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.
Contents

1. Category data
   - Retail Prices
   - Category Volume
   - Category Share

2. Channel share
   - Fresh Meat Channel Share
   - Beef and Veal Channel Share
   - Lamb Channel Share
   - Pork Channel Share
   - Chicken Channel Share

3. State data
   - NSW channel share
   - VIC channel share
   - QLD channel share
   - SA/NT channel share
   - WA channel share
Category Data

RED MEAT
Amazing Food

We love our Lamb

beef
get into it

Click - Back to Contents
Fresh Meat Retail Prices

<table>
<thead>
<tr>
<th>Fresh Meat</th>
<th>3 Months</th>
<th>12 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Apr - Jun</td>
<td>% Change</td>
</tr>
<tr>
<td></td>
<td>2009</td>
<td>2010</td>
</tr>
<tr>
<td>Beef</td>
<td>1602</td>
<td>1608</td>
</tr>
<tr>
<td>Lamb</td>
<td>1402</td>
<td>1451</td>
</tr>
<tr>
<td>Chicken</td>
<td>403</td>
<td>405</td>
</tr>
<tr>
<td>Pork</td>
<td>1372</td>
<td>1359</td>
</tr>
</tbody>
</table>

Source: ABS

Click - Back to Contents
Fresh Meat Category Volume ('000,000 serves/week)

<table>
<thead>
<tr>
<th>Fresh Meat</th>
<th>12 Months Aug - Jul</th>
<th>3 Months May - Jul</th>
<th>Jul-09</th>
<th>Jun-10</th>
<th>Jul-10</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LY</td>
<td>TY</td>
<td>LY</td>
<td>TY</td>
<td></td>
</tr>
<tr>
<td>Total fresh meat</td>
<td>129.27</td>
<td>131.58</td>
<td>135.21</td>
<td>134.22</td>
<td>134.28</td>
</tr>
<tr>
<td>Total red meat</td>
<td>72.09</td>
<td>73.24</td>
<td>77.28</td>
<td>75.28</td>
<td>77.35</td>
</tr>
<tr>
<td>Beef</td>
<td>47.39</td>
<td>48.29</td>
<td>51.71</td>
<td>49.80</td>
<td>52.40</td>
</tr>
<tr>
<td>Veal</td>
<td>2.91</td>
<td>2.96</td>
<td>3.28</td>
<td>3.08</td>
<td>2.90</td>
</tr>
<tr>
<td>Beef and Veal</td>
<td>50.30</td>
<td>51.25</td>
<td>54.99</td>
<td>52.88</td>
<td>55.30</td>
</tr>
<tr>
<td>Lamb</td>
<td>21.53</td>
<td>21.79</td>
<td>22.08</td>
<td>22.14</td>
<td>22.00</td>
</tr>
<tr>
<td>Chicken</td>
<td>35.99</td>
<td>37.75</td>
<td>37.47</td>
<td>39.19</td>
<td>37.26</td>
</tr>
<tr>
<td>Pork</td>
<td>16.28</td>
<td>16.04</td>
<td>16.93</td>
<td>16.87</td>
<td>17.11</td>
</tr>
<tr>
<td>Ham</td>
<td>3.89</td>
<td>3.44</td>
<td>2.67</td>
<td>2.06</td>
<td>1.96</td>
</tr>
</tbody>
</table>

