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Report Highlights:

The Canadian cattle herd continued to experience contraction to begin 2025, however, there are signs of herd stabilization as cow slaughter declines and producers indicate an increase in heifer retention for beef replacement. Live cattle imports are forecast to see a reduction in 2025 on uncertainty and a weaker Canadian dollar. Slaughter is forecast down as the cattle herd is positioned to enter a rebuild phase. Both beef imports and exports are forecast to decline. A weaker Canadian dollar should position Canadian exports competitively but there remains significant uncertainty in the global trade environment. The Canadian swine herd saw year-over-year declines in January 1 inventories. The 2025 pig crop is forecast down as a result of the smaller sow herd. Live exports are forecast down on a smaller herd. Pork imports are forecast down on lowered demand and while a weaker Canadian dollar should support exports, they are forecast down on smaller production volumes and current uncertainty.

Cattle:

Table 1- Production, Supply and Distribution Estimates for Cattle.

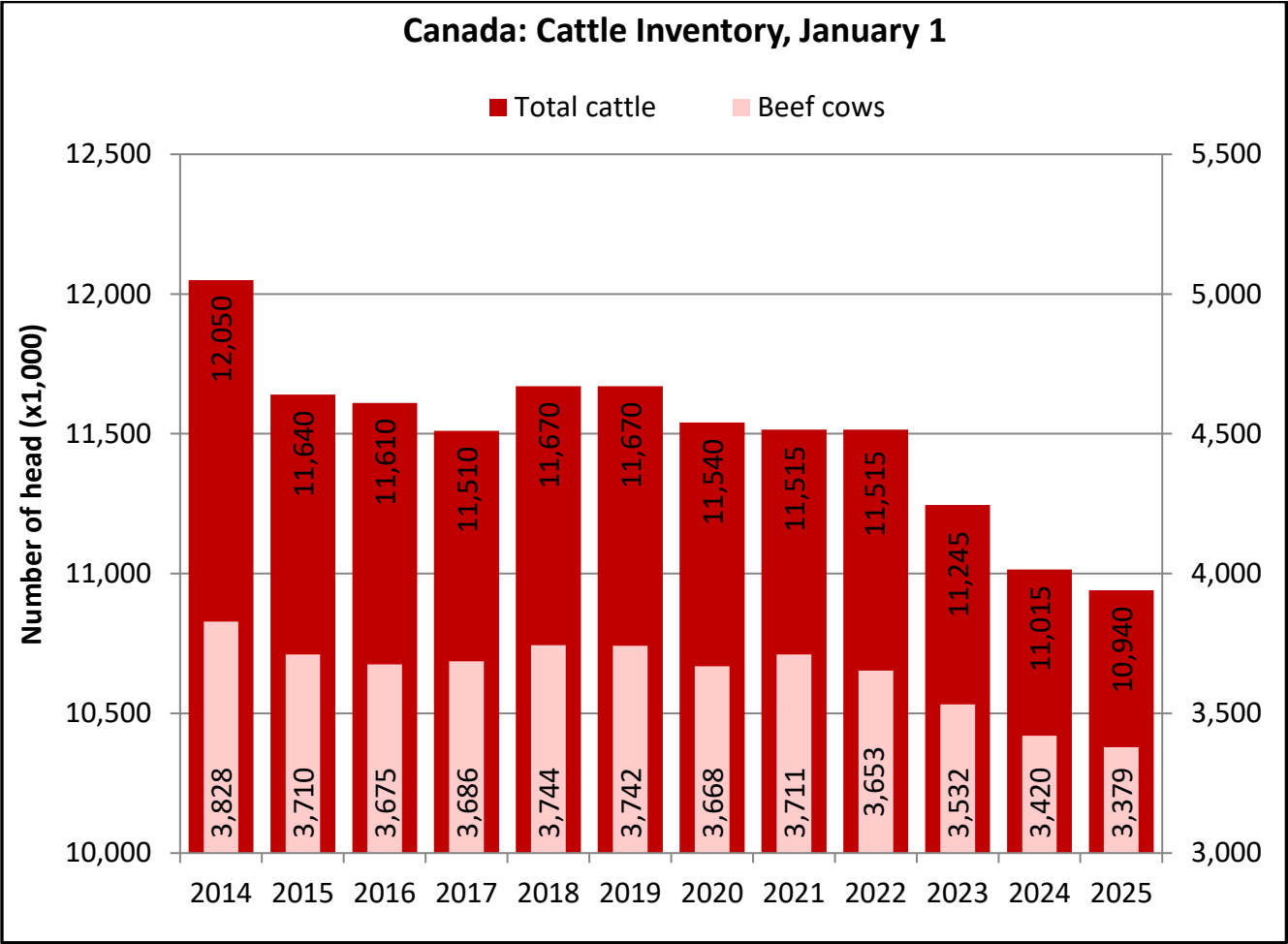
CANADA Animal Numbers CATTLE ('000 head)	2023		2024		2025	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Estimates
Total Cattle Beg. Stocks	11,245	11,245	11,025	11,015	10,935	10,940
Dairy Cows Beg. Stocks	965	965	963	963	960	962
Beef Cows Beg. Stocks	3,532	3,532	3,424	3,420	3,390	3,379
Production (Calf Crop)	4,341	4,316	4,310	4,296	4,280	4,270
Total Imports	294	294	300	364	250	350
Total Supply	15,880	15,855	15,635	15,675	15,465	15,560
Total Exports	734	734	765	797	685	770
Cow Slaughter	546	546	460	428	430	420
Calf Slaughter	207	206	180	180	170	170
Other Slaughter	2,840	2,832	2,780	2,812	2,780	2,770
Total Slaughter	3,593	3,584	3,420	3,420	3,380	3,360
Loss	528	522	515	518	465	500
Ending Inventories	11,025	11,015	10,935	10,940	10,935	10,930
Total Distribution	15,880	15,855	15,635	15,675	15,465	15,560

NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data

The Canadian cattle herd contracted further to begin 2025 with January 1 reported inventories down 75,000 head from January 1, 2024 according to statistics Canada. This represents a one percent reduction in Canada's year-over-year January 1 cattle numbers. The beef cattle herd likewise contracted to begin 2025, with January 1 beef cow numbers 41,000 head lower in 2025 compared to 2024, also representing a one percent herd size contraction. Despite improving moisture conditions in regions of Canada which have seen several years of drought impacts, cattle producers were still reducing cow herd sizes through 2024. Continuation of poorer pasture conditions in certain areas and subsequent feed outlook coupled with stronger cattle pricing likely saw producers choosing to reduce herd numbers or exit the industry at a time of higher profit rather than seeking to retain and rebuild herds despite a stronger pricing outlook. Despite these declining statistics to begin 2025, there are signs of the Canadian

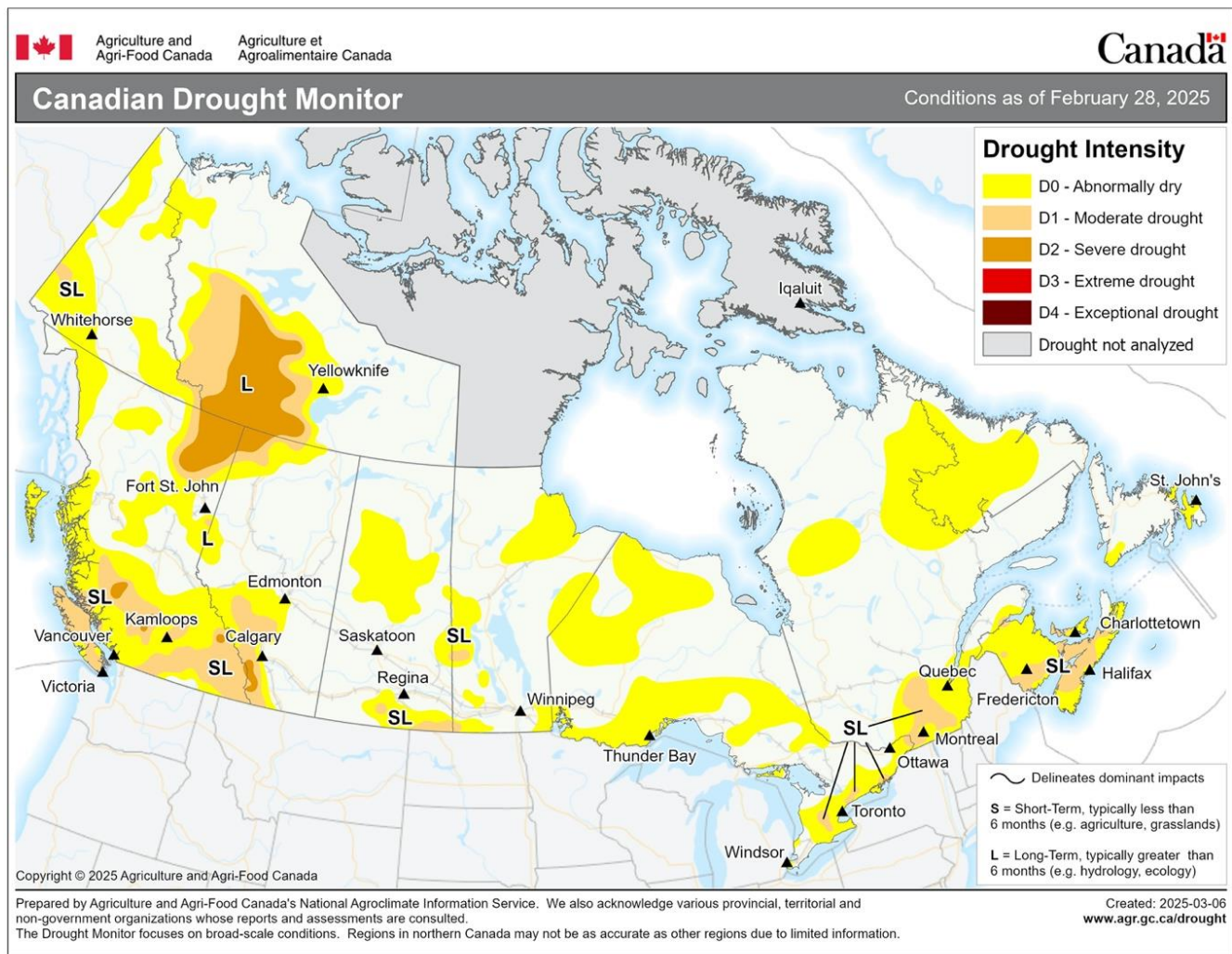
cattle herd entering the consolidation phase as reports on heifer retention for beef replacement show a one percent increase in beef heifer retention indications with both Western and Eastern Canada producers reporting intents to increase heifer retention for beef replacement in 2025. However, these numbers remain small and would not see meaningful growth in the Canada cattle herd in the short-term. Should heifer retention continue to grow along with a reduction in beef cow culling, herd rebuilding could materialize in the next two years. FAS/Ottawa had forecast a slightly larger beginning inventory for beef cattle and, as a result of a smaller beef cow herd, is now forecasting a lower 2025 calf crop. The calf crop is being forecast 10,000 head lower to 4,270 thousand head while maintaining the 2024 reproductive rate. The aggressive cow culling practice in recent years has seen the productivity rate of remaining cows improve.

