



# Grocery Chicken Featuring Report: August 2025

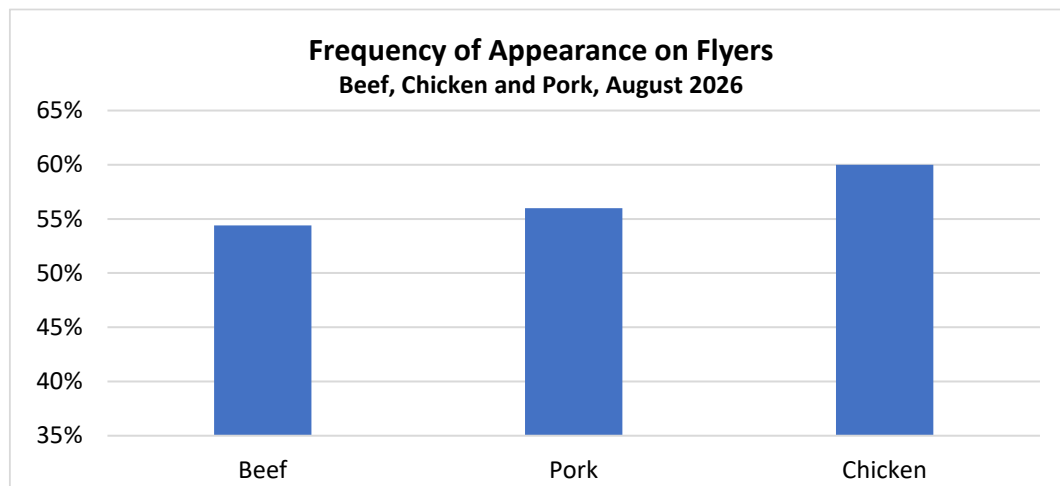
The following is a summation of fresh meat feature share and pricing on the front pages of 25 surveyed flyers during August 2025. The flyers are from grocery banners across Canada (see appendix A). The survey only uses the front page of the flyer as those are the most important meat ads.

## 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 chicken's frequency of appearance on the front page of flyers across Canada.

### August Frequency of Appearance of Three Main Meats

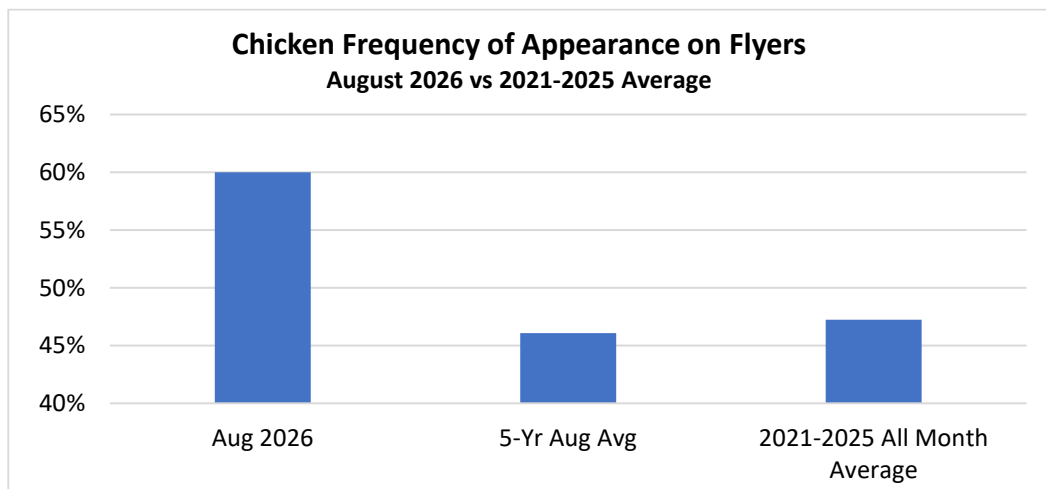
- Chicken frequency of appearance on the front page of flyers: 60%. [Of 125 possible front page flyer opportunities in August, (5 weeks x 25 flyers), chicken was on 75 (75/125 = 60%)].
- Beef frequency, 54%; pork frequency, 56%.



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

## August Chicken Frequency Compared to Average

- Chicken frequency August 2026: 60%.
- Chicken frequency August 2021-2025 average: 46%.
  - August 2026 chicken frequency was 14% point **more** than August 2021-2025.
- Chicken frequency average for all sixty months from 2021-2025: 47%.
  - August 2026 chicken frequency was 13% points **more** (60%-47% = 13%) than all 60 months 2021-2025.
  - August 2021-2025 averaged -1% less than the 60-month average.
  - August 2026 **exceeded** the August norm by 14% points against the 60-month average.



