

Australian Meat Purchasing Data

Category report

July 2010

Published: 5 October 2010

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Executive summary

July 2010

- **Category sales:**

In a slower month for the fresh meat category, total red meat serves per week appeared to decline in Jul 2010. Additionally, on a quarterly basis, total red meat share declined slightly in comparison to the same period last year (largely due to a tough Jul 2010).

- **Channel shares:**

Woolworth's share of fresh meat remains strong, whilst Butcher's share appeared to drop back to previous levels after a high Jun 2010. Coles Group's share of the fresh meat market picked up in Jul 2010 after some unexplained falls the previous months. When compared to the same quarter last year, Coles Group share remained stable. IGA/Foodland's share of the fresh meat market remains strong in May-Jul 2010 (despite a drop in share in Jul 2010) and Aldi remained steady for the period.

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Category Data

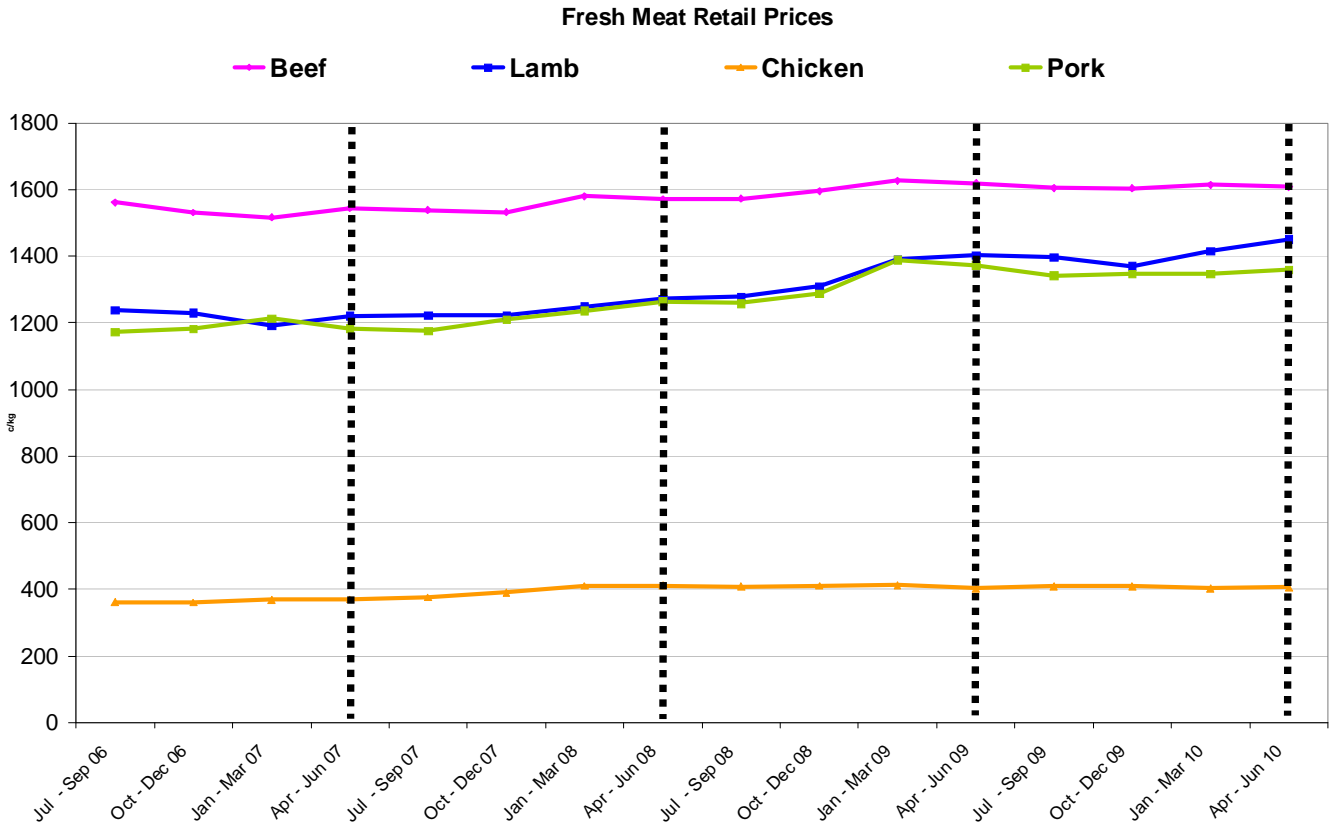
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Fresh Meat Retail Prices

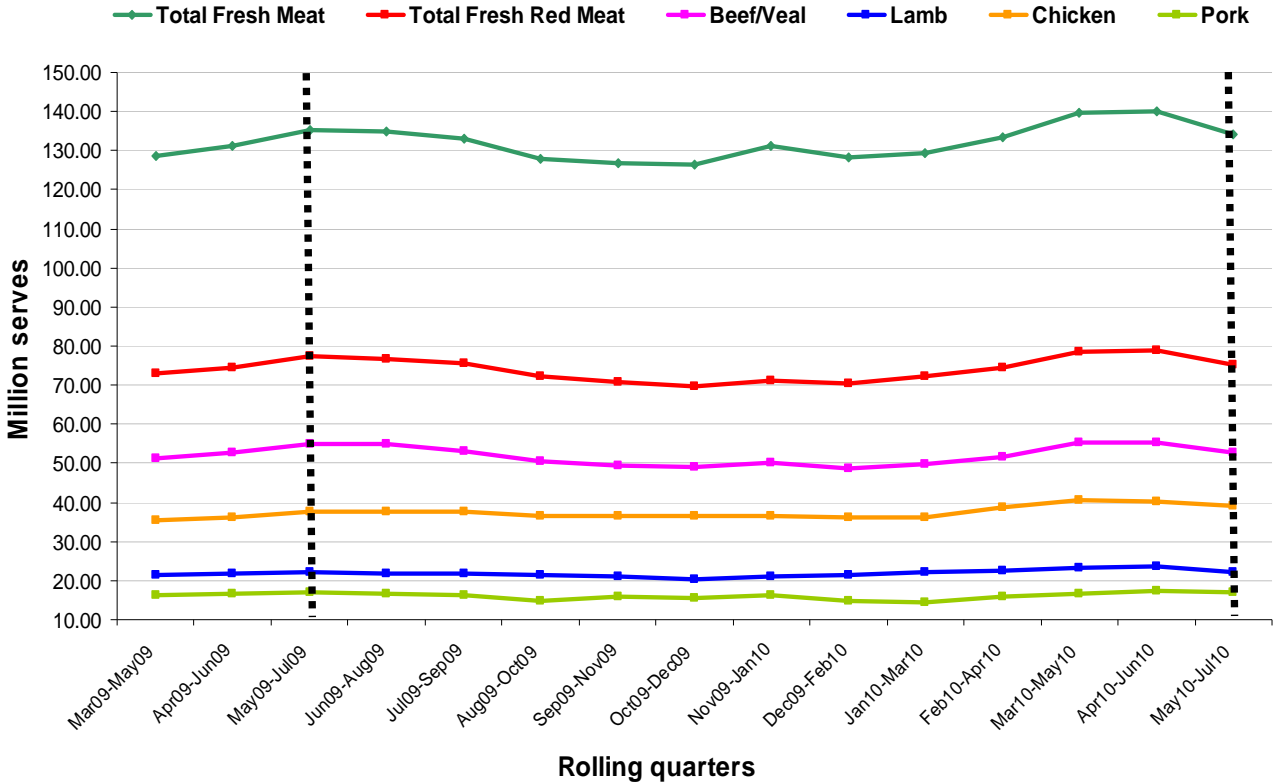


Fresh Meat Retail Prices

Fresh Meat	3 Months		% Change	12 Months		% Change
	Apr - Jun			Jul - Jun		
	2009	2010	2009	2010		
Beef	1602	1608	0.37%	1604	1608	0.26%
Lamb	1402	1451	3.50%	1345	1409	4.76%
Chicken	403	405	0.50%	409	406	-0.55%
Pork	1372	1359	-0.95%	1327	1349	1.65%

