



# Grocery Chicken Featuring Report: April 2025

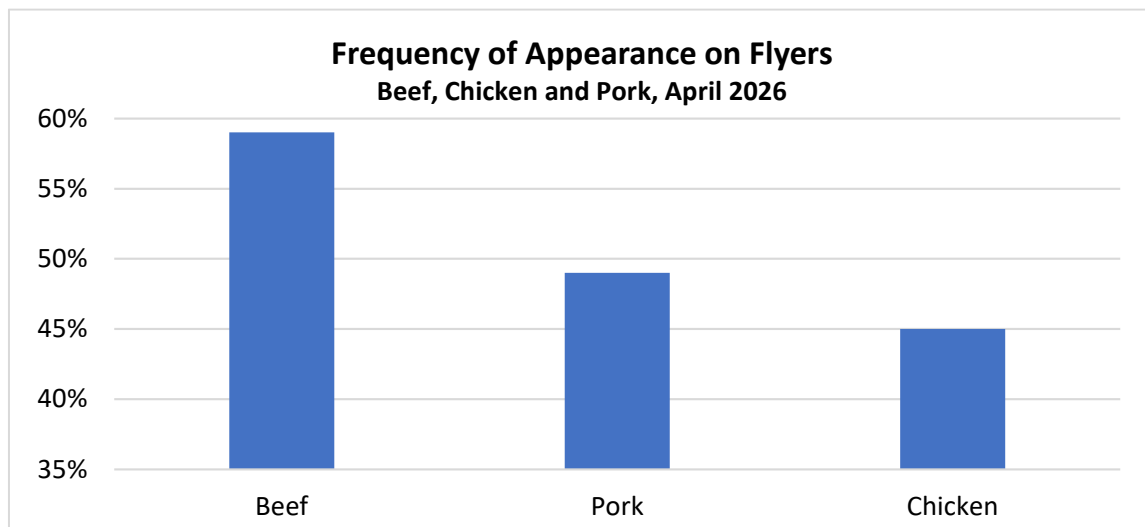
The following is a summation of fresh meat feature share and pricing on the front pages of 25 surveyed flyers during April 2025. The flyers are from grocery banners across Canada (see appendix A). The survey only uses the front page of the flyer as those are the most important meat ads.

## Frequency of Appearance on Flyer Front Page

Frequency of appearance is a measure of the number of times that beef, pork, or chicken appeared at least one time on the front page of the 25 flyers during the month.<sup>1</sup> This section focusses on the number of times chicken appeared at least once on the flyer front page across Canada.

### April Frequency of Appearance of Three Main Meats

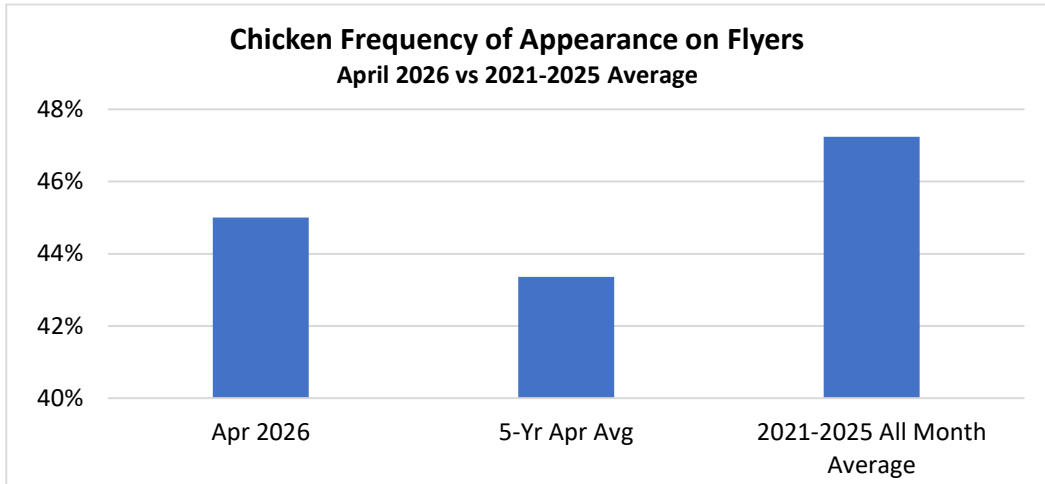
- Chicken frequency of appearance on the front page of flyers: 45%. [Of 100 possible front page flyer opportunities in April, (4 weeks x 25 flyers), chicken was on 45 (45/100 = 45%)].
- Beef frequency, 59%; pork frequency, 49%.