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

## August 2026 Chicken Frequency Grade on an A to F scale: “A+” (Excellent).

August 2026 chicken featuring frequency was greater than beef and pork. Frequency during August was much greater than normal for August and far more than normal relative to the 60-month average.

## Share of Fresh Meat on Flyer Front Page

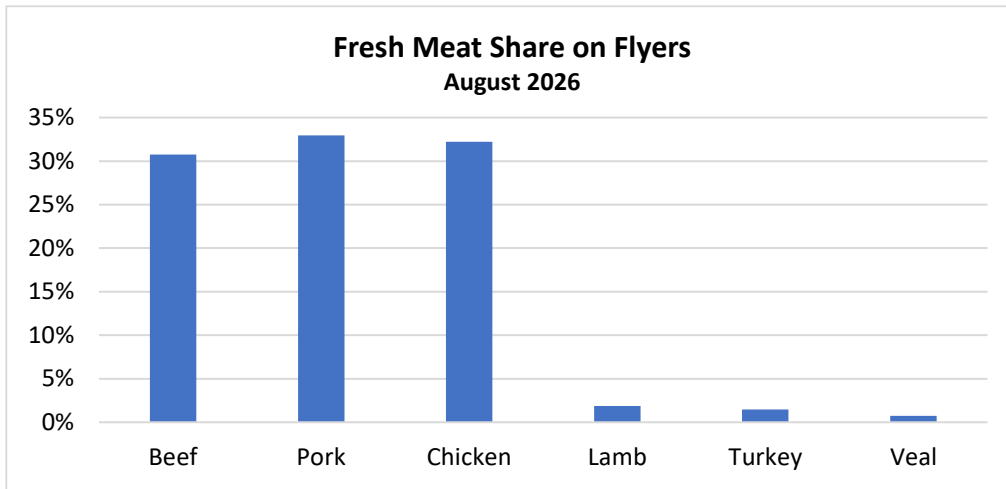
The next task is to calculate chicken’s share of appearances compared to the other fresh meat ads on the flyers.<sup>2</sup> This section focusses on the percentage share of chicken ads on the 25 flyers compared to the other meats on the flyer.

### August Fresh Meat Features Shares of Flyer

- Chicken’s share of fresh meat featured on the front page of the flyer: 32%.
- There were 87 chicken ads out of a grand total of 270 fresh meat ads (87/270=32%)
- Beef fresh meat share: 31%, pork 33%, and others 4%.

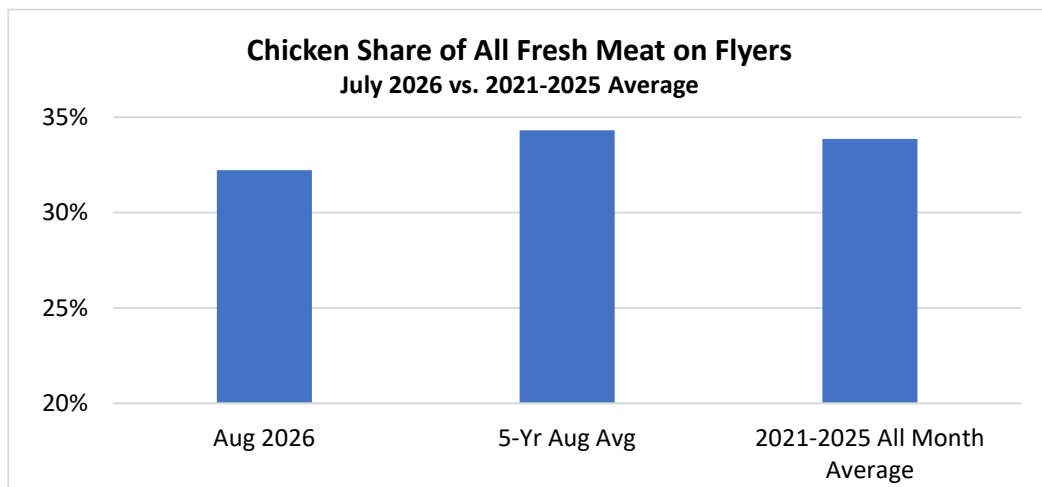
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<sup>2</sup> This concept of share of fresh meat features is explained more fully in Appendix C.



