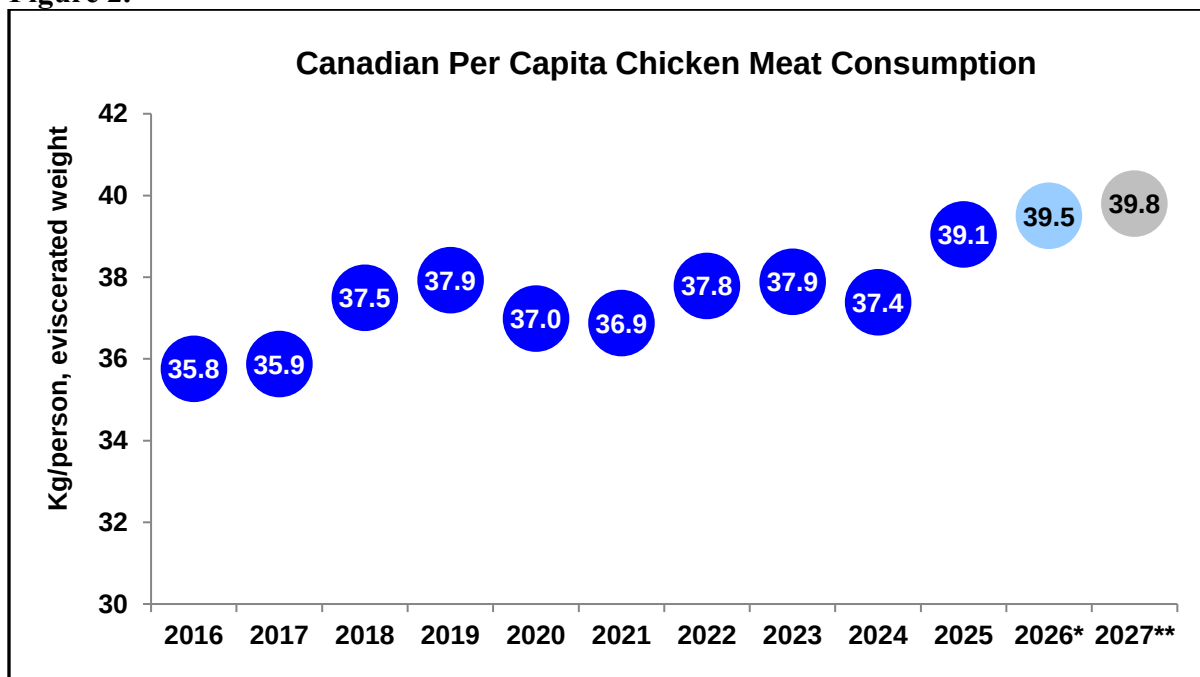
Consumption

FAS/Canada projects the 2026 and 2027 per capita chicken consumption at 39.5 and 39.8 kilograms per person, respectively, the highest levels on record, primarily as a consequence of stagnant population growth and undiminished demand.

Population growth in Canada is primarily attributed to immigration (as opposed to births). After reaching an exceptional annual growth rate of 3.0 percent in both 2023 and 2024, Canada’s population growth rate in 2025 reverted to the decades long annual average rate of 1.0 percent, following the federal government’s tighter immigration policies. The new annual immigration targets were meant to substantially reduce the number of temporary residents (i.e. international students and temporary workers), while maintaining strict controls over the number of permanent residents admitted in the country. Coupled with increased departures of temporary residents from the country, these new

immigration targets resulted in a population decline for 2026 compared to 2025, and anticipated modest growth for 2027.

Figure 2.



