Grocery Chicken Featuring Report: September 2025

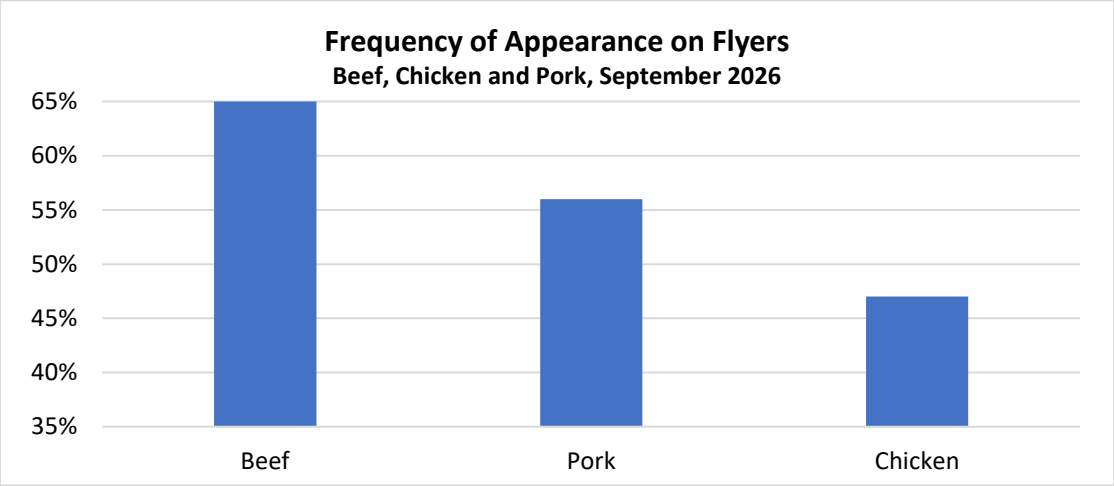
The following is a summation of fresh meat feature share and pricing on the front pages of 25 surveyed flyers during September 2025. The flyers are from grocery banners across Canada (see appendix A). The survey only uses the front page of the flyer as those are the most important meat ads.

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

September Frequency of Appearance of Three Main Meats

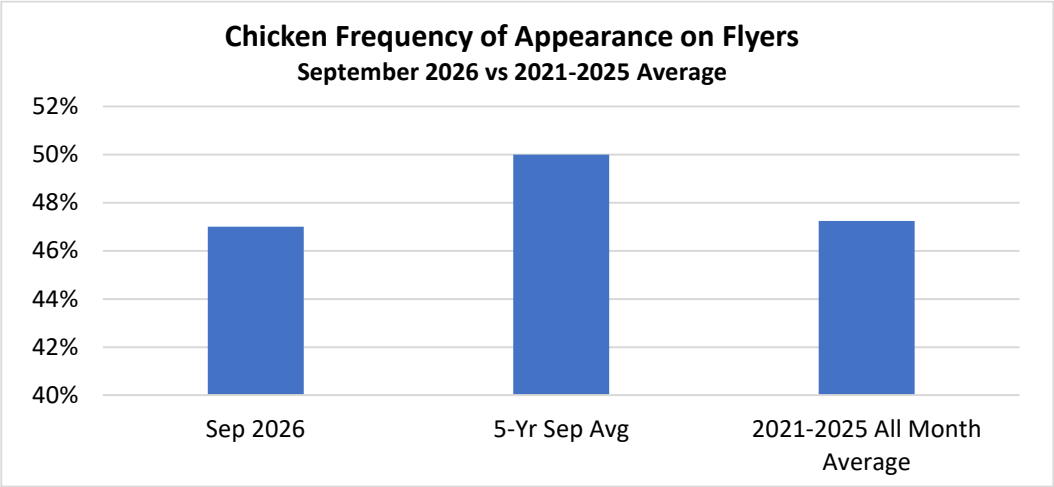
- Chicken frequency of appearance on the front page of flyers: 47%. [Of 100 possible front page flyer opportunities in September, (4 weeks x 25 flyers), chicken was on 47 (47/100 = 47%)].
- Beef frequency, 65%; pork frequency, 56%.



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

September Chicken Frequency Compared to Average

- Chicken frequency September 2026: 47%.
- Chicken frequency September 2021-2025 average: 50%.
  - September 2026 chicken frequency was 3% points ***less*** than September 2021-2025.
- Chicken frequency average for all sixty months from 2021-2025: 47%.
  - September 2026 chicken frequency was the same as than all 60 months frequency for 2021-2025.
  - September 2021-2025 averaged +3% **more** than the 60-month average.
  - September 2026 was -3% less than the September norm against the 60-month average.



