

Monday, 12 January 2020

## Woolworths Group takes the largest cut of fresh meat market

The latest Roy Morgan [Fresh Food and Grocery Report](#) shows that Woolworths Group has the largest share of the fresh meat market, taking 27.5% of the more than \$13 billion spent on fresh meat in Australia each year. Woolworths Group also enjoys the highest number of customers, with 42.7% of meat buyers having recently purchased from its stores.

The report shows Coles Group is in second place with 22.6% of the fresh meat market, followed by specialist Butchers (20.9%), Aldi (10.6%), Other Non-Supermarkets (6.6%), IGA (5.1%), Other Supermarkets (4.3%), and produce Markets taking the remaining 2.3%.

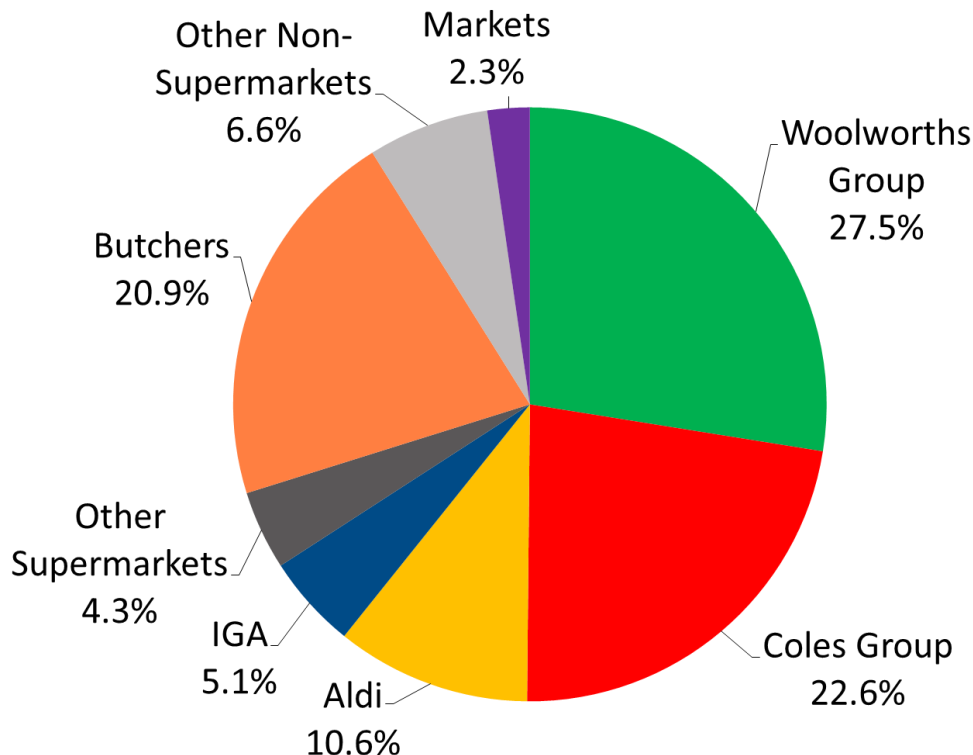
The findings are taken from the Roy Morgan Single Source survey, compiled by in-depth face-to-face interviews with over 1,000 Australians each week in their homes.

Roy Morgan CEO Michele Levine says long-term market-share trends show while buying meat remains a staple at 70% Australians buying meat each week, the changing way Australians purchase fresh meat is having a big impact.

*“Supermarkets now account for 70.2% of the meat market and while Woolworths Group’s market share has remained steady over the past eight years, declining only 0.1% points since 2011, there have been other notable changes. Butchers have declined in market share by 8.6% points, with the big winners in scooping up their customers being Aldi (up by 6.9% points), and Coles Group (up by 3.8% points). The major supermarket brands continue to increase their share of the fresh meat market, while small retail butchers are in long-term decline,”* Ms. Levine says.

