

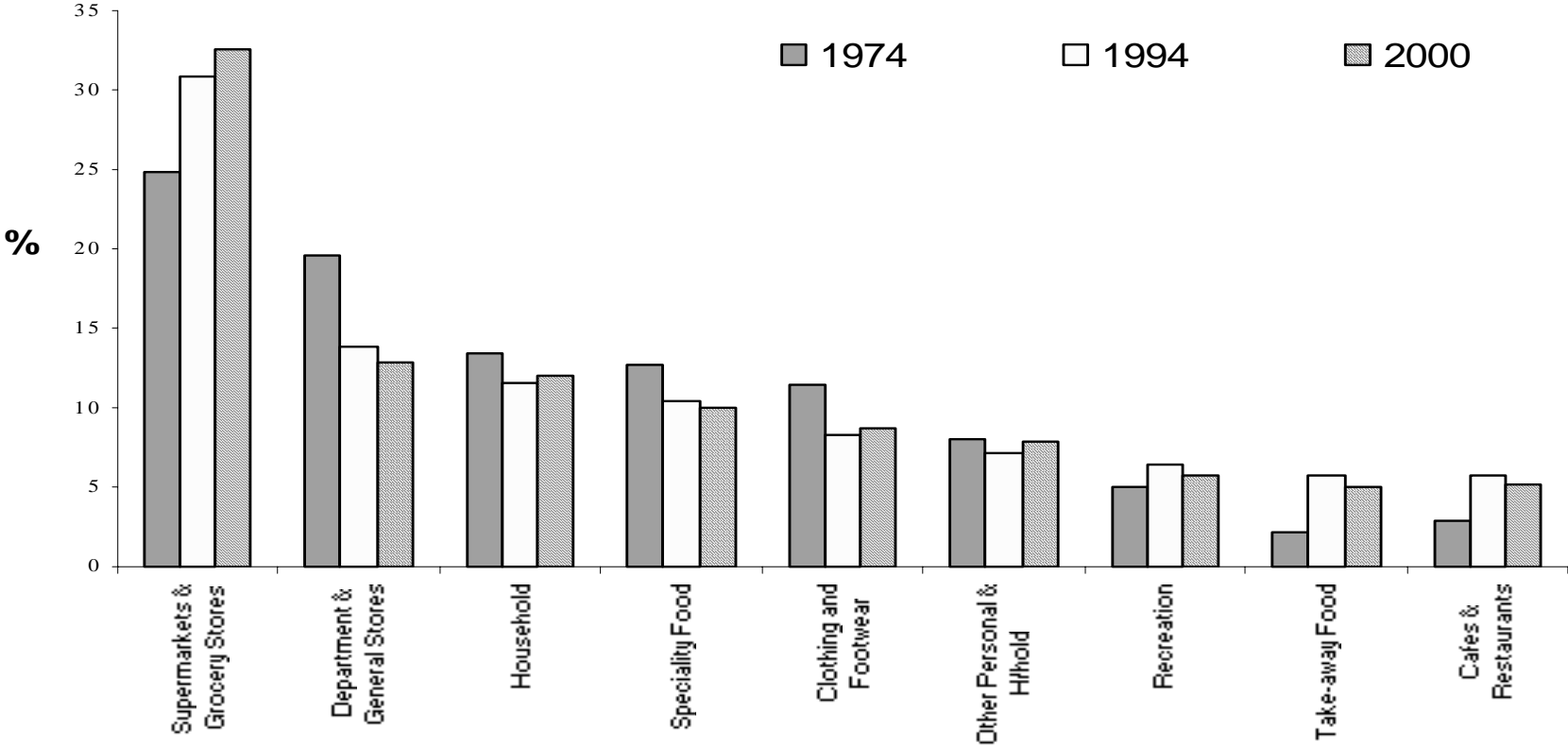
Food Retailing

Stan Moore

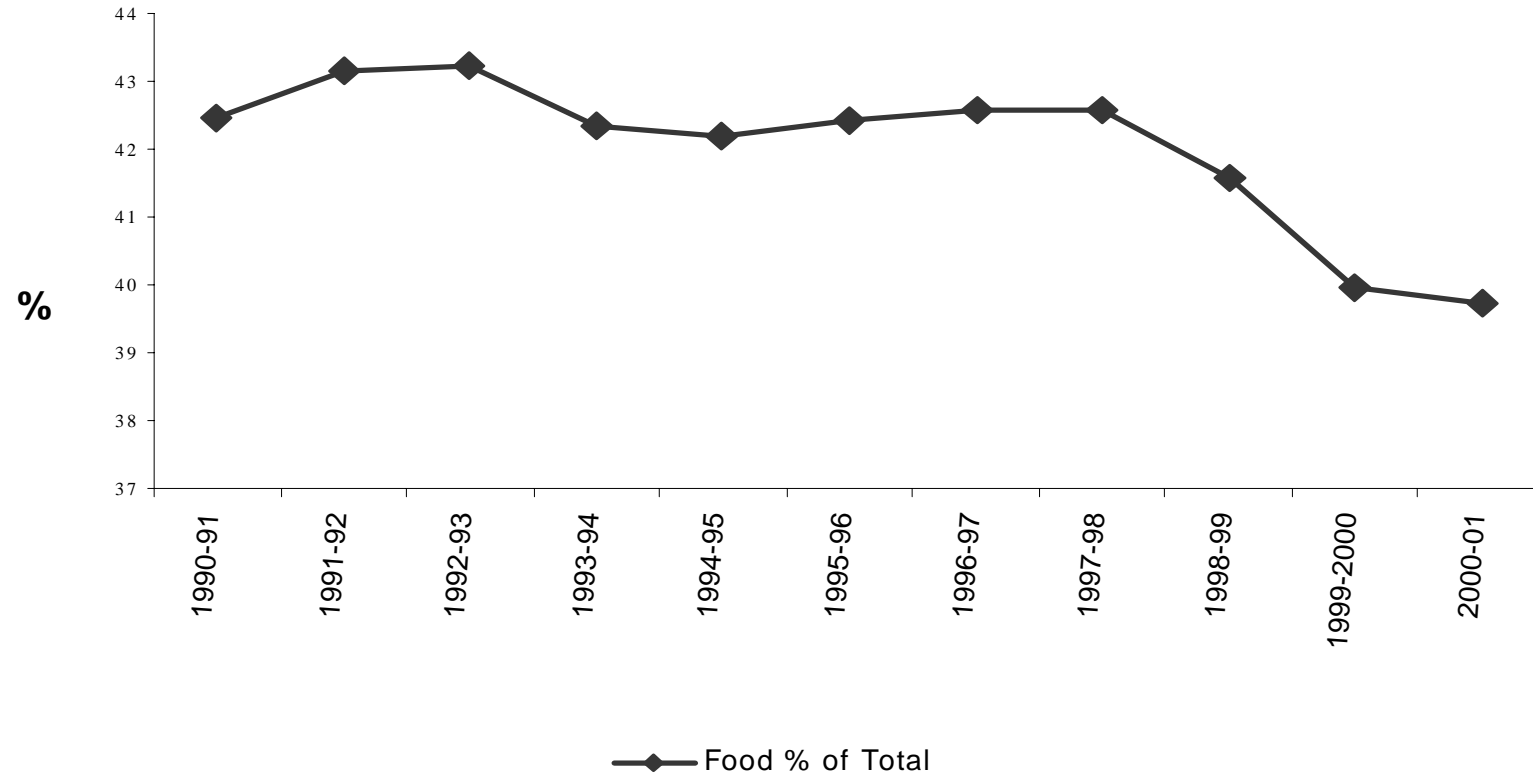
Selected Industry Profit Margins %



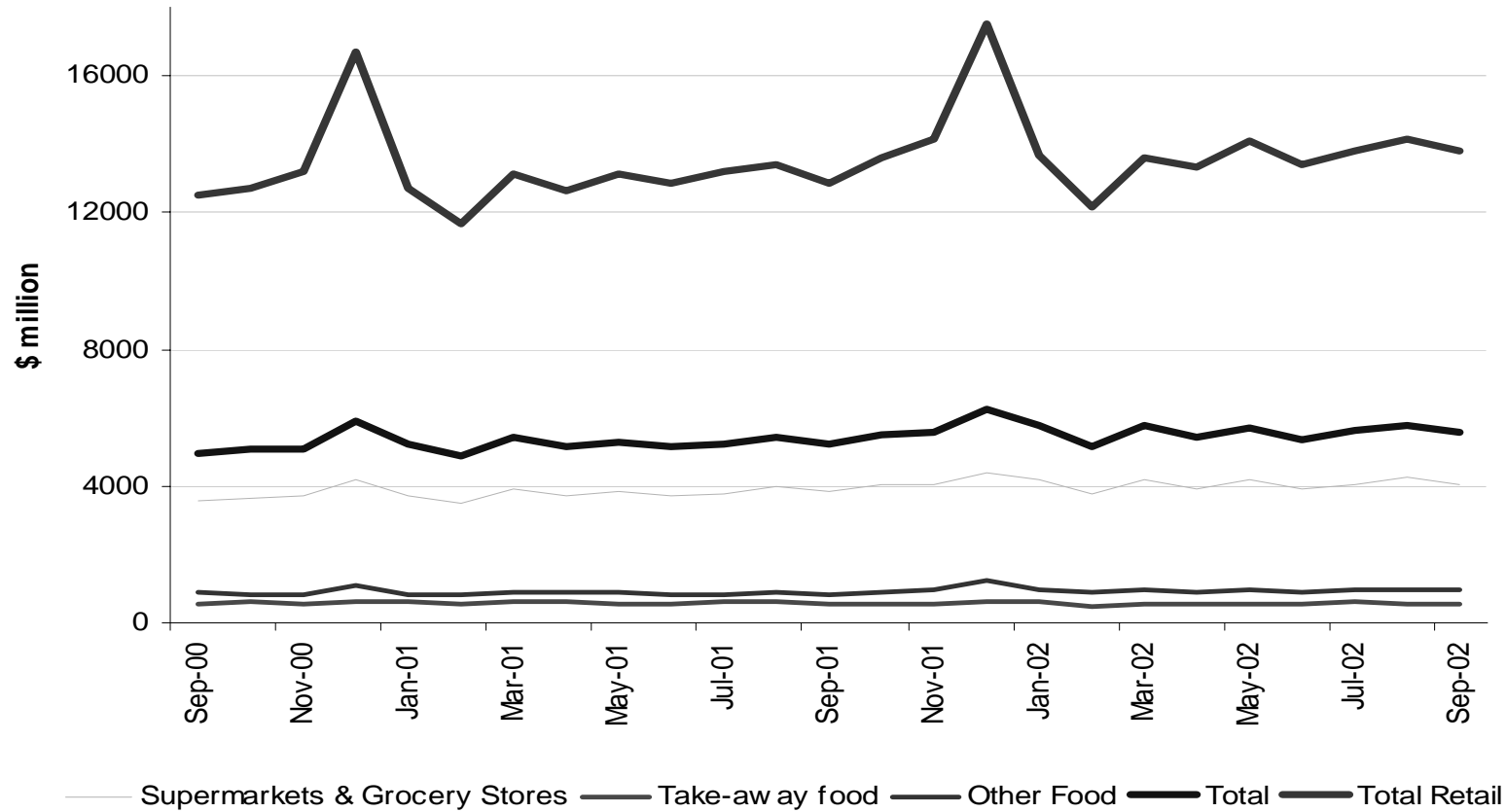