Source: Statistics Canada / Post *estimate ** forecast

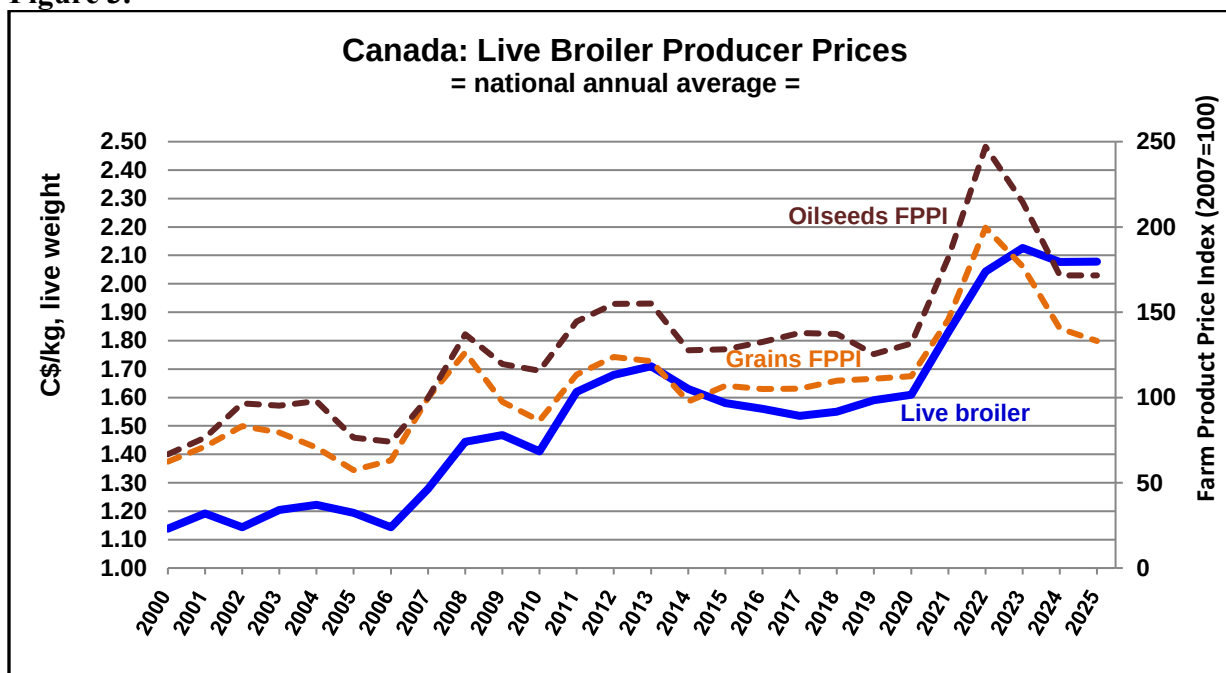
In general, total chicken meat consumption in Canada has nearly tripled over the last 35 years, due in part to the country's steady population growth, which peaked in 2025 at 41.6 million people, up from nearly 28 million in 1990. Additionally, Canada's immigration is mostly comprised of ethnic groups that tend to share similar positive preferences when it comes to chicken meat consumption.

In this context, 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.

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.