Source: ABS

Fresh Meat Category Volume



Fresh Meat Category Volume ('000,000 serves/week)

Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
Total fresh meat	129.27	131.58	135.21	134.22	134.28	136.07	127.06
Total red meat	72.09	73.24	77.28	75.28	77.35	77.68	67.71
Beef	47.39	48.29	51.71	49.80	52.40	51.05	45.35
Veal	2.91	2.96	3.28	3.08	2.90	2.72	2.53
Beef and Veal	50.30	51.25	54.99	52.88	55.30	53.77	47.89
Lamb	21.53	21.79	22.08	22.14	22.00	23.69	19.36
Chicken	35.99	37.75	37.47	39.19	37.26	38.24	38.45
Pork	16.28	16.04	16.93	16.87	17.11	17.41	18.08
Ham	3.89	3.44	2.67	2.06	1.96	2.01	1.90

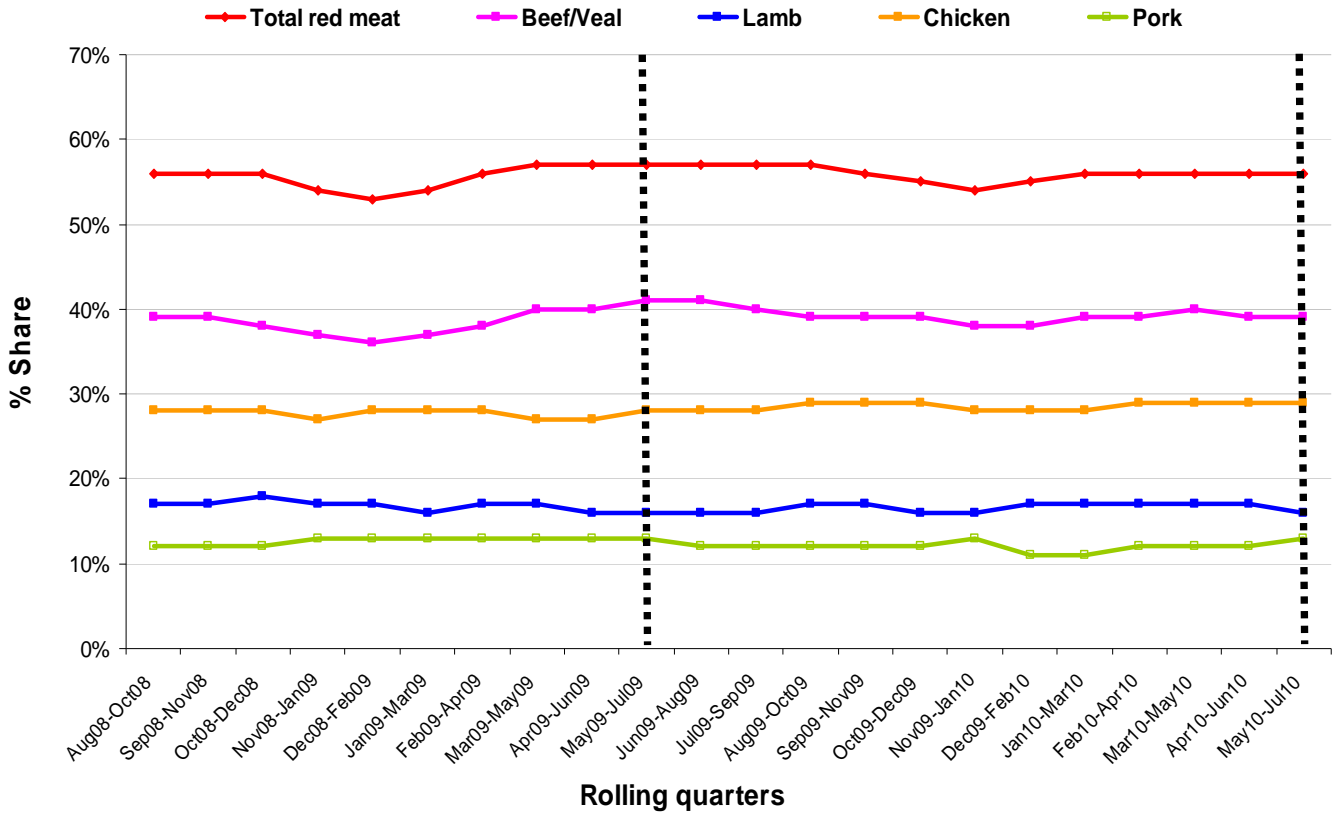
Source: Roy Morgan

LY = Last Year TY = This Year

Total red meat = Beef + Lamb + Veal

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Fresh Meat Category Share



Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
Total red meat	55.8%	55.7%	57.2%	56.1%	57.6%	57.1%	53.3%
Beef	36.7%	36.7%	38.2%	37.1%	39.0%	37.5%	35.7%
Veal	2.3%	2.2%	2.4%	2.3%	2.2%	2.0%	2.0%
Beef and Veal	38.9%	38.9%	40.7%	39.4%	41.2%	39.5%	37.7%
Lamb	16.7%	16.6%	16.3%	16.5%	16.4%	17.4%	15.2%
Chicken	27.8%	28.7%	27.7%	29.2%	27.7%	28.1%	30.3%
Pork	12.6%	12.2%	12.5%	12.6%	12.7%	12.8%	14.2%
Ham	3.0%	2.6%	2.0%	1.5%	1.5%	1.5%	1.5%

