

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Australia

Retail Foods

Retail Food Sector Report 2019

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Report Highlights:

Health, wellness, and the environment continue to be key purchasing factors for Australian consumers.

Portion sizes are increasingly important as consumers want quality over quantity and they expect packaging to be informative and environmentally responsible. The value of food and liquor retailing in Australia grew by 3 percent in 2018 to US\$119.7 billion. Supermarket and grocery expenditures continue to account for the bulk of food retailing purchases with a share of 68 percent. The United States accounted for US\$1.2 billion or 12 percent of Australia's total food related imports in 2018. Australia's economy continues to be strong and the market presents an excellent opportunity for U.S. exporters.

Post: Canberra

Market Fact Sheet: Australia

Executive Summary

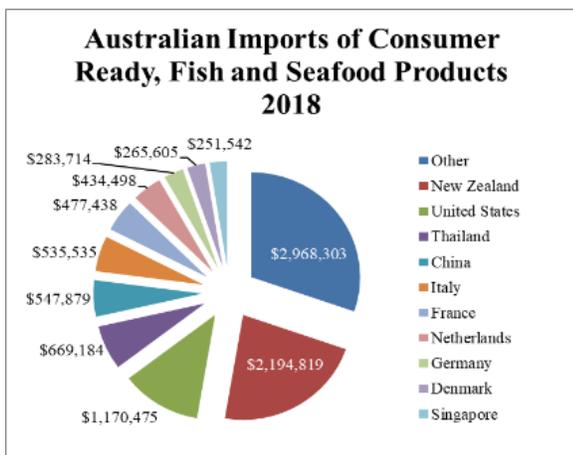
Australia has proven to be an appealing and profitable market for U.S. companies for many years. Underpinning Australia's strong economy is its open and transparent trade and investment environment, and strong trade and economic links with emerging economies, particularly in Asia.

Australia is the world's 13th largest economy, with nominal GDP estimated to be \$1.3 trillion in 2018. Australia has one of the highest levels of per capita GDP in the world and is now ranked first for median wealth per adult according to Credit Suisse's 2018 Global Wealth Report. The Australian economy has enjoyed 27 years of consecutive economic growth and is expected to realize average annual real GDP growth of 2.8 percent between 2019 and 2023 – the highest forecast among major advanced economies. The unemployment rate is 5.1 percent and the labor force participation rate rose to an all-time high of 65.7 percent in April 2018 and remains at the same rate in March 2019.

The U.S. - Australia Free Trade Agreement provides advantages for U.S. products as tariff rates for many U.S. food products exported to Australia are zero.

Imports of Consumer-Oriented Products

The value of Australian consumer oriented, fish, and seafood imports totaled \$9.8 billion in 2018. The U.S. accounted for US\$1.2 billion or 12 percent of total imports. The majority of Australia's imports in these sectors are sourced from New Zealand and the United States is the second largest supplier.



Source: Global Trade Atlas (thousand \$)

Food Processing Ingredients

Australia's food, beverage, and grocery sectors account for over one third of the country's total manufacturing sector. In 2018 turnover totaled US\$124 billion (A\$176 billion). The industry is comprised of over 36,000 enterprises. The largest number of companies are in the fresh produce sector, followed by food and beverage manufacturing and grocery (non-food) manufacturing. For more information, please see the [Food Processing Ingredients](#) report.

Food Service Industry

The Australian foodservice industry is valued at \$41 billion. By far the largest proportion of the Australia's food industry is the commercial foodservice sector, which consist of more than 70,000 outlets. An aging population is fueling faster growth in the institutional foodservice sector. For more information, please see the [Food Service](#) report.