<sup>1</sup> "Frequency" is defined in more detail in Appendix B.

## April Chicken Frequency Compared to Average

- Chicken frequency April 2026: 45%.
- Chicken frequency April 2021-2025 average: 43%.
  - April 2026 chicken frequency was 2% point **more** than April 2021-2025.
- Chicken frequency average for all sixty months from 2021-2025: 47%.
  - April 2026 chicken frequency was 2% points **less** than all 60 months 2021-2025.
  - April is normally 4% points **less** than the all 60-month average.
  - April 2026 **exceeded** the April norm by 2% points against the 60-month average.



(See Appendix B for monthly average chicken flyer frequency).

**April 2026 Chicken Frequency Grade on an A to F scale: “B” (Good).** April 2026 chicken featuring frequency was greater than April normally is and greater than usual against the average of all months. The one factor that brought the April grade down from an “A” to a “B” was that the April chicken frequency was less than beef and pork.

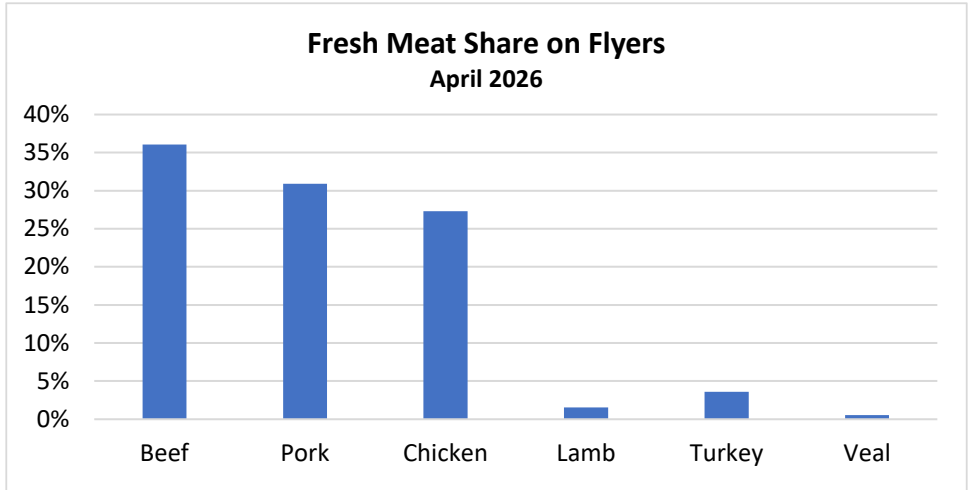
## Share of Fresh Meat on Flyer Front Page

The next task is to calculate chicken’s share of appearances compared to the other fresh meat ads on the flyers.<sup>2</sup> This section focusses on the percentage share of chicken ads on the 25 flyers compared to the other meats on the flyer.

### April Fresh Meat Features Shares of Flyer

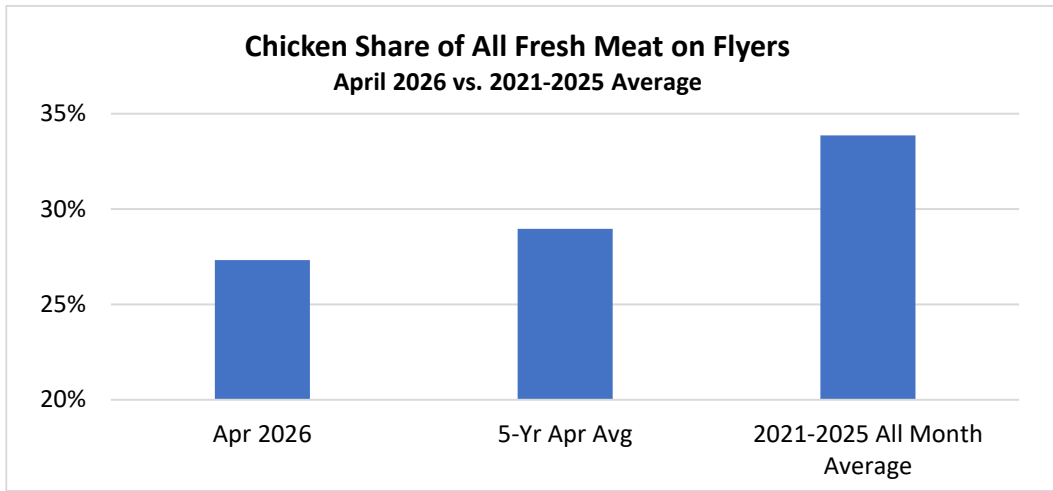
- Chicken’s share of fresh meat featured on the front page of the flyer: 27%.
- There were 53 chicken ads out of a grand total of 194 fresh meat ads (53/194=27%)
- Beef fresh meat share: 36%, pork 31%, and others 11%.