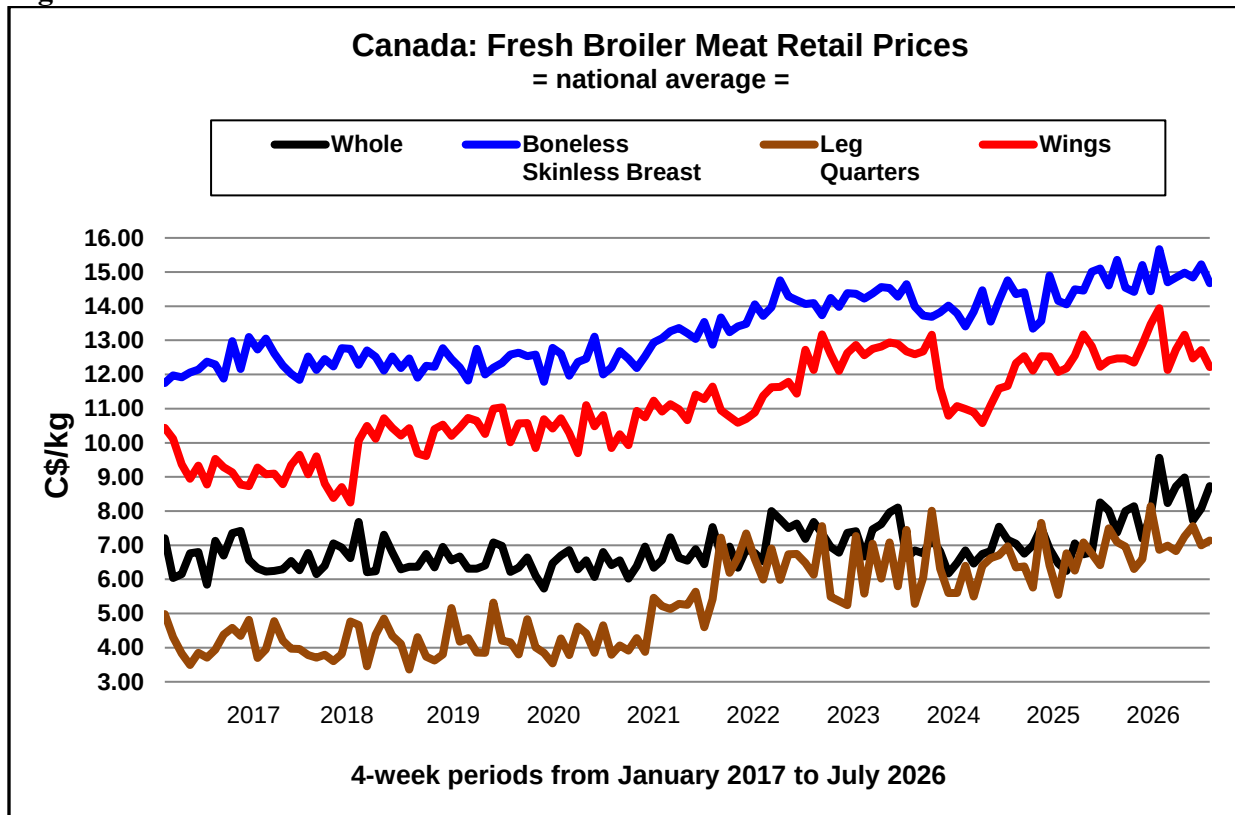


Source: Statistics Canada / Chicken Farmers of Canada

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 skewed heavily towards white meat (chicken breasts and wings) over dark meat (chicken legs and thighs), but these preferences 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.



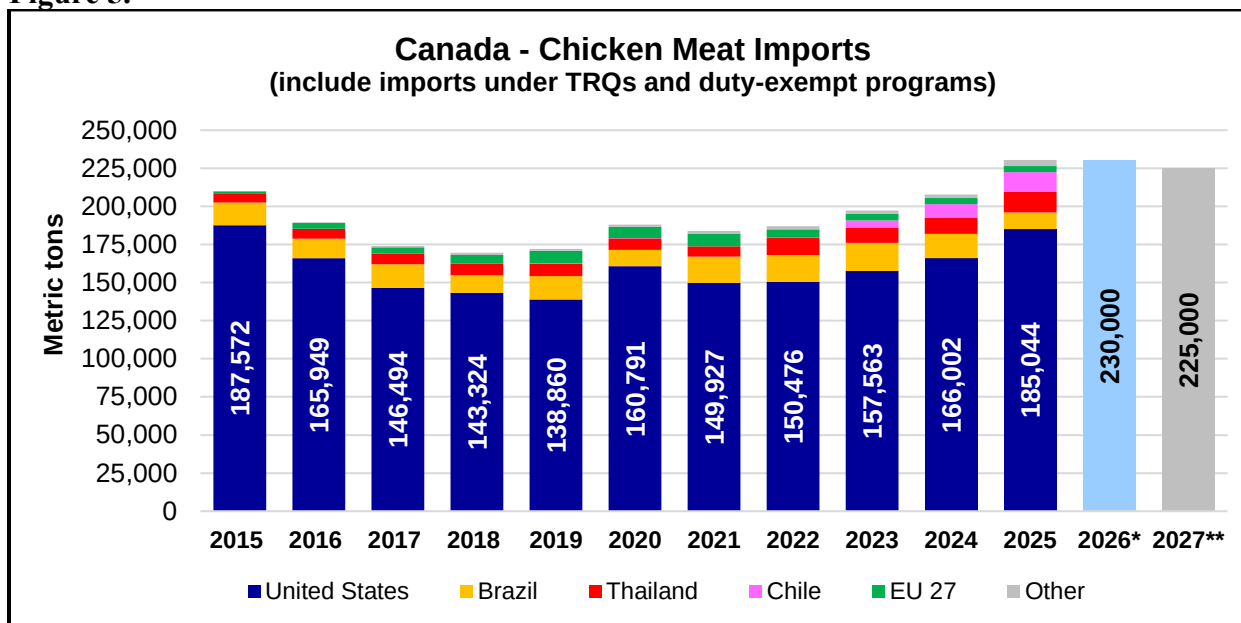
Source: Agriculture and Agri-Food Canada

Trade

Imports

FAS/Canada forecasts total chicken meat imports at 225,000 MT in 2027, down 5,000 MT from the estimated level of 230,000 MT for 2026. This downward trend is attributable to sufficient domestic supplies, and stable domestic requirements. 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. Border enforcement authorities are currently considering the possibility of using genetic tests to differentiate between broiler meat and spent fowl meat.

Table 2.