Figure 1- Canadian cattle herd numbers on January 1.



Source: Statistics Canada

Figure 2- Canadian drought conditions as of February 28, 2025.

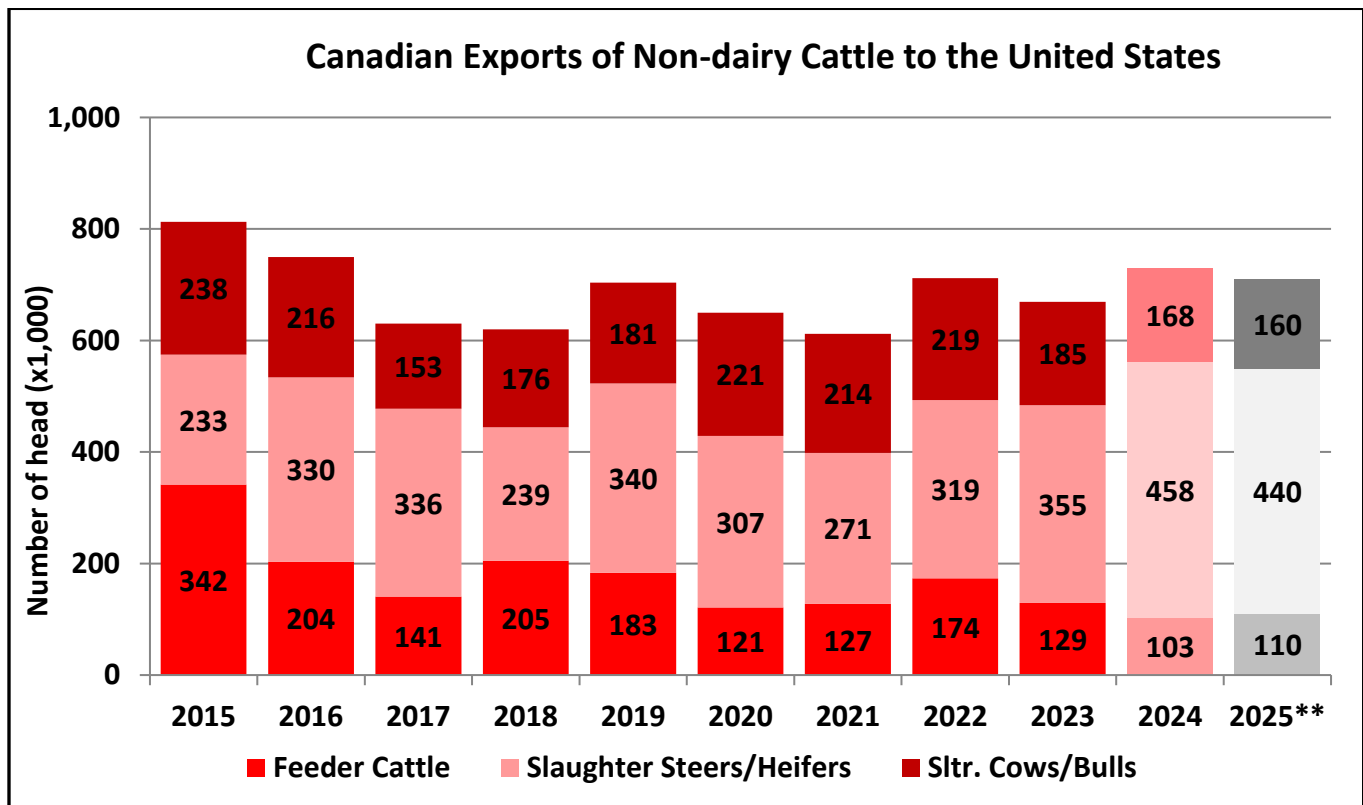


Source: Agriculture and Agri-Food Canada

While there are signs of a stabilizing cattle herd, the uncertainty of recent years continues with volatility at a heightened level amidst unknowns around tariffs being imposed or not. With this level of uncertainty, live cattle trade will be impacted but what impacts materialize will factor into how long uncertainty remains. Alberta and Saskatchewan have continued to see some feedlot expansion, with feedlot capacity now similar to the capacity in the early 2000s. During that period, Canada's cattle herd was almost 3 million head larger than at present. The expectation would be that Canadian feeders would continue to import U.S. feeder cattle to supplement the smaller Canadian feeder herd. With a contracted U.S. herd, they would need to compete with U.S. feeders for these animals but regionality, feed costs and fed pricing, and ability to finish beef-on-dairy feeders have seen Canadian feeders continue to support U.S. feeder imports despite a weakening Canadian dollar. However, threats of tariffs are likely going to factor into this supply chain if there is potential for tariffs on live cattle imports to Canada as well as live cattle exports to the United States, in addition to beef products. Given the level of

uncertainty, FAS/Ottawa is forecasting live cattle imports into Canada to decline on 2024 numbers but presently moderating the decline at a four percent reduction. Cattle trade flows have remained active and above year-to-date 2024 numbers through the end of February 2025. There are reports of some Canadian feeder cattle moving south in advance of potential tariffs. Feeders may also be looking to secure any U.S. feeders should the scenario of Canadian tariffs on cattle from the United States arise. Even in the absence of tariffs later in 2025, the live trade is not likely to maintain the current rate in both directions.

Figure 3- Canadian exports of non-dairy cattle to the United States.