Quick Facts CY 2018

Total Imports of Consumer-Oriented Products – \$9.8 billion
U.S. Share (12%) – \$1.2 billion

Food Industry by Channels (\$ billion)

Imports – Consumer-Oriented, Fish & Seafood Total	\$9.8
Imports – from the United States	\$1.2
Exports – Consumer-Oriented, Fish & Seafood Total	\$18.9
Exports – to the United States	\$2.6
Total Food Retailing	\$124.0
Food Manufacturing Turnover	\$92.5

Top Australian Food Retailers

- 1) Woolworths
- 2) Coles (Wesfarmers)
- 3) Aldi
- 4) Metcash/IGA

GDP/Population

Population – 25.2 million

GDP (\$ trillion) – \$1.3

GDP per capita – \$50,000

Sources: Global Trade Atlas; Australian Bureau of Statistics

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
<ul style="list-style-type: none"> • U.S. culture well accepted and similar to Australia. • No language barriers • U.S. products have excellent image and acceptance. • Northern hemisphere seasonal advantage for fresh foods, e.g. fruit and vegetables. 	<ul style="list-style-type: none"> • Australia has strict quarantine requirements for fresh products. Import permits are required for fresh produce and some products are prohibited. • Australia is a significant producer of a similar variety of agricultural products. • Australian labeling and advertising laws are different from the U.S., which may require some changes to food labels.
Opportunities	Threats
<ul style="list-style-type: none"> • The U.S./Australia Free Trade Agreement enables many U.S. products to enter Australia tariff free. • Australian consumers are experimental and desire new and innovative products. • Opportunity to trial innovative products and capture/gain market share. • Opportunity to enter into private label arrangements as major players expand their private label offerings. 	<ul style="list-style-type: none"> • “Buy Australian” campaign is significant. • A focus on fresh food presentation by the major supermarket chains provides advantages to local producers. • Most categories have substantial market leaders. • Country of origin labeling is compulsory and many Australian made products bear the “Australian Made” logo.

Data Sources: Global Trade Atlas; Australian Bureau of Statistics; Euromonitor; IBISWorld

Contact: FAS Canberra, Australia; AgCanberra@fas.usda.gov

SECTION 1 – MARKET SUMMARY

- The value of Australian consumer oriented (i.e., snack foods, breakfast cereals, meat and poultry, dairy, eggs and products, fresh fruit and vegetables, processed fruit and vegetables, fruit and vegetable juices, nuts, wine, beer, nursery products, pet food, etc.), fish, and seafood imports totaled US\$9.8 billion in 2018. The U.S. accounted for US\$1.17 billion or 12 percent of Australia’s total food related imports. The majority of Australia’s imports in these sectors are sourced from New Zealand – the United States is the second largest supplier.
- The value of food and liquor retailing in Australia grew by 3 percent in 2018 totaling US\$119.7 billion. Supermarket and grocery expenditures continue to account for the bulk of food retailing purchases with a share of 68 percent.
- Consumer aspirations, both personal and social, along with product developments by suppliers and retailers, continue to be important influences on shopping choices. For example: **Sustainability:** Consumers support products and brands that address concerns for better environmental outcomes. Food producers and retailers have made considerable investments into sustainability platforms. **Waste reduction:** Consumers desire to reduce household food waste. **Integrity of food production systems:** Consumers have supported products positioned to resonate with them (such as free-range egg, poultry, and meat products). **Healthy eating:** The high profile given to obesity has increased the awareness of managing portion sizes.



SECTION 2 – ROAD MAP FOR MARKET ENTRY ENTRY STRATEGY

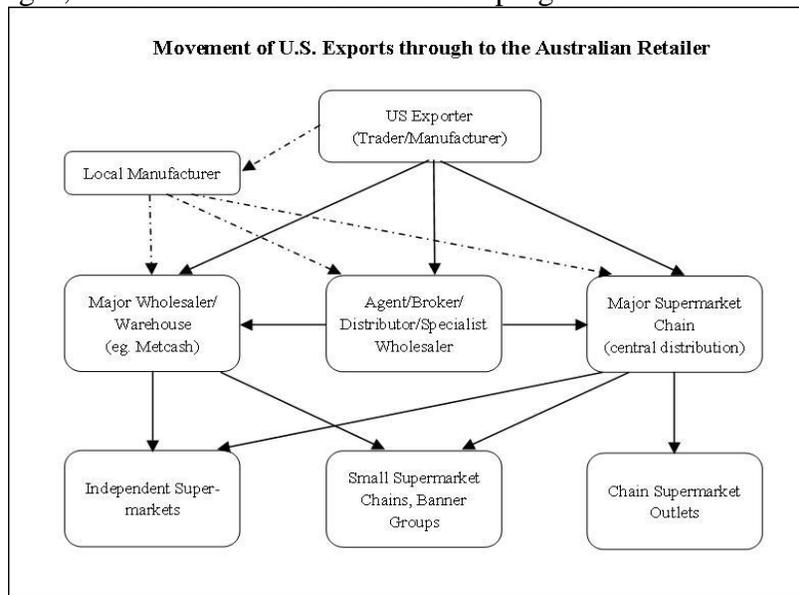
- Enter the market through a distributor, importer, agent or broker who then targets specific food categories or merchandise managers at major wholesalers and major supermarket chains. Major chains and wholesalers have their own distribution centers and national coverage. Targeting major chains through an agent/distributor will reduce the risk of entering an inappropriate state market in Australia. Specialist distributors or wholesalers may also be approached.
- Product promotion - product launches for supermarkets are popular and effective. Provide agent/distributor with promotional material and product suitable for in-store demonstrations.

