

Friday, 30 November 2018

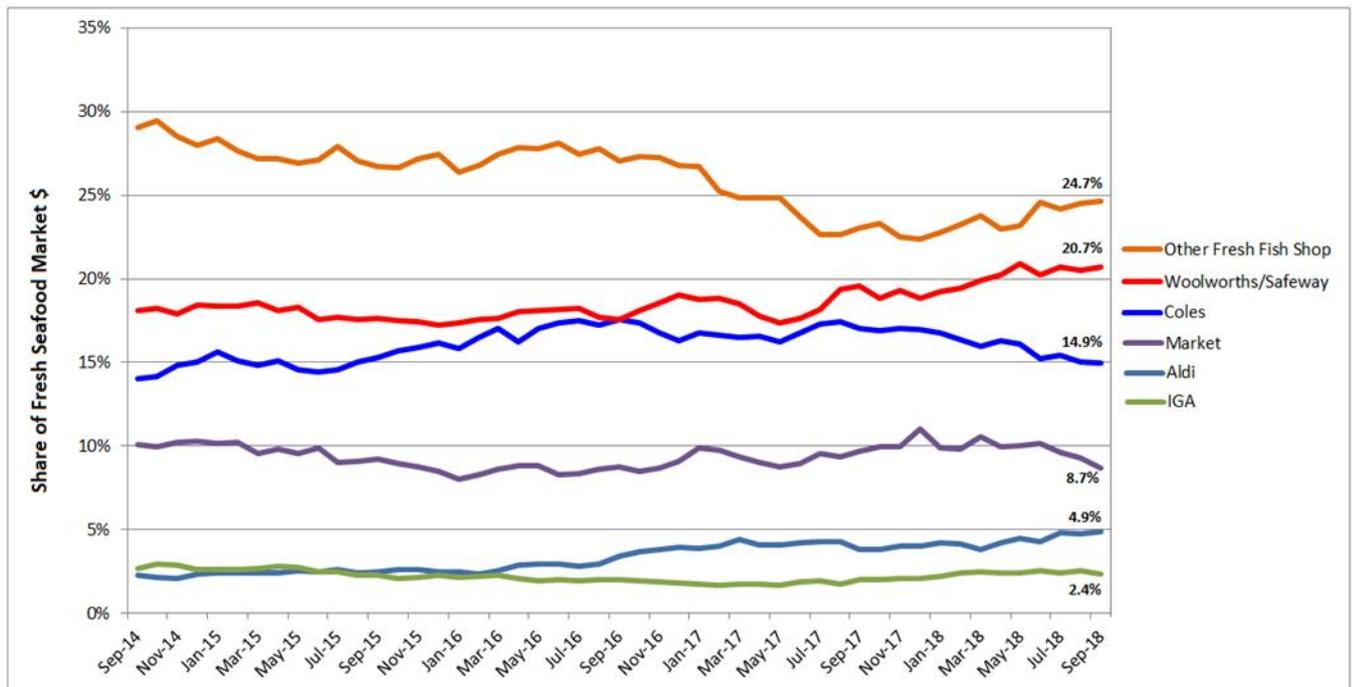
## Woolworths extends lead over Coles in seafood

**Woolworths has continued to be the dominant player in fresh foods over the past year, but has show particular strength in fresh seafood, according to Roy Morgan's latest survey data.**

Woolworths holds 27.4% of the fresh food market overall, according to the September quarter [Supermarket & Fresh Food Currency Report](#), ahead of Coles (24.6%) and Aldi (9.8%).

In fresh seafood, which accounts for 7 per cent of the overall fresh food sector, stand-alone shops still have the largest market share in dollar terms (see chart below), but among supermarkets Woolworths has opened up a strong lead over rival Coles during the 12 months to September.

**Fresh seafood – % market share over time (\$)**



(Source: Roy Morgan Single Source. Base: Grocery Buyers 14+, Oct09-Sep18, 12mma. Average n=12,140)

Woolworths also continues to hold the largest market share in dollar terms of fresh meat, fresh deli, fresh bread and fresh fruit and vegetables, although Coles has narrowed the market share gap in all those categories in the 12 months to September. In fresh bread, Coles has almost reached parity with Woolworths, with the two brands commanding over 50% of the market.

Across all groceries departments, Woolworths retains its overall market lead, ahead of Coles, Aldi and IGA supermarkets.

The September [Supermarket & Fresh Food Currency Report](#) is compiled from data collected as part of Roy Morgan's Single Source survey, which involves more than 50,000 in-home, face-to-face interviews each year, including more than 12,000 detailed surveys of grocery and fresh food buying behaviour.

Single Source data can provide subscribers with granular data on all kinds of fresh foods and groceries buying behaviour, as well as satisfaction levels with individual retail brands.

FOR IMMEDIATE RELEASE

**Michele Levine, Roy Morgan CEO, commented:**

*“The buying trends we’re seeing in the grocery space closely follow social and demographic trends that we are constantly tracking.*

*“Our Single Source survey data shows, for instance, that Australians with parents born in Singapore, Vietnam, the Philippines and Greece buy fresh seafood considerably more often than the national average, and those with parents born in Pakistan, the Middle East and India less often.*

*“It will be interesting to see how Coles responds to Woolworths’ growing dominance in fresh seafood following its divestment from Wesfarmers. We know that supermarkets are being squeezed by strong price competition and rising costs, so in this environment winning market share cost-effectively is the name of the game.*

*“With our market segmentation tool Helix Personas, companies operating in the grocery and fresh food sector can track more precisely than ever where their customers, and future customers, live, work and shop – and importantly gain a deep understanding of the values and attitudes that drive their buying behaviour.”*

The full [Supermarket & Fresh Food Currency Report](#) is now available from the [Roy Morgan Online Store](#).

**For comments or more information about Roy Morgan’s data, please contact:**

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More information on the suite of products available via the [Roy Morgan Single Source](#) and the psychographic segmentation tools provided by [Roy Morgan Helix Personas](#) is available at [roymorgan.com](http://roymorgan.com).

**About Roy Morgan**

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States, Indonesia and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 70 years’ experience in 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%
5,000	±1.4	±1.2	±0.8	±0.6
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