Source: Roy Morgan

Total red meat = Beef + Lamb + Veal + Mutton

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Channel Share

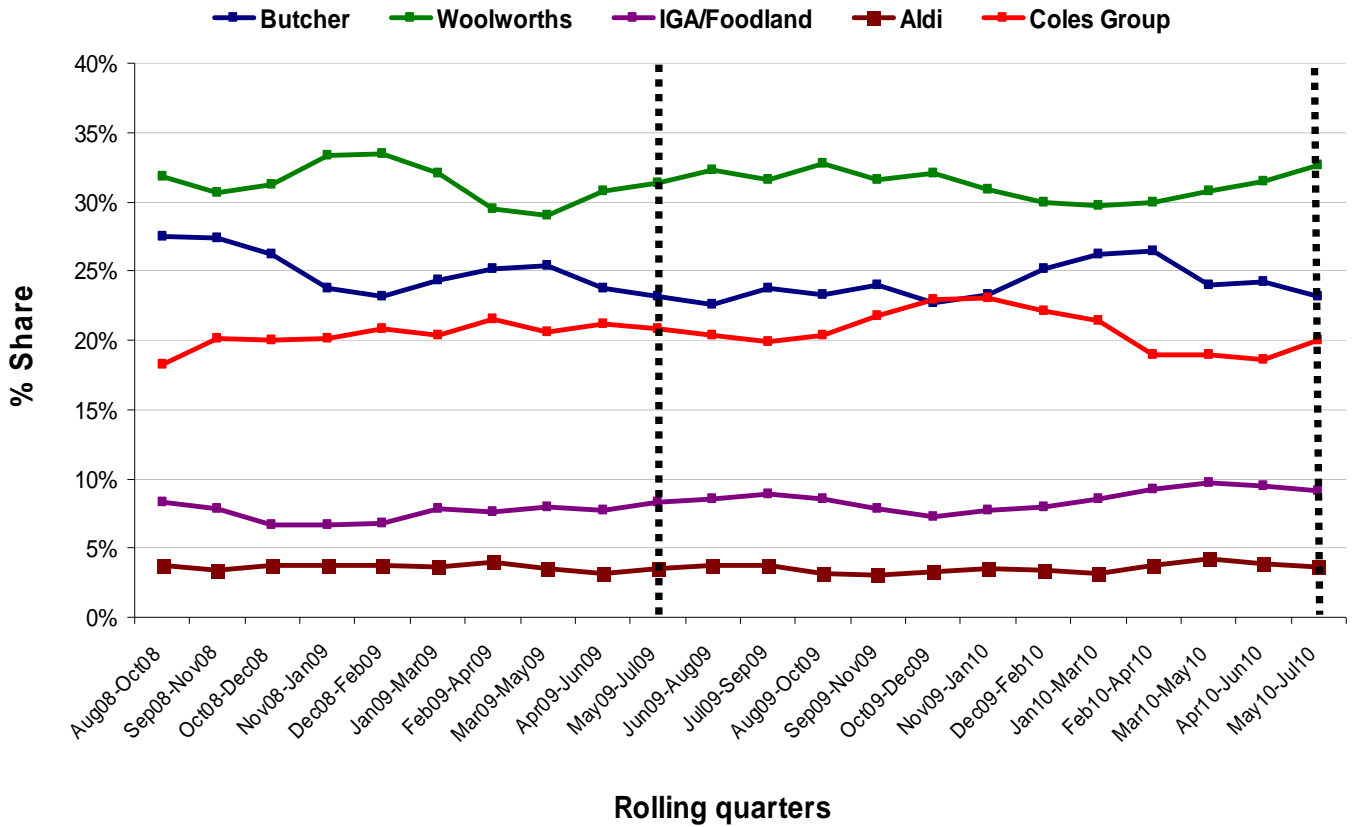
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Fresh Meat Channel Share



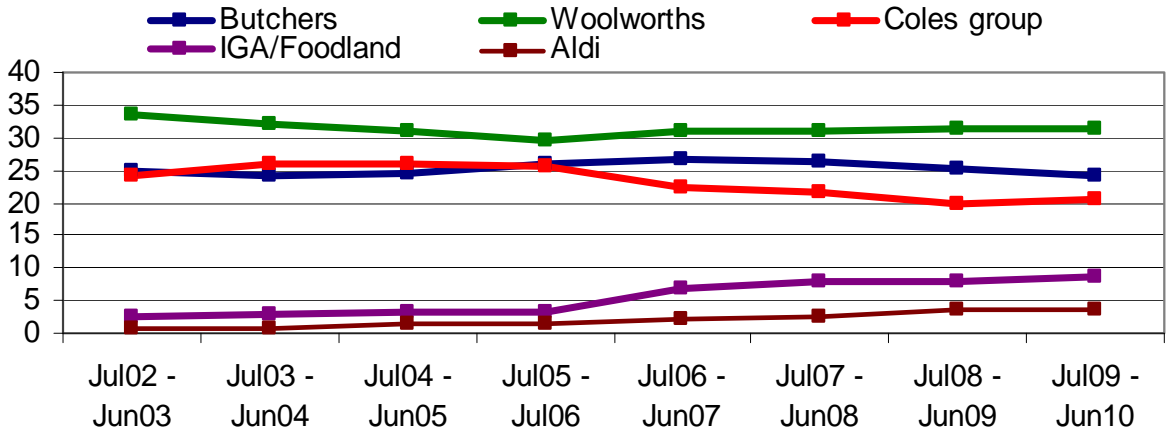
Fresh Meat	12 Months		3 Months		Jul-09	Jun 10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	24.9%	24.1%	23.2%	23.2%	22.8%	27.2%	20.8%
All Supermarkets	65.1%	65.9%	66.3%	67.0%	67.2%	63.5%	69.8%
Woolworths	31.5%	31.6%	31.4%	32.6%	30.4%	32.1%	34.6%
Coles Group	20.2%	20.6%	20.8%	20.0%	21.1%	18.5%	20.6%
IGA/Foodland	7.7%	8.6%	8.3%	9.1%	8.1%	9.0%	7.9%
Aldi	3.7%	3.5%	3.5%	3.6%	5.0%	2.5%	4.3%
Market/Deli/Other	10.1%	10.0%	10.5%	9.8%	10.1%	9.3%	9.4%

Source: Roy Morgan

LY = Last Year TY = This Year

Fresh Meat Channel Share (Financial Years)

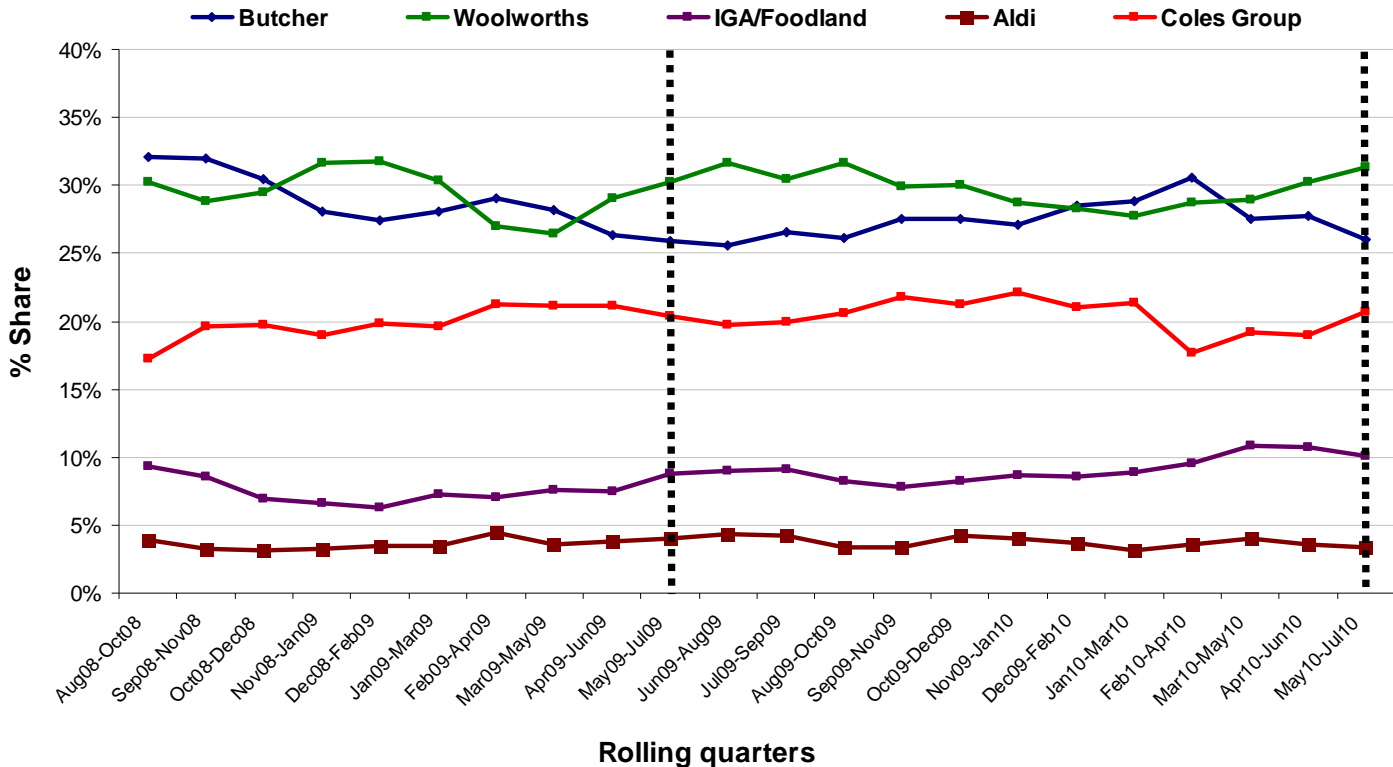
Fresh Meat Channel Share (Financial Years)