### August Chicken Share of Fresh Meat Features Compared to Average

- Chicken fresh meat share August 2026: 32%.
- Chicken fresh meat share for August from 2021-2025: 34%.
  - August 2026 chicken fresh meat share vs August 2021-2025: -2%.
- Chicken fresh meat share for all sixty months from 2021-2025: 34%.
  - August 2026 chicken fresh meat share was -2% point **less** than all 60 months from 2021-2025 (32%-34%= -2%).
  - During August from 2021-2025, chicken feature share averaged **the same** (≈0% points) as the all-month average.
  - August 2026 was -2% less than the average August against the total 60-month average (-2% less than average this year compared to ≈0% for August 2021-2025).

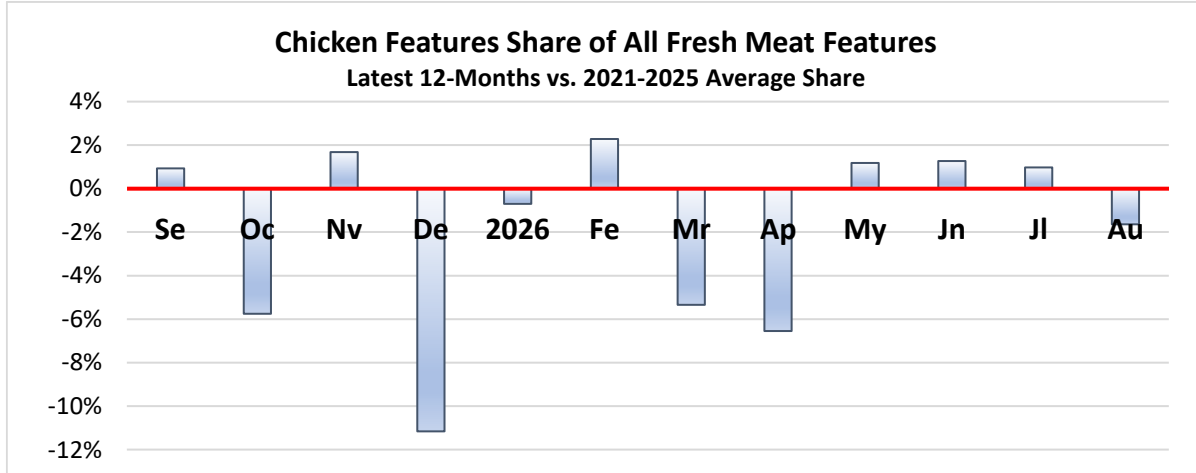


### Twelve-Month Chicken Share of Fresh Meat Features Compared to Average

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

- During August 2026, feature share was equal to the 12-month average share (32% in August 2026, vs 32% 12-month share).

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.



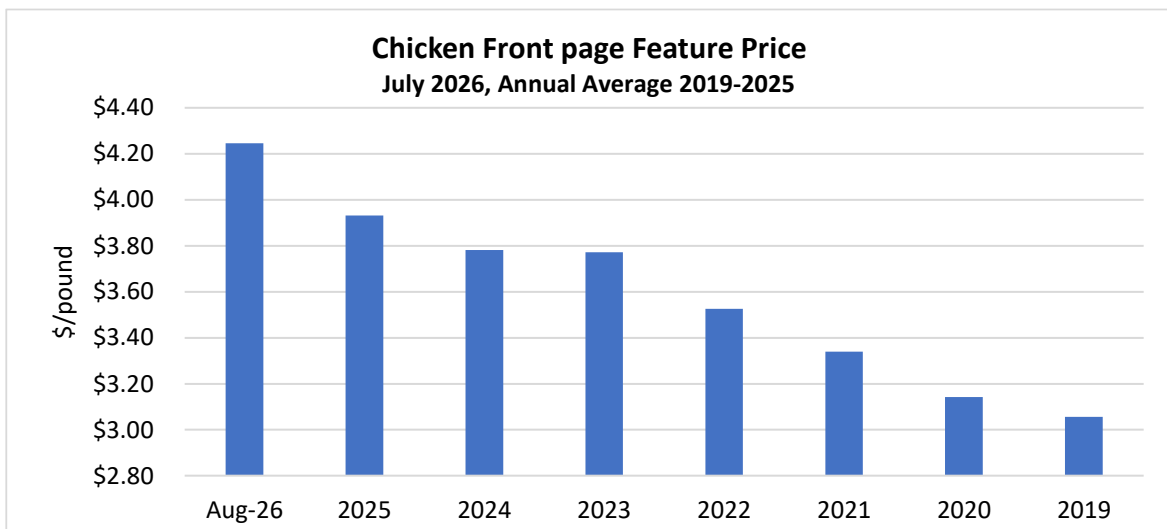
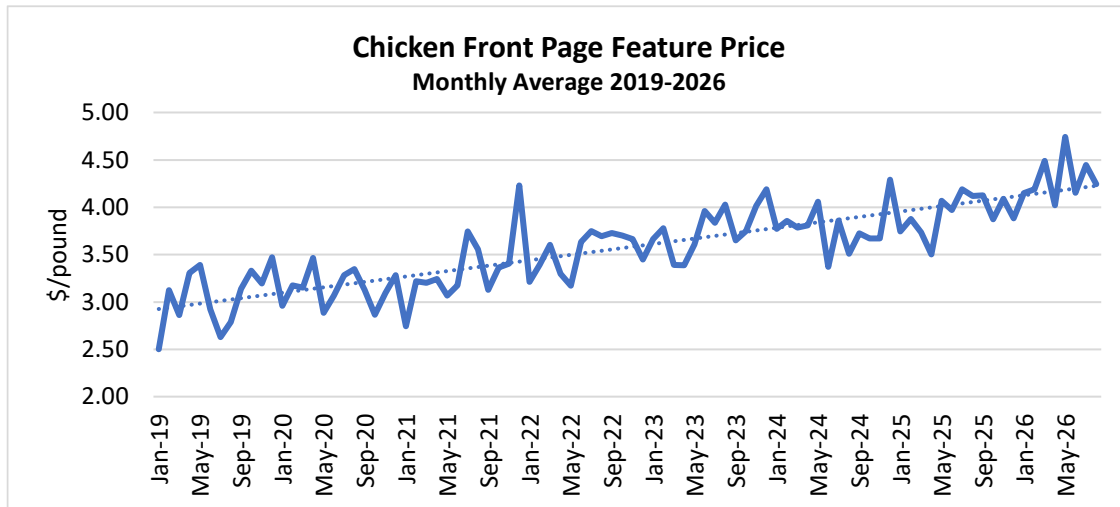
### **August Chicken Share of Meat Grade on an A to F scale: “C+” (Average).**