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

September 2026 Chicken Frequency Grade on an A to F scale: "F" (Very poor).

September 2026 chicken featuring frequency was less than beef and pork. Frequency during September was less than normal for September and less than normal for September compared to the all 60-month average for 2021-2025.

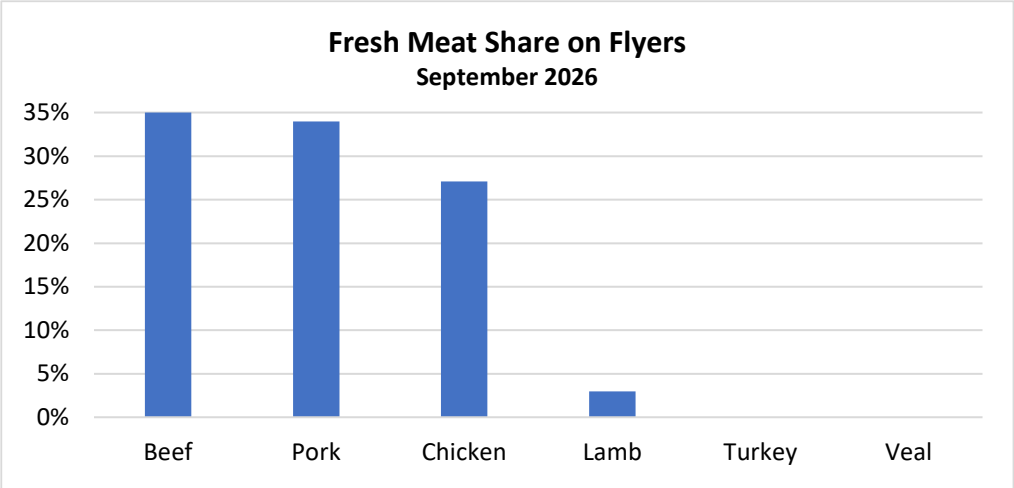
Share of Fresh Meat on Flyer Front Page

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.

September Fresh Meat Features Shares of Flyer

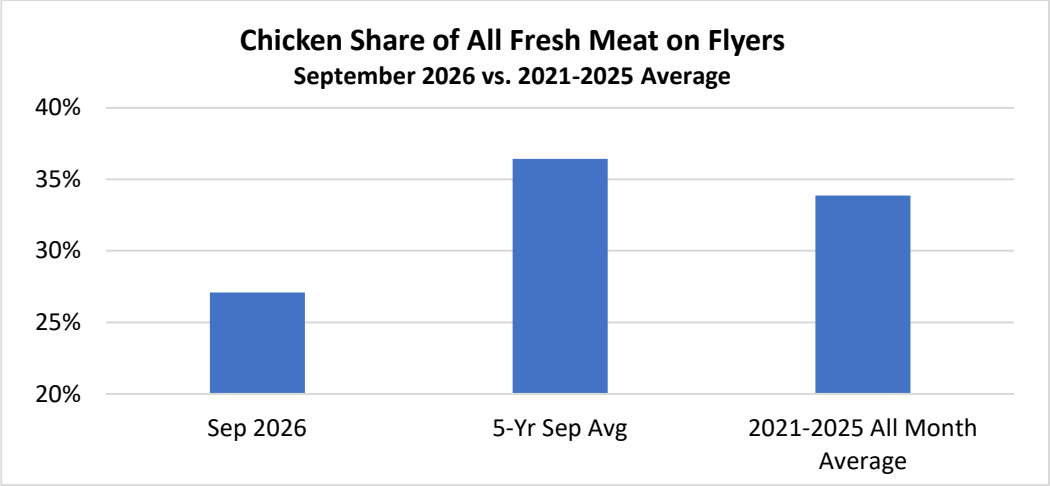
- Chicken's share of fresh meat featured on the front page of the flyer: 27%.
- There were 55 chicken ads out of a grand total of 203 fresh meat ads (55/203=27%)
- Beef fresh meat share: 36%, pork 34%, and others 3%.