Canada: Chicken Meat Imports, January - June (metric tons)							
	Quantity			% Market Share			% Change 2026/2025
	2024	2025	2026	2024	2025	2026	
World	96,098	120,481	113,621	100%	100%	100%	-5.7%
United States	76,755	93,212	89,673	80%	77%	79%	-3.8%
Thailand	4,961	7,528	7,210	5%	6%	6%	-4.2%
Chile	3,875	6,837	6,609	4%	6%	6%	-3.3%
Brazil	7,349	8,949	5,279	8%	7%	5%	-41.0%
Ukraine	186	1,227	2,386	0%	1%	2%	94.5%
Hungary	1,223	1,329	1,498	1%	1%	1%	12.7%
Germany	760	699	590	1%	1%	1%	-15.6%
Other countries	989	700	376	1%	1%	0%	-46.3%

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 percent of the import market, followed by countries like Thailand, Brazil, and more recently Chile. Some Canadian importers are discouraged from importing Brazilian chicken, despite its lower cost, because it cannot be re-exported to the United States.

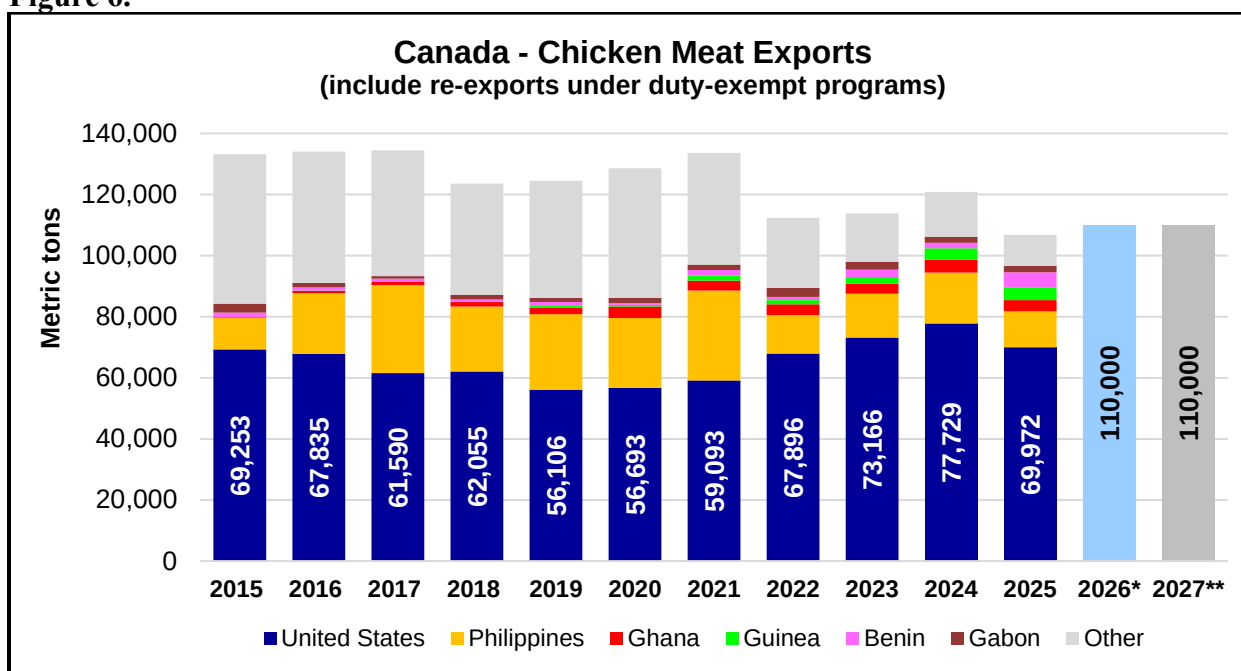
In 2023, Chile was the first country to benefit from Canada's market access commitments under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) TRQ, and is currently viewed as a major emerging supplier of chicken to Canada. In 2025, Chile outpaced Brazil and became the third largest supplier of chicken meat to Canada, just behind Thailand, the second largest supplier.

At a much smaller scale than Chile, Ukraine is another emerging supplier of chicken products to Canada, primarily of frozen wings. 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), adding competitive pressure on traditional suppliers.

