SUPERMARKET

*in*Colour

June 2024

Interact: AreaSearch.com.au/incolour/supermarkets

CONCENTRICS

June 2024

Introduction

Putting retail performance in perspective on a sector-by-sector basis, the 'inColour' series aims to serve as a yardstick for those seeking to action assets and locations likely to outperform, while operating in a timely and efficient manner.

To help owners best secure and position assets, the AreaSearch approach to retail analysis looks beyond the standard 'population per store' approach commonly referred to in the industry. Instead, our approach which we call 'concentric radials', assesses each retail location and its competitiveness, by gauging proximity to, and likely capture of, its local target market considering the intersecting property catchments of each surrounding retailer in its peer group. This integral component of the assessment process draws on a deep database of hundreds of thousands of retail locations across the country, and cross-references that against every verified address and resident location in Australia.

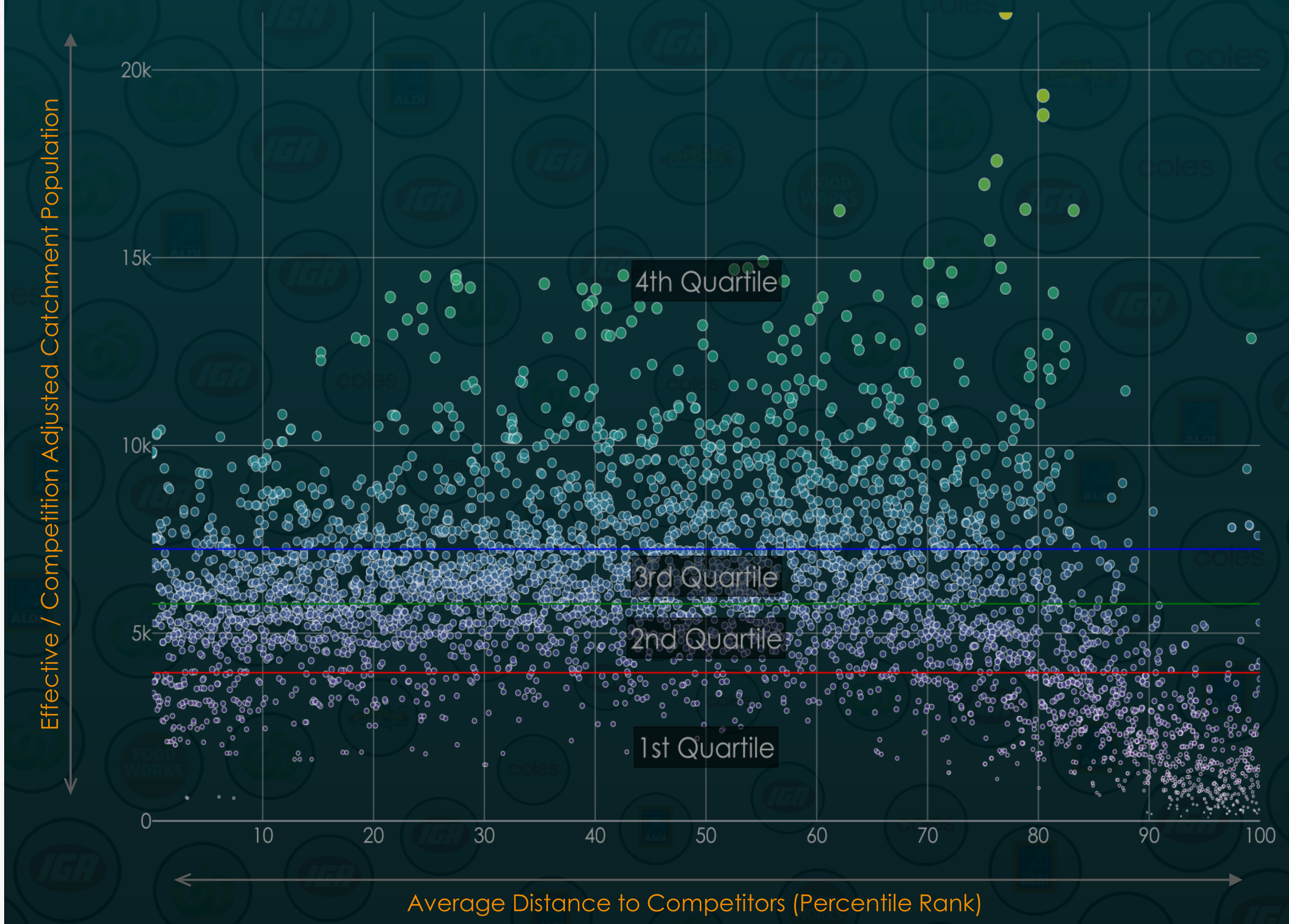
The national results of this from one perspective are shown in the adjoining chart. With an average of 6,161 people per Supermarket nationally, and a standard deviation of 2,361 in the effective population capture of the average Supermarket catchment, this research highlights large variations across regions, pointing to both opportunities and risks for sector participants.