- To enhance marketing activities, exporters should consider combining promotional advertising such as in-store displays and store catalogues, major industry magazines (e.g. Retail World), newspapers, television, radio and public transport.
- Exhibit at Australian food shows. Fine Food Australia, the premier international food, drink and equipment exhibition is endorsed by the U.S. Department of Agriculture and is held each September, alternating between Sydney and Melbourne (see <http://www.finefoodaustralia.com.au/> for more information). Major buyers and importers from all over the country and region attend. Due to Australia's large geographic size and the high cost of internal airfares and transport, exhibiting at trade shows such as Fine Food is the most cost-effective way for U.S. companies to meet potential partners and customers for consumer-oriented food products in Australia.

MARKET STRUCTURE

Distribution Channels

- Distribution centers and wholesalers are the two main distribution channels to enter major supermarkets and smaller supermarket chains. Distribution points in Australia are centralized. All major supermarket chains and warehouse/wholesale clubs operate their own network of national and regional distribution centers.
- Food products will be stored in warehouses prior to delivery.
- Transport between distribution centers in Australia is predominantly by road.
- Product flows in a similar manner for each of the major supermarket chains, with each operating central distribution centers.
- Independent supermarkets and smaller supermarket chains purchase their food products through the major wholesalers or direct from manufacturers. The larger chains are also direct importers.
- Banner groups, such as the Independent Grocers of Australia (IGA), are used by a large number of independent retailers to improve the buying, advertising, and competitive power of smaller grocery and convenience stores. Under banner groups, retailers are able to negotiate better prices, coordinate marketing campaigns, and collaborate to establish new programs that benefit consumers.



Types of Retail Outlets

- The **traditional grocery retailers** channel has been shrinking and losing market share to modern grocery retailers such as supermarkets. Liquor retail establishments have propped up this sector.

- Australians tend to choose **modern grocery retailers** over traditional ones due to the more comprehensive range of products than traditional retailers. Modern grocery retailers such as supermarkets also compete with the offering of food specialists such as bakers and butchers, as well as health food stores and confectioners. Furthermore, the scale of these modern grocery retailers allows them to offer better prices, further encouraging consumers to choose this channel.
- **Independent small grocers** remain at a disadvantage to modern grocery retailers due to their lower buying power and economies of scale. They are also unable to match the marketing spend of larger modern retailers leading to them struggling to compete.
- **Food/drink/tobacco specialists** remained the leading distribution channel for **alcoholic drinks** in Australia in 2017. This channel was led by Woolworths' BWS and Dan Murphy's, Australia's biggest liquor retailer, and Wesfarmers' First Choice and Liquorland. Nine out of 10 sales of alcoholic drinks by value are from food/drink/tobacco specialists.
- The **other grocery retailers** channel is comprised of small retail formats with a primary focus on selling food, beverages, and tobacco. These include outlets specializing in health food, organic products, and dietary supplements, as well as those offering direct sales from producers such as wholesale markets, vineyards, dairies, and farms.

