

Manitoba Grocery Price Study:

Mandate and Analytical Framework

1. Purpose of the Study

As grocery prices continue to rise, the Manitoba government is committed to using every lever it has to lower grocery costs for Manitobans. From providing healthy food for every child in school, to closing loopholes that made it possible for large grocery chains to freeze out competition, Manitoba is taking action. The next step is the Manitoba Grocery Price Study, which will undertake a systematic examination of grocery price trends, the structural and market factors contributing to food affordability challenges, and the range of policy interventions available to the province to mitigate rising costs. The study, the first of its kind to be led by a Canadian province, will generate a rigorous, data-driven foundation to help inform Manitobans and drive future government action.

2. Problem Definition: Rising Grocery Prices and Market Dynamics

Grocery prices in Manitoba have increased at a rapid pace over the last five years, placing disproportionate pressure on families, seniors, workers and low-income households.

Market concentration within the grocery retail sector has further intensified affordability challenges. A limited number of companies exert significant influence over pricing structures, supplier negotiations and product availability, which can constrain competition and limit consumer choice. These dynamics underscore the need for greater transparency, accountability and regulatory oversight.

The Manitoba government has initiated several measures to address affordability pressures and increase competition including legislative reforms to remove barriers to new grocery market entrants and targeted cost-reduction initiatives such as freezing the price of a one-litre carton of milk. To further address food insecurity, the Manitoba government has doubled the prenatal benefit to help expectant parents with food costs during pregnancy and created a provincewide school nutrition program, helping ensure students have access to free, nutritious meals at school.

The Manitoba Grocery Price Study will investigate a set of interrelated challenges driving increased grocery prices including:

- Predatory pricing practices at the checkout, contributing to inconsistent or inflated consumer costs. This practice involves big companies using personalized data or purchasing patterns to potentially charge you more for groceries.
- Rising cost of essential food staples, disproportionately impacting working people, seniors and lower-income households.
- Outdated antitrust and anti-competition policies, such as restrictive covenants, that inhibit market entry, suppress competition and contribute to higher prices.
- Competitive barriers facing independent and local retailers to operate in the market.

- Rising production costs, supply-chain vulnerabilities and market constraints are undermining the sustainability of agricultural producers, small and medium-scale food enterprises, local food organizations and farmers' markets.
- Disparities in access to healthy food including geographic food deserts in places like downtown Winnipeg and parts of northern Manitoba and higher rates of food insecurity among certain populations, such as seniors living in personal care homes.

3. Study Objectives and Scope

The Manitoba Grocery Price Study will address these challenges by examining opportunities to reduce prices, protect consumers, increase competition, support producers and strengthen Manitoba's food supply resilience, and enable more access to food for all Manitobans including:

- Reducing the cost of grocery bills by examining fees, taxes, and prices on groceries.
- Enabling price stability and examining regulations for staple food items, including two-litre and four-litre milk jugs.
- Strengthening anti-trust and competition laws to help bring down rising costs at checkout by working with the federal government.
- New regulatory and policy measures to address the use of grocery surveillance technology, creating more protection for Manitoba consumers at the grocery store.
- Examining shelf pricing regulations like unit-price transparency and shelf-label accuracy to ensure clearer price comparison.
- Investigating more restrictions on expirations of loyalty points, gift cards and other consumer benefit programs.
- Stronger support for Manitoba producers to weather volatility without passing on costs to consumers, by bolstering local food supply chains, improving access to new technology and building on Manitoba's strengths in sustainable agriculture.
- Furthering Manitoba's work on ending restrictive covenants on grocery retailers and enabling greater access for other independent and local retailers to enter the market.
- Working with food retailers and innovative community-led food security initiatives to expand access to local food and address food deserts.
- Enabling greater access to healthy, nutritious food for those in congregate living settings like personal care homes.
- Modernizing food donation and grading regulations to reduce food waste, increase access to food and support food banks.

4. Study Expected Deliverables

The Manitoba Grocery Price Study will pursue three primary deliverables:

A. Conduct a comprehensive, data-driven analysis of grocery pricing in Manitoba.

A detailed technical assessment of rising grocery prices in Manitoba and the broader food market in the province – unprecedented in scope within Manitoba – will be completed in spring 2026. This analysis will draw on the most current data available and will incorporate collaboration with external experts to ensure methodological rigor and policy relevance.

B. Identify immediate, actionable measures the Manitoba government can implement to reduce grocery costs.

Preliminary technical findings will inform potential affordability measures for inclusion in Budget 2026, demonstrating immediate action to help Manitobans reduce their grocery costs.

C. Develop longer-term policy options to enhance affordability, competition and food access.

The Manitoba government will find new ways to play its part to address rising grocery prices with innovative policy measures that address food affordability, protect consumers, strengthen access to healthy, nutritious food, and help make producers and Manitoba's supply chain more resilient.

As part of this step, Manitoba will work with policy experts from across Canada to support the identification and development of medium- and longer-term policy measures the province can take.

The study will identify medium- and longer-term policy levers available to the province to address structural drivers of high grocery prices, create greater price stability for consumers, strengthen market accountability and improve equitable access to affordable food across Manitoba.