

## Appendix 6 Time Line of Retail Grocery Trends

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Early 1900s	
	1914 First Coles store opens in Melbourne
1920s	Suburban sprawl leads to ordering of goods and home delivery
	Experimentation with different retail formats in food departments
	1924 First Woolworths store opens in Sydney
1930s and 1940s	Depression and World War Two austerity stifles retail innovation
	1941 Franklins open branch stores in Sydney metropolitan area
	1949 Food departments of department stores increasingly convert to self service
1950s	Establishment of independent supermarkets across expanding suburbs, stocking a wide range of groceries and cleaning products, including refrigerated goods such as milk, cheese, dairy and 'deli' products
	1950 First fully self-service grocery store opens in Sydney
	1954 766 self-service stores in Australia
	1956 Coles and Woolworths trial self-service
	1957 1700 self-service stores in Australia by end of year
1960s	Fruit and vegetables introduced in supermarkets
	Woolworths and Coles acquire small and innovative supermarket chains such as BCC in Brisbane and Flemings in Sydney, convert many of their variety stores to a grocery and variety format, and create the first house brands to undercut leading brands.
	Supermarkets buy out their franchise butchers and begin to invest in integrated supply chains via long-term contracts with suppliers. Sophisticated food processing techniques implemented.
	1960 Coles opens first purpose-built free-standing supermarket in Victoria
	1962 Coles has 8 supermarkets
	1968 After a decade of rapid growth Franklins operates 70 supermarkets
1970s	Higher levels of inflation increase cost consciousness among consumers
	Supermarkets seek to keep prices down by keeping service to a minimum, narrowing aisles to reduce floor space rentals and dimming

	the lighting to cut electricity bills
	Supermarkets build their own meat distribution facilities
1972	Davids open fully computer-controlled warehouse in Sydney
1978	'No Frills' house brand introduced at Franklins
1979	Hong Kong company Dairy Farm International Holdings Limited buys Franklins
1980s	Discounters Franklins become popular in NSW; Bi-Lo in South Australia; Shoeys in Victoria and Jack the Slasher in Queensland, draw market share from both Woolworths and Coles.
	Convenience stores such as 7-Eleven and Food Plus, often on main roads and with longer opening hours, became popular and also draw market share from both Woolworths and Coles despite higher prices and limited range. These stores sell confectionary, soft drink, partly prepared meals, fast food items and often petrol.
	Woolworths and Coles purchase discount chains such as Jack the Slasher, Shoeys and Bi-Lo, and renovating their stores. Coles opens big new-look Super K stores. They improve the quality of their fruit and vegetables and invest heavily in technology and systems to improve efficiency, such as barcoders and scanners.
	Franklins expands into Queensland, South Australia and Victoria
	Davids, the major wholesaler to the independent retailers, begins to merge with other independent wholesalers
	The range of items on supermarket shelves continues to expand into areas such as health and beauty products, magazines, and pre-prepared meals.
	EFTPOS facilities introduced at checkouts.
1980	Scanning first appears at an independent supermarket in Victoria.
1982	Coles adopts scanning
1990s	Increasing sophistication of consumers demanding new flavours, methods of preparation and packaging
	Credit cards and retail incentive schemes such as 'fly buys' introduced

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	Fall in employment of casual workers in the retail sector as proportion of national retail workforce
1990	Franklins moves into liquor sales
1991	Coles centralises buying from state to national level
1993	Woolworths Limited floats on stock exchange, adding over 330,000 new shareholders consisting mainly of small investors
1994	Store managers at Coles increasing freed to customise a portion of their offerings to suit local tastes.
1999	Major chains experiment with Internet shopping
	Announcement of fuller banking services to be provided at Woolworths

Source: Most items are sourced from Eric Jones, 'Coles Myer & Grocery Retailing in Twentieth-Century Australia', Coles Myer Submission 168 Part 2, and Franklins, Submission 200.