Grocery Sales by Retailer Type: A\$m

Retailer Type	2014	2015	2016	2017	2018
Convenience Stores	2,654	2,707	2,763	2,808	2,847
Discounters	5,273	6,088	6,818	7,964	8,968
Forecourt Retailers	6,924	7,242	7,626	7,839	8,083
Hypermarkets	-	-	-	-	-
Supermarkets	80,033	82,793	84,562	86,887	89,928
Modern Grocery Retailers	94,883	98,830	101,769	105,498	109,826
Traditional Grocery Retailers	23,794	23,903	24,033	24,5922	25,219
Grocery Retailers	118,677	122,733	125,802	130,090	135,045

Source: Euromonitor International, Retailing in Australia

SECTOR TRENDS AND MAJOR PLAYERS

Key Players

- **Woolworths** is an Australian-owned company that has been trading since the 1920s. Woolworths is the number one player in the grocery sector with a 38 percent value share of the market in 2018.
- **Coles** supermarkets are part of Wesfarmers Limited and are the second largest player in the grocery sector with a 30 percent value share in 2018.
- **Aldi Stores Supermarkets Pty Ltd**, the German based international discount food retailer which began trading in Australia in 2001, is the only discounter in Australia and continues to increase its market share (10 percent in 2018).
- **Metcash Trading Limited Australasia** ranks fourth in supermarkets in value terms (7 percent in 2018). Metcash is Australia's largest grocery wholesaler and is a leading marketing and distribution company operating in the food, and other fast-moving consumer goods, categories.
- **Hypermarkets** – there are no hypermarkets in Australia, with no investment made by retailers to develop the channel since a failed attempt by Coles in the 1990s.

Trends in Retail Food and Sub-sectors

- The supermarkets industry is one of the most fiercely competitive sectors in Australia with the rapid growth of German-owned ALDI over the past five years significantly altering the industry.

- Changing consumer sentiment and shopping preferences have also influenced the industry's trading conditions. Shoppers have shifted their shopping habits over the last decade with some of the key determinants being food safety, location and good value.
- Most grocery shopping is still done in the major supermarkets with consumers preferring the convenience over supporting local and independent outlets. However, shoppers indicated that local green-grocers and markets hold sentimental value and they would choose to go to them if possible for their fresh fruit and vegetable purchases.
- Supermarkets and grocery stores continue to maintain the vast majority of the retail food market share, at around 68 percent. The market share of cafés, restaurants and takeaway food outlets is around 17 percent, reflecting consumers' continued desire for convenience. Other food retailers, such as butchers and bakeries, remain relatively stable with around 5-6 percent market share.
- Aggressive pricing initiatives taken by the major supermarket retailers in recent years are expected to last for the longer term. Competition within grocery retailing is expected to intensify with aggressive discounting continuing to be used to appeal to value-conscious consumers.
- **Private label** in Australia tends to be more prominent in the grocery channel. ALDI's private-label strategy has been so successful in Australia that it has changed the perception that Australians had of the quality of private-label brands. Leading supermarket operators, Coles and Woolworths, are increasing their range of private-label products each year.
- Growing satisfaction with private label products has resulted in many consumers sticking with those products even during periods of positive consumer sentiment when they would have previously switched back to branded products.
- **Warehouse clubs** made an aggressive expansion in 2011 following the launch of Costco's first store in Melbourne in 2009 and its expansion since to all main cities across Australia. This presents a further challenge to value gains for supermarkets. Costco remains the only warehouse club in the Australian market and offers a variety of U.S. and Australian products.
- **Convenience stores** focus on providing a daily routine stop for consumers, with an emphasis on driving visit frequency through selling freshly prepared hot food and drinks to attract time-pressed customers. The industry only includes businesses that primarily sell convenience store goods and excludes all service (gas) stations and is therefore highly fragmented and diverse, with a significant number of owner-operated enterprises which include stores operating under banner groups and franchise agreements which are usually run as individual businesses.
- Convenience stores in Australia are facing growing competition from smaller-sized supermarkets. Best exemplified by the Woolworths Metro and Coles Local formats, these smaller outlets are increasingly found in busy inner city locations and densely populated suburban areas. Like convenience stores, they target time-pressed consumers who tend to shop more frequently, but buy fewer items at a time. Crucially, however, smaller supermarkets generally offer lower prices, while some also serve as "click and collect" points for online customers.
- The **independent small grocers** channel has been struggling to differentiate itself in order to compete with modern grocery retailers, with many players exiting the channel or joining a larger banner. This channel will remain at a competitive disadvantage to supermarkets due to the weaker buying power and economies of scale of the larger businesses. Independent players are also unable to match the marketing budgets of larger retailers and will therefore struggle to compete.

