

Australian Meat Purchasing Data

Comparison between Roy Morgan & Nielsen Homescan



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Introduction

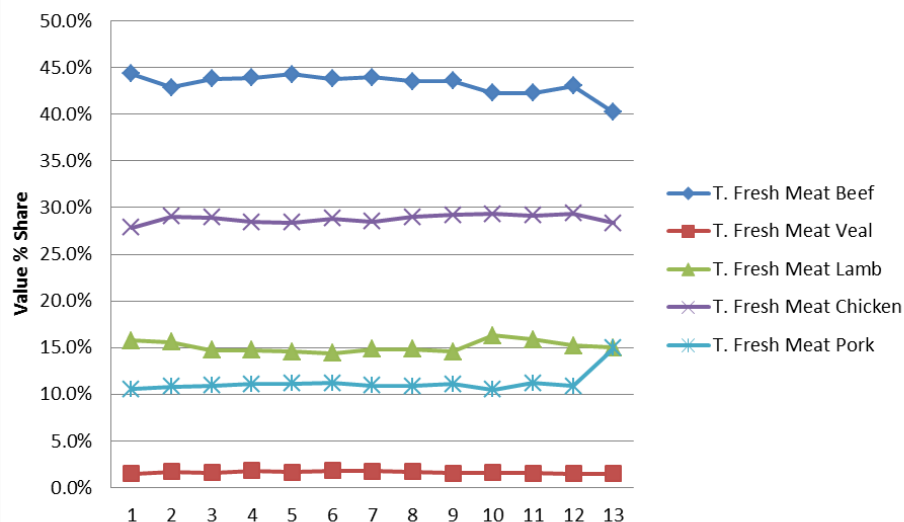
MLA has been providing fresh meat purchasing information based on Roy Morgan Single Source data for over a decade now. This data is based on a door to door survey that estimates purchasing - respondents tell us how many serves they have bought in the last 7 days.

Recently we decided to switch suppliers to Nielsen Homescan. This data consists of 10,000 households all around Australia who use special equipment to scan all grocery purchases that enter their home. The Homescan data represents actual purchases rather than stated serves, so the data is (in MLA's opinion) a better estimate of the actual trends in fresh meat expenditure.

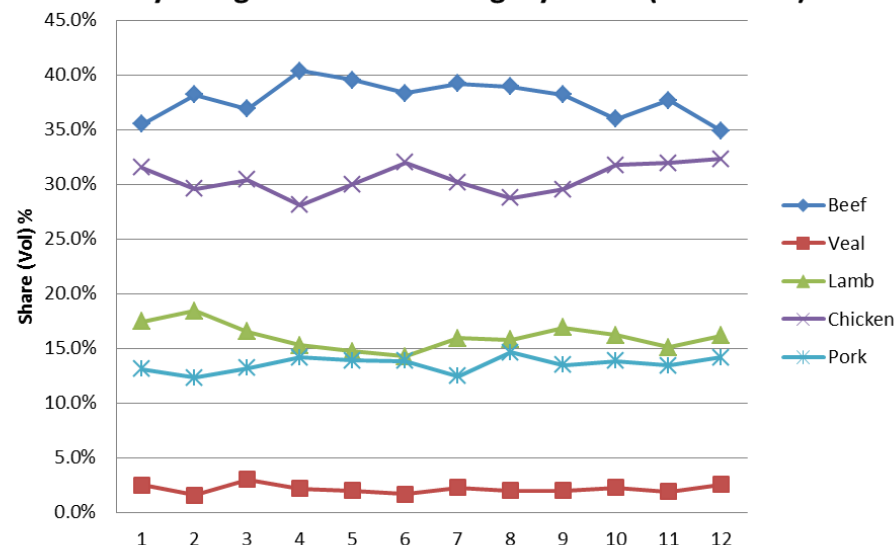
As always, switching data providers means some differences in data. So before we switch reporting from Roy Morgan to Nielsen we want to give you some insight in what differences to expect.

