

PACKAGED FOOD IN AUSTRALIA - DATAGRAPHICS

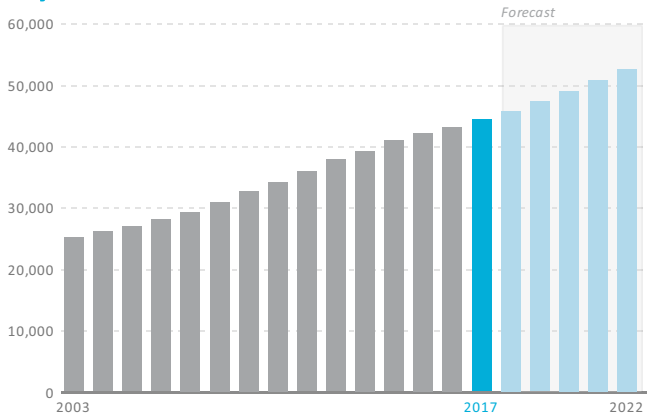
Country Report | Dec 2017

Market Sizes

Sales of Packaged Food

Retail Value RSP - AUD million - Current - 2003-2022

44,288



Sales of Packaged Food

% Y-O-Y Growth 2003-2022

2.9%



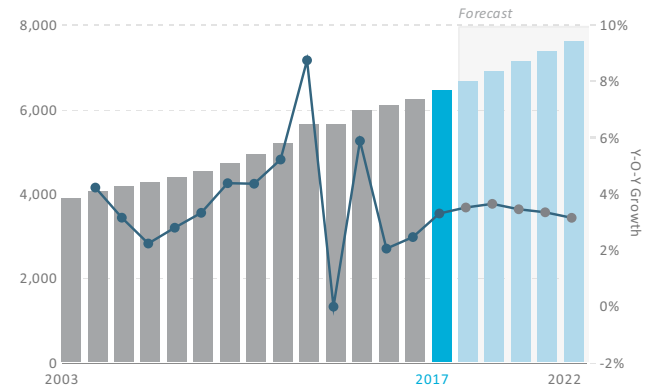
Sales of Packaged Food by Category

Retail Value RSP - AUD million - Current - 2017

Category	Category Value	Current Year Growth	% CAGR (Historic)	%CAGR (Forecast)
Baby Food	965.0	13.1	14.7	8.4
Baked Goods	6,422.2	3.3	2.7	3.4
Breakfast Cereals	1,268.5	0.9	0.8	1.8
Confectionery	4,274.9	3.2	3.6	4.2
Dairy	10,707.3	1.9	2.5	3.2
Edible Oils	542.6	3.9	2.3	3.7
Ice Cream and Frozen Desserts	2,558.1	4.7	6.3	4.7
Processed Fruit and Vegetables	1,740.0	0.2	0.1	1.1
Processed Meat and Seafood	3,321.0	0.6	1.8	1.4
Ready Meals	2,008.8	5.6	6.5	5.6
Rice, Pasta and Noodles	1,084.4	3.3	3.1	3.1
Sauces, Dressings and Condiments	2,529.7	2.6	2.9	3.0
Savoury Snacks	3,477.4	5.2	5.2	4.9
Soup	408.9	-0.2	0.3	0.9
Spreads	699.1	-0.2	3.5	0.8
Sweet Biscuits, Snack Bars and Fruit Snacks	2,280.5	2.1	3.2	3.2