Consumer Trends

- **Positive nutrition:** The drive to make food and beverages healthier continues to gain momentum in Australia. Australian consumers are looking for constructive guidance to assist their food and beverage

purchases rather than being told “what not to eat.” This encompasses a movement from food avoidance (such as products with reduced fat and sugar) to positive nutrition and the inclusion of healthy food and ingredients.

- **Healthy indulgence:** Australians aren’t really interested in strict diet plans, but there is a huge spike in people trying to control their portion sizes. They don’t want to cut out certain food groups or flavors, but they are willing to control the amount they eat.
- Demand for **healthy food** is being boosted by demographic shifts. An aging population and rising birth rates have both had a positive impact on the development of the health and wellness market since 2005.
- **Freshness** is an important area of concern for packaged food sales. Foodservice players and consumers appreciate the peace of mind from knowing the offerings are in good condition. This can be achieved with single-serve pack sizes, resealable packaging, and clear on-pack communication.
- **Food priorities** – a recent report on food consumption, habits, attitudes and trends determined Australia’s top five food priorities are: eating more fresh fruit and vegetables; smaller portion sizes; reducing sugar intake from food; eating healthier snacks; and cutting down on fat.
- **Snacking still popular** – two-thirds of respondents to a recent survey indicated that they eat between meals and that healthy snacks are a priority.
- **Health concerns** among Australians increasingly encompass not only finished products, but also the production process. The same is true with regard to ethical and environmental concerns, with issues like sustainable production, fair wages for farmers and animal welfare playing an increasingly influential role in consumer purchasing decisions.
- **Organic** packaged food is second strongest performer among the main health and wellness packaged food categories in this regard, after “free from.” One factor constraining the development of this sector in Australia is the difficulty in obtaining official accreditation, a process that can take up to three years. This is among the reasons why organic packaged food products tend to have high prices as compared to standard alternatives, which limits demand. Demand for organic packaged food is expected to continue outstripping supply, which will continue to hinder the development of the category as a whole but presents excellent opportunities for U.S. exporters. In 2018, sales of organic packaged food in Australia reached A\$1 billion. Baby food is the largest value category (24 percent) in organic packaged food.
- **Packaging** has grown in importance in recent years and innovative packaging is a valuable selling point in the Australian market. Packaging ensures that offerings conform to market trends by communicating unique selling points and offering freshness and convenience. By being lightweight, packaging can reduce the carbon footprint of transportation. Australian consumers expect that packaging will be recyclable. A recent study found that 50 percent of Australians think food and drink products are over-packaged and 69 percent would consider boycotting a product if it didn’t meet their environmental criteria. In 2018, due to consumer demand, major supermarkets removed as much plastic packaging as possible from their fresh produce sections.
- Australian consumers have been slow to go **online** for groceries, preferring to shop in-store, particularly for fresh products. However, time-poor customers and Australia’s ageing population have boosted industry growth over the past five years. Woolworths and Coles are now investing heavily in digital strategies. Both have significantly improved their online services, assortments and delivery options in recent years, while also forming new partnerships that better position them to meet the growing demand for online grocery shopping and compete against other retailers in this arena.

SECTION 3 – COMPETITION

Competitive Analysis

- Imported products will have to compete with ‘Australian Made’ products. Australians generally have a keen awareness and affinity for buying Australian made goods. Over two-thirds of Australian consumers indicate they believe it is important for grocery products to be sourced locally. However, only one-third claims to actually buy local food and drinks regularly. Higher prices continue to be a major drawback of local offerings, with lower prices more important to some shoppers than a product being produced locally.
- Imported products need to be **competitively priced** to compete with the growing number of discount chain stores.

- **Food labeling** in Australia is stringent and has different requirements than in the United States. Full details of Australia's food labeling regulations can be found in the Food and Agriculture Import Regulations and Standards (FAIRS) report, which is updated each year. The latest copy of the FAIRS report is available on the [FAS website](#).
- Manufacturers need to consider the costs involved with changes in labeling for a relatively small market (Australia's population is just over 25 million). Sometimes the quantity required for the Australian market is not compatible with large volume U.S. production. An option that is currently used for some U.S. branded products is labeling that satisfies many different export markets. This assists in making the Australian market more accessible.