National Category Share | Fresh Meat

Nielsen: National Category Share (Value%)



Roy Morgan: National Category Share (Volume %)



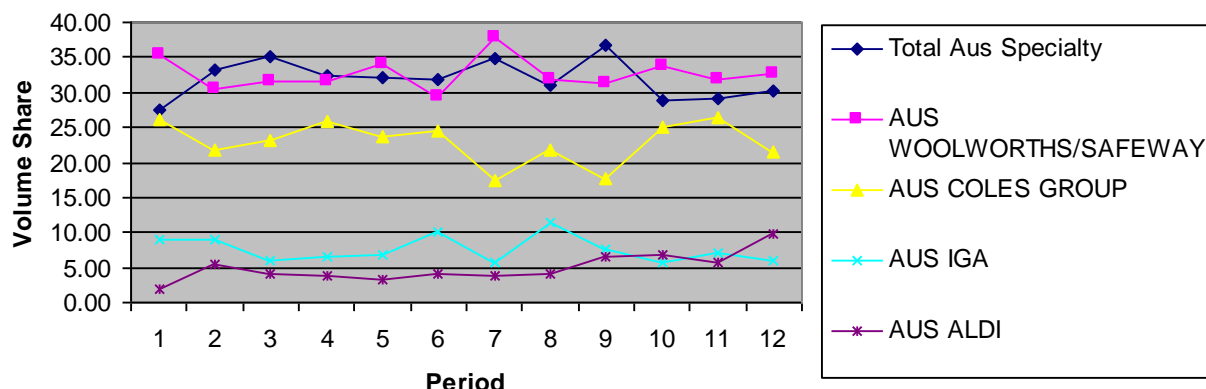
- The overall market share for each meat type is similar in each survey (+/-5%)
- Beef records a higher share in Nielsen than Roy Morgan (+5.7% on average)
- Chicken (-1.7%) and pork (-2.6%) have lower value shares in Nielsen
- The shares for veal (-0.5%) and lamb (-0.9%) are slightly lower in Nielsen

Notes :

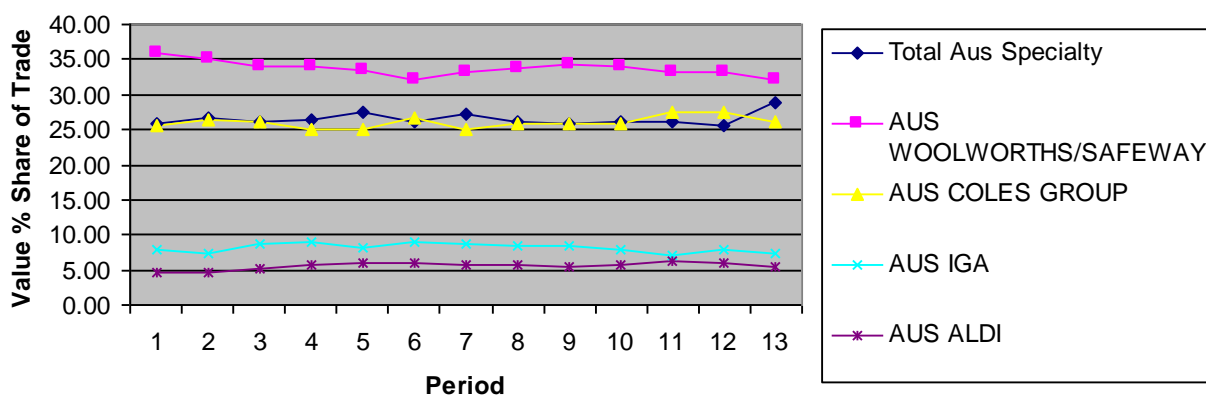
1. Period Jan-Dec 2011
2. Reporting period: 4 w/e (Nielsen) vs monthly (Roy Morgan)
3. Fact: Value % Share (Nielsen) vs Volume % Share (Roy Morgan)
4. Percentages have been re-based to 100% in order to compare across the data sources. Actual shares will be lower.