<sup>2</sup> This concept of share of fresh meat features is explained more fully in Appendix C.



**April Chicken Share of Fresh Meat Features Compared to Average**

- Chicken fresh meat share April 2026: 27%.
- Chicken fresh meat share for April from 2021-2025: 29%.
  - April 2026 chicken fresh meat share: -2% points *less* than April 2021-2025.
- Chicken fresh meat share for all sixty months from 2021-2025: 34%.
  - April 2026 chicken fresh meat share was 7% points *less* than all 60 months from 2021-2025 (27%-34%= -7%).
  - During April from 2021-2025, chicken feature share averaged 5% points *less* than the all-month average.
  - April 2026 was -2% *less* than the norm against the 60-month average (-7% less than average this year compared to -5% for April 2021-2025).

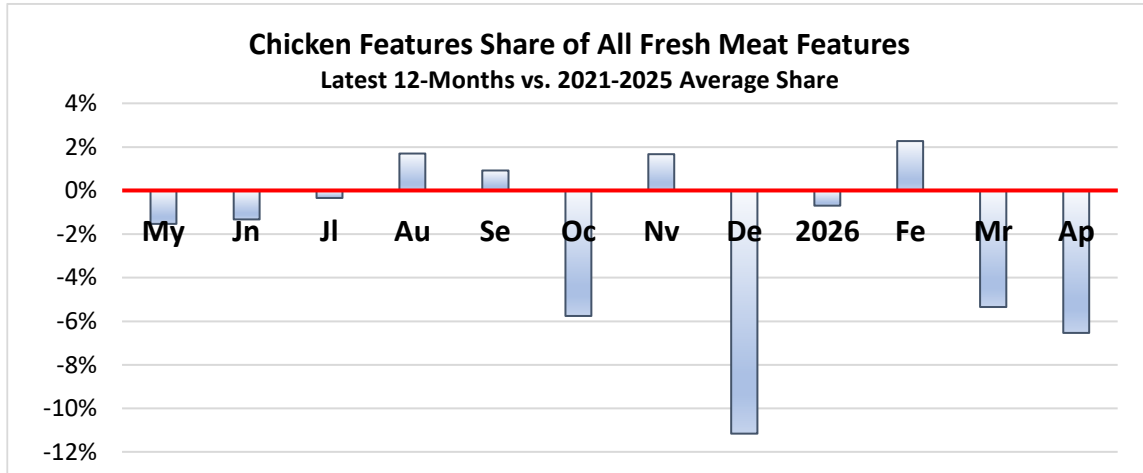


**Twelve Month Chicken Share of Fresh Meat Features Compared to Average**

- 12-month May 2025 through April 2026, chicken fresh meat features share: 32%.
  - 60-month (2021-2025) average chicken share: 34%.
  - May 2025 through April 2026: -2% vs all month 2021-2025 average.

- During the past 12 months, chicken feature share of all fresh meats has been 2% points **less** than normal, or below average compared to all months from 2021-2025.

The following graph shows a comparison of chicken share of fresh meat performance in each of the past twelve months against the 60-month chicken 34% share average for 2021-2025.