Retail Categories Market Share %



Food Retail as % of Total Retail



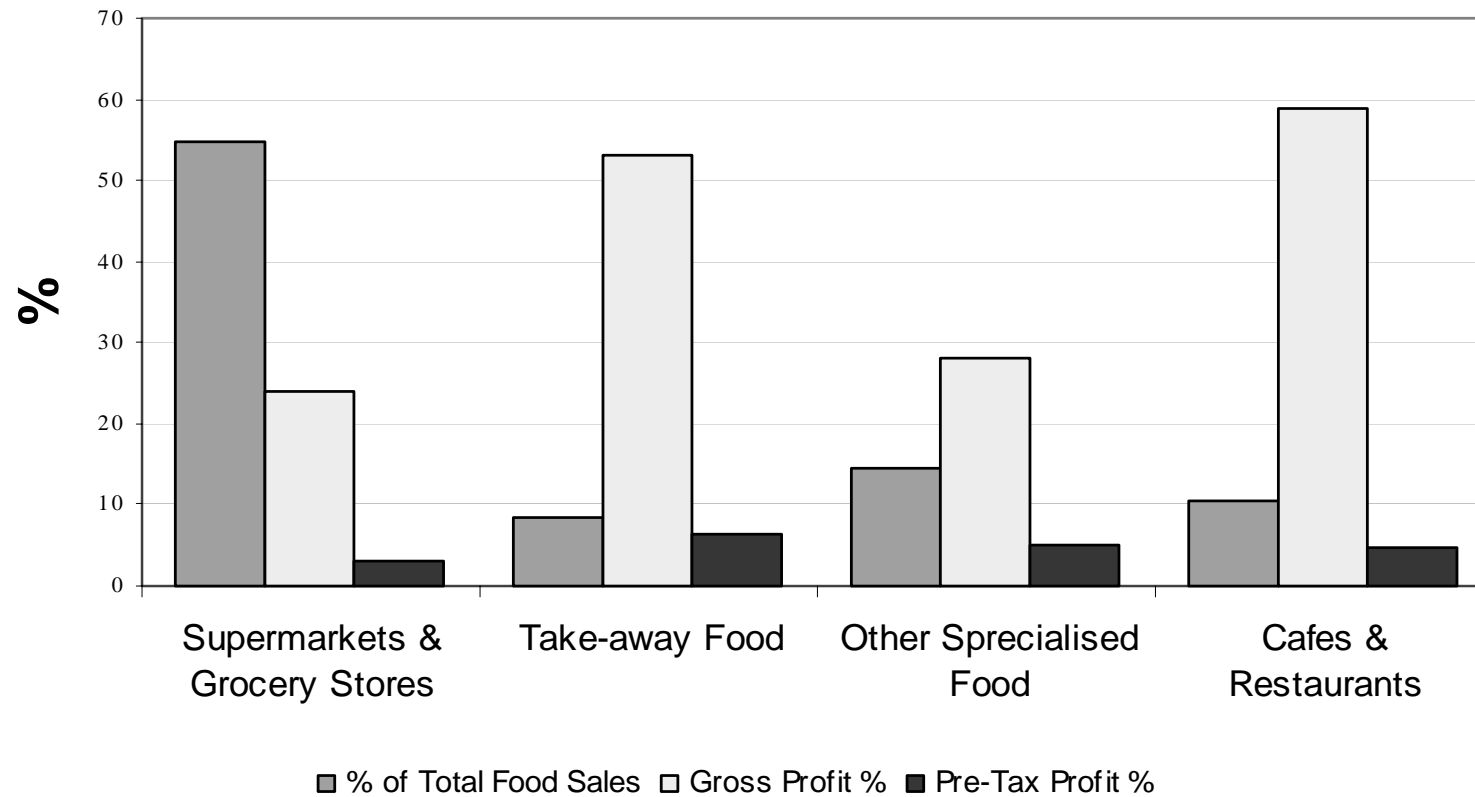
Food Retail Turnover