National Channel Share | Beef & Veal

Roy Morgan: Total Fresh Meat Beef & Veal



Nielsen: Total Fresh Meat Beef & Veal



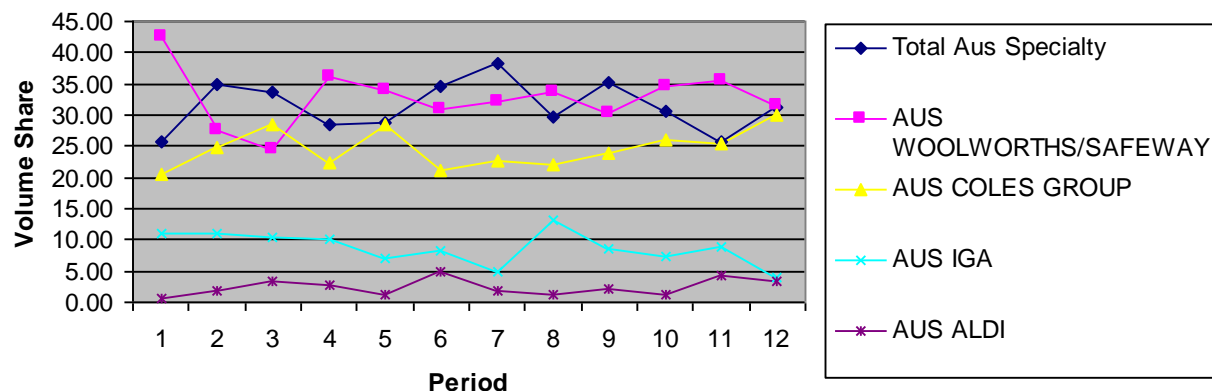
- Nielsen data is more stable than Roy Morgan.
- Specialty is the only channel with a lower beef and veal share in Nielsen (-5.6% on average).
- Coles (+3.2%) and Woolworths (+1.1%) have the biggest positive difference in channel share for beef and veal.
- IGA (+0.6%) and Aldi (+0.6%) have very similar shares across the two data sources.
- [N.B. IGA includes IGA bannered supermarkets such as IGA, Supa-IGA, Ritchies IGA, Cornetts IGA etc. It does not include others such as Foodland, Franklins, etc.]

Notes :

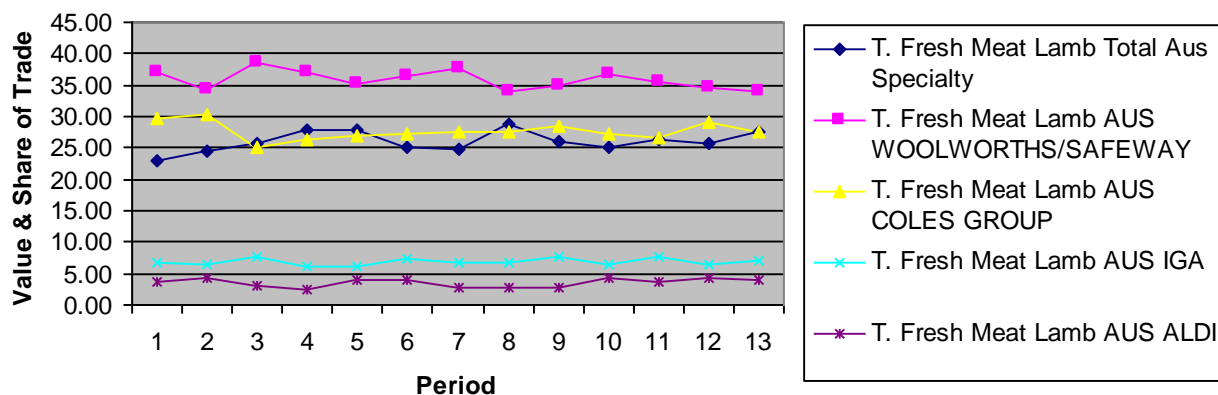
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National Channel Share | Lamb