	Jul02 - Jun03	Jul03 - Jun04	Jul04 - Jun05	Jul05 - Jun06	Jul06 - Jun07	Jul07 - Jun08	Jul08 - Jun09	Jul09 - Jun10
Fresh Meat								
Share (Vol %) Butchers	24.9	24.3	24.6	25.8	26.7	26.4	25.2	24.2
Woolworths	33.4	32	31	29.7	30.9	30.9	31.4	31.2
Coles group	24.3	25.8	26	25.7	22.5	21.8	20	20.6
IGA/Foodland	2.7	2.9	3.1	3.3	6.9	8	7.8	8.6
Aldi	0.7	0.9	1.4	1.5	2	2.6	3.7	3.6

Beef and Veal Channel Share

Beef and Veal Channel Share



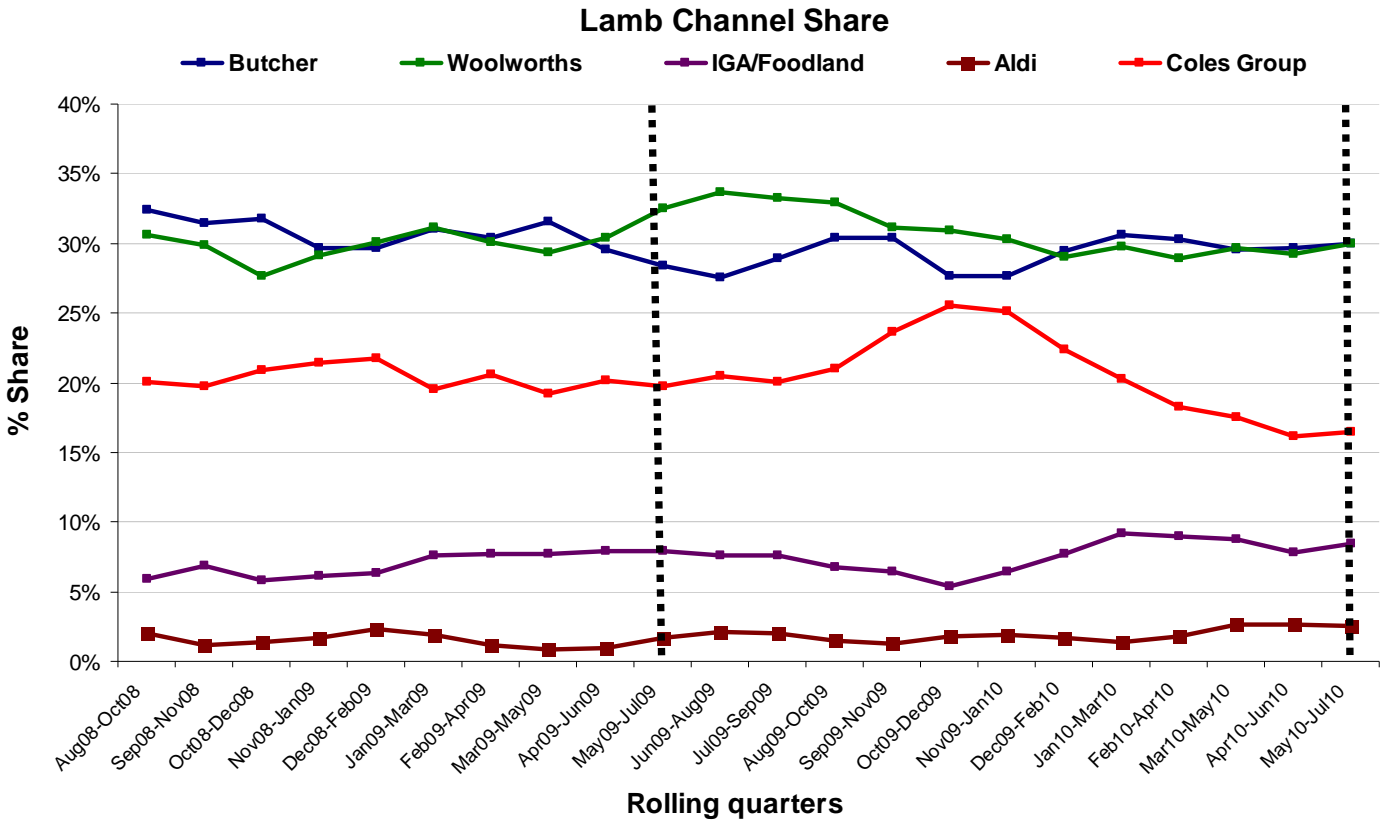
Rolling quarters

Fresh Beef and Veal	12 Months		3 Months		Jul-09	Jun 10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	28.7%	27.4%	25.9%	26.0%	26.9%	31.3%	24.2%
All Supermarkets	63.4%	65.0%	66.2%	67.4%	66.8%	64.1%	67.8%
Woolworths	29.8%	30.1%	30.2%	31.3%	29.0%	30.8%	34.6%
Coles Group	19.5%	20.3%	20.4%	20.7%	20.0%	19.1%	19.0%
IGA/Foodland	8.0%	9.1%	8.8%	10.1%	9.6%	10.1%	8.1%
Aldi	3.9%	3.6%	4.0%	3.4%	5.7%	2.6%	4.1%
Market/Deli/Other	7.9%	7.6%	7.8%	6.6%	6.3%	4.6%	8.1%