Sales of Baked Goods

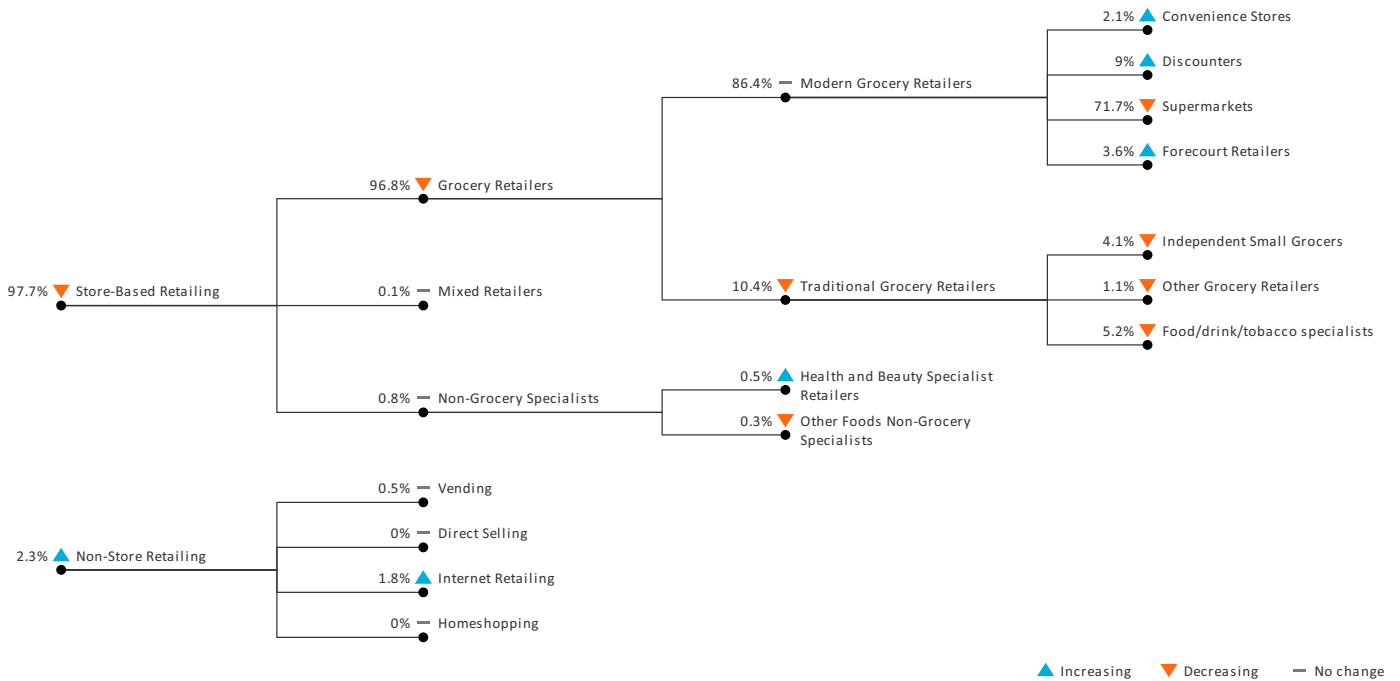
Retail Value RSP - AUD million - Current - 2003-2022



Distribution

Channel Distribution for Packaged Food

% Breakdown 2017 and Point Growth Trend - 2012-2017



Competitive Landscape

Company Shares of Packaged Food

% Share - Retail Value RSP - 2017

Aldi Stores Supermarkets...	8.9%	▲
Woolworths Ltd (Australi...	6.2%	▼
Wesfarmers Ltd	5.5%	▲
Lion Pty Ltd	4.1%	▼
Mondelez Australia Pty L...	3.3%	▲
Parmalat Australia Pty L...	3.0%	▲
Simplot Australia Pty Lt...	2.7%	▼
Mars Australia Pty Ltd	2.6%	▲
Nestlé Australia Ltd	2.4%	▼
Arnott's Biscuits Ltd	2.4%	▼
Goodman Fielder Ltd	2.0%	▼
Smiths Snackfoods Co Pty...	2.0%	▲
Unilever Australia Ltd	1.9%	▼
George Weston Foods Ltd	1.8%	▼
Australasian Food Group ...	1.7%	▲
McCain Foods (Aust) Pty ...	1.4%	▲
Bega Cheese Ltd	1.4%	▲
Fonterra Brands (Austral...	1.3%	▼
Artisanal	8.2%	▲
Others	37.1%	▼

