

Supermarkets other Aldi 3.0% 4.9% Other stores Fruit shops 7.0% 21.5% Independent Supermarkets 7.5% Markets 10.1% Woolworths 27.5% Coles 18.5%

Figure 1: Retail Sales of Fresh Fruit & Vegetables in Australia

Source: Roy Morgan Supermarket Monitor (June 2011) in Woolworths (2011), 'Submission to the Senate Economics Committee Inquiry into the Constitutional Corporations (Farm Gate to Plate) Bill 2011'.

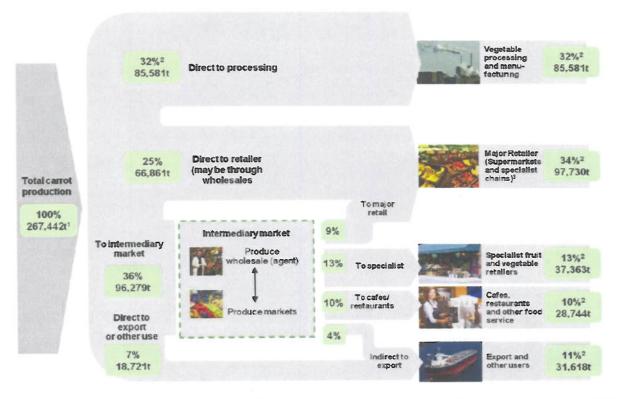


Figure 2 - Distribution of Australian Carrots (2009/10)

Source: Incorporating Australian Bureau of Statistics (April 2011), Agricultural Commodities 2009-10 table 7121.0 and IBISWorld (February 2011) A0113 Vegetable Growing in Australia Industry Report in Woolworths (2011), 'Submission to the Senate Economics Committee Inquiry into the Constitutional Corporations (Farm Gate to Plate) Bill 2011'.

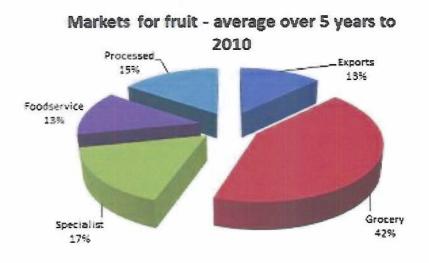


Fruit processing and manufacturing 3%2 880t Direct to processing Tomate processing 70%2 70%2 and manufacturing 330,318t 330.318t Total tomato production 100% 471,883t1 Major retailer (Supermarkets and specialist chains) 15%2 Direct to retailer (may be 11% 70.859t through wholesaler) 51.005t To major retail To intermediary 4% 4%2 and vegetable retailers 20,233t Intermediary market Produce wholesale market 4% 16% To specialist Cafes, restaurants and other food (agent) 6%2 75.779t To cafes/ restaurants 6% 27.4321 Produce markets 2% 3% Indirect to 5%2 Direct to export or other use Export and 14.781t other users 23.041t

Figure 3 - Distribution of Australian Tomatoes (2009/10)

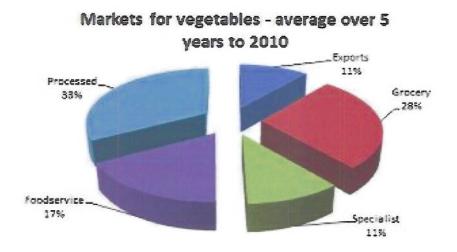
Source: Ibid.

Figure 4: Estimated allocation of Australian fruit produce over the 5 years to 2010



Source: Fresh Logic (2011), courtesy of Coles.

Figure 5: Estimated allocation of Australian vegetable produce over the 5 years to 2010



Source: Fresh Logic (2011), courtesy of Coles.

FY11 weighted average buy price Oct-Jan-Jul-Apr-

Figure 6: Annual Indexed Buy Price for Strawberries (2010/11, July 2010 = 100)

Source: Woolworths (2011), 'Submission to the Senate Economics Committee Inquiry into the Constitutional Corporations (Farm Gate to Plate) Bill 2011'.



1,100 1,050 1,000 FY11 weighted average 100 buy price Oct-Jul-Jan-Apr-

Figure 7: Annual Indexed Buy Price for Bananas (2010/11, July 2010 = 100)

Source: Woolworths (2011), 'Submission to the Senate Economics Committee Inquiry into the Constitutional Corporations (Farm Gate to Plate) Bill 2011'.



Table 1 - Estimated Profit Margin for Selected Industries

Industry	Profit Margin (%)				
	2006/07	2007/08	2008/09	2009/10	Average
Motor vehicle and motor vehicle parts retailing	2.3	2.7	3.6	4.8	3.3
Fuel retailing	2.8	2.7	2.8	2.4	2.7
Food retailing	6.5	7.3	5.5	5.8	6.3
Other store-based retailing	7.3	5.2	6.3	5.9	6.2
Non-store retailing and retail commission-based buying and/or selling	11.3	7.7	4.5	6.6	7.5
Total retail trade	5.5	5.0	5.1	5.3	5.2
Other industries					
Accommodation, food and beverage services	9.1	6.4	9.8	10.0	8.8
Agriculture, forestry and fishing	10.0	11.1	9.2	12.3	10.7
Manufacturing	8.6	9.1	6.7	6.5	7.7
Utilities	16.4	13.2	13.0	11.8	13.6
All Industries	12.8	12.0	11.0	11.1	11.7

Source: Australian Bureau of Statistics (2011), 81550DO002_200910 Australian Industry, 2009-10.

Table 2: Average Annual Growth in Food Prices and Real GDP (%, 2000 – 2010)

	Food Prices	Real GDP	
Australia	3.5	3.0	
Canada	2.7	2.2	
New Zealand	3.1	2.6	
OECD Europe	3.5	1.6	
United Kingdom	2.9	1.7	
United States	2.5	1.8	
Source	OECD.StatExtracts	OECD.StatExtracts	