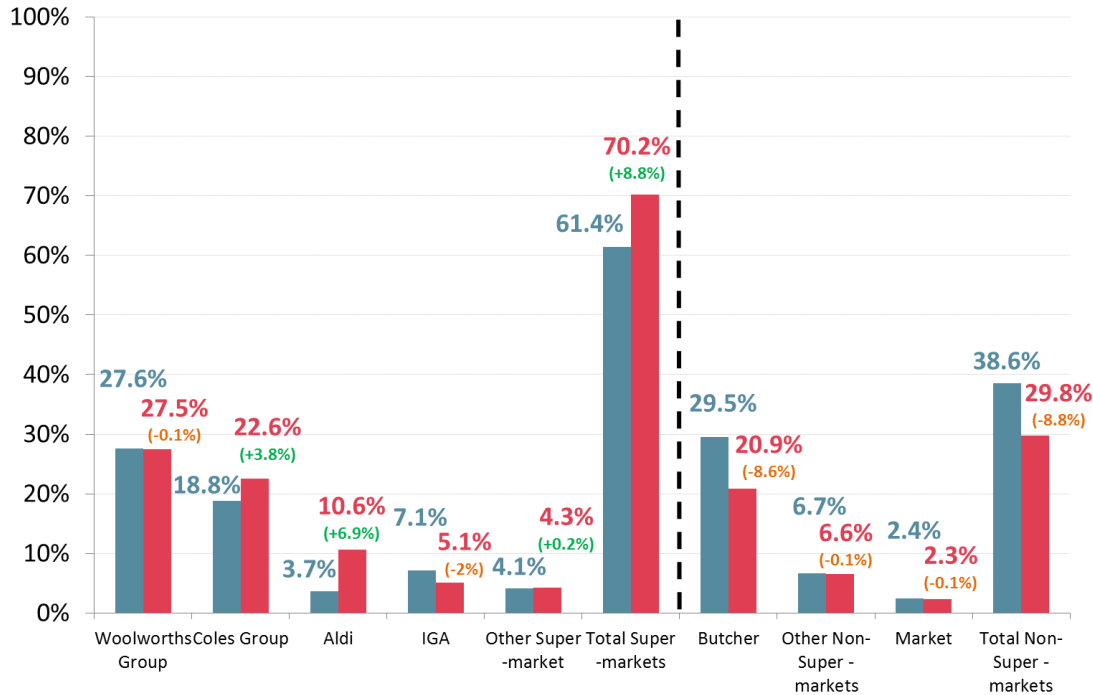
*“There are also significant regional variations to the fresh meat market with Woolworths dominant in Tasmania (41% of the fresh meat market) and Queensland (32%) while Coles has a leading position in Western Australia (30%) and the Northern Territory (41%). In South Australia Foodland is just behind Woolworths as the leading fresh meat supermarket while Butchers retain their highest market shares in New South Wales (22%) and Tasmania (23%). For further details on the regional breakdowns of the fresh meat market don’t hesitate to tap into the resources Roy Morgan can provide.”*

### Market share of fresh meat retailers



**Source:** Roy Morgan Single Source Australia, October 2018 – September 2019, n = 7,891 **Base:** Australians 14+ who purchased fresh meat in the past seven days (weighted to Australian households).

**Comparison of market share of fresh meat retailers 2019 cf. 2011**



**Source:** Roy Morgan Single Source Australia, Oct. 2010 – Sep. 2011, n=10,601, Oct. 2018 – Sep. 2019, n = 7,891.  
**Base:** Australians 14+ who purchased fresh meat in the past seven days (weighted to Australian households).

**For comments or more information about Roy Morgan’s supermarket and additional retail consumer data please contact:**

**Roy Morgan Enquiries**  
**Office: +61 (3) 9224 5309**  
[askroymorgan@roymorgan.com](mailto:askroymorgan@roymorgan.com)

**Related research findings**

For further in-depth analysis, view the [Supermarket Currency Report](#).

**About Roy Morgan**

Roy Morgan is Australia’s largest independent Australian research company, with offices in each state, as well as in the U.S. and U.K. A full-service research organisation, Roy Morgan has over 75 years’ experience collecting objective, independent information on consumers.

**Margin of Error**

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2