Brand Shares of Packaged Food

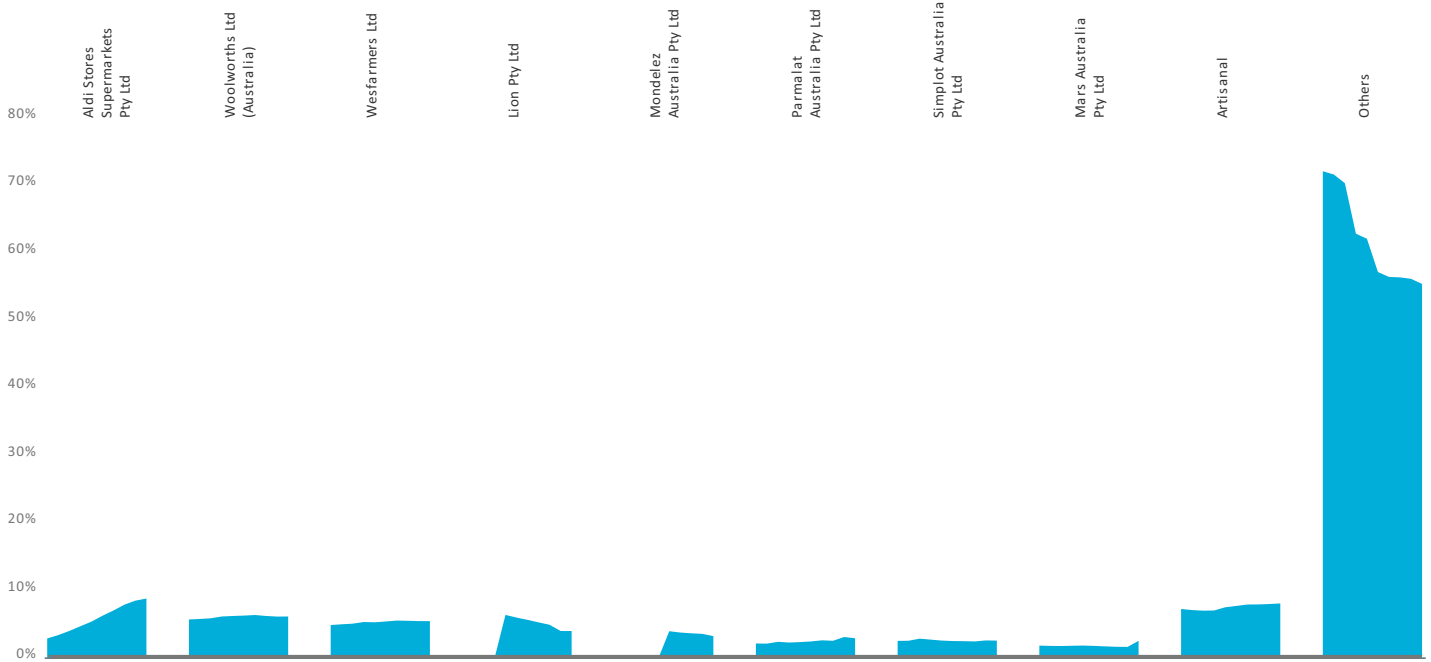
% Share - Retail Value RSP - 2017

Woolworths	5.6%	▼
Coles	5.5%	▲
Arnott's	1.4%	▼
Dairy Farmers	1.4%	▼
Peters	1.2%	▲
Pauls	1.0%	▼
McCain	0.9%	▼
Devondale	0.9%	▲
a2 Milk	0.9%	▲
Farmdale	0.8%	▲
Bulla	0.8%	▼
Heinz	0.7%	▲
Birds Eye	0.7%	▼
Tip Top	0.7%	▼
John West	0.7%	▲
Smith's	0.7%	▲
Helga's	0.6%	▲
Bakers Life	0.6%	▲
Artisanal	8.2%	▲
Others	66.5%	▼

▲ Increasing share ▼ Decreasing share — No change

Company Share Performance in Packaged Food

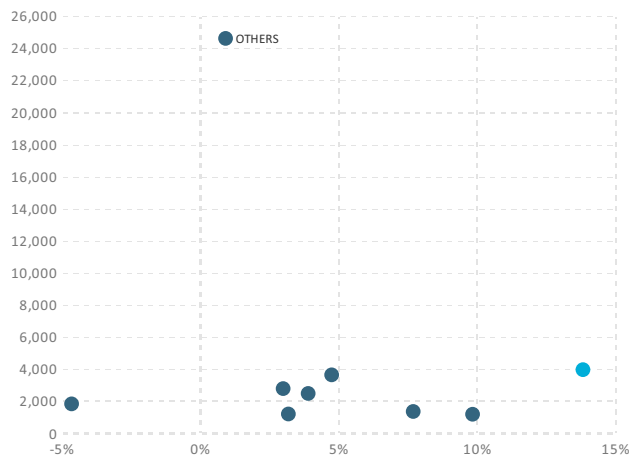
% Share - Retail Value RSP - 2008-2017



Retail Sales Performance by Company

Retail Value RSP - AUD million 2017 - % CAGR 2012-2017

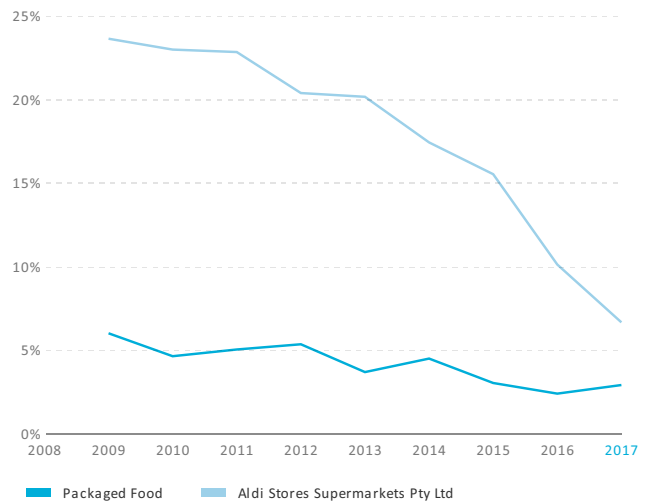
Click on company to compare against market



Company Performance vs Market

% Y-O-Y Growth 2008-2017

[Aldi Stores Supermarkets Pty Ltd](#)



Market Concentration of Packaged Food by Company

% Share - Retail Value RSP - 2017