Source: Trade Data Monitor, LLC/FAS/Ottawa **forecast

Canada has long discussed the need for more processing capacity and locations, especially during pandemic years where processing plant disruptions caused significant cattle backlogs. However, the continually shrinking herd does not provide a positive signal to invest in processing capacity. The majority of Canada's federal processing capacity is highly consolidated to two corporations with the highest capacity located in Alberta followed by Ontario. At present, and outside of a limited scale pilot project, only federally inspected meat products are able to move interprovincially in Canada. Meaning any disruption in meat trade and/or processing can have more substantial consequences and pivoting to increase utilization of provincial abattoirs, if more domestic processing is required, is limited by the fact that any product produced would need to be marketed within that province.

While Canada's cattle herd has continued to consolidate, the export of live cattle for processing to the United States has remained an important practice for both Canadian feeders and some U.S. processors.

Regional dynamics have seen Canadian fed cattle form an integral part of some regional U.S. processing demand. Amidst the current uncertainty, FAS/Ottawa is maintaining a forecast for live exports to decline year-over-year in 2025. A smaller calf crop and expectations of a reduction in cull cows and higher retention of beef heifers will contribute to this reduction.

FAS/Ottawa continues to maintain a reduced slaughter forecast for 2025. A further contracted cattle herd will be the main driver to this reduction. In general, slaughter to supply will be maintained at the 2024 rate.

Beef:

Table 2- Production, Supply and Distribution Estimates for Beef.

CANADA Meat BEEF and VEAL	2023		2024		2025	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Estimates
Slaughter (Reference)	3,593	3,584	3,420	3,420	3,380	3,360
Beginning Stocks	42	42	36	36	35	38
Production	1,326	1,326	1,315	1,310	1,310	1,300
Total Imports	241	241	270	264	255	250
Total Supply	1,609	1,609	1,621	1,610	1,600	1,588
Total Exports	572	572	585	562	580	560
Total Dom. Consumption	1,001	1,001	1,001	1,010	990	998
Ending Stocks	36	36	35	38	30	30
Total Distribution	1,609	1,609	1,621	1,610	1,600	1,588

Data in '000 metric tons, except for "slaughter" which is in '000 head

NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data

FAS/Ottawa maintaining the beef production forecast, forecasting a one percent reduction in beef production on lower slaughter numbers. Heavier carcass weights will somewhat offset reduced slaughter numbers.

Despite higher prices, demand for beef has remained strong in Canada. However, economic uncertainty continues to factor into consumer consciousness. FAS/Ottawa is maintaining a forecast of lower beef import volumes in 2025 but has adjusted the volume upwards, supporting lean beef imports on expectation of more demand for ground beef. A weaker Canadian dollar will also impact imports and consumer purchasing power.

As with live cattle, the uncertain trade environment may impact beef trade, whether or not long-term tariffs and counter-tariffs materialize. Geographic proximity and integrated supply chains have led to strong trade between Canada and the United States, in both directions. The United States remains an important market for Canadian beef exports as well as an important supplier for Canada's beef imports. As previously mentioned, interprovincial trade in meat is limited to product from federal facilities, this coupled with transport logistics has meant that north-south, south-north trade is typical across Canada, further lending to the cross-border integration between Canada and the United States. A short supply of beef in Eastern Canada would generally see product pulled up from the United States rather than supplied by Western Canada and vice versa. Shifting consumer sentiment amidst geopolitical tensions may see some lowered demand for U.S. beef imports into Canada. The weaker Canadian dollar will, however, likely be a more significant factor. While uncertainty persists, integration and logistical proximity should see the United States remain the main supplier of beef to Canada.

Conversely, a weaker Canadian dollar is typically supportive of export opportunities for Canadian beef which has been making a concerted effort to diversify export markets in recent years and capitalize on tariff reductions occurring under free trade agreements, especially within the Indo-Pacific region. FAS/Ottawa is maintaining the original forecast of reduced export volumes for 2025 but further revising the volume down on lower 2024 export volumes. Lower production is a contributing factor to lowered export volumes and uncertain market demand with key trade partners. While a weaker Canadian dollar should make Canadian beef more competitive in export markets against U.S. beef there are multiple other factors in effect that could end up impacting 2025 beef trade. Canadian beef continues to seek to regain market access to China following the detection of an atypical bovine spongiform encephalopathy (BSE) case in December 2021.

Table 3- Annual Exports of Beef and Veal.

Canada Beef and Veal Exports						
Partner	Annual Series (January - December)					
	2019	2020	2021	2022	2023	2024
World	524,952	510,814	592,640	582,902	571,624	562,292
EU 27	77,277	69,665	80,835	84,223	66,179	56,391
CPTPP	3,028	3,076	2,821	1,683	1,718	1,106
United States	395,877	385,228	439,730	452,753	471,186	466,147
Japan	59,061	53,766	60,107	60,643	34,432	31,988
Hong Kong	19,853	16,164	8,199	4,163	4,129	2,587
Mexico	18,211	15,762	20,570	23,515	31,110	23,815
South Korea	6,155	7,277	14,973	18,544	15,279	15,424
All other countries	25,795	32,617	49,061	23,284	15,488	22,331
% Market Share						
EU 28	14.72	13.64	13.64	14.45	11.58	10.03
CPTPP	0.58	0.60	0.48	0.29	0.30	0.20
United States	75.41	75.41	74.20	77.67	82.43	82.90
Japan	11.25	10.53	10.14	10.40	6.02	5.69
Hong Kong	3.78	3.16	1.38	0.71	0.72	0.46
Mexico	3.47	3.09	3.47	4.03	5.44	4.24
South Korea	1.17	1.42	2.53	3.18	2.67	2.74
All other countries	4.91	6.39	8.28	3.99	2.71	3.97

Source: Trade Data Monitor. *Conversion to carcass weight equivalent (CWE)

Table 4- Annual Imports of Beef and Veal.