We hope this approach provides a fresh perspective and opens new opportunities for our clients, such as that detailed overleaf. For those seeking further information on our process or results, please reach out at areasearch.com.au/contact

Covering 17 major Supermarket retailers across 4,242 locations nationwide

Click for individual brand detail

Please note: this analysis excludes a number of stores in the convenience category such as Coles Express, IGA Xpress and others.



Sources: AreaSearch

Supermarkets in Australia

Grocery retailing – a sector particularly favourable due to its essential nature, relative stability, and the reliable income streams offered to investors via long-term lease commitments.

A hot topic at present, major players Coles and Woolworths are facing scrutiny as to price increases and potential anti-competitive behaviour, against a backdrop of multi-decade-high inflation. With these groups leading in terms of floorspace, followed by ALDI, franchise group IGA, Foodworks and several others, the coming years are sure to be interesting, given larger, more efficient groups have historically been best placed to serve local communities. This is not only due to their wider product range, but also down to their favour among developers, for whom the underwriting process is particularly challenging at present, with site and construction costs making many opportunities unfeasible. As a result, many high-demand regions are likely to remain underserved for the foreseeable future.

Online shopping is a noteworthy trend which may ease these pressures somewhat with above groups now well established in this area. Over coming years, population growth exceeding OECD averages in Australia (see EcoSearch for our monthly economic review) is expected to drive ongoing demand in the sector which has seen 3.8% in year-over-year growth to Apr-24 with total moving annual turnover now amounting to $140.2 billion.

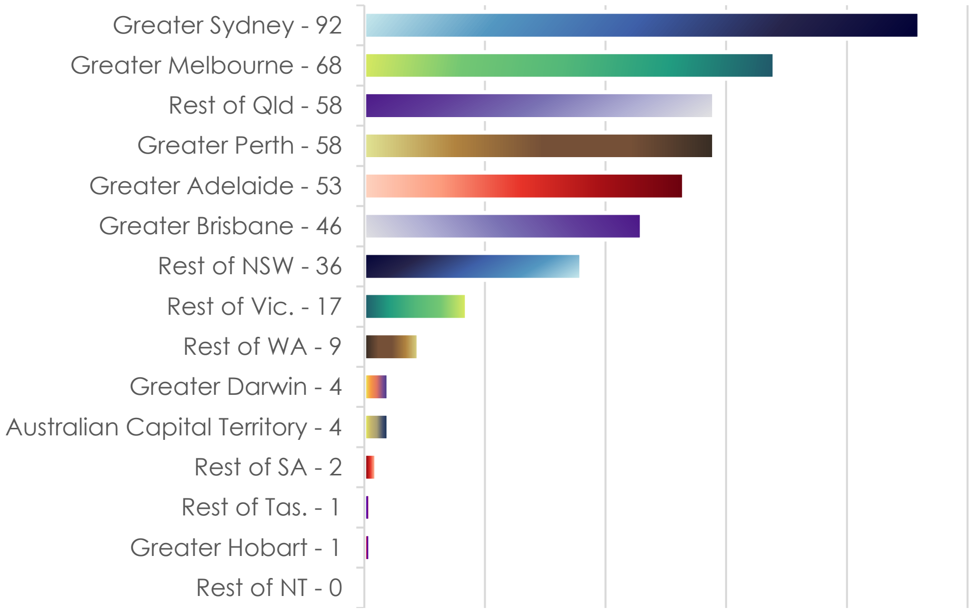
6,321	0.50km	3.28km	1.03km
Effective Population	**Nearest Peer** *	**Nearest Network** *	**Nearest to Residents** *

See final page for breakdown by brand..

* Median

Shopping Centre Spotlight

AreaSearch analysis of major supermarket brand coverage across Australian shopping destinations has identified 449 shopping centres where the 'effective population' metric exceeds that of its broader region while 11 of these were found to have over twice the regional average.



