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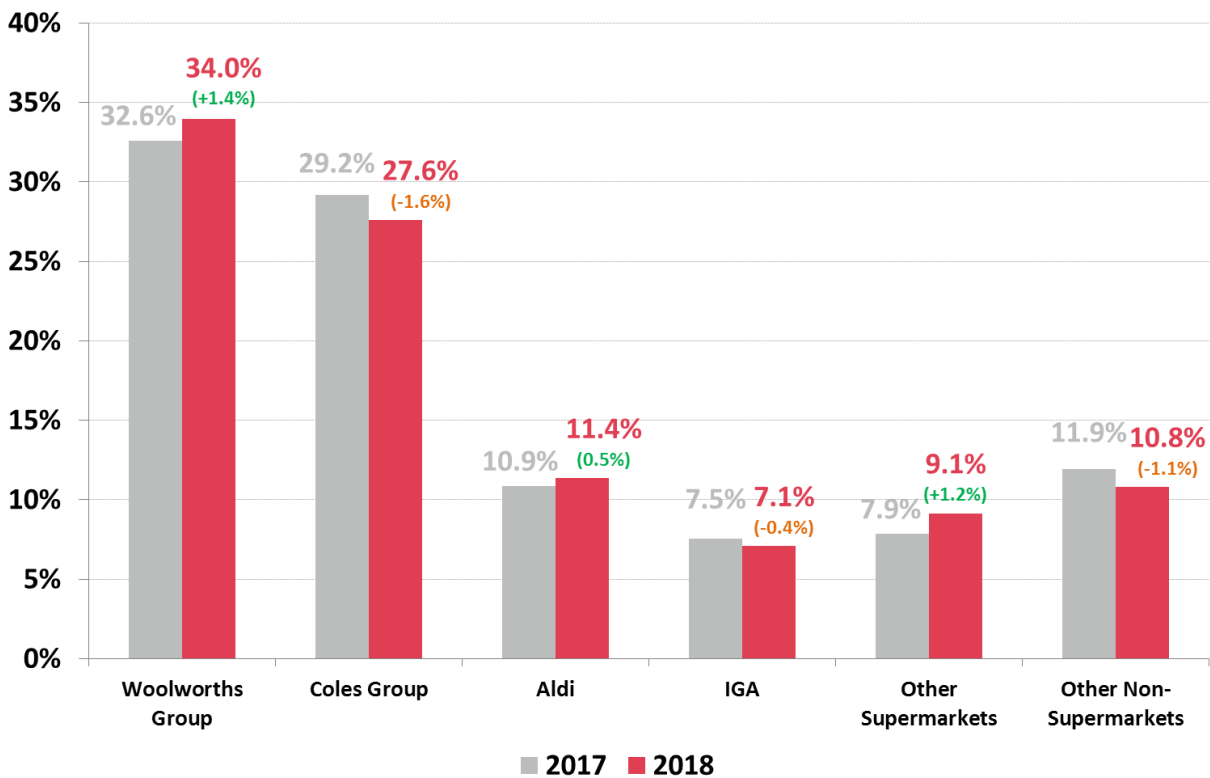
Woolworths and Aldi grow grocery market share in 2018

Woolworths has increased its lead as Australia's top grocery retailer increasing its share of Australia's total grocery market to 34% in 2018, up 1.4ppts from a year ago according to Roy Morgan's latest survey data contained within the [Supermarket & Fresh Food Currency Report](#).

While Woolworths increased its market share the newly independent Coles now has a share of 27.6% of the total grocery market down 1.6ppts on a year ago. German supermarket Aldi has had a good year in 2018 growing its market share to 11.4%, up 0.5ppts from a year ago.

The other winners over the past year were Other Supermarkets outside the 'big four' such as 2018 [Roy Morgan Supermarket of the Year Award winner Foodland](#), Foodworks and other supermarkets which increased their share of the total grocery market to 9.1% (up 1.2ppts) while IGA's grocery share was down 0.4ppts to 7.1%.

Total grocery market – % market share 2017 cf. 2018



Source: Roy Morgan Single Source. Base: Grocery Buyers 14+, Jan-Dec 2017, n=12,312, Jan-Dec 2018, n=12,310.

Woolworths dominance is built on strong leads in key fresh food categories with the Sydney-headquartered retailer holding the largest market share in dollar terms for fresh meat, fresh deli, fresh bread and fresh fruit and vegetables ahead of Coles, Aldi and IGA supermarkets.

Over the last year Woolworths has grown its market share in dollar terms across all four fresh food sub-categories and increased its lead over nearest rival Coles. The two brands currently dominate Australia's fresh food markets holding over 50% of each of the fresh food markets.

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The December [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.

Michele Levine, Roy Morgan CEO, comments that the impressive performance of Woolworths over the last year has Australia's leading grocery retailer in a strong position to deal with the entry of German 'hypermarket' Kaufland into Australia's \$100 billion+ grocery market:

"Australia's leading supermarket chain Woolworths has increased its lead in Australia's increasingly competitive grocery market in 2018 now capturing over a third of Australia's total grocery spend in 2018 – up 1.4ppts to 34% from a year ago.

"The successful year for Woolworths has been built upon strong performances across the four key categories of fresh food. Woolworths has grown its market share in dollar terms for fresh meat, fresh deli, fresh bread and also fresh fruit and vegetables and is the market leader in all four categories ahead of main rival Coles.

"The demerger of Coles Group from industrial conglomerate Wesfarmers in the December quarter of 2018 means Australia's second largest supermarket chain now has the opportunity to refocus on its core business ahead of the imminent arrival of German retailer Kaufland.

"Kaufland has already bought six industrial sites in Melbourne at which it plans to open its successful 'hypermarkets' over the next two years before rolling out stores Australia-wide following in the footsteps of fellow German retailer Aldi. Aldi also had a good year in 2018 and grew its share of the total grocery market by 0.5ppts to a new high of 11.4%.

"In addition to Kaufland the Australian grocery market is also anticipating a rollout of the 'Amazon Fresh' brand in the near future after the American Internet giant launched a food and grocery segment (although not yet fresh food) in the December quarter 2018.

"The increasingly competitive \$100 billion+ grocery market in Australia means it is more important than ever for companies operating in the grocery and fresh food sector to track precisely where their customers, and future customers, live, work and shop. [Roy Morgan's market segmentation tool Helix Personas](#) allows retailers to gain a deep understanding of the values and attitudes that drive the buying behaviour of their current and future customers."

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 www.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

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