Canada Beef and Veal Imports						
Partner	Annual Series (January - December)					
	2019	2020	2021	2022	2023	2024
World	204,167	249,427	211,950	214,039	241,401	263,795
EU 27	28,603	37,866	31,627	29,284	40,062	51,465
CPTPP	7,411	24,234	19,669	19,884	12,630	10,387
United States	130,267	142,050	132,796	131,786	133,622	124,135
Australia	22,109	18,913	10,370	13,969	27,260	36,223
New Zealand	19,059	25,290	18,435	15,700	24,668	35,816
Uruguay	10,860	21,361	11,656	9,395	16,288	16,037
Mexico	7,604	10,458	11,629	12,609	14,465	14,507
All other countries	14,268	31,355	27,064	30,580	25,098	37,077
% Market Share						
EU 28	14.01	15.18	14.92	13.68	16.60	19.51
CPTPP	3.63	9.72	9.28	9.29	5.23	3.94
United States	63.80	56.95	62.65	61.57	55.35	47.06
Australia	10.83	7.58	4.89	6.53	11.29	13.73
New Zealand	9.34	10.14	8.70	7.34	10.22	13.58
Uruguay	5.32	8.56	5.50	4.39	6.75	6.08
Mexico	3.72	4.19	5.49	5.89	5.99	5.50
All other countries	6.99	12.57	12.77	14.29	10.40	14.06

Source: Trade Data Monitor. *Conversion to carcass weight equivalent (CWE)

Swine:

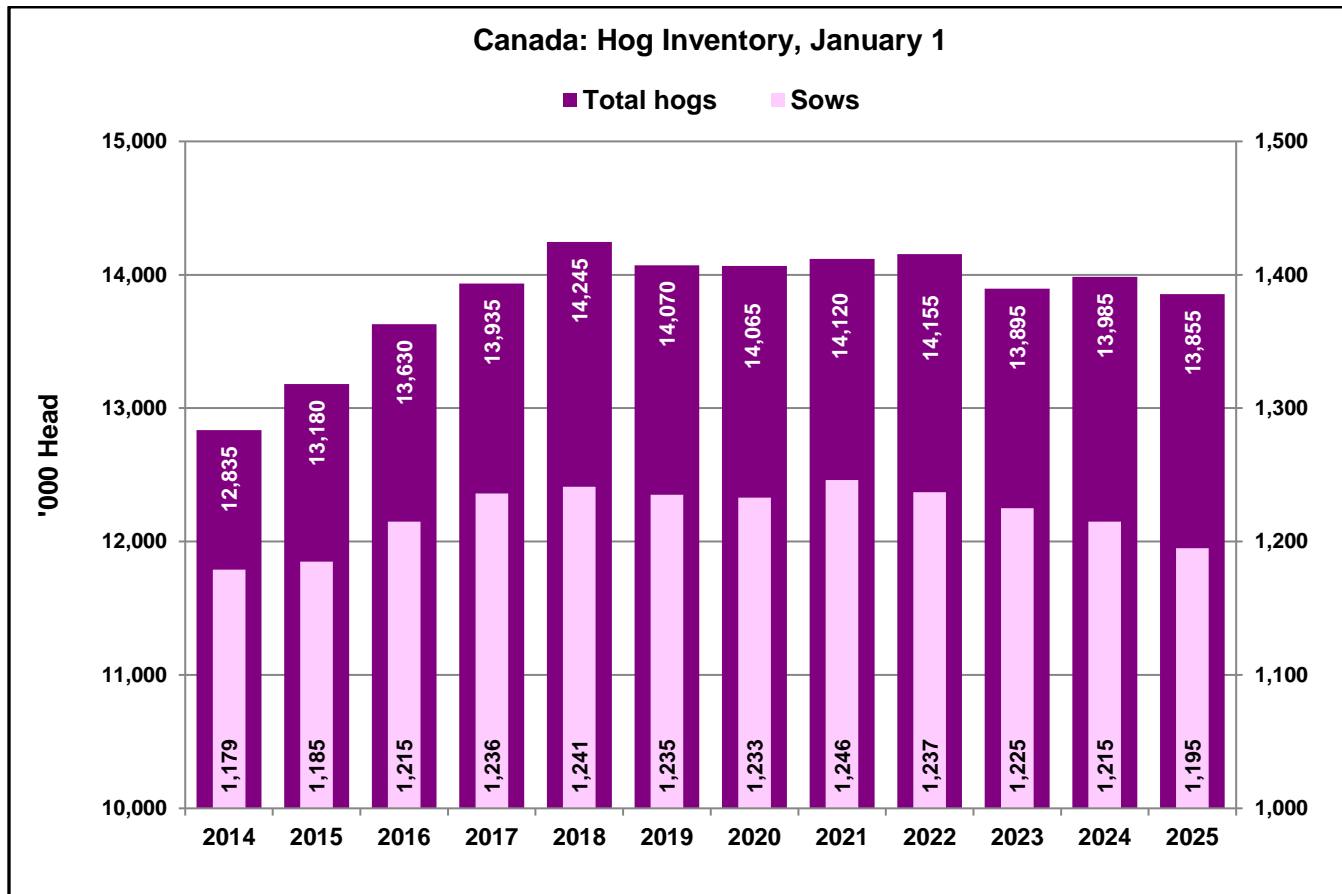
Table 5- Production, Supply and Distribution Estimates for Hogs.