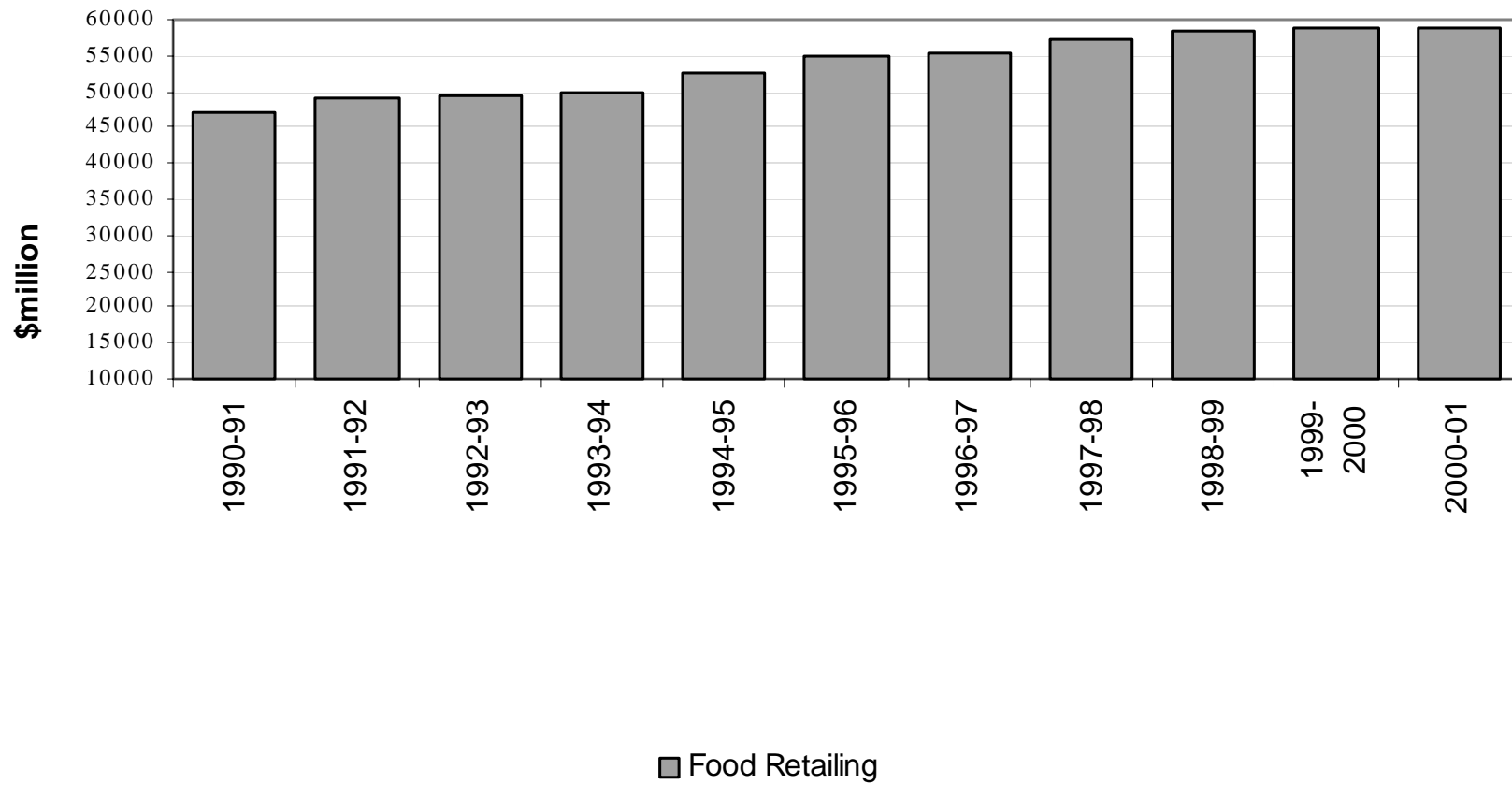
Food Sector Employment

	Total Employed	% of Retail Workforce	Female %	Male %	Casual/Part time %	Labour Costs as % of income
Supermarkets & Grocery Stores	235,000	26	57	43	67	11.3
Take-away Food	167,000	18	59	41	77	22.7
Other Specialised Food	77,000	8	51	49	47	12.4
Cafes & Restaurants	152,000	17	56	44	51	29
	631,000					