Exports

FAS/Canada forecasts 2027 chicken meat exports at 110,000 MT, flat from the estimated 2026 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 2026/2025
	2024	2025	2026	2024	2025	2026	
World	60,386	56,259	57,537	100%	100%	100%	2.3%
United States	38,876	39,012	39,302	64%	69%	68%	0.7%
Philippines	8,480	4,964	6,847	14%	9%	12%	37.9%
Benin	632	1,893	2,070	1%	3%	4%	9.4%
Guinea	1,651	1,866	2,013	3%	3%	3%	7.9%
Ghana	1,656	2,054	1,487	3%	4%	3%	-27.6%
Trinidad and Tobago	1,666	1,125	1,059	3%	2%	2%	-5.9%
Mexico	759	657	755	1%	1%	1%	14.9%
Gabon	1,261	1,274	650	2%	2%	1%	-49.0%
Other countries	5,405	3,414	3,354	9%	6%	6%	-1.8%

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 2026 (January-December), under these various chicken meat TRQs are as follows:

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

In calendar year 2027 (January-December), the chicken market access levels will be:

- WTO TRQ: 39,800 MT
- USMCA TRQ: 58,146 MT
- CPTPP TRQ: 24,454 MT
- **Total: 122,400 MT**

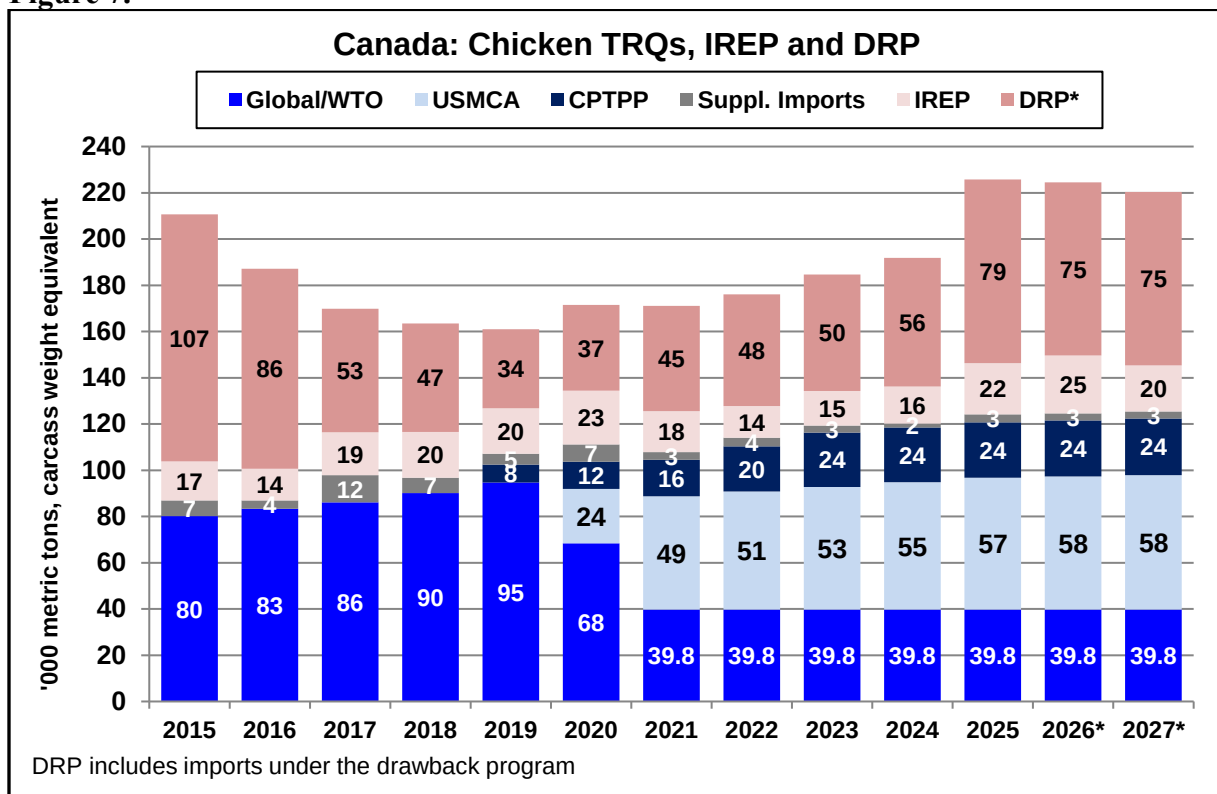
Traditionally, the global/WTO chicken TRQ has been filled at nearly 100 percent, and FAS/Canada expects this fill rate to continue in the future. Although the USMCA chicken TRQ is relatively new, FAS/Canada expects this TRQ to fill as well, given the long-standing business relationships established between 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. Over time, 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) may issue supplementary import permits in the following situations:

- [Resale Due to Domestic Market Shortages](#)
- [Dark Chicken Meat not Supplied by the Chicken Farmers of Canada's Domestic Supply Program](#)
- [Import-to-Compete Program](#)
- [Import for Re-Export Program \(IREP\)](#)
- [Test Marketing](#)
- [Extraordinary or Unusual Circumstances](#)

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.

Attachments:

No Attachments