Source: Roy Morgan

LY = Last Year TY = This Year

Lamb Channel Share

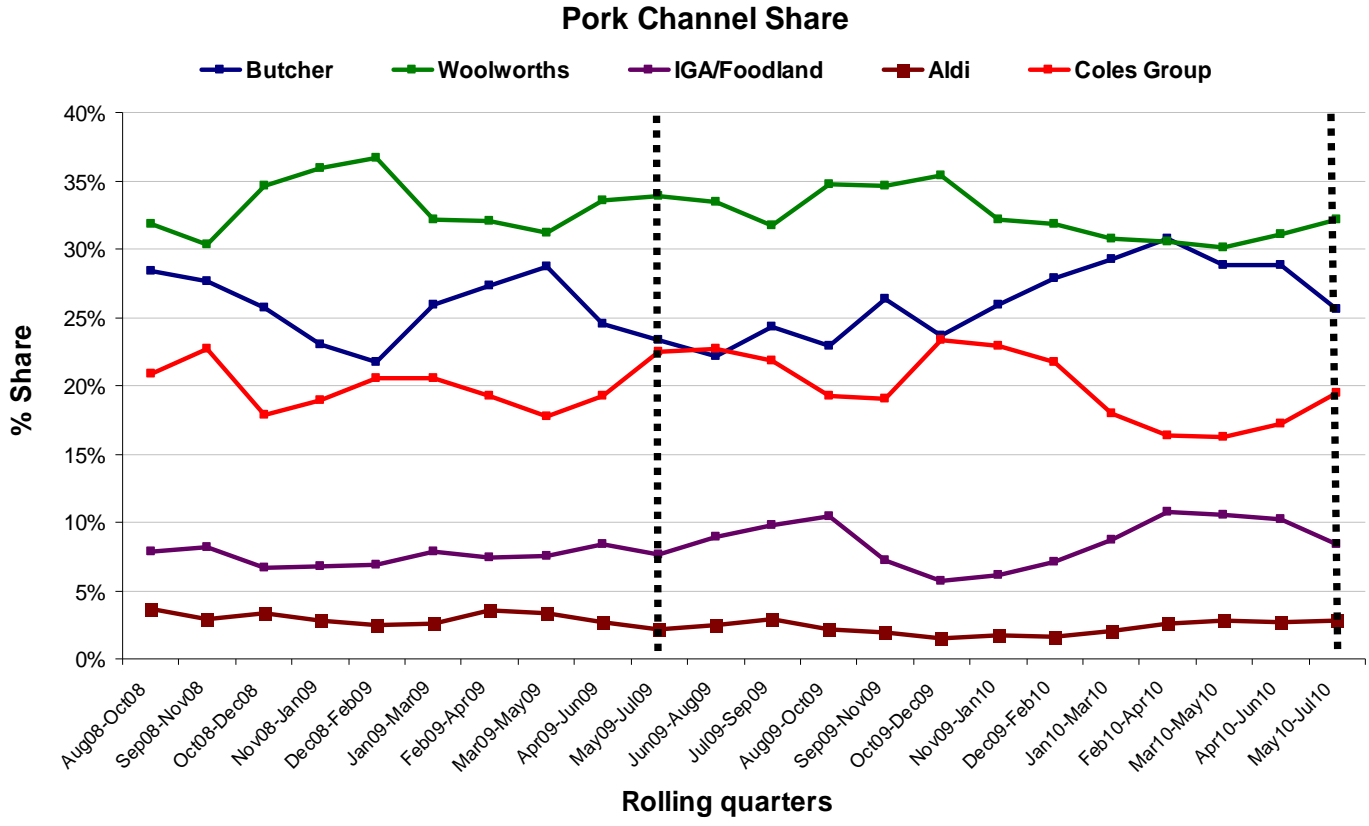


Fresh Lamb	12 Months		3 Months		Jul-09	Jun 10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	30.2%	29.6%	28.4%	30.0%	24.8%	32.1%	29.0%
All Supermarkets	61.2%	61.6%	63.0%	58.9%	67.0%	53.9%	63.8%
Woolworths	30.6%	30.5%	32.5%	30.0%	34.7%	29.2%	32.3%
Coles Group	20.4%	20.1%	19.7%	16.5%	20.6%	14.2%	18.1%
IGA/Foodland	6.9%	7.7%	7.9%	8.4%	6.9%	7.2%	8.5%
Aldi	1.7%	1.9%	1.7%	2.5%	2.8%	1.7%	2.3%
Market/Deli/Other	8.6%	8.7%	8.6%	11.1%	8.2%	14.0%	7.2%

Source: Roy Morgan

LY = Last Year TY = This Year

Pork Channel Share



Fresh Pork	12 Months		3 Months		Jul-09	Jun 10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	25.5%	26.3%	23.3%	25.6%	23.4%	28.1%	21.8%
All Supermarkets	65.6%	65.0%	69.0%	64.6%	73.0%	65.7%	69.8%
Woolworths	33.4%	32.3%	33.9%	32.2%	33.3%	31.9%	34.0%
Coles Group	20.4%	19.5%	22.5%	19.5%	27.2%	20.2%	21.3%
IGA/Foodland	7.4%	8.9%	7.6%	8.4%	4.9%	11.0%	7.1%
Aldi	3.0%	2.3%	2.1%	2.8%	3.3%	1.8%	3.5%
Market/Deli/Other	8.9%	8.7%	7.7%	9.8%	3.6%	6.2%	8.4%