'In the same day we can identify a tenant need in our centres, have exceptionally detailed analysis done, generate a compelling format as a leasing handout for potential tenants, and receive a definitive list of the best tenants to target across each category of retailer. That's why we use AreaSearch..'

Ben Stewart
Head of Retail and Residential, Mintus

Retail Supply & Demand Assessment

More than mapping.. We are proud to work with some of the biggest names in retail, and in Australian property, helping to identify and action opportunities in under serviced locations across over 30 different retail categories

Going beyond legacy GIS tools, our platform enables easy and instant transfer of insights, removing the burden of data collection, analysis and even report writing, with full consulting standard reports never more than a few minutes away. Whether for a last-minute meeting, or carefully crafted planning submission, our materials are used with confidence by users ranging from the country's largest property institutions to part-time investors.

While this report focuses on the critical 'effective population' statistic, there are a number of other factors we consider when assessing the viability of each project or location we analyse, with the following providing a quick summary.

Resident & Commercial Demand

Demand to supply ratios generated through cross examination of quarterly address-level population counts, land-use, activity and working population statistics, with the latest sector location data, for accurate estimates of daily demand.

Spending Trends & Differentiators

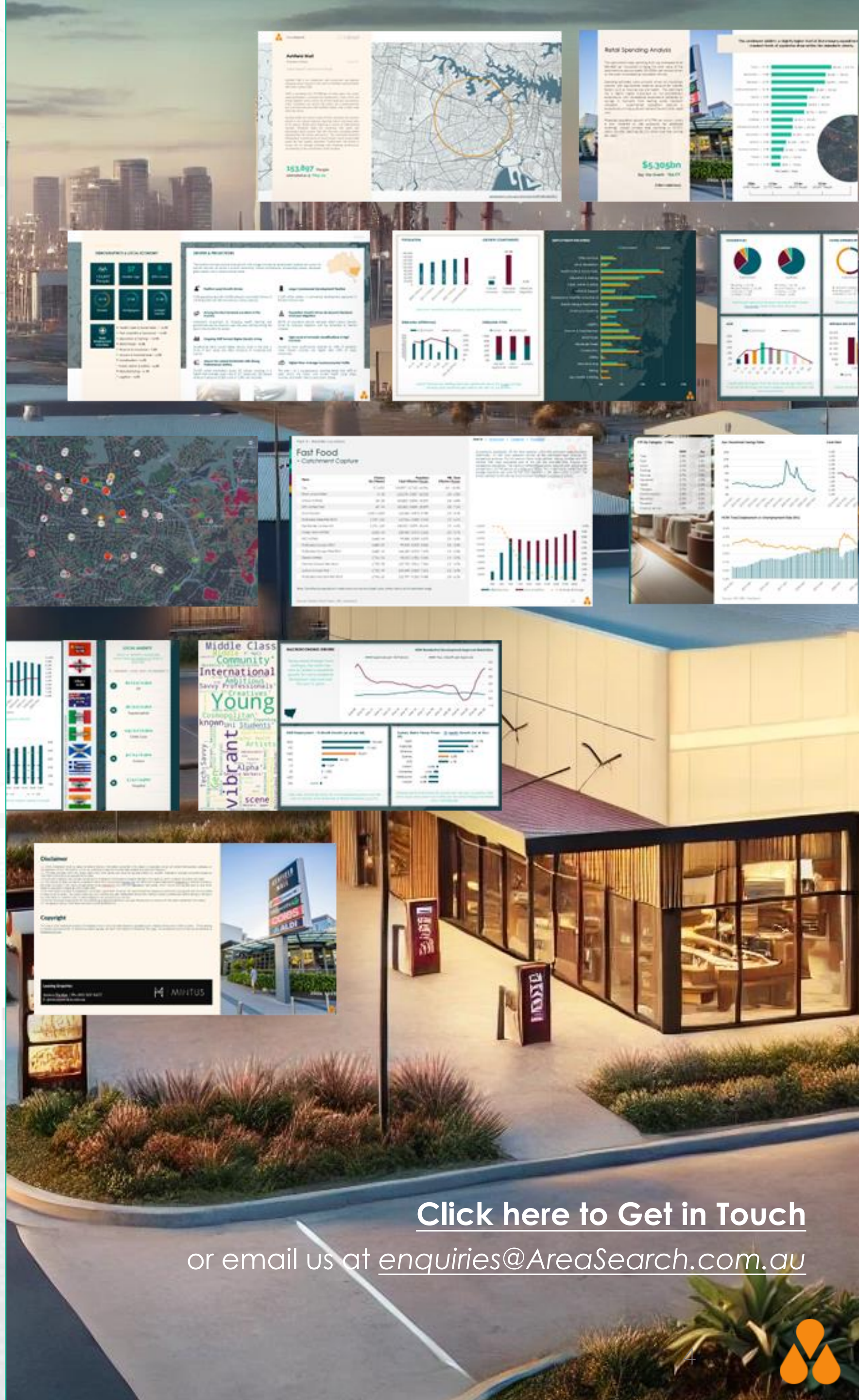
Local income data updated quarterly with analysis of average and median income differentials and spending splits by income, age and household type across primary and secondary catchments to estimate total spend, local differentiators and likely floor space requirements.