Source: Roy Morgan

Total red meat = Beef + Lamb + Veal

Click - Back to Contents
Fresh Meat Category Share

- Total red meat
- Beef/Veal
- Lamb
- Chicken
- Pork

Rolling quarters

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

Source: Roy Morgan

Total red meat = Beef + Lamb + Veal + Mutton

Click - Back to Contents
Channel Share

RED MEAT
Amazing Food  We love our Lamb

Click - Back to Contents
### Fresh Meat Channel Share

#### Butcher

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

#### Woolworths

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

#### IGA/Foodland

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

#### Aldi

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

#### Coles Group

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

#### Market/Deli/Other

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

#### Source
Roy Morgan

**Fresh Meat**

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

**Rolling quarters**

<table>
<thead>
<tr>
<th>Period</th>
<th>Share (Vol %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug-Oct 08</td>
<td></td>
</tr>
<tr>
<td>Sep-Nov 08</td>
<td></td>
</tr>
<tr>
<td>Oct-Dec 08</td>
<td></td>
</tr>
<tr>
<td>Nov-Jan 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Feb 09</td>
<td></td>
</tr>
<tr>
<td>Jan-Mar 09</td>
<td></td>
</tr>
<tr>
<td>Feb-Apr 09</td>
<td></td>
</tr>
<tr>
<td>Mar-May 09</td>
<td></td>
</tr>
<tr>
<td>May-Jun 09</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 09</td>
<td></td>
</tr>
<tr>
<td>Jul-Aug 09</td>
<td></td>
</tr>
<tr>
<td>Aug-Sep 09</td>
<td></td>
</tr>
<tr>
<td>Sep-Oct 09</td>
<td></td>
</tr>
<tr>
<td>Oct-Nov 09</td>
<td></td>
</tr>
<tr>
<td>Nov-Dec 09</td>
<td></td>
</tr>
<tr>
<td>Dec-Jan 10</td>
<td></td>
</tr>
<tr>
<td>Jan-Feb 10</td>
<td></td>
</tr>
<tr>
<td>Feb-Mar 10</td>
<td></td>
</tr>
<tr>
<td>Mar-Apr 10</td>
<td></td>
</tr>
<tr>
<td>Apr-May 10</td>
<td></td>
</tr>
<tr>
<td>May-Jun 10</td>
<td></td>
</tr>
<tr>
<td>Jun-Jul 10</td>
<td></td>
</tr>
</tbody>
</table>

**Click - Back to Contents**
Fresh Meat Channel Share (Financial Years)

<table>
<thead>
<tr>
<th>Fresh Meat</th>
<th>Jul02 - Jun03</th>
<th>Jul03 - Jun04</th>
<th>Jul04 - Jun05</th>
<th>Jul05 - Jun06</th>
<th>Jul06 - Jun07</th>
<th>Jul07 - Jun08</th>
<th>Jul08 - Jun09</th>
<th>Jul09 - Jun10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butchers</td>
<td>24.9</td>
<td>24.3</td>
<td>24.6</td>
<td>25.8</td>
<td>26.7</td>
<td>26.4</td>
<td>25.2</td>
<td>24.2</td>
</tr>
<tr>
<td>Woolworths</td>
<td>33.4</td>
<td>32</td>
<td>31</td>
<td>29.7</td>
<td>30.9</td>
<td>30.9</td>
<td>31.4</td>
<td>31.2</td>
</tr>
<tr>
<td>Coles group</td>
<td>24.3</td>
<td>25.8</td>
<td>26</td>
<td>25.7</td>
<td>22.5</td>
<td>21.8</td>
<td>20</td>
<td>20.6</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>2.7</td>
<td>2.9</td>
<td>3.1</td>
<td>3.3</td>
<td>6.9</td>
<td>8</td>
<td>7.8</td>
<td>8.6</td>
</tr>
<tr>
<td>Aldi</td>
<td>0.7</td>
<td>0.9</td>
<td>1.4</td>
<td>1.5</td>
<td>2</td>
<td>2.6</td>
<td>3.7</td>
<td>3.6</td>
</tr>
</tbody>
</table>
**Fresh Beef and Veal Channel Share**

### Beef and Veal Channel Share

- **Butcher**
- **Woolworths**
- **IGA/Foodland**
- **Aldi**
- **Coles Group**

#### Rolling quarters

<table>
<thead>
<tr>
<th>Fresh Beef and Veal</th>
<th>12 Months</th>
<th>3 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aug - Jul</td>
<td>May - Jul</td>
</tr>
<tr>
<td>All butchers</td>
<td>28.7%</td>
<td>27.4%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>63.4%</td>
<td>65.0%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>29.8%</td>
<td>30.1%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>19.5%</td>
<td>20.3%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>8.0%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Aldi</td>
<td>3.9%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>7.9%</td>
<td>7.6%</td>
</tr>
</tbody>
</table>

**Source:** Roy Morgan

**LY = Last Year**  **TY = This Year**

**Click - Back to Contents**
Lamb Channel Share

Fresh Lamb Share (Vol %)