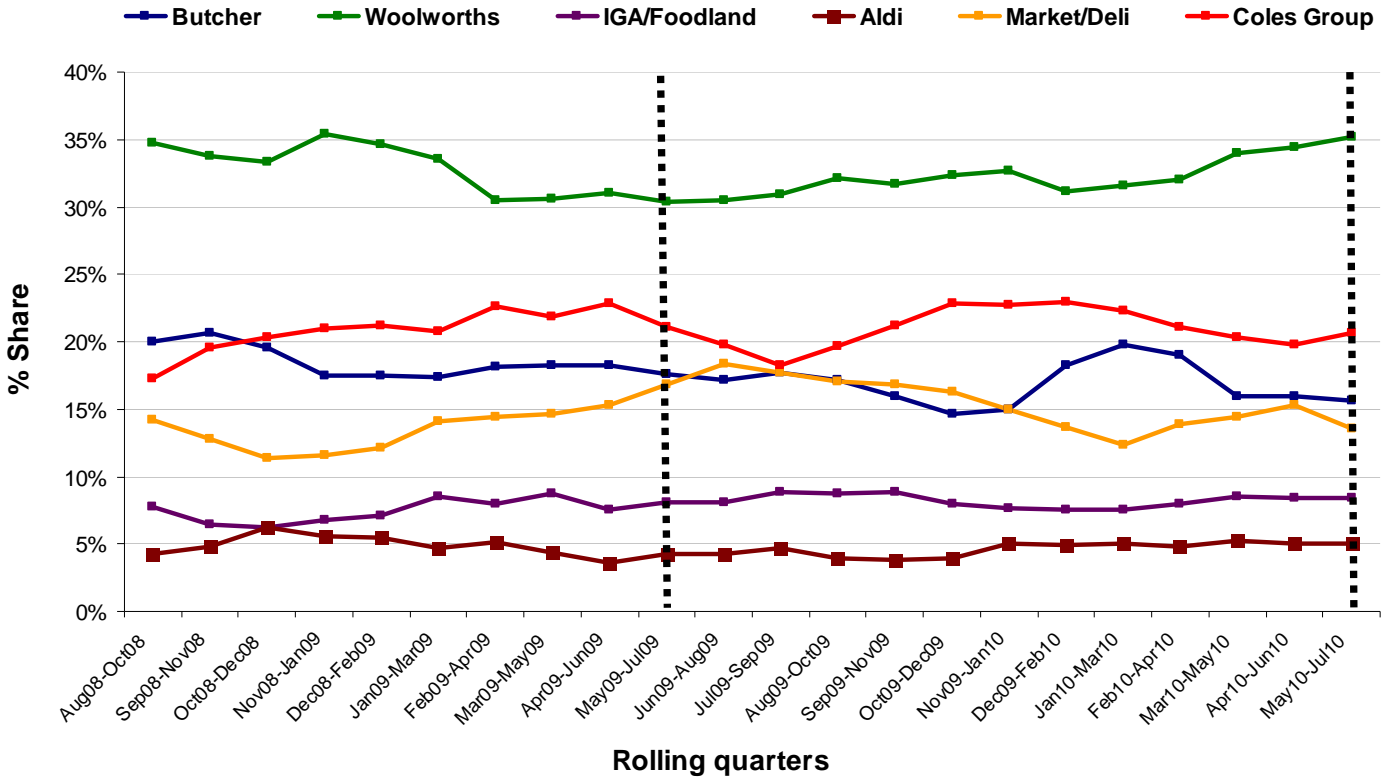
Source: Roy Morgan

LY = Last Year TY = This Year

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Chicken Channel Share

Chicken Channel Share



Rolling quarters

Fresh Chicken	12 Months		3 Months		Jul-09	Jun 10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	18.3%	16.7%	17.6%	15.6%	16.1%	19.9%	12.8%
All Supermarkets	67.4%	68.5%	65.6%	70.8%	64.0%	65.9%	74.4%
Woolworths	32.7%	33.0%	30.4%	35.2%	27.3%	35.0%	35.0%
Coles Group	20.5%	21.0%	21.1%	20.7%	19.9%	19.0%	23.2%
IGA/Foodland	7.7%	8.2%	8.1%	8.4%	8.2%	7.3%	8.0%
Aldi	4.8%	4.7%	4.3%	5.0%	6.1%	3.3%	6.0%
Market/Deli/Other	14.3%	14.8%	16.8%	13.6%	19.9%	14.2%	12.8%

Source: Roy Morgan

LY = Last Year TY = This Year

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State Data

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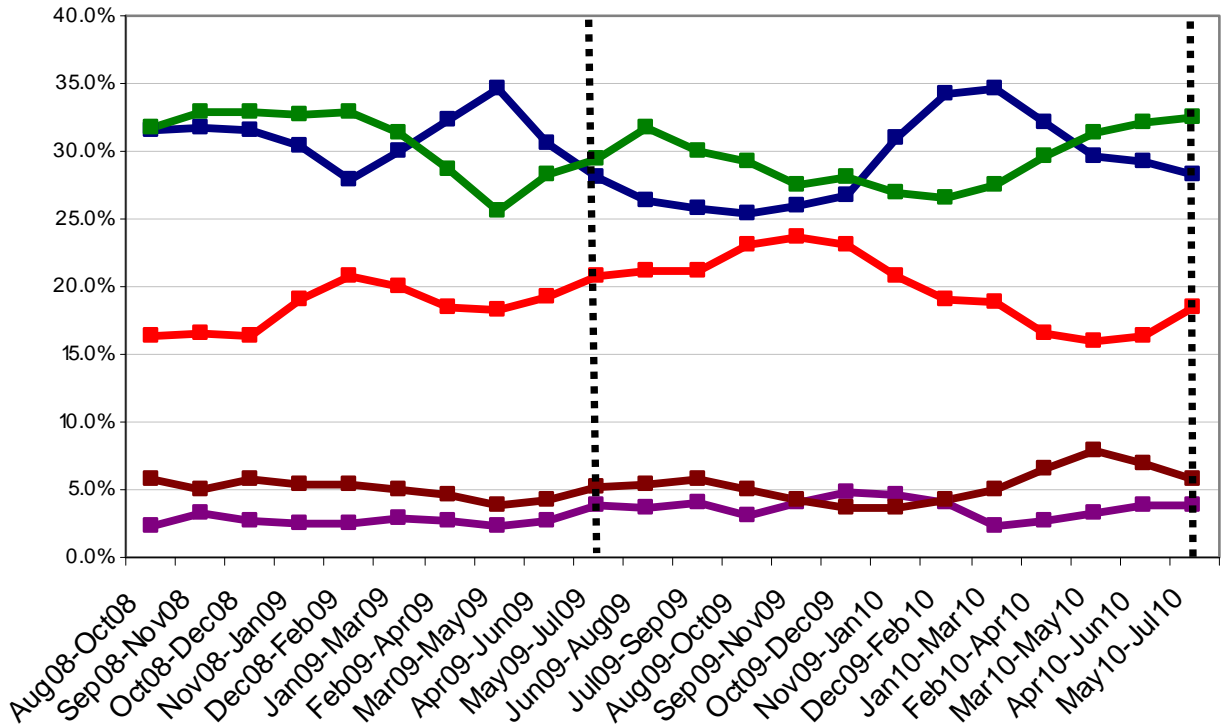
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NSW Fresh Meat Channel Share

■ Butchers ■ Woolworths ■ Coles Group
■ IGA/Foodland ■ Aldi



NSW Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	30.5%	29.2%	28.0%	28.2%	25.5%	30.1%	25.9%
All Supermarkets	60.0%	60.1%	62.2%	63.0%	66.5%	60.8%	63.1%
Woolworths	30.6%	29.5%	29.5%	32.5%	31.4%	32.3%	33.2%
Coles Group	18.7%	19.7%	20.7%	18.5%	21.2%	18.7%	19.7%
IGA/Foodland	2.9%	3.5%	3.8%	3.8%	5.2%	3.9%	2.4%
Aldi	5.2%	5.2%	5.1%	5.8%	6.3%	3.6%	5.2%
Market/Deli/Other	9.5%	10.7%	9.8%	8.8%	8.0%	9.0%	11.0%