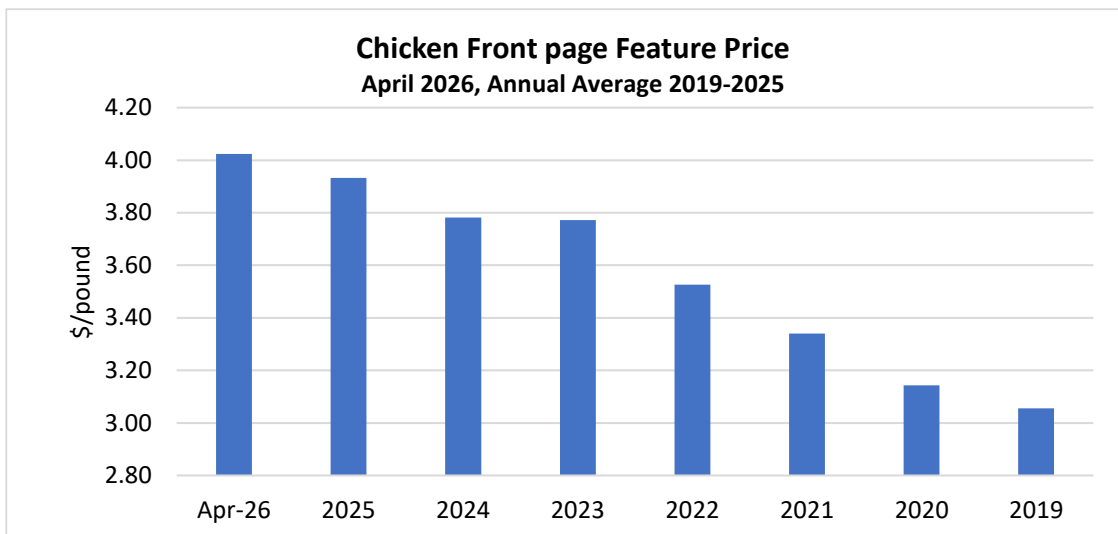
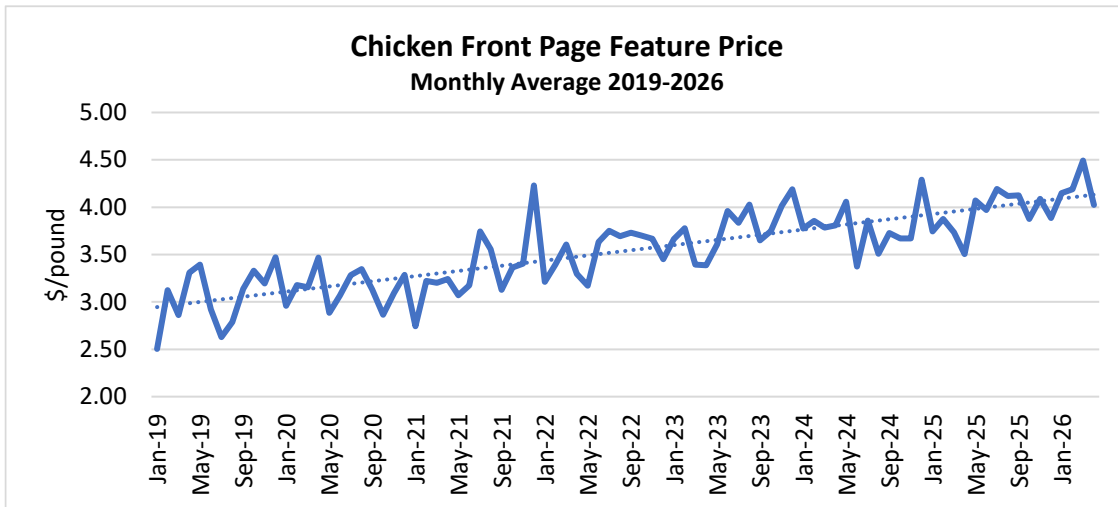
**April Chicken Share of Meat Grade on an A to F scale: “F” (Fail).**

Chicken had had less share of the front page of the flyer than beef and pork during April. Chicken had less share of the flyer in April than it normally does in April over 2021-2025. During April chicken had less share of all 60 months from 2021-2025 than it normally does. During the past twelve months the share of chicken on the front of the flyer has declined compared to the average of all months. Once again, another failing month for chicken on the flyers in Canada.