Comparative Advantage of U.S. Products

- The United States is the second largest supplier (behind New Zealand) of imported consumer-oriented foodstuffs to the Australian market, holding a 12 percent share in 2018 valued at more than \$1.1 billion.
- The U.S./Australia Free Trade Agreement signed in 2005 allows most U.S. products to enter the Australian market tariff free.
- Due to the large U.S. market, U.S. manufacturers are able to develop a range of products far beyond that which can be achieved by smaller manufacturers in Australia. This enables U.S. exporters to deliver innovative product lines that are otherwise not available from Australian manufacturers.
- U.S. products are well regarded as safe (with regard to food safety) and a good value for money.
- The Australian market is very 'Americanized', and most food categories are compatible with Australian tastes. Many categories are already dominated by American brands, such as Kraft, Mars, Campbell's, Kellogg's, Coca-Cola, and Pepsi, who have been very successful in the Australian market.
- Most of these U.S.-owned food manufacturers also have a long-standing manufacturing presence in the Australian market, thereby making market entry easier.

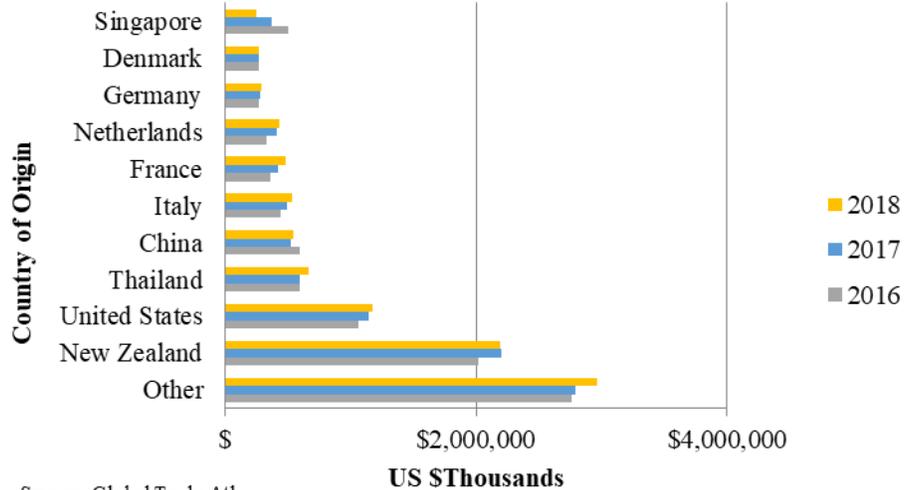
Value of Overall Retail Food Sales

- The following table summarizes total food retail sales and growth for the past five years. The total value of food retailing in 2018 was \$120 billion.
- The supermarket and grocery sector accounts for 68 percent of food expenditure (\$82 billion in 2018), followed by cafes, restaurants and takeaway (17 percent; US\$20 billion); liquor retailing (8 percent; \$9 billion); and other specialized food retailing (6 percent; \$7 billion).

Value of Imported Food vs Domestic Products

- The value of total Australian imports of consumer oriented (i.e., snack foods, breakfast cereals, meat and poultry, dairy, eggs and products, fresh fruit and vegetables, processed fruit and vegetables, fruit and vegetable juices, nuts, wine, beer, nursery products, pet food, etc.), fish, and seafood imports was US\$9.9 billion in 2018.
- The United States accounted for US\$1.1 billion or 12 percent of Australia's total food related imports in 2018. The majority of Australia's imports in these sectors are sourced from New Zealand.
- Although most Australians would say that they want to buy Australian-made 'whenever possible' or 'often,' this does not translate into behavioral change in-store, as evidenced by the meteoric rise of Aldi stores in the supermarket sector.
- Factors that matter most to Australian grocery buyers are: high standards of food safety; location close to home; good value; convenient trading hours; and hygienically prepared food.