Chicken had greater share of the front page than beef and a lesser share than pork. Chicken’s share of fresh meat in the flyer was 2% less than what it normally is during August. August share was 2% less than the total 60-month average, which is less than normal for August. August was equal to the rolling 12-month average for August. Combining all the metrics leads to the conclusion that August was a below average month regarding share of the flyer compared to the other meats.

## **Flyer Fresh Meat Pricing**

### **August Chicken Front Page Flyer Pricing Trends**

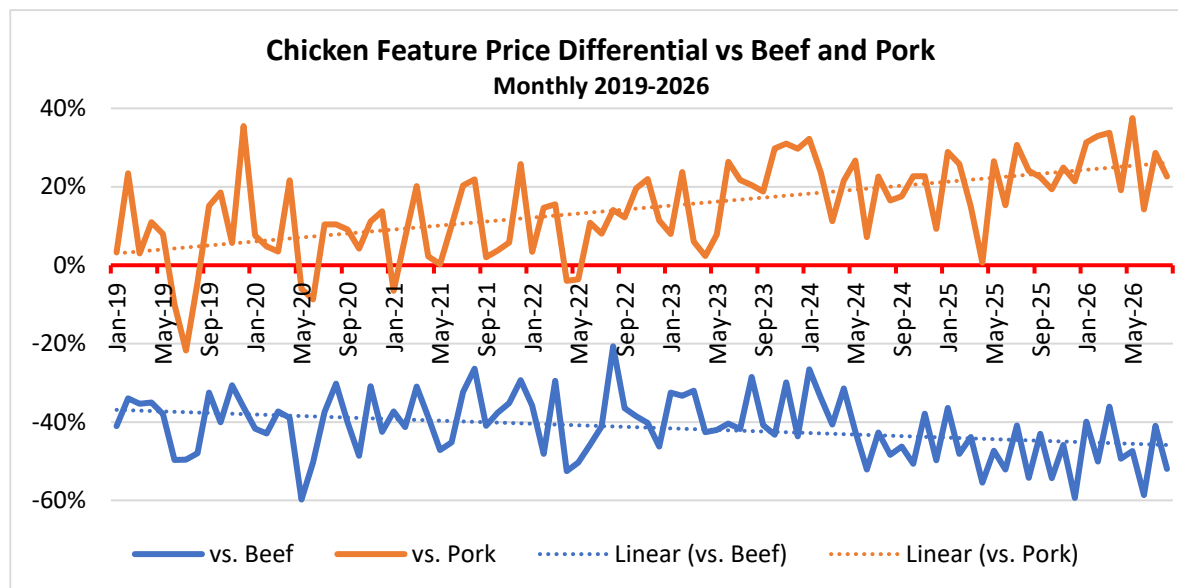
- The average price for all chicken cuts featured during August 2026 was \$4.25/pound.
- August 2025 average for chicken, \$4.12.
- 2025 annual average chicken price, \$3.93
- 2024 annual average chicken price, \$3.78.