Competition Analysis

Every location across over 400 major retailers assessed with 'effective population' counts accounting for competitive draw of proximate peers.

Local Economy, Growth & Projections

Local employment trends and population forecasts updated frequently to provide further insight into area trajectories and accurate 2041 spending projections.



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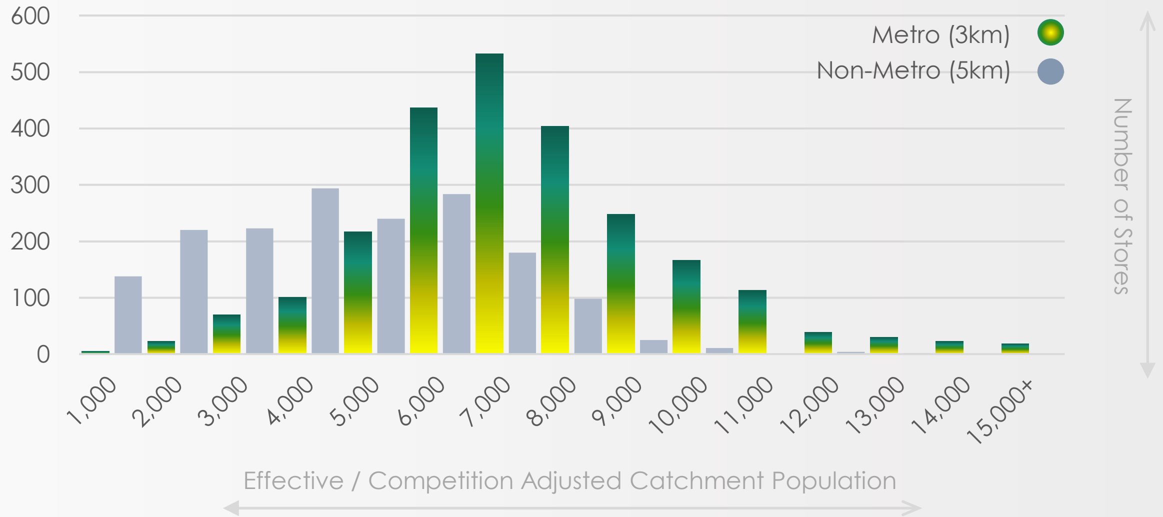
City & State Trends

View interactive detail: AreaSearch.com.au/incolour/supermarkets

This report examines 4,242 supermarkets across Australia and reveals notable differences in market composition nationwide. These findings underscore the importance for operators to adopt location-specific strategies when expanding into new regions or optimising existing assets. The 'population per store' indicator, a critical metric for many sector operators, varies significantly by region. In greater capital regions, averages range from 5,594 in the Australian Capital Territory to 9,391 in Hobart. In non-metro regions, the range is from 3,915 in Western Australia to 10,992 in the Northern Territory. These variations are influenced by differences in population density, which also affect the average travel distance required to reach critical mass.

The most significant insights from this report come from analysing primary trade areas at the catchment level, considering each supermarket's surrounding competitors and their respective trade areas. This analysis reveals substantial differences among the country's operators, with the standard deviation in effective/competition and proximity-adjusted population per store being 34.3% of the average in metro regions and 59.9% in non-metro regions. The subsequent pages delve into sub-regional trends across each state, highlighting differences in typical catchment competitiveness.