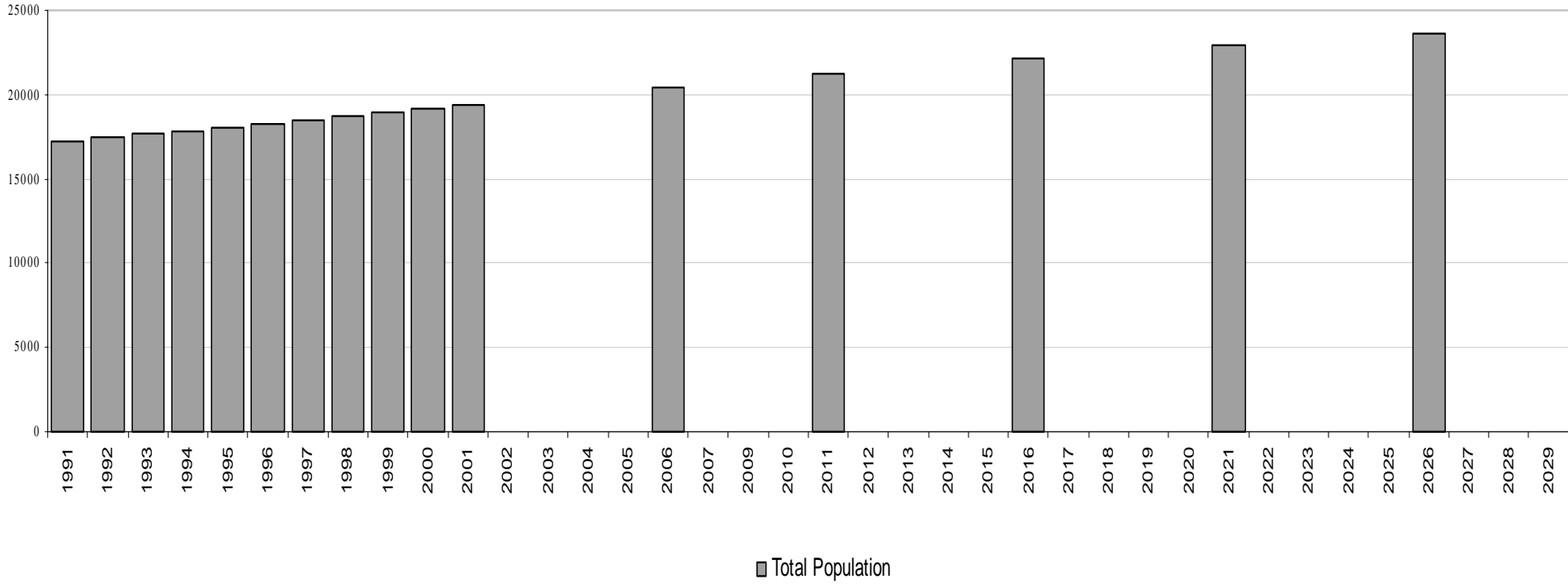
Food Retail Market Share & Profitability