### August Chicken Flyer Pricing Compared to Competing Meats

- Chicken \$4.25
- Beef \$8.84
- Pork \$3.46
- Chicken on the front page:
  - -52% less than beef prices.
  - +23% more than pork prices.
- For 2021-2025 on average, chicken was priced 41% less than beef and 16% more than pork.
- August 2026 chicken front page feature price:
  - -11% points **less** than average versus beef.
  - +7% 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 August 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).



## August Feature Summary and September Outlook

- Chicken frequency of appearance during August was more than beef and pork.
- Chicken frequency of appearance overperformed August appearance over 2021-2025.
- August frequency was more than it usually is in comparison to the all 60-month average.
- Chicken's share of August fresh meat features was more than beef and less than pork.
- Chicken feature share was less than what it normally is during August.
- August chicken feature share in 2026 was less than usual share versus all months from 2021-2025.
- From September 2025 through August 2026, chicken share has underperformed the 60-month norm.

The summary point for the August features is mixed. Chicken was in the flyer more than it normally is, but its share versus the other meats remained sub-normal. Beef continues to garner a sizable share of the flyer space despite its high cost. Pork continues to be prominent in the flyer due to its low-price points. These trends can be expected to remain in force during September.

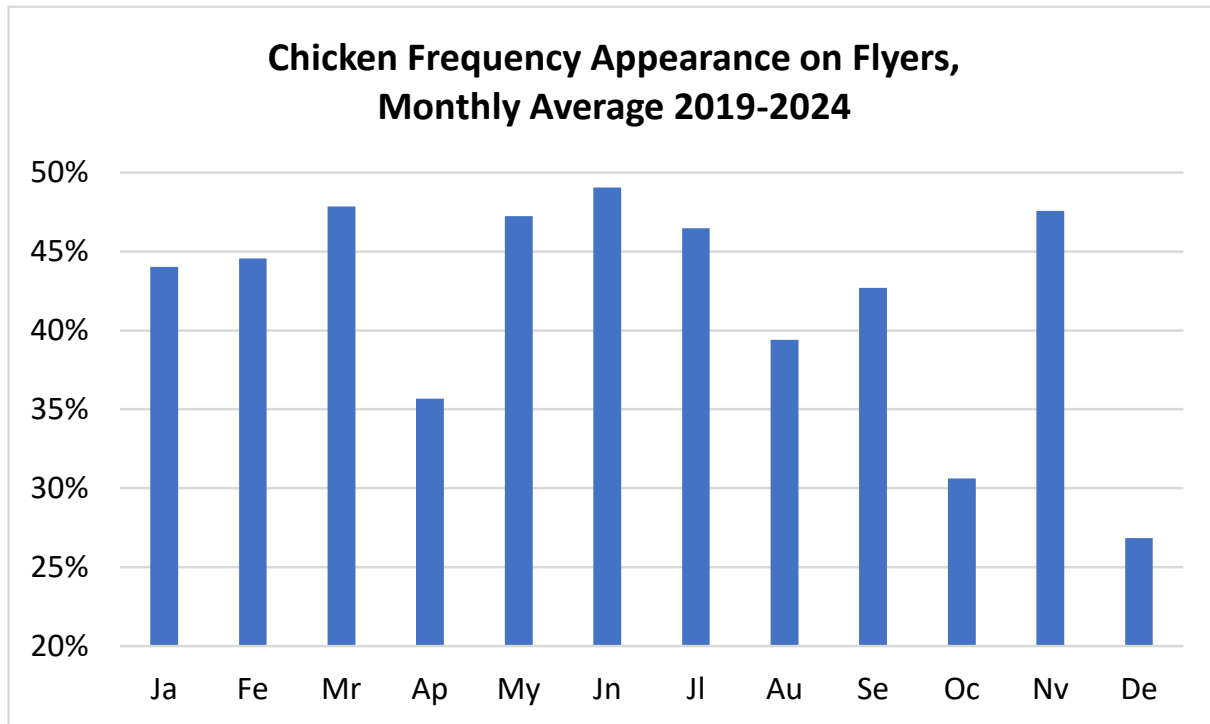
Kevin Grier, September 16, 2026

## 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 ( $4 \times 25$  flyers) if the month had five weeks there would be 125 possible appearances ( $5 \times 25$ ).



## 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.