CANADA Animal Numbers SWINE ('000 head)	2023		2024		2025	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Forecast
Total Beginning Stocks	13,900	13,895	13,975	13,985	14,180	13,855
Sow Beginning Stocks	1,227	1,225	1,215	1,215	1,220	1,195
Production (Pig Crop)	30,241	30,257	29,750	29,523	29,600	29,300
Total Imports	3	3	3	2	3	2
Total Supply	44,144	44,155	43,728	43,510	43,783	43,157
Total Exports	6,750	6,750	6,780	6,767	6,575	6,607
Total Slaughter	21,947	21,926	21,270	21,420	21,500	21,350
Loss	1,495	1,494	1,498	1,468	1,433	1,400
Ending Inventories	13,975	13,985	14,180	13,855	14,275	13,800
Total Distribution	44,167	44,155	43,728	43,510	43,783	43,157

NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data

The Canadian swine herd contracted to begin 2025, with beginning inventories at the lowest level since 2016. Sow herd numbers are two percent lower compared to January 1, 2024 with 20,000 head fewer reported in Statistics Canada's January 1, 2025 inventory report. Overall herd contraction is at one percent, with the sow herd contraction slightly above the general herd contraction. Of the four main hog producing provinces, only Ontario posted an increase in sow numbers while Quebec, Manitoba, and Alberta all saw reduced sow numbers. The Quebec sow herd is two percent below 2024 beginning inventories, a result of processing capacity reductions in the province.

Figure 4- Canadian hog herd numbers on January 1.



Source: Statistics Canada

FAS/Ottawa is revising the 2025 pig crop forecast downward on lower beginning sow inventories. Initial expectations were for more stability of the sow herd and some expansion outside of Quebec. However, that expansion only materialized in Ontario and not at a level to offset declines in other provinces. Productivity per pig is still anticipated to remain above 24 piglets with no significant disease pressures being observed at present. The pig crop is now forecast to decline one percent year-over-year.

Hog prices have been performing well which should signal some expansion, however, market volatility and the uncertainty in trading relationships will likely suppress 2025 planned expansions, unless uncertainty and volatility resolve within the next few months. Some expansion had been anticipated with new barn construction in Western Canada for 2025 but many projects will likely be put on hold to see what direction geopolitical tensions continue in. Tariff threats within North America and the announcement of retaliatory tariffs by China on Canadian pork, anticipated to come into effect March 20, 2025, are creating significant industry uncertainty. Planned barn modernizations and re-builds will likely also be held off until more certainty materializes.

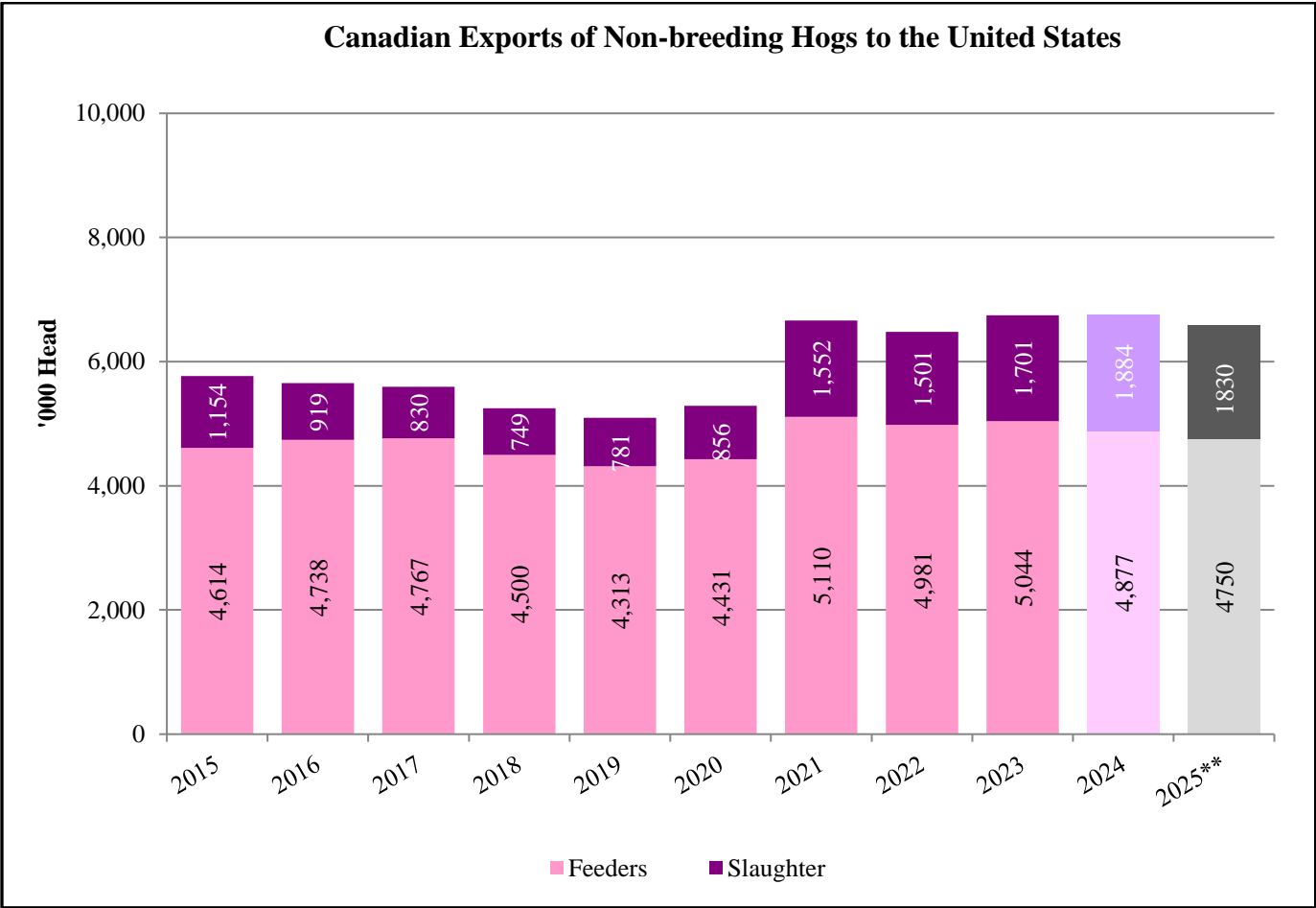
Where uncertainty has the potential to impact live cattle trade in both directions across the Canada-United States border, on hogs, the trade flow is predominantly southbound from Canada to the United

