



Grocery Chicken Featuring Report: June 2025

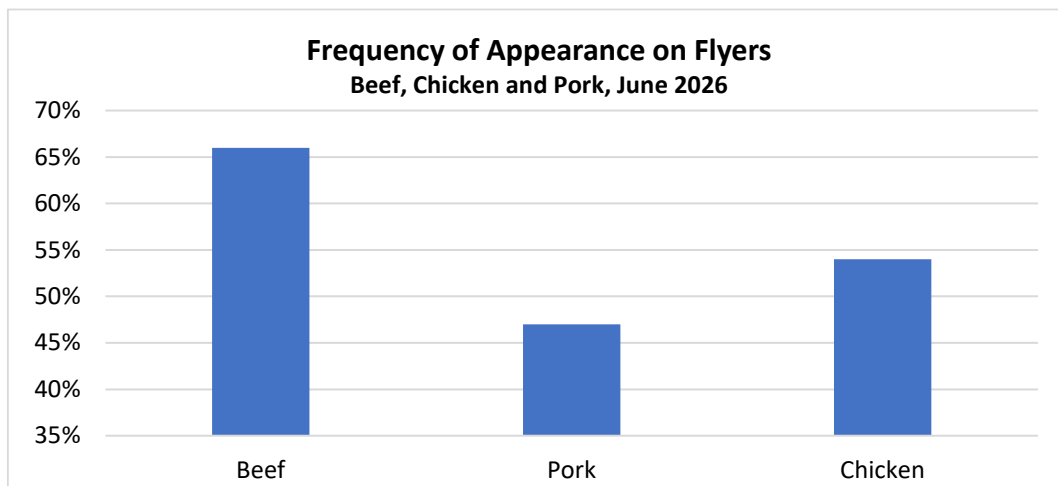
The following is a summation of fresh meat feature share and pricing on the front pages of 25 surveyed flyers during June 2025. The flyers are from grocery banners across Canada (see appendix A). The survey only uses the front page of the flyer as those are the most important meat ads.

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.¹ This section focusses on the number of times chicken appeared at least once on the flyer front page across Canada.

June Frequency of Appearance of Three Main Meats

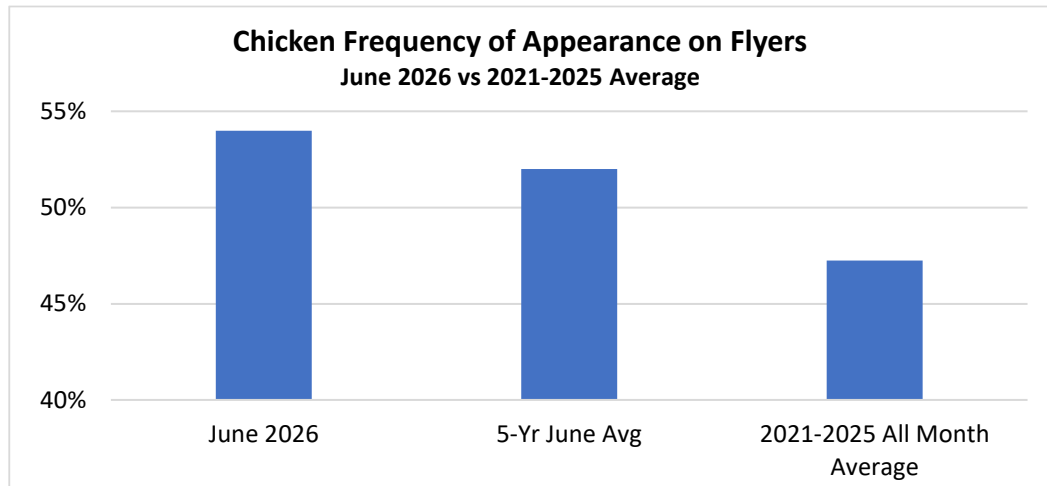
- Chicken frequency of appearance on the front page of flyers: 54%. [Of 100 possible front page flyer opportunities in June, (4 weeks x 25 flyers), chicken was on 54 (54/100 = 54%)].
- Beef frequency, 66%; pork frequency, 47%.



¹ "Frequency" is defined in more detail in Appendix B.