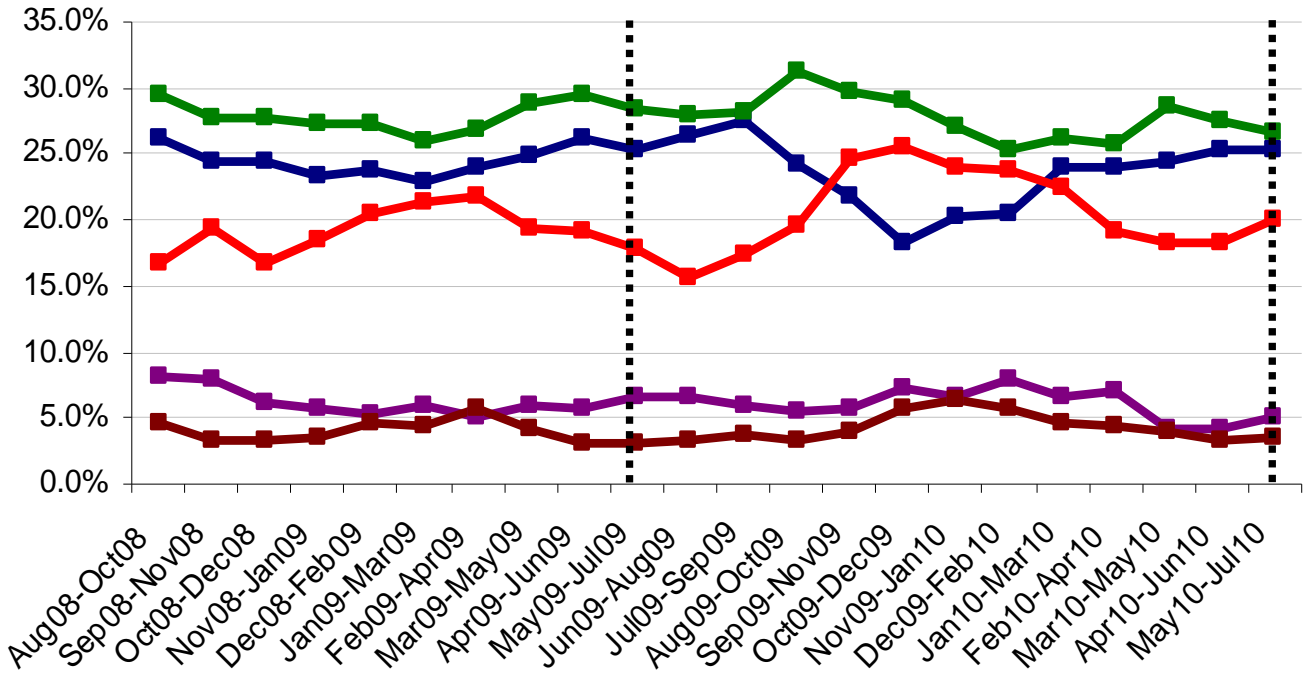
Source: Roy Morgan

LY = Last Year TY = This Year

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VIC Fresh Meat Channel Share

- Butchers
- Woolworths
- Coles Group
- IGA/Foodland
- Aldi



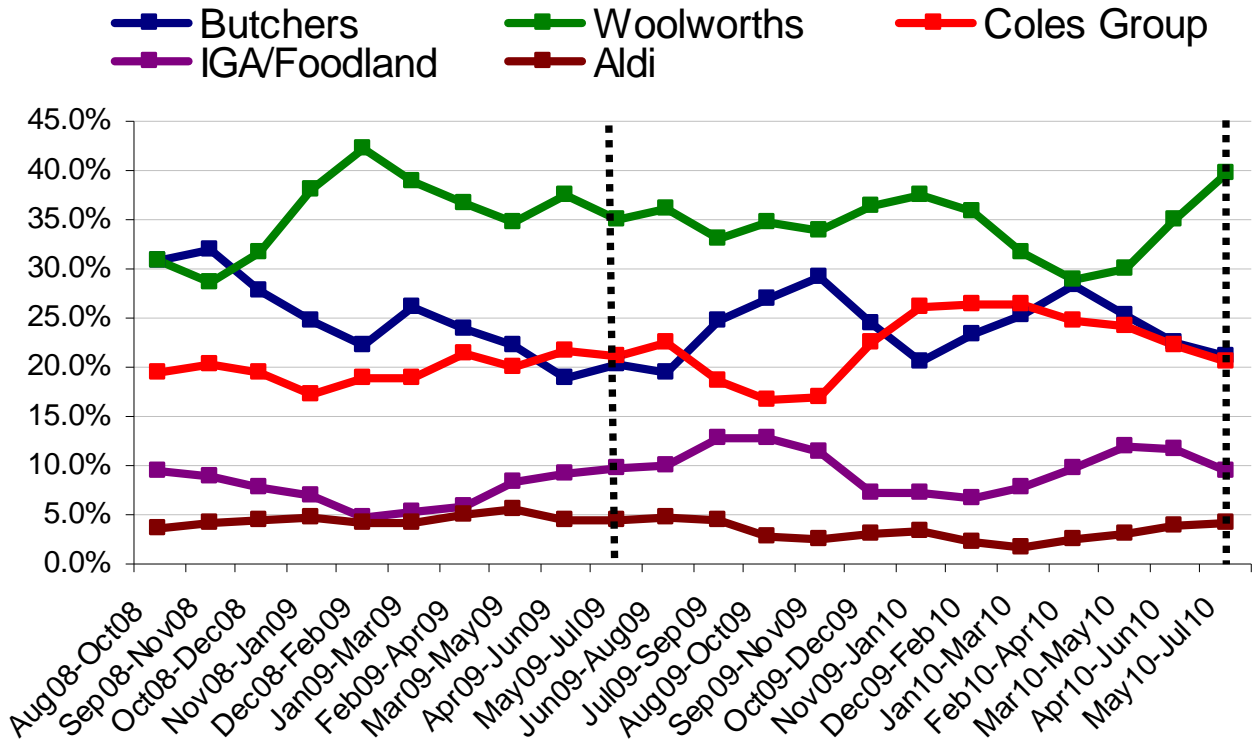
VIC Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	24.7%	23.6%	25.4%	25.4%	25.6%	32.1%	19.2%
All Supermarkets	59.1%	61.0%	58.3%	57.1%	58.2%	53.4%	61.0%
Woolworths	28.0%	27.7%	28.5%	26.7%	25.4%	24.4%	23.7%
Coles Group	18.6%	20.7%	17.9%	20.0%	17.7%	20.3%	17.8%
IGA/Foodland	6.4%	6.0%	6.7%	5.0%	6.8%	5.1%	9.3%
Aldi	4.1%	4.3%	3.0%	3.6%	5.1%	2.0%	7.3%
Market/Deli/Other	16.1%	15.5%	16.3%	17.4%	16.2%	14.5%	19.8%

Source: Roy Morgan

LY = Last Year TY = This Year

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QLD Fresh Meat Channel Share



*** CAUTION SMALL SAMPLE SIZE ***

QLD Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	24.9%	24.3%	20.3%	21.0%	20.8%	20.3%	22.9%
All Supermarkets	68.4%	70.9%	71.4%	74.8%	70.6%	74.4%	76.2%
Woolworths	35.1%	35.0%	35.1%	39.7%	30.6%	41.3%	43.9%
Coles Group	19.8%	22.1%	21.0%	20.5%	22.1%	18.7%	20.1%
IGA/Foodland	8.0%	9.8%	9.6%	9.4%	7.6%	9.6%	4.6%
Aldi	4.5%	3.2%	4.5%	4.1%	7.6%	4.2%	5.1%
Market/Deli/Other	6.6%	4.8%	8.3%	4.2%	8.6%	5.3%	0.8%