States. There is a long-established weaner/feeder pig trade between Canadian producers and U.S. finishing barns; this is especially true for certain provinces where piglet production is far above the available finishing space capacity in the province. These relationships go back decades in many cases and in some instances, Canadian operations have invested in U.S. finishing space. While feeder pig prices have been profitable recently, ability to absorb any tariffs in the long-term is extremely limited; in most cases, the Canadian producer would be in a position to be a price taker. For some operations, their business model may be predominately U.S. export focused and the current level of uncertainty will likely impact decision making for second half 2025 production and therefore would have a carry-over impact on live export trade.

Canada's live exports of market hogs have been fewer than one for every four feeder pigs exported throughout the 2010's. However, in recent years, during and post-pandemic, proportionately more market hogs have been exported. This has been a result of processing disruptions in Canada, processing capacity reductions, and increased U.S. demand. In particular, Eastern Canada has seen a higher number of market hogs flow to the United States for processing. FAS/Ottawa is maintaining the forecast trend for a reduction in live exports in 2025 but further reducing number forecast as a result of a lower forecast pig crop and market uncertainty. A weaker Canadian dollar will still support interest in Canadian hog exports but it will be dependent on how tariff and counter-tariff threats materialize. Industry reports that disease pressure in the United States in the second half of 2024, has supported higher volumes of Canadian hog exports to begin 2025.

Expansion of Canada's cull sow processing capacity is supporting more domestic processing of cull sows and a lower export volume. This expanded capacity has been concentrated in Western Canada with additional capacity expected to come online in Manitoba in 2025. These capacity additions have the potential to remove close to 500,000 cull sow exports to the United States depending on demand. Cull sow exports to the United States are expected to decline year-over-year on a smaller sow herd and increased Canadian cull sow processing capacity.

Figure 5- Canadian exports of non-breeding hogs to the United States.



Source: Trade Data Monitor, LLC/FAS/Ottawa **forecast

Slaughter is forecast to remain relatively stable on 2024 final slaughter numbers. Additional cull sow processing has offset some reductions in slaughter in Quebec. There is also some increased capacity in Ontario being used.

Pork:

Table 6- Production, Supply and Distribution Estimates for Pork.

CANADA Meat SWINE	2023		2024		2025	
	USDA Official Data	NEW FAS/Ottawa Data	USDA Official Data	NEW FAS/Ottawa Estimates	USDA Official Data	NEW FAS/Ottawa Estimates
Slaughter (Reference)	21,947	21,926	21,270	21,420	21,500	21,300
Beginning Stocks	79	79	78	78	60	81
Production	2,106	2,106	2,085	2,090	2,125	2,080
Total Imports	261	261	245	242	240	230
Total Supply	2,446	2,446	2,408	2,410	2,425	2,391
Total Exports	1,327	1,328	1,400	1,434	1,450	1,366
Total Dom. Consumption	1,041	1,040	948	895	925	950
Ending Stocks	78	78	60	81	50	75
Total Distribution	2,446	2,446	2,408	2,410	2,425	2,391

Data in '000 metric tons, except for "slaughter" which is in '000 head

NOTE: "NEW FAS/Ottawa" data reflect author's assessments and are NOT official USDA data

FAS/Ottawa is revising the 2024 pork production forecast down to 2,080 MT. This revision downward is based on a reduced slaughter forecast and expectations that carcass weights will moderate. Carcass weights have trended heavier in recent years, with processing disruptions a factor in heavier weights.

FAS/Ottawa is adjusting the pork import forecast down slightly for 2025 as demand for pork continues to be reasonably stagnant amongst Canadian consumers. Improved domestic demand for pork has continued to struggle despite competitive pricing compared to other protein sources. Export demand for pork has been a contributor in a lack of focus on the domestic market. Trade challenges could see a re-invigoration of the domestic market as 2025 continues.

Brazil continued to make gains in export volumes to Canada in 2024, almost doubling 2023 volumes. However, the United States continues to hold a dominant market share and should continue to do so, although consumer demand in Canada will need to see an increase to see higher volumes in U.S. pork imports, especially with a weaker Canadian dollar reducing demand for higher value imports.

Interprovincial trade in meat is limited to product from federal facilities, this coupled with transport logistics has meant that north-south, south-north trade is typical across Canada, which has supported the cross-border integration between Canada and the United States. A short supply of pork in Eastern Canada would generally see product pulled up from the United States rather than supplied by Western Canada and vice versa. While uncertainty persists, integration and logistical proximity should see the United States remain the main supplier of pork exports to Canada for now. However, shifting consumer sentiment amidst geopolitical tensions may see some lowered demand for U.S. pork imports into Canada. The weaker Canadian dollar will, however, likely be a more significant factor.

Tariff threats within North America and the announcement of retaliatory tariffs by China on Canadian pork, anticipated to come into effect March 20, 2025, are creating significant industry uncertainty. China has been a declining market for Canadian pork exports in recent years as recovery from African Swine Fever has occurred in China and geopolitical tensions have periodically impacted Canada-China trade. However, China is an important market for certain pork products that have limited alternative markets outside of rendering.