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



September Chicken Share of Fresh Meat Features Compared to Average

- Chicken fresh meat share September 2026: 27%.
- Chicken fresh meat share for September from 2021-2025: 36%.
  - September 2026 chicken fresh meat share vs September 2021-2025: -9%.
- Chicken fresh meat share for all sixty months from 2021-2025: 34%.
  - September 2026 chicken fresh meat share was -7% points ***less*** than all 60 months from 2021-2025 (27%-34%= -7%).
  - During September from 2021-2025, chicken feature share averaged +2% more than the all-month average (36%-34% =2%).
  - September 2026 was -9% less than the average September against the total 60-month average (-7% less than average this year compared to +2% for September 2021-2025).

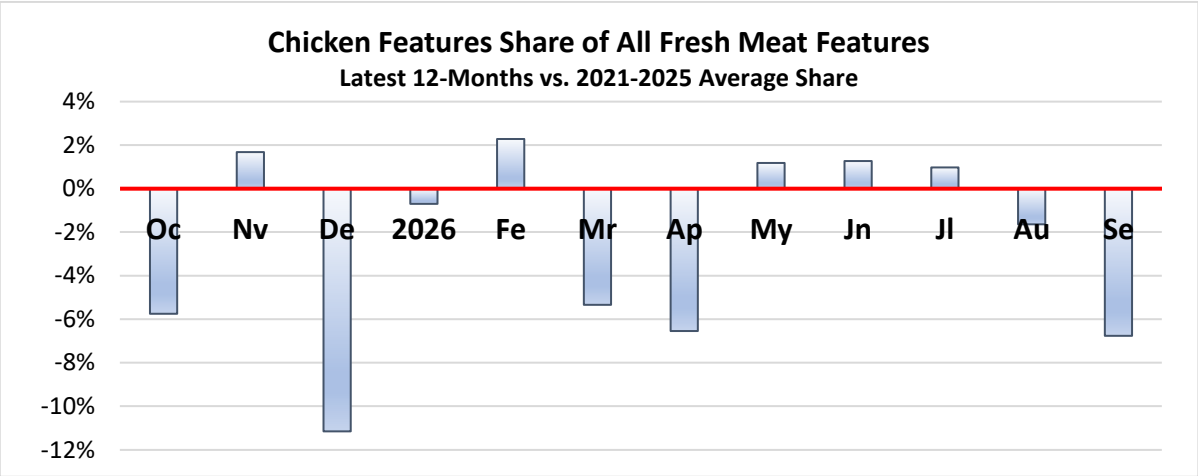


Twelve-Month Chicken Share of Fresh Meat Features Compared to Average

- 12-month October 2025 through September 2026, chicken fresh meat features share: 31%.
  - 60-month (2021-2025) average chicken share: 34%.
  - October 2025 through September 2026 vs all month 2021-2025 average: -3%.
  - During the past 12 months, chicken feature share of all fresh meats has been -3% points ***less*** than the average of all months from 2021-2025.

- During September 2026, feature share -4% points ***less*** than the 12-month average share (27% in September 2026, vs 31% 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.



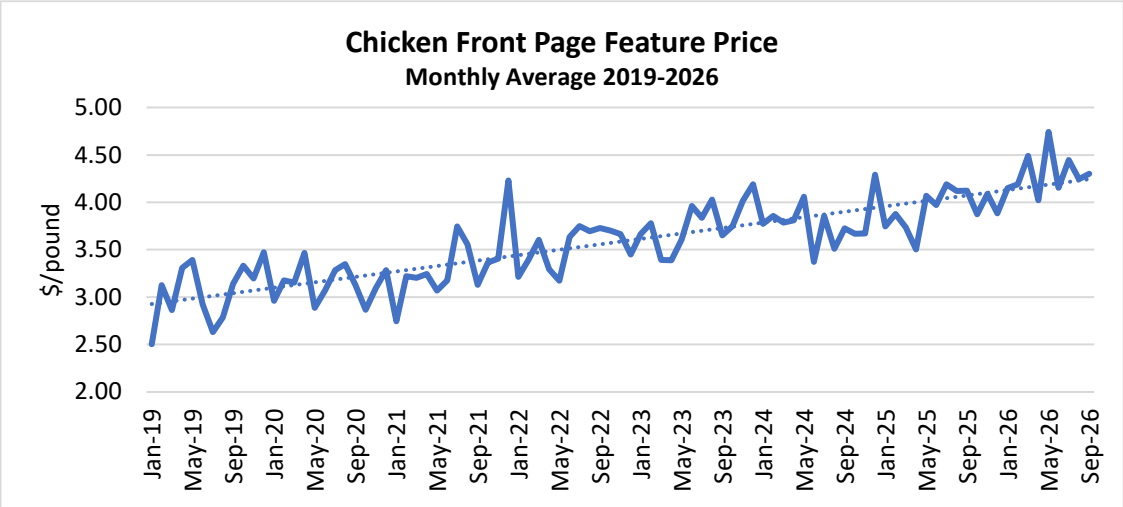
September Chicken Share of Meat Grade on an A to F scale: "F" (Very poor).