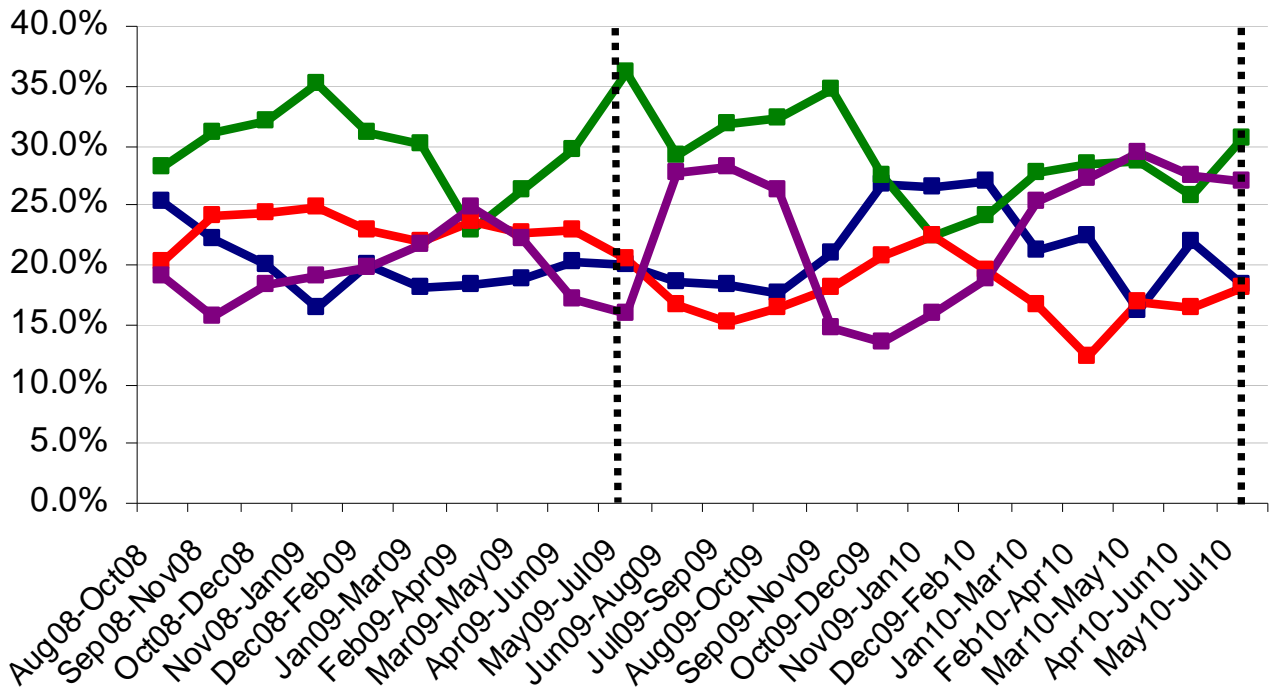
Source: Roy Morgan

LY = Last Year TY = This Year

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SA/NT Fresh Meat Channel Share

■ Butchers
 ■ Woolworths
 ■ Coles Group
 ■ IGA/Foodland



*** CAUTION SMALL SAMPLE SIZE ***

SA/NT Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	20.0%	21.1%	19.9%	18.2%	23.6%	28.8%	13.5%
All Supermarkets	73.5%	70.9%	73.5%	76.1%	72.9%	66.7%	82.3%
Woolworths	30.3%	28.5%	36.2%	30.6%	34.7%	27.0%	36.7%
Coles Group	22.2%	17.4%	20.4%	18.1%	12.8%	15.1%	15.5%
IGA/Foodland	19.8%	24.0%	15.8%	26.9%	24.8%	24.2%	29.5%
Market/Deli/Other	6.5%	7.9%	6.6%	5.7%	3.5%	4.5%	4.2%

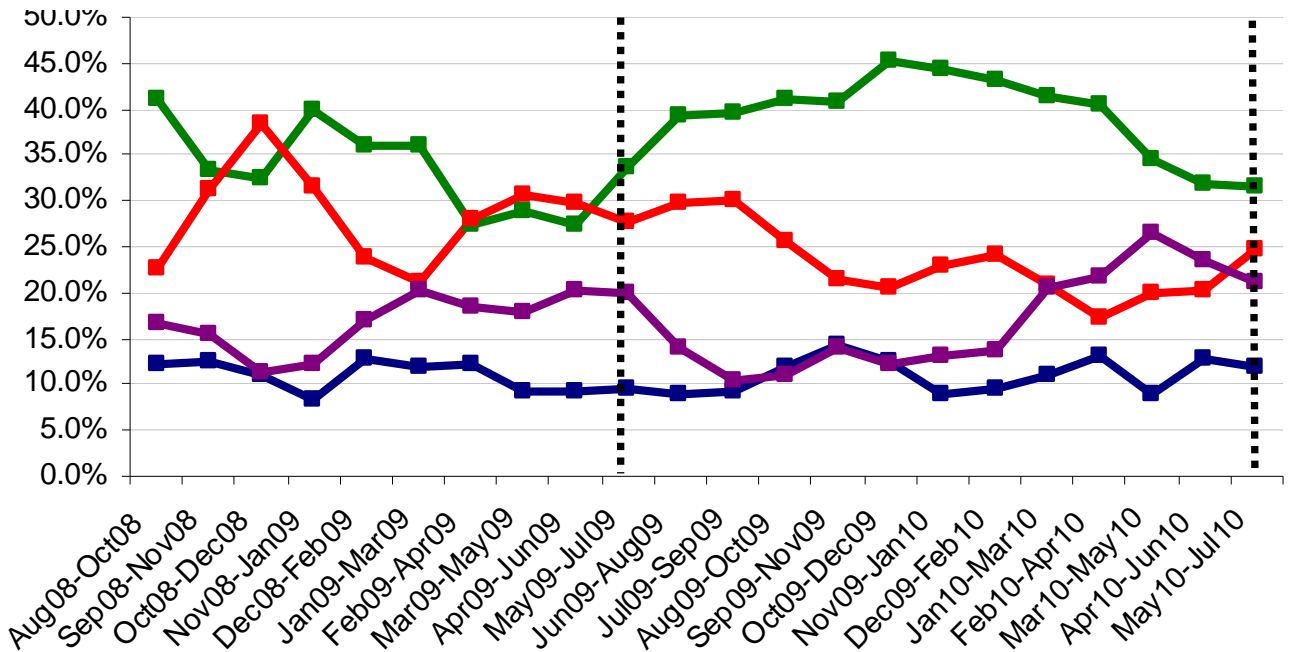
Source: Roy Morgan

LY = Last Year TY = This Year

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WA Fresh Meat Channel Share

■ Butchers
 ■ Woolworths
 ■ Coles Group
 ■ IGA/Foodland



*** CAUTION SMALL SAMPLE SIZE ***

WA Fresh Meat	12 Months		3 Months		Jul-09	Jun-10	Jul-10
	Aug - Jul		May - Jul				
	LY	TY	LY	TY			
All butchers	10.6%	11.5%	9.5%	11.9%	8.4%	21.5%	9.6%
All Supermarkets	82.1%	80.3%	85.4%	78.6%	86.2%	68.7%	81.8%
Woolworths	35.6%	39.1%	33.7%	31.4%	37.0%	32.1%	34.9%
Coles Group	27.5%	22.7%	27.8%	24.6%	34.6%	15.9%	31.9%
IGA/Foodland	16.8%	16.9%	20.0%	21.1%	11.7%	20.3%	12.8%
Market/Deli/Other	7.3%	8.3%	5.0%	9.5%	5.4%	9.8%	8.7%

Source: Roy Morgan

LY = Last Year TY = This Year

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Methodology

Roy Morgan Meat & Smallgoods data
How is the data collected?

Where

Australia wide. Metro, regional and rural.

Who

An annual sample of approximately 26,000 respondents (15,000 fresh meat buyers).

Questions asked

Meat Type and Cut Purchased in the last 7 days
Number of Serves of each Meat Type and Cut Purchased
Place of Purchase