FAS/Ottawa is now forecasting a reduction in pork exports on a lower volume of production and amidst uncertainty in trade relationships. Canada is likely to continue to explore market diversification opportunities and will continue to have a focus on the Indo-Pacific region. Mexico is also likely to remain an import market for hams and shoulders in 2025. A weaker Canadian dollar should support Canadian pork exports but with potential trade actions pork trade is likely to experience significant volatility.

Table 7- Annual Exports of Pork.

Canada Pork Exports						
Partner	Annual Series (January - December)					
	2019	2020	2021	2022	2023	2024
World	1,285,528	1,545,570	1,482,697	1,416,425	1,327,911	1,434,152
CPTPP	460,683	394,173	458,583	429,567	399,070	547,912
EU 27	3,020	786	896	443	3,097	2,036
United States	320,799	313,126	405,594	472,202	416,254	398,186
Japan	298,170	292,405	279,501	250,081	222,790	333,654
China	259,574	652,205	319,403	207,553	190,688	145,036
Mexico	134,274	85,916	164,449	168,262	159,394	184,467
Taiwan	52,661	21,948	24,060	25,987	58,458	53,069
Philippines	52,077	46,237	124,148	141,712	110,716	100,509
South Korea	47,887	38,332	54,105	66,183	66,953	96,259
All other countries	120,086	95,401	111,437	84,445	102,658	122,972
% Market Share						
CPTPP	35.84	25.50	30.93	30.33	30.05	38.20
EU 27	0.23	0.05	0.06	0.03	0.23	0.14
United States	24.95	20.26	27.36	33.34	31.35	27.76
Japan	23.19	18.92	18.85	17.66	16.78	23.26
China	20.19	42.20	21.54	14.65	14.36	10.11
Mexico	10.45	5.56	11.09	11.88	12.00	12.86
Taiwan	4.10	1.42	1.62	1.83	4.40	3.70
Philippines	4.05	2.99	8.37	10.00	8.34	7.01

South Korea	3.73	2.48	3.65	4.67	5.04	6.71
All other countries	9.34	6.17	7.52	5.96	7.73	8.57

Source: Trade Data Monitor, LLC / *Conversion to carcass weight equivalent (CWE)

Table 8- Annual Imports of Pork.

Canada Pork Imports						
Partner	Annual Series (January - December)					
	2019	2020	2021	2022	2023	2024
World	242,075	273,546	263,002	234,416	261,213	242,871
CPTPP	27,008	29,303	49,521	50,734	36,714	26,445
EU 27	3,338	3,358	6,371	5,150	3,050	1,627
United States	211,196	240,336	206,886	177,593	215,603	201,286
Denmark	5,954	7,061	23,921	19,531	12,281	8,108
Germany	6,602	6,857	5,975	10,013	11,743	8,728
Spain	3,541	3,233	6,096	7,529	4,261	2,750
Brazil	0	0	0	548	5,320	11,591
All other countries	14,782	16,059	20,124	19,202	12,005	10,408
% Market Share						
CPTPP	11.16	10.71	18.83	21.64	14.06	10.89
EU 27	1.38	1.23	2.42	2.20	1.17	0.67
United States	87.24	87.86	78.66	75.76	82.54	82.88
Denmark	2.46	2.58	9.10	8.33	4.70	3.34
Germany	2.73	2.51	2.27	4.27	4.50	3.59
Spain	1.46	1.18	2.32	3.21	1.63	1.13
Brazil	0.00	0.00	0.00	0.23	2.04	4.77
All other countries	6.11	5.87	7.65	8.19	4.60	4.29

Source: Trade Data Monitor, LLC / *Conversion to carcass weight equivalent (CWE)

Policy:

China

Canadian beef exports to China remain suspended due to the atypical bovine spongiform encephalopathy (BSE) case detected in December 2021.

Pork Promotion and Research Agency

The [Canadian Pork Promotion and Research Agency](#) (Pork PRA) was officially established under the Farm Products Agencies Act on December 16, 2020. Collection of the import levy began in May 2022. The import levy is CAD 0.80 per hog, or equivalent adjustment for pork products, based on matching the lowest provincial levy amount. Additional information can be found on the Pork PRA [website](#).

Tariffs

Canada has implemented a [first tranche](#) of retaliatory tariffs, as of March 4, 2025, on select U.S. goods with trade valued at CAD 30 billion. Live hog and cattle HS codes were not targeted in this first tranche of goods. Certain meat offal and sausage products are captured under the first tranche HS codes. Canada continues to consult on a potential [second tranche](#) of retaliatory tariffs on U.S. goods valued at CAD 125 billion. These second tranche tariffs could be implemented on April 2, 2025 should U.S. tariffs on Canadian goods go into effect on that date.

China has announced retaliatory tariffs on Canada in response to Canada's tariffs on Chinese electric vehicles, steel, and aluminum imported into Canada. China is scheduled to implement a 25 percent tariff on fifteen HS codes of Canadian pork products on March 20, 2025.

Comprehensive Economic Partnership Agreement (CEPA)

On December 2, 2025, Canada and Indonesia announced the conclusion of negotiations on [CEPA](#). Both countries made a commitment to sign the agreement at some point in 2025. Global Affairs Canada notes that once fully implemented, over 95 percent of Canadian exports to Indonesia will receive preferential tariff treatment.

Canada-Ecuador Free Trade Agreement

On February 4, 2025, the Government of Canada [announced](#) the conclusion of negotiations on a free trade agreement between Canada and Ecuador. Once ratified, several Canadian agricultural commodities will receive preferential treatment with Global Affairs Canada highlighting improved access for meat, grains and oilseeds, cereals, pulses, processed foods, and sugar-containing foods.

Attachments:

No Attachments