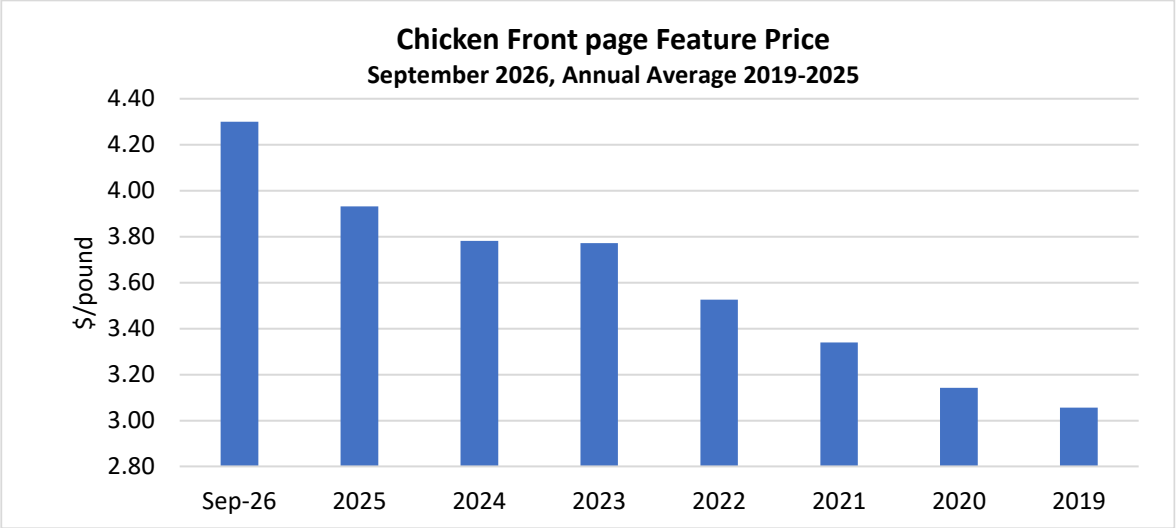
Chicken had less share of the flyer than both beef and pork. Chicken's share of fresh meat in the flyer was 9% less than what it normally is during September. September share was 7% less than the total 60-month average, which is less than normal for September. September was less than the rolling 12-month average for September. Combining all the metrics leads to the conclusion that September was a very poor month regarding share of the flyer compared to the other meats.

Flyer Fresh Meat Pricing

September Chicken Front Page Flyer Pricing Trends

- The average price for all chicken cuts featured during September 2026 was $4.30/pound.
- September 2025 average for chicken, $4.13.
- 2025 annual average chicken price, $3.93
- 2024 annual average chicken price, $3.78.