Roy Morgan: Total Fresh Meat Lamb



Nielsen: Total Fresh Meat Lamb



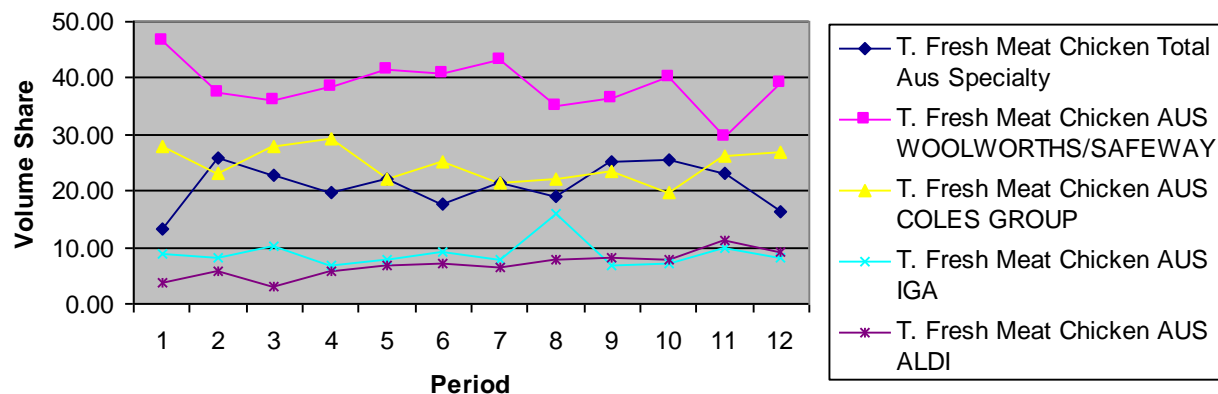
- Nielsen data is more stable than Roy Morgan.
- Specialty loses some lamb share in Nielsen (-5.5% on average).
- Woolworths (+3.3%) and Coles (+3.0%) record increases in lamb share in the Nielsen data.
- Minor changes can be seen for IGA (-1.9%) and Aldi (+1.1%).

Notes :

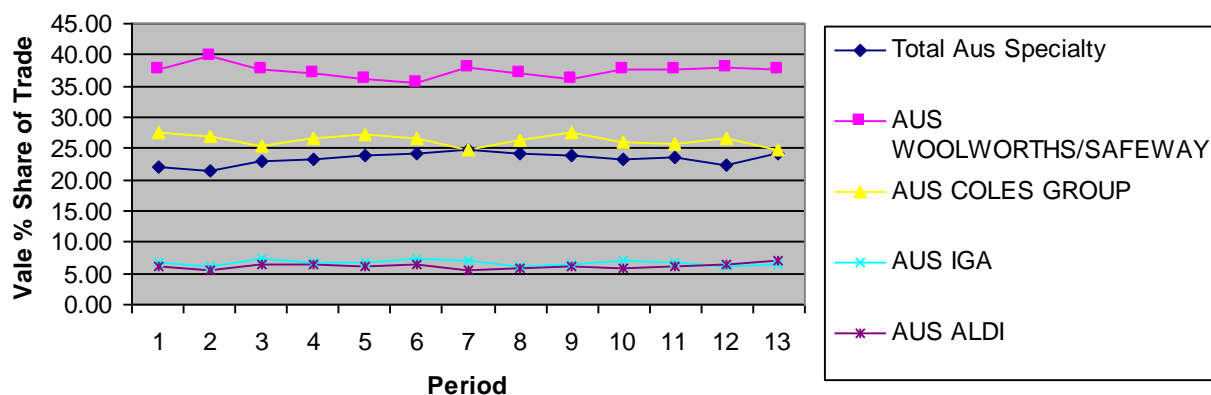
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National Channel Share | Chicken