June Chicken Frequency Compared to Average

- Chicken frequency June 2026: 54%.
- Chicken frequency June 2021-2025 average: 52%.
 - June 2026 chicken frequency was 2% point **more** than June 2021-2025.
- Chicken frequency average for all sixty months from 2021-2025: 47%.
 - June 2026 chicken frequency was 7% points **more** than all 60 months 2021-2025.
 - June is normally 5% points **more** than the all 60-month average.
 - June 2026 **exceeded** the June norm by 2% points against the 60-month average.



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

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

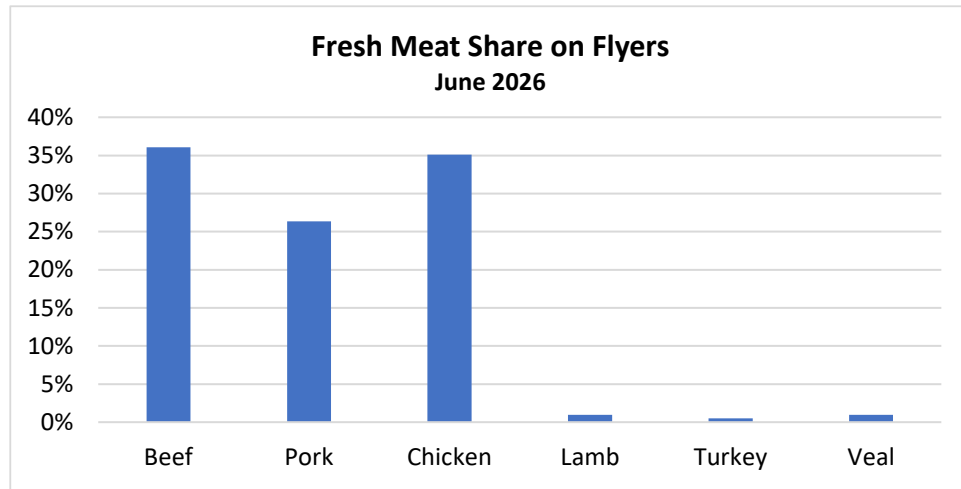
Share of Fresh Meat on Flyer Front Page

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

June Fresh Meat Features Shares of Flyer

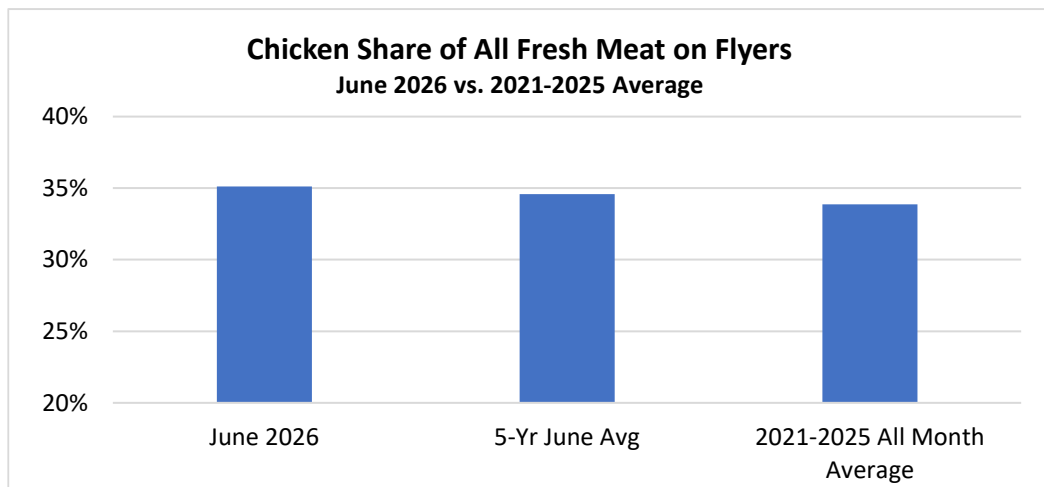
- Chicken’s share of fresh meat featured on the front page of the flyer: 35%.
- There were 72 chicken ads out of a grand total of 205 fresh meat ads (72/205=35%)
- Beef fresh meat share: 36%, pork 26%, and others 2%.