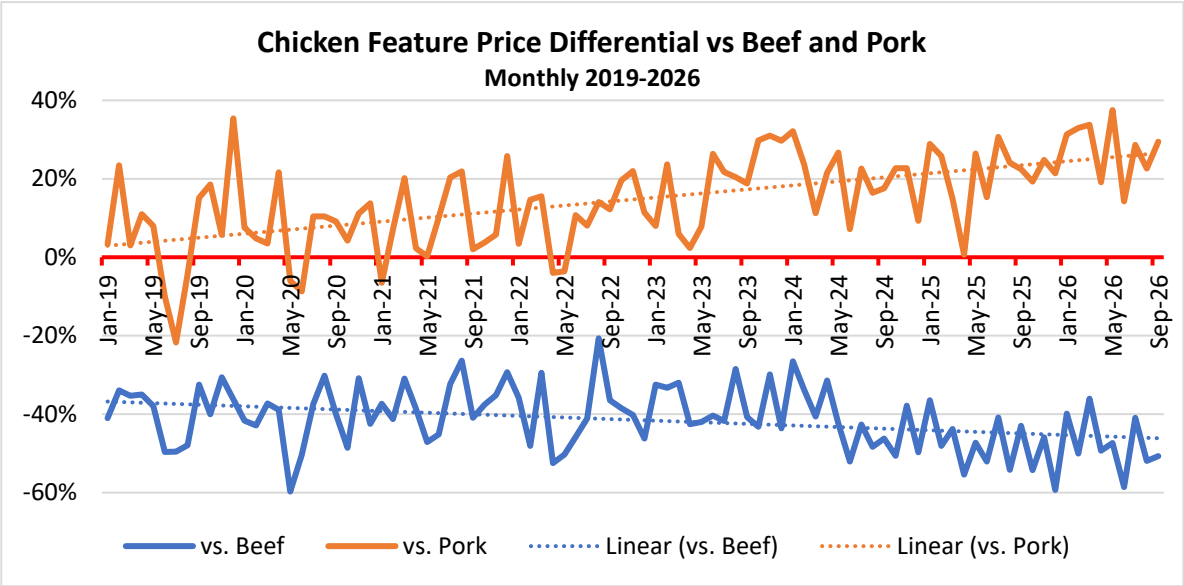




September Chicken Flyer Pricing Compared to Competing Meats

- Chicken $4.30
- Beef $8.72
- Pork $3.32
- Chicken on the front page:
  - -51% *less* than beef prices.
  - +29% *more* than pork prices.
- For 2021-2025 on average, chicken was priced 41% less than beef and 16% more than pork.
- September 2026 chicken front page feature price:
  - -10% points ***less*** than average versus beef.
  - +14% 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 September 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).



September Feature Summary and September Outlook

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

The conclusion is that chicken featuring was very poor during September from both a frequency of appearances on the flyer and share of meat on the flyer. Chicken underachieved based on all measures of normal comparisons.



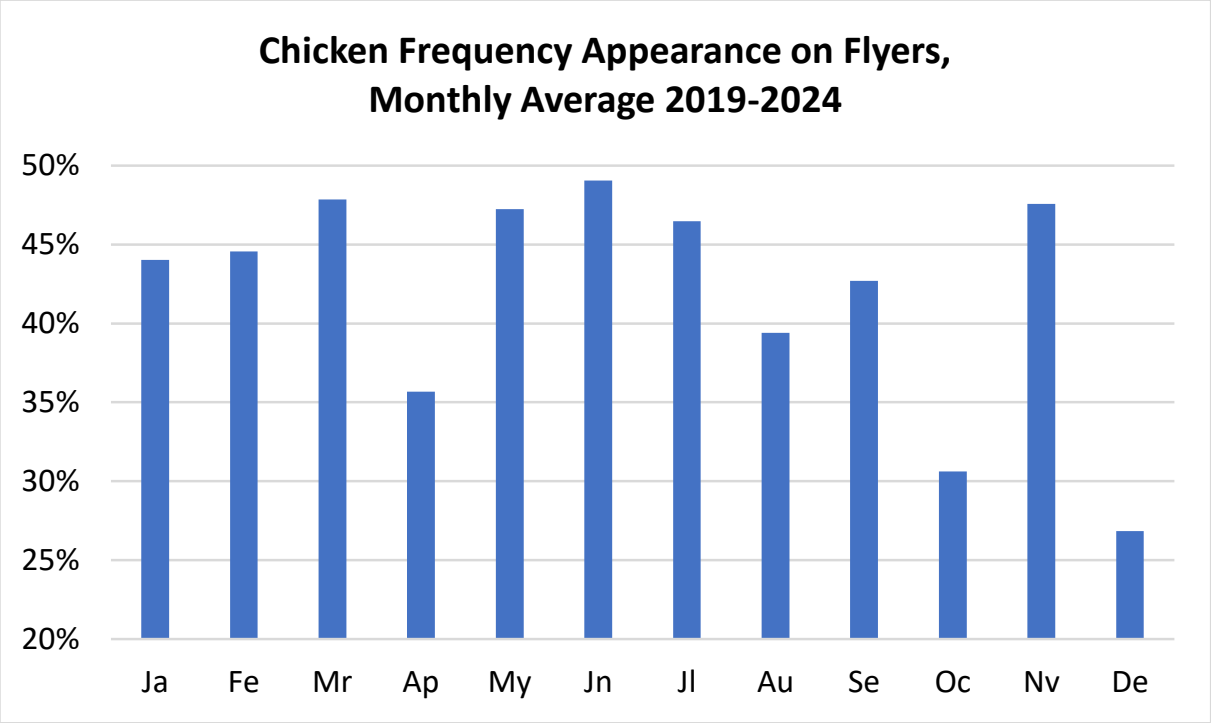
Kevin Grier, October 9, 2026

Appendix A: Grocery Banners Surveyed

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

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.