Australian Imports of Consumer Ready & Fish & Seafood Products



SECTION 4 – BEST PRODUCT PROSPECTS

- The **organic, healthy, and natural products** market in Australia continues to grow rapidly. Although Australia is a large producer of organic raw products, it does not have the manufacturing capacity to satisfy demand for processed organic products. Prospects are excellent for organic and natural ingredients as well as consumer-ready processed foods and beverages. Findings from a recent survey show that Australian consumers are adopting a back-to-basics mindset, focusing on simple ingredients and fewer artificial or processed foods. The top 10 ingredients being avoided by Australian consumers are: Antibiotics/hormones in animal products; MSG; artificial preservatives; artificial flavors; artificial sweeteners; foods with BPA packaging; artificial colors; sugar; GM foods; and sodium. These ingredients are being avoided primarily because of their perceived impact on health rather than actual medical conditions.
- The survey showed that Australians want to eat healthier but need help to make it happen. Almost 50 percent of consumers indicated that they wished there were more ‘all natural’ food products on shelves. They also indicated that they would be willing to pay more for foods and beverages that don’t contain unhealthy ingredients.
- The types of products consumers want to see more of are: all natural; no artificial colors; low sugar/sugar free; no artificial flavors; and low fat/fat free. U.S. exporters who are able to provide ingredients and preparation methods that improve the nutritional profile of products will be strongly positioned to succeed in this market.

SECTION 5 – POST CONTACT AND FURTHER INFORMATION

POST CONTACT

Office of Agricultural Affairs
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Yarralumla, ACT 2600
Australia
Tel: +61 2 6214 5854
E-Mail: AgCanberra@fas.usda.gov

IMPORT REGULATIONS

- See the Department of Agriculture and Water Resources biological import conditions (BICON) database to identify whether your product is prohibited entry to Australia - <https://bicon.agriculture.gov.au/BiconWeb4.0/ImportConditions/Search/>
- Information on Food Law and Policy in Australia can be obtained from the www.ausfoodnews.com.au website.

AUSTRALIA’S FOOD LABELING REGULATIONS

- In Australia, Food Standards Australia New Zealand (FSANZ) regulates the delivery of safe food. FSANZ is a bi-national independent statutory authority that develops food standards for composition, labeling, and contaminants (including microbiological limits) that apply to all foods produced or imported for sale in Australia and New Zealand. FSANZ operates under the Food Standards Australia New Zealand Act 1991.
- The Foreign Agricultural Import Regulations and Standards (FAIRS) report from this office contains detailed information on the Food Standards Code and other food regulations. This report is updated each year and a copy is available on the [FAS website](#).
- An Internet version of the entire Australia New Zealand Food Standards Code is available through [FSANZ website](#).

OTHER RELEVANT REPORTS

Copies of other reports from this office can be found by conducting a search at:

<http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx>

- Food and Agriculture Import Regulations and Standards (FAIRS) – contains detailed information on Australia's food labeling and quarantine requirements.
- Exporter Guide (search in the Exporter Assistance category).
- Food Ingredients Report (search in the Exporter Assistance category).

TRADE SHOWS

Fine Food is the largest food, beverage and equipment show in Australia and this region and presents U.S. exporters with the most efficient and cost-effective way to enter the Australian market. Australia is a very large country and internal transportation is expensive and time consuming. Fine Food offers an opportunity for U.S. exporters to access a 'one-stop-shop' for entry to the Australian market because a large number of the major importers, distributors, etc., exhibit at the show and at times represent other companies. This presents an ideal opportunity for U.S. exhibitors to meet with a majority of the big players in this market in one place. The show is held every September alternating between Melbourne and Sydney. This year the Fine Food Show is in Melbourne, September 10-13, 2018.

Fine Food is endorsed by the U.S. Department of Agriculture. For information on participating in the U.S. Pavilion at Fine Food, please contact the Office of Agricultural Affairs listed above.

INDUSTRY INFORMATION

Australian Food and Grocery Council

Email: info@afgc.org.au

Web: www.afgc.org.au

Food and Beverage Importers Association

Email: info@fbia.org.au

Web: <http://www.fbia.org.au>

The Association of Sales and Marketing Companies Australasia (ASMCA)

Web: www.asmca.com

The association is the peak industry body, which represents the interests of sales and marketing companies in Australia and New Zealand. A list of brokers in each state is also available on the [website](#).

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