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



June Chicken Share of Fresh Meat Features Compared to Average

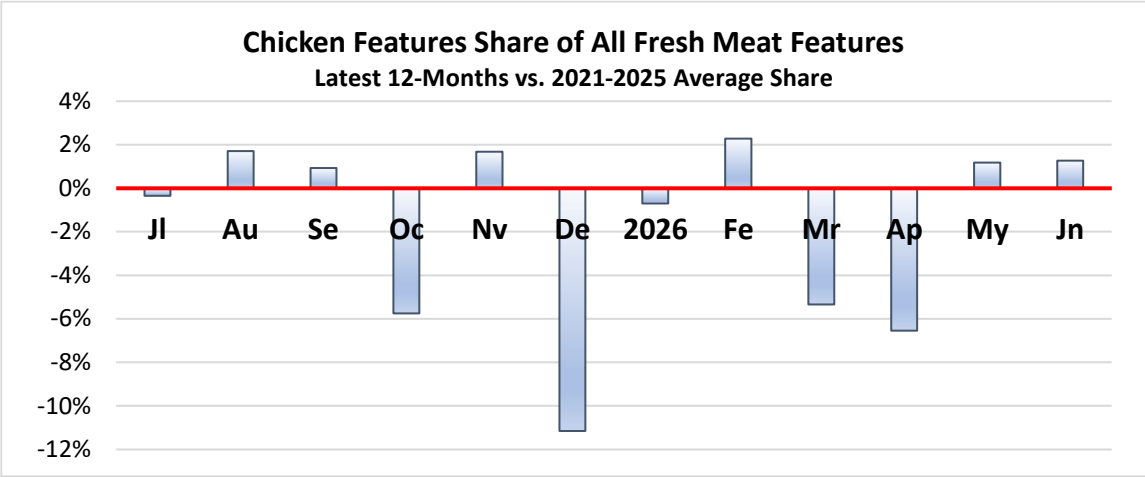
- Chicken fresh meat share June 2026: 35%.
- Chicken fresh meat share for June from 2021-2025: 35%.
 - June 2026 chicken fresh meat share: ≈June 2021-2025.
- Chicken fresh meat share for all sixty months from 2021-2025: 34%.
 - June 2026 chicken fresh meat share was 1% point **more** than all 60 months from 2021-2025 (35%-34%= +1%).
 - During June from 2021-2025, chicken feature share averaged 1% points **more** than the all-month average.
 - June 2026 was equal to the 60-month average (+1% more than average this year compared to +1% for June 2021-2025).



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

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



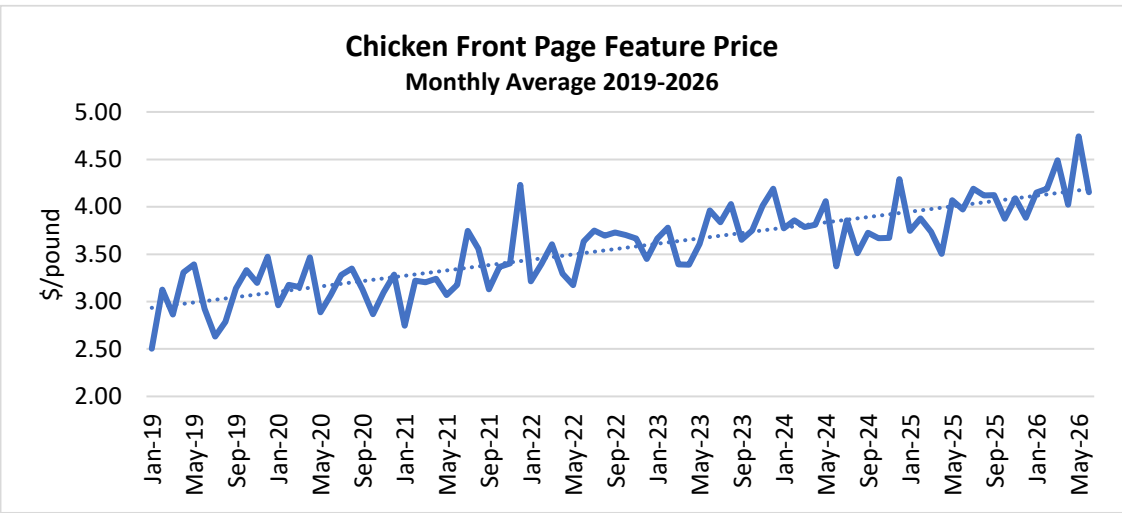
June Chicken Share of Meat Grade on an A to F scale: “C-” (Average).