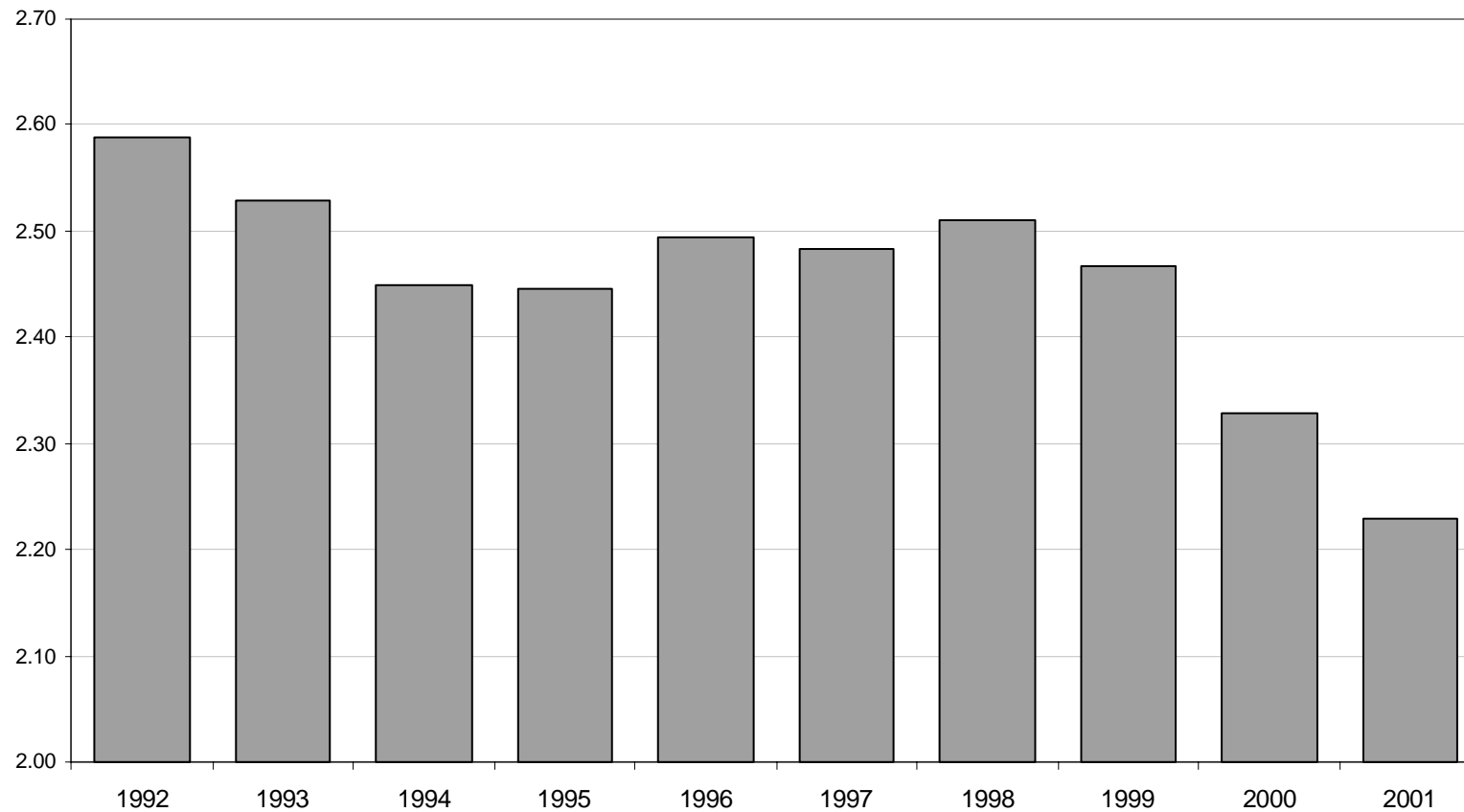
Food Retail Turnover



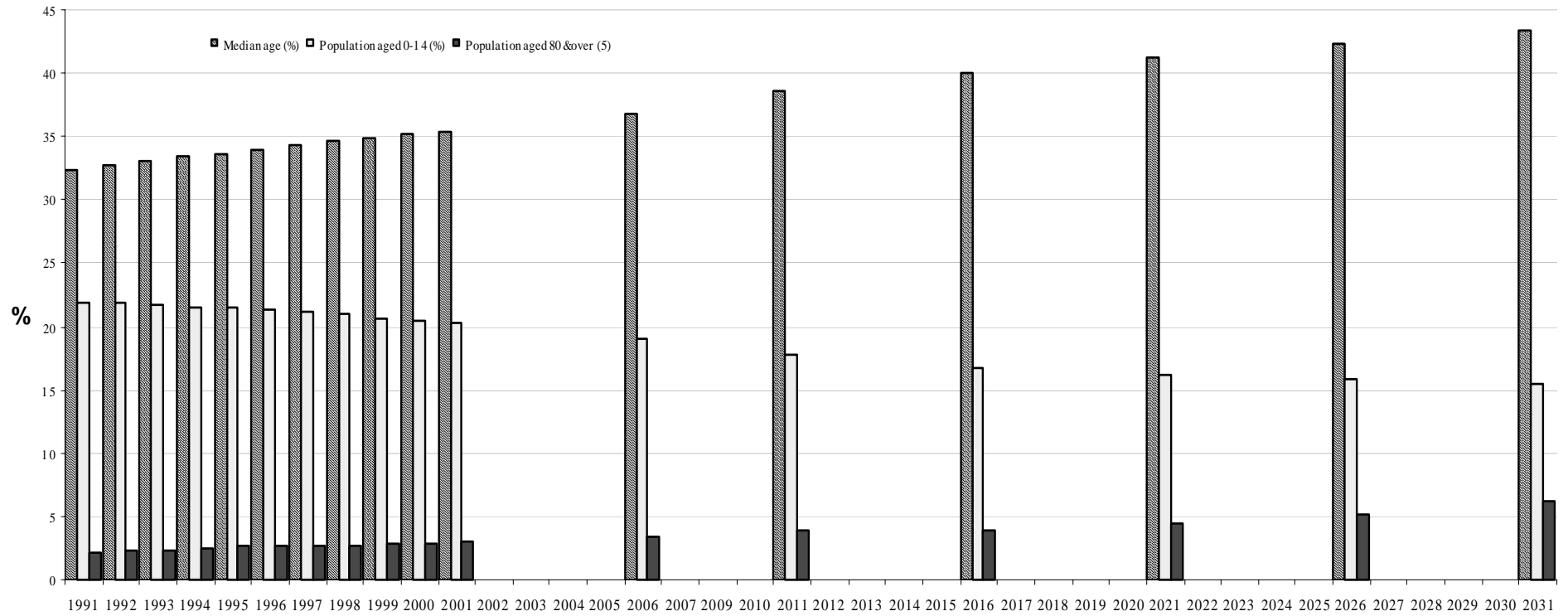
Total Population



Population vs Food T/O



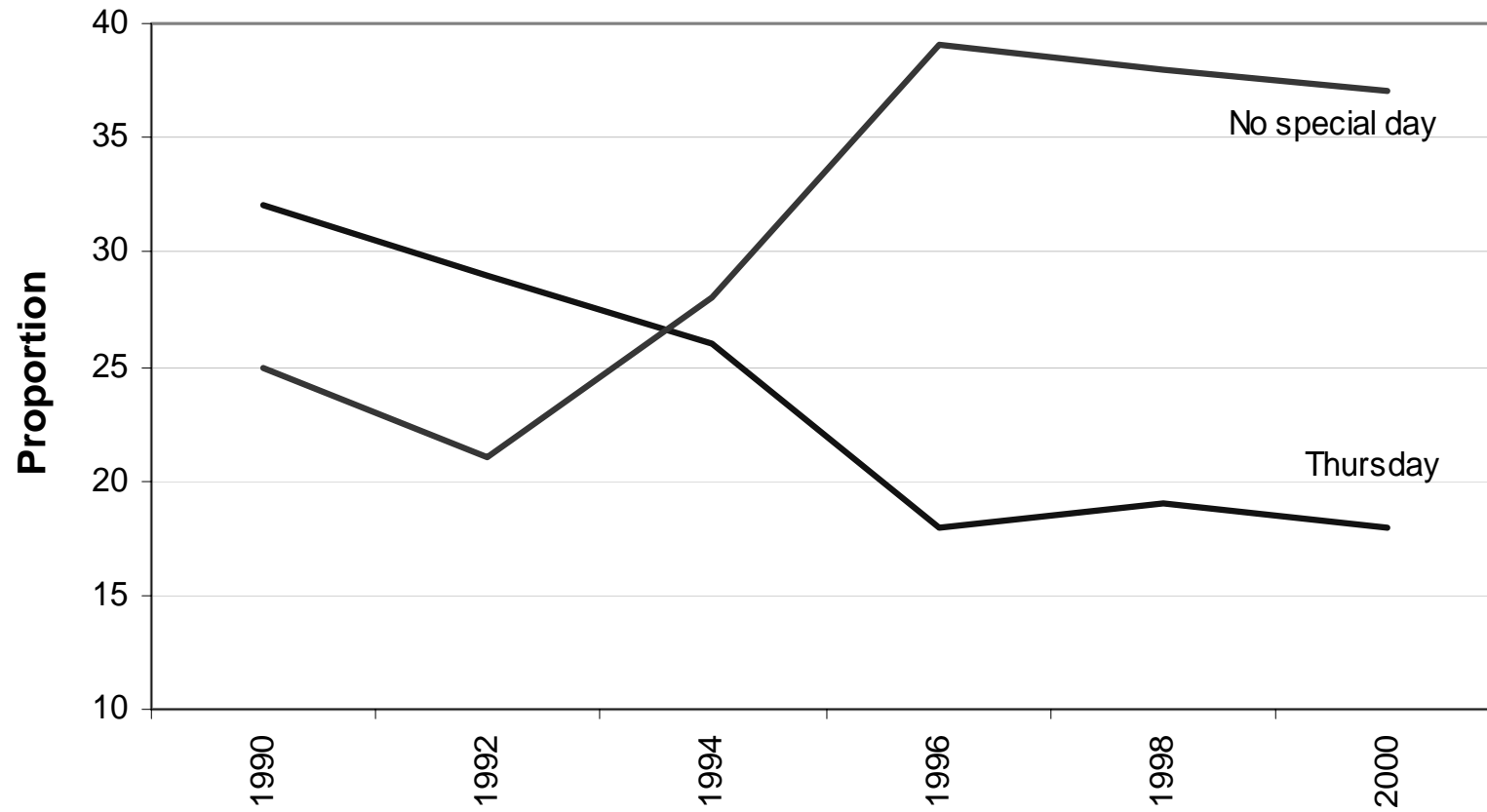
Age Trends of Australian Population



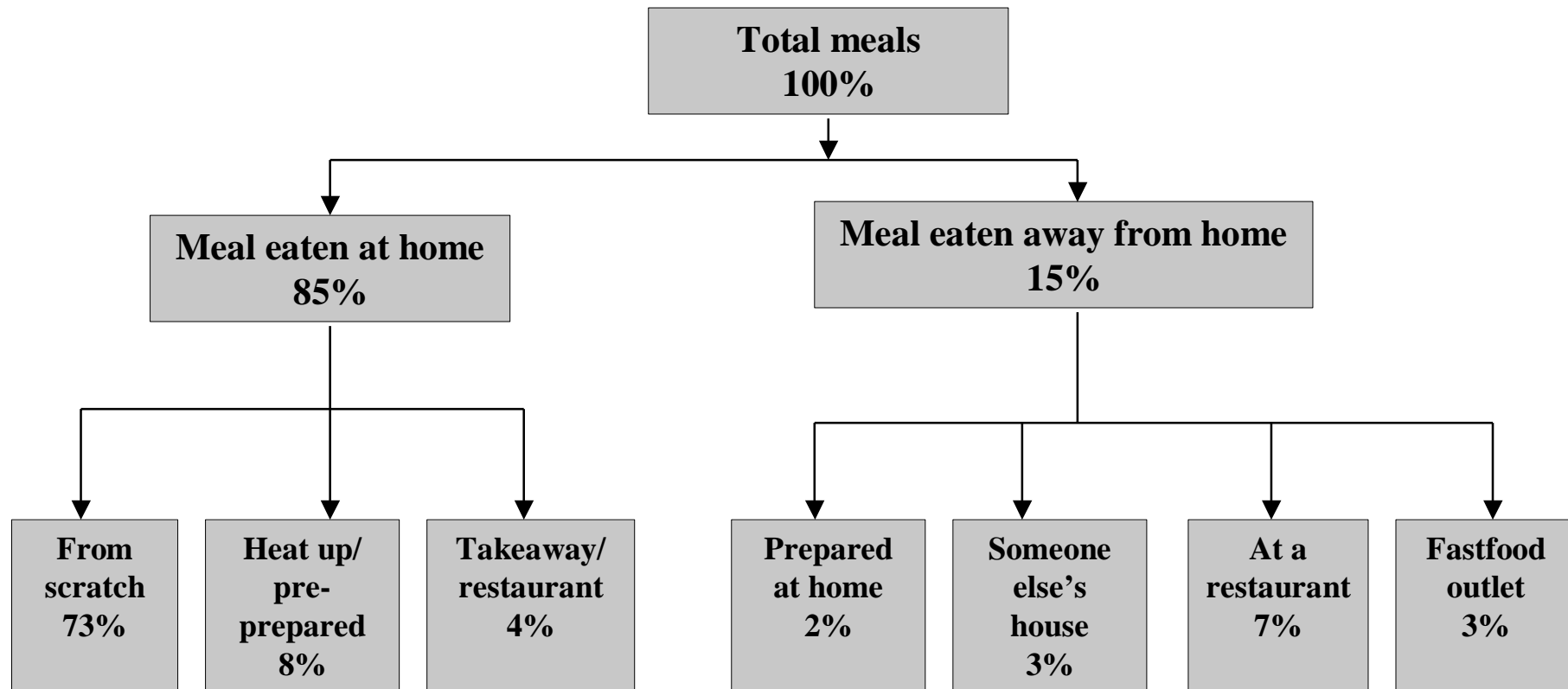
Household Final Consumption Expenditure

	June 2002 (\$m)	% of total
Food	10910	10.2
Cigarettes & Tobacco	2420	2.3
Alcoholic Beverages	2110	2.0
Clothing & Footwear	4284	4.0
Rent & other dwelling services	19663	18.5
Electricity, gas & other fuel	2139	2.0
Furnishings & household equipment	6062	5.7
Health	5088	4.8
Purchase of vehicles	3639	3.4
Operation of vehicles	6231	5.8
Transport services	2630	2.5
Communications	2939	2.8
Recreation & culture	13354	12.5
Education services	2417	2.3
Hotels, Cafes & Restaurants	7972	7.5
Insurance and other financial services	6828	6.4
Other goods and services	7693	7.2
Total	106517	

Shopping Day for Groceries



Flowchart of Evening Meal Consumption



Purchase of Ready Prepared Foods

Question: “In the past week, have you purchased any of the following items?”

	1998 %
Fresh baked goods	44
Ready to eat hot foods, such as BBQ chicken, pizza	33
Cold beverage which you drank within one hour of buying it	27
Freshly prepared meals that you heat and serve at home	14
Ready prepared fresh vegetable such as peeled carrots, mixed lettuce etc	13
Marinated ready to cook meats	9
Ready to eat salads such as tabbouli, coleslaw, fruit salad	8

Integrity of Food Supply

- Food Safety
- Integrity
 - GM
 - Residues
 - Organic
 - Animal welfare
- Labeling
- Food Standards.

Food Supply

- Supply chain
 - Consistency
 - Traceability
 - Timeliness
- Supplier / retailer relationships.