<table>
<thead>
<tr>
<th></th>
<th>12 Months</th>
<th>3 Months</th>
<th>Jul-09</th>
<th>Jun 10</th>
<th>Jul-10</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aug - Jul</td>
<td>May - Jul</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All butchers</td>
<td>30.2%</td>
<td>29.6%</td>
<td>28.4%</td>
<td>30.0%</td>
<td>24.8%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>61.2%</td>
<td>61.6%</td>
<td>63.0%</td>
<td>58.9%</td>
<td>67.0%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>30.6%</td>
<td>30.5%</td>
<td>32.5%</td>
<td>30.0%</td>
<td>34.7%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>20.4%</td>
<td>20.1%</td>
<td>19.7%</td>
<td>16.5%</td>
<td>20.6%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>6.9%</td>
<td>7.7%</td>
<td>7.9%</td>
<td>8.4%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Aldi</td>
<td>1.7%</td>
<td>1.9%</td>
<td>1.7%</td>
<td>2.5%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>8.6%</td>
<td>8.7%</td>
<td>8.6%</td>
<td>11.1%</td>
<td>8.2%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan  
LY = Last Year  
TY = This Year

Click - Back to Contents
## Pork Channel Share

### Pork Channel Share

**Fresh Pork**

<table>
<thead>
<tr>
<th>Share (Vol %)</th>
<th>12 Months</th>
<th>3 Months</th>
<th>Jul-09</th>
<th>Jun 10</th>
<th>Jul-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>All butchers</td>
<td>25.5%</td>
<td>26.3%</td>
<td>23.3%</td>
<td>25.6%</td>
<td>23.4%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>65.6%</td>
<td>65.0%</td>
<td>69.0%</td>
<td>64.6%</td>
<td>73.0%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>33.4%</td>
<td>32.3%</td>
<td>33.9%</td>
<td>32.2%</td>
<td>33.3%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>20.4%</td>
<td>19.5%</td>
<td>22.5%</td>
<td>19.5%</td>
<td>27.2%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>7.4%</td>
<td>8.9%</td>
<td>7.6%</td>
<td>8.4%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Aldi</td>
<td>3.0%</td>
<td>2.3%</td>
<td>2.1%</td>
<td>2.8%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>8.9%</td>
<td>8.7%</td>
<td>7.7%</td>
<td>9.8%</td>
<td>3.6%</td>
</tr>
</tbody>
</table>

**Source:** Roy Morgan

**Rolling quarters**

- Aug-Oct08
- Sep-Nov08
- Oct-Nov08
- Nov-Dec08
- Dec-Jan09
- Jan-Feb09
- Feb-Mar09
- Mar-Apr09
- Apr-May09
- May-Jun09
- Jun-Jul09
- Jul-Aug09
- Aug-Sep09
- Sep-Oct09
- Oct-Nov09
- Nov-Dec09
- Dec-Jan10
- Jan-Feb10
- Feb-Mar10
- Mar-Apr10
- Apr-May10
- May-Jun10
- Jun-Jul10

**Click - Back to Contents**
### Fresh Chicken

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

Source: Roy Morgan

LY = Last Year  TY = This Year

### Chicken Channel Share

#### Butcher

#### Woolworths

#### IGA/Foodland

#### Aldi

#### Market/Deli/Other

**Rolling quarters**

<table>
<thead>
<tr>
<th>Rolling quarters</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug08-Oct08</td>
<td>0%</td>
</tr>
<tr>
<td>Sep08-Oct08</td>
<td>5%</td>
</tr>
<tr>
<td>Oct08-Nov08</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Click - Back to Contents**
NSW Fresh Meat Channel Share

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

**NSW Fresh Meat Share (Vol %)**

<table>
<thead>
<tr>
<th>NSW Fresh Meat</th>
<th>12 Months</th>
<th>3 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aug - Jul</td>
<td>May - Jul</td>
</tr>
<tr>
<td>All butchers</td>
<td>30.5%</td>
<td>29.2%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>60.0%</td>
<td>60.1%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>30.6%</td>
<td>29.5%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>18.7%</td>
<td>19.7%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>2.9%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Aldi</td>
<td>5.2%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>9.5%</td>
<td>10.7%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan

LY = Last Year    TY = This Year
VIC Fresh Meat Channel Share

<table>
<thead>
<tr>
<th>VIC Fresh Meat</th>
<th>12 Months</th>
<th>3 Months</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aug - Jul</td>
<td>May - Jul</td>
<td>Jul-09</td>
<td>Jun-10</td>
<td>Jul-10</td>
</tr>
<tr>
<td></td>
<td>LY</td>
<td>TY</td>
<td>LY</td>
<td>TY</td>
<td></td>
</tr>
<tr>
<td>All butchers</td>
<td>24.7%</td>
<td>23.6%</td>
<td>25.4%</td>
<td>25.4%</td>
<td>25.6%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>59.1%</td>
<td>61.0%</td>
<td>58.3%</td>
<td>57.1%</td>
<td>58.2%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>28.0%</td>
<td>27.7%</td>
<td>28.5%</td>
<td>26.7%</td>
<td>25.4%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>18.6%</td>
<td>20.7%</td>
<td>17.9%</td>
<td>20.0%</td>
<td>17.7%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>6.4%</td>
<td>6.0%</td>
<td>6.7%</td>
<td>5.0%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Aldi</td>
<td>4.1%</td>
<td>4.3%</td>
<td>3.0%</td>
<td>3.6%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>16.1%</td>
<td>15.5%</td>
<td>16.3%</td>
<td>17.4%</td>
<td>16.2%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan

LY = Last Year
TY = This Year

Click - Back to Contents
QLD Fresh Meat Channel Share

**QLD Fresh Meat**

| 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**

***CAUTION SMALL SAMPLE SIZE***

**Click - Back to Contents**
SA/NT Fresh Meat Channel Share

Butchers | Woolworths | Coles Group | IGA/Foodland

![Graph showing channel share for Butchers, Woolworths, Coles Group, and IGA/Foodland from Aug 08 to May 10.]

***CAUTION SMALL SAMPLE SIZE***

<table>
<thead>
<tr>
<th>SA/NT Fresh Meat</th>
<th>12 Months</th>
<th>3 Months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aug - Jul</td>
<td>May - Jul</td>
</tr>
<tr>
<td>Share (Vol %)</td>
<td>LY</td>
<td>TY</td>
</tr>
<tr>
<td>All butchers</td>
<td>20.0%</td>
<td>21.1%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>73.5%</td>
<td>70.9%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>30.3%</td>
<td>28.5%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>22.2%</td>
<td>17.4%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>19.8%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>6.5%</td>
<td>7.9%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan

LY = Last Year  TY = This Year

Click - Back to Contents
### WA Fresh Meat Channel Share

![Graph showing channel share for different meat retailers over various periods](image)

### Share (Vol %)

<table>
<thead>
<tr>
<th>WA Fresh Meat</th>
<th>12 Months</th>
<th>3 Months</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aug - Jul</td>
<td>May - Jul</td>
<td>Jul-09</td>
<td>Jun-10</td>
<td>Jul-10</td>
</tr>
<tr>
<td></td>
<td>LY</td>
<td>TY</td>
<td>LY</td>
<td>TY</td>
<td></td>
</tr>
<tr>
<td>All butchers</td>
<td>10.6%</td>
<td>11.5%</td>
<td>9.5%</td>
<td>11.9%</td>
<td>8.4%</td>
</tr>
<tr>
<td>All Supermarkets</td>
<td>82.1%</td>
<td>80.3%</td>
<td>85.4%</td>
<td>78.6%</td>
<td>86.2%</td>
</tr>
<tr>
<td>Woolworths</td>
<td>35.6%</td>
<td>39.1%</td>
<td>33.7%</td>
<td>31.4%</td>
<td>37.0%</td>
</tr>
<tr>
<td>Coles Group</td>
<td>27.5%</td>
<td>22.7%</td>
<td>27.8%</td>
<td>24.6%</td>
<td>34.6%</td>
</tr>
<tr>
<td>IGA/Foodland</td>
<td>16.8%</td>
<td>16.9%</td>
<td>20.0%</td>
<td>21.1%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Market/Deli/Other</td>
<td>7.3%</td>
<td>8.3%</td>
<td>5.0%</td>
<td>9.5%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

Source: Roy Morgan  
LY = Last Year  
TY = This Year

***CAUTION SMALL SAMPLE SIZE***
## Methodology

**Roy Morgan Meat & Smallgoods data**

How is the data collected?

<table>
<thead>
<tr>
<th>Where</th>
<th>Australia wide. Metro, regional and rural.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who</td>
<td>An annual sample of approximately 26,000 respondents (15,000 fresh meat buyers).</td>
</tr>
</tbody>
</table>
| 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 |