**Flyer Fresh Meat Pricing**

**April Chicken Front Page Flyer Pricing Trends**

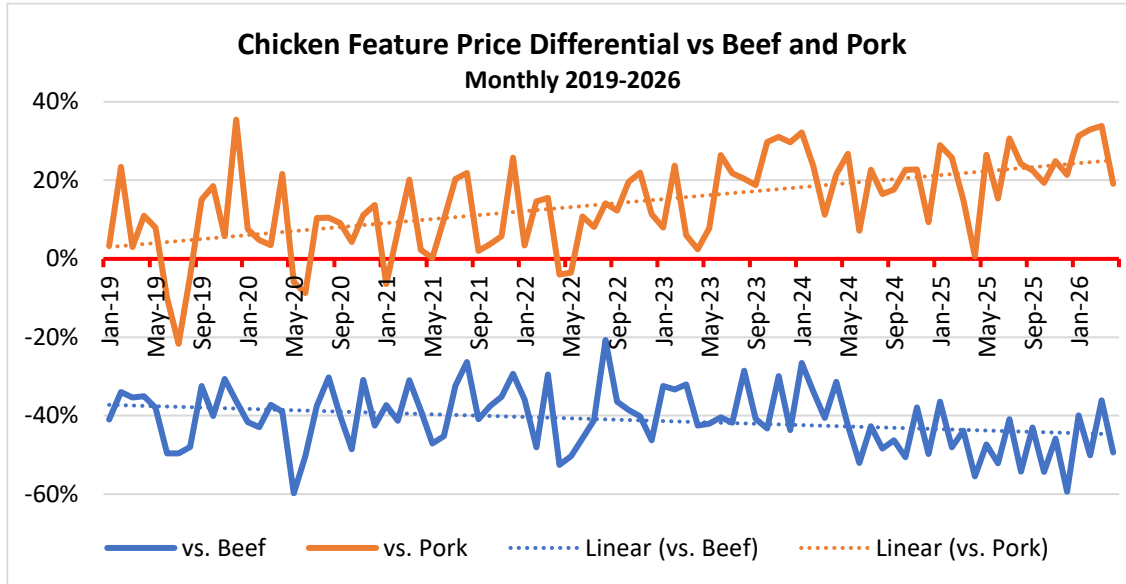
- The average price for all chicken cuts featured during April 2026 was \$4.02/pound.
- April 2025 average for chicken, \$3.50.
- 2025 annual average chicken price, \$3.93
- 2024 annual average chicken price, \$3.78.



### April Chicken Flyer Pricing Compared to Competing Meats

- Chicken \$4.02
- Beef \$7.94
- Pork \$3.38
- Chicken on the front page:
  - -49% *less* than beef prices.
  - +19% *more* than pork prices.
- For 2021-2025 on average, chicken was priced 41% less than beef and 16% more than pork.
- April 2026 chicken front page feature price:
  - -8% points *less* than average versus beef.
  - +3% points *more* than average against pork.
- Chicken was priced **more** competitively than average against beef and **less** competitively than average against pork on grocery flyer front pages in April 2026.
- As seen on the graph below, the front-page flyer price relationship of chicken against beef on the front page of the flyer was relatively steady from 2019-2023. In mid-2024 chicken became even more lower priced compared to beef (i.e., beef got more expensive against chicken). Chicken has

consistently been getting more costly or less competitive compared to pork on the front page of flyers (the chicken price versus pork increased).



## April Feature Summary and Outlook

- Chicken frequency of appearance during April was less than beef and pork.
- Chicken frequency of appearance overperformed April appearance over 2021-2025.
- April frequency was more than it usually is in comparison to the all 60-month average.
- Chicken’s share of April fresh meat features was less than beef and pork.
- Chicken feature share was less than what it normally is during April.
- April chicken feature share in 2026 was less than its usual share versus all months from 2021-2025.

Last report I anticipated once again that April would be a “bounce back” month for chicken features. I said “This is especially the case given record setting beef prices in early 2026 when April ads were being negotiated.” That bounce back did not happen. Once again chicken had a lethargic feature month. Based on many lethargic featuring months during the past 12 months, it is apparent that the high cost and tighter availability during 2025 continues to impact chicken merchandising. That also means that chicken market share has fallen short of its potential.

May is a very important featuring month, especially the Victoria Day weekend. That sets the tone for the grilling season. Given that the supply situation in the industry began to improve in early 2026, it can be expected that chicken featuring should begin to improve in May.