Roy Morgan: Total Fresh Meat Chicken



Nielsen: Total Fresh Meat Chicken



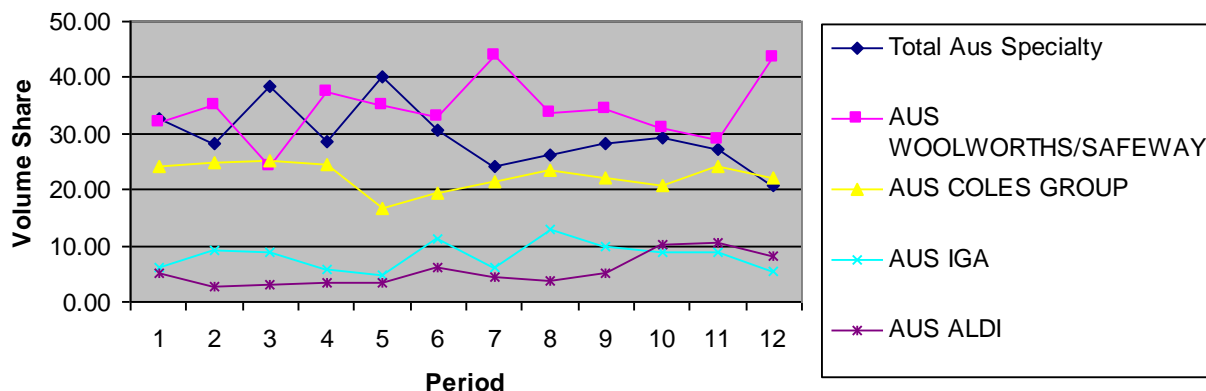
- Nielsen data is more stable than Roy Morgan.
- Specialty actually has a higher share of chicken in the Nielsen data (+2.3%), most likely caused by the fact that specialist chicken shops are now included.
- Coles (+1.9%) also has a higher share in Nielsen.
- IGA (-2.1%), Woolworths (-1.3%) and Aldi (-0.7%) have lower channel shares.

Notes :

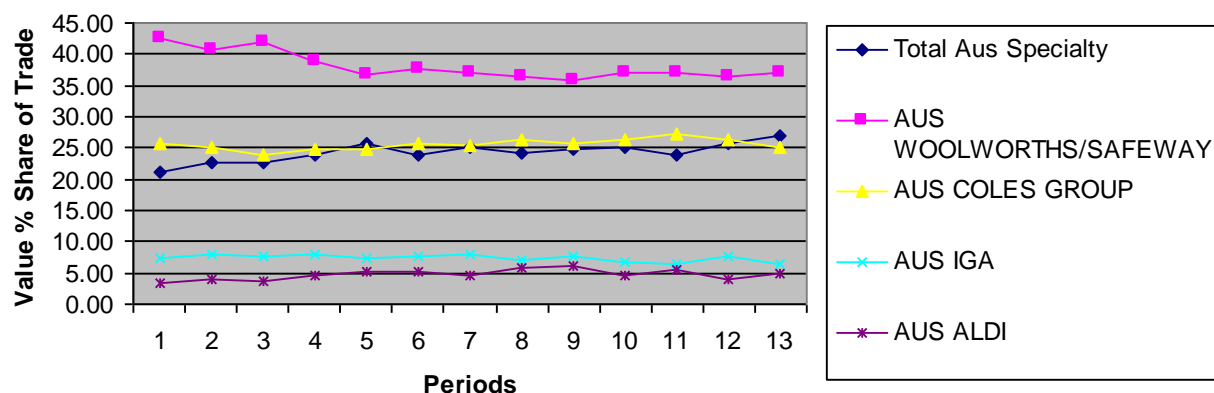
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National Channel Share | Pork

Roy Morgan: Total Fresh Meat Pork



Nielsen: Total Fresh Meat Pork



- Nielsen data is more stable than Roy Morgan.
- Again, specialty has a slightly lower channel share in Nielsen (-5.5%)
- Woolworths (+3.8%) and Coles (+3.2%) have higher channel shares for pork.
- Pork channel share for IGA (-0.7%) and Aldi (-0.8%) is very similar across the two data sources

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Conclusion

- Overall there is not a considerable difference in the data trends observed between Nielsen and Roy Morgan.
- Nielsen offers a more stable trend and the use of value instead of volume data, giving us a more realistic picture of the market.

However, there are some slight differences;

- Beef now has a higher (value) share, while pork and chicken share decreases. This could be because of its higher average price relative to the other two meat types.
- Specialty channel has a lower share for all meats except chicken. The nature of the specialty shop could result in a lower capture rate in Nielsen and a higher in Roy Morgan. The exception (chicken) is caused by the fact that fresh chicken specialty shops are now included in the sample.
- Woolworths and Coles have higher share of fresh meat in Nielsen, with almost no change for IGA and Aldi.