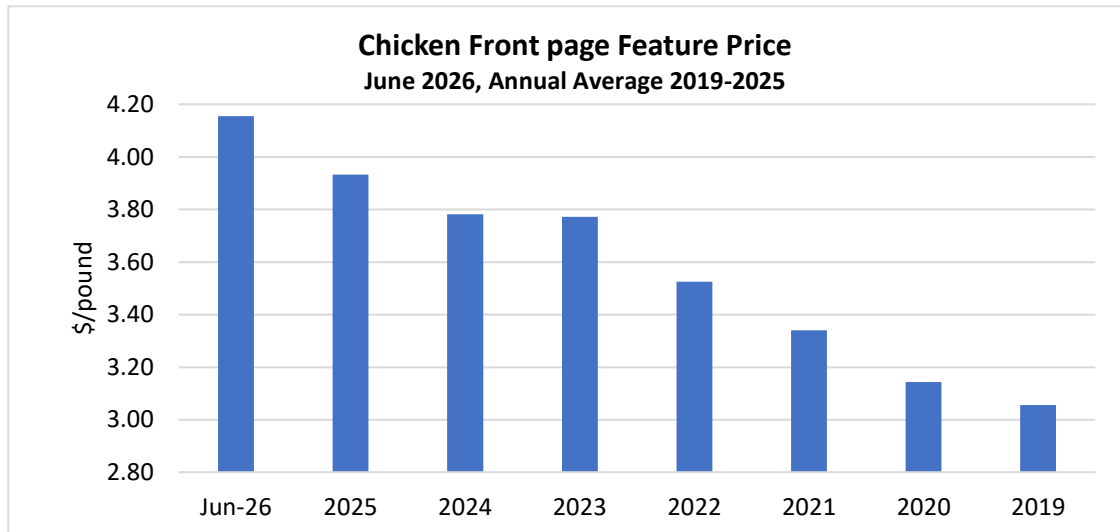
Chicken had the a little less share of the front page as beef and more share than pork. Chicken had a normal share of the flyer for June. June chicken share was more than normal over the past 12 months. All in all, an average performance for chicken share during June; so positive, some negative.

Flyer Fresh Meat Pricing

June Chicken Front Page Flyer Pricing Trends

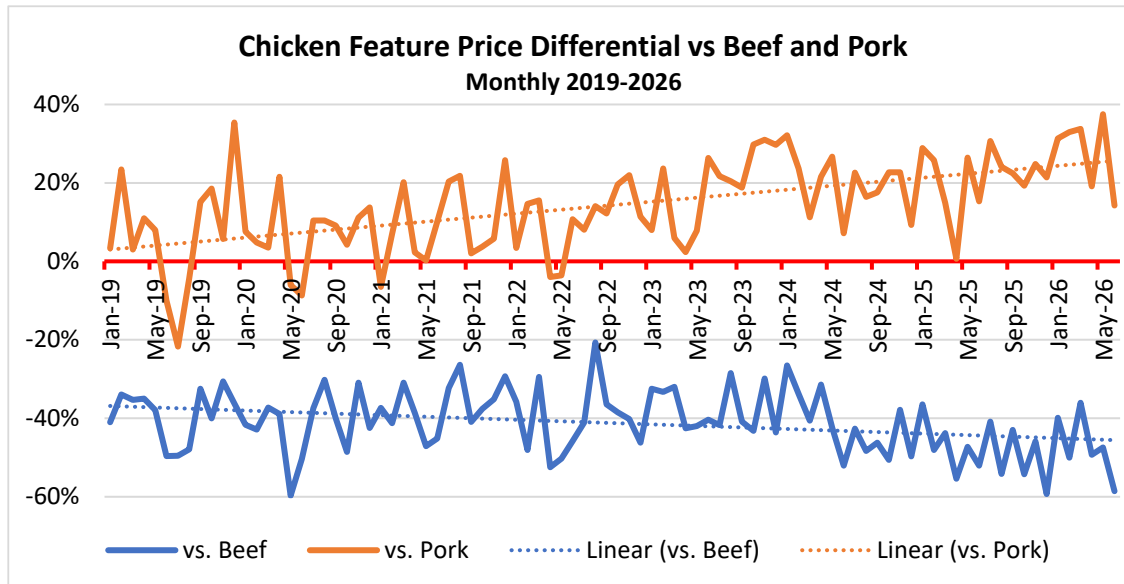
- The average price for all chicken cuts featured during June 2026 was \$4.16/pound.
- June 2025 average for chicken, \$3.97.
- 2025 annual average chicken price, \$3.93
- 2024 annual average chicken price, \$3.78.





June Chicken Flyer Pricing Compared to Competing Meats

- Chicken \$4.16
- Beef \$10.05
- Pork \$3.64
- Chicken on the front page:
 - -59% less than beef prices.
 - +14% more than pork prices.
- For 2021-2025 on average, chicken was priced 41% less than beef and 16% more than pork.
- June 2026 chicken front page feature price:
 - -18% points less than average versus beef.
 - -2% points less than average against pork.
- Chicken was priced **more** competitively than average against beef and **more** competitively than average against pork on grocery flyer front pages in June 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).



June Feature Summary and Outlook

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

As noted in the prior report, June can be expected to see improvement in both share and frequency given beef's still elevated costs. Chicken feature activity did improve in June. The month was basically an average month and an average June. Considering that chicken featuring has been below normal in recent month, a return to average is positive for the industry.

July should continue to see slow and steady improvement in share and frequency.

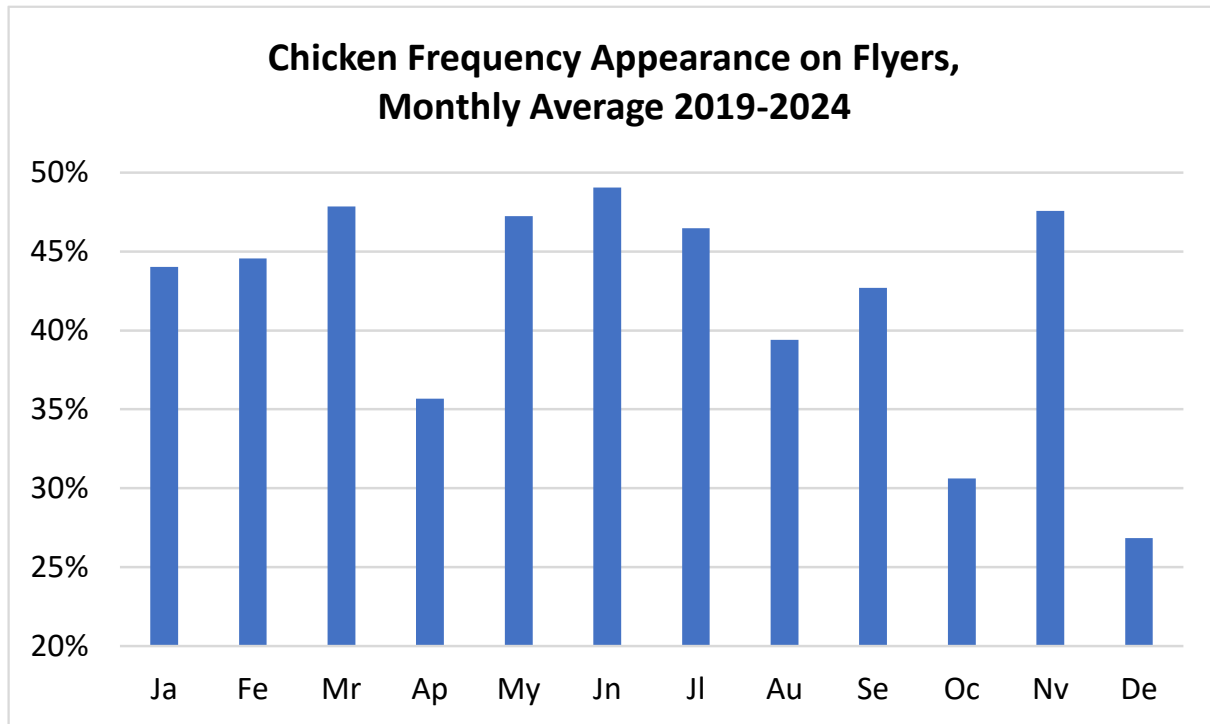
Kevin Grier, July 11, 2026

Appendix A: Grocery Banners Surveyed

Maritimes	<i>ATL Superstore</i>
	<i>Foodland Coop</i>
	<i>Sobeys</i>
Quebec	<i>IGA</i>
	<i>Maxi</i>
	<i>Metro</i>
	<i>Provigo</i>
	<i>Super C</i>
Ontario	<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>
West	<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.