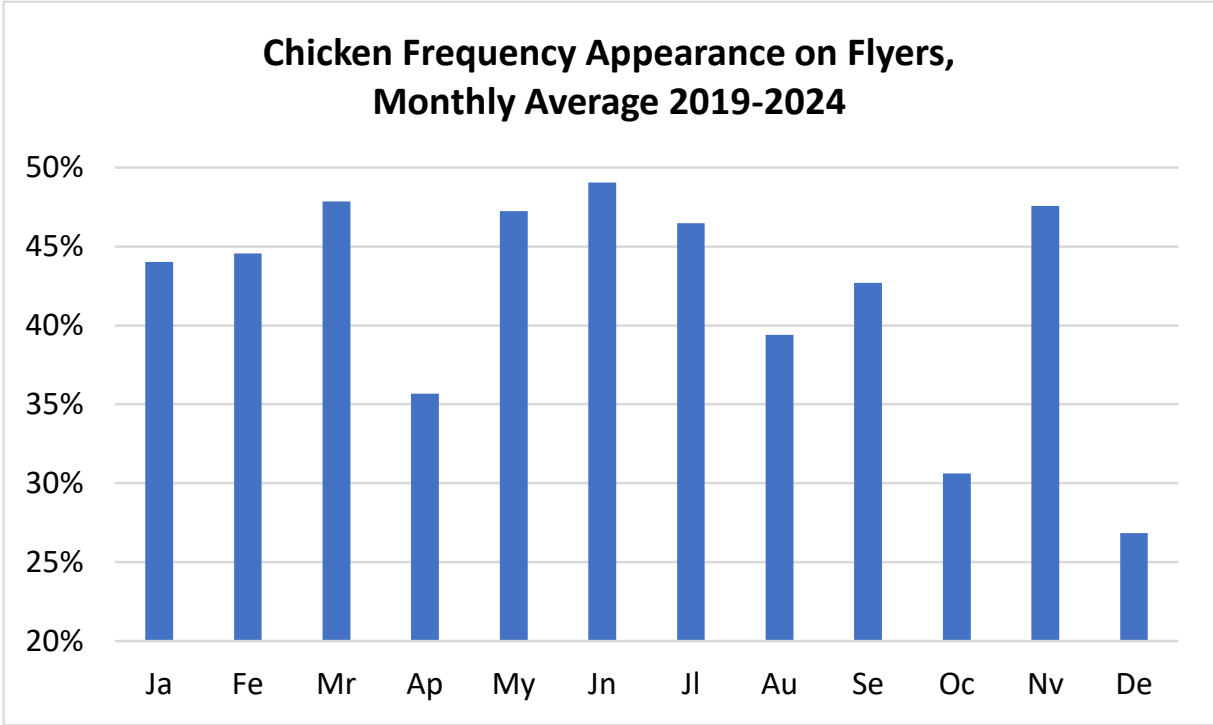
Kevin Grier, May 8, 2026

## Appendix A: Grocery Banners Surveyed

|                  |                           |
|------------------|---------------------------|
| <b>Maritimes</b> | <i>ATL Superstore</i>     |
|                  | <i>Foodland Coop</i>      |
|                  | <i>Sobeys</i>             |
| <b>Quebec</b>    | <i>IGA</i>                |
|                  | <i>Maxi</i>               |
|                  | <i>Metro</i>              |
|                  | <i>Provigo</i>            |
|                  | <i>Super C</i>            |
| <b>Ontario</b>   | <i>Food Basics</i>        |
|                  | <i>Foodland</i>           |
|                  | <i>Freshco</i>            |
|                  | <i>Loblaws</i>            |
|                  | <i>Metro</i>              |
|                  | <i>No Frills</i>          |
|                  | <i>Sobeys</i>             |
|                  | <i>Valu-Mart</i>          |
|                  | <i>Walmart SC</i>         |
| <b>West</b>      | <i>Calgary Coop</i>       |
|                  | <i>Freshco</i>            |
|                  | <i>No Frills</i>          |
|                  | <i>Real Canadian</i>      |
|                  | <i>Save on Foods (BC)</i> |
|                  | <i>Sobey(Safeway)</i>     |
|                  | <i>Thrifty</i>            |
|                  | <i>Walmart</i>            |

# Appendix B: Chicken Feature Frequency of Appearance Explanation

Frequency of appearance is a measure of the number of times the 25 sampled flyers advertised any beef, pork, or chicken item on the front page during the month. In any given week, chicken (or beef or pork) could be on from zero flyers to all 25 flyers. Frequency of appearance is expressed as a percentage of the total 25 flyer sample for the total weeks of the month. This measure of frequency assesses the percentage of times that the meat appeared on a flyer every week of the month. If the month had four weeks, there would be 100 possible appearances (4\*25 flyers) if the month had five weeks there would be 125 possible appearances (5\*25).



# Appendix C: Chicken Share of Fresh Meat Explanation

Tabulation of the share of fresh meats involves counting the total number of appearances that each of the fresh meats were featured on the front page of the 25 flyers. That is, how many chicken ads were on the front page of the 25 flyers over the course of the month compared to the number of times that all fresh meats and poultry were on the front page of the flyers. The calculation is the total number of times chicken is featured, divided by the total fresh meat and poultry features. That simple calculation gives chicken's share, and the same for the other meats featured on the front pages. The total of all the fresh meats shares will equal 100% for the month.