Number of Stores By Effective Population Cohort



Sources: ABS / AreaSearch

	Stores Assessed	Population Per Store	Average Catchment Metrics *				
			Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m) **
Greater Sydney	685	7,751	81,325	12.0	7,712	2,705	1,371
Greater Melbourne	721	6,988	68,498	11.0	7,139	2,348	1,574
Greater Brisbane	395	6,755	48,271	8.0	6,365	2,000	2,064
Greater Adelaide	231	6,158	45,435	8.0	6,026	1,704	1,497
Greater Perth	359	6,227	41,304	7.0	6,175	1,653	1,521
Greater Hobart	27	9,391	21,776	3.0	7,557	2,986	3,730
Greater Darwin	19	7,883	21,233	3.0	7,126	3,531	3,822
Australian Capital Territory	82	5,594	33,240	6.0	5,717	1,874	1,458
Non-Metro NSW	588	4,876	25,305	5.0	4,092	2,025	10,988
Non-Metro Vic.	344	4,626	21,545	5.0	3,724	2,019	9,972
Non-Metro Qld	494	5,511	41,251	8.0	4,673	2,170	14,330
Non-Metro SA	83	4,864	8,178	2.0	3,210	1,978	31,303
Non-Metro WA	144	3,915	10,286	3.0	2,906	2,252	44,684
Non-Metro Tas.	58	5,516	19,626	5.0	3,850	2,005	18,656
Non-Metro NT	12	10,992	13,758	4.0	3,567	2,244	160,964

* Metro - 3km Radial / Non-Metro – 5km Radial
** average distance to 3 nearest

June 2024

Greater Sydney

A total of 685 supermarkets were identified in Greater Sydney. Significant variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per supermarket catchment ranging from an average of 5,595 in the Central Coast region to 10,465 in Sydney - Parramatta, based on a 3.0km catchment range.

When compared to other metropolitan regions analysed nationally, the effective population capture within the typical supermarket catchment in Greater Sydney deviated by a standard rate of 35.1% from the average level recorded across all of the region's supermarket locations. This results in the majority of catchment effective population counts falling within the 5,000 to 10,400 range.

As noted at the beginning of the report, Greater Sydney also has the highest number of existing shopping centre assets with a higher-than-average effective population count per supermarket of all regions in the country. This is a key point of interest for stakeholders on both ends of the tenant/landlord spectrum. Additionally, the typical resident in the region enjoys more convenient access to supermarkets than in all other regions, with the nearest supermarket being 0.76km from home.

Woolworths - 210

IGA - 153

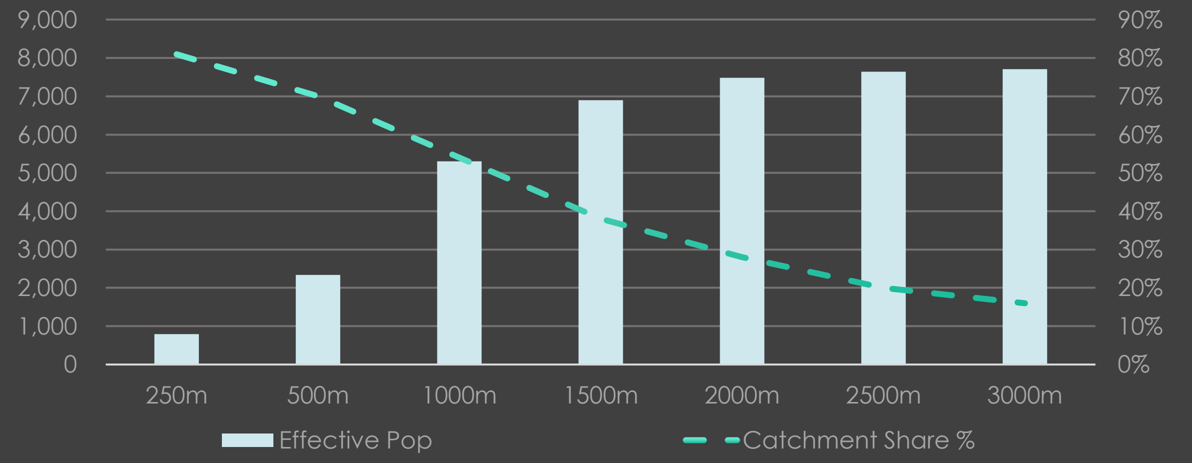
Coles - 144

ALDI - 126

Other - 52

Average Store Catchment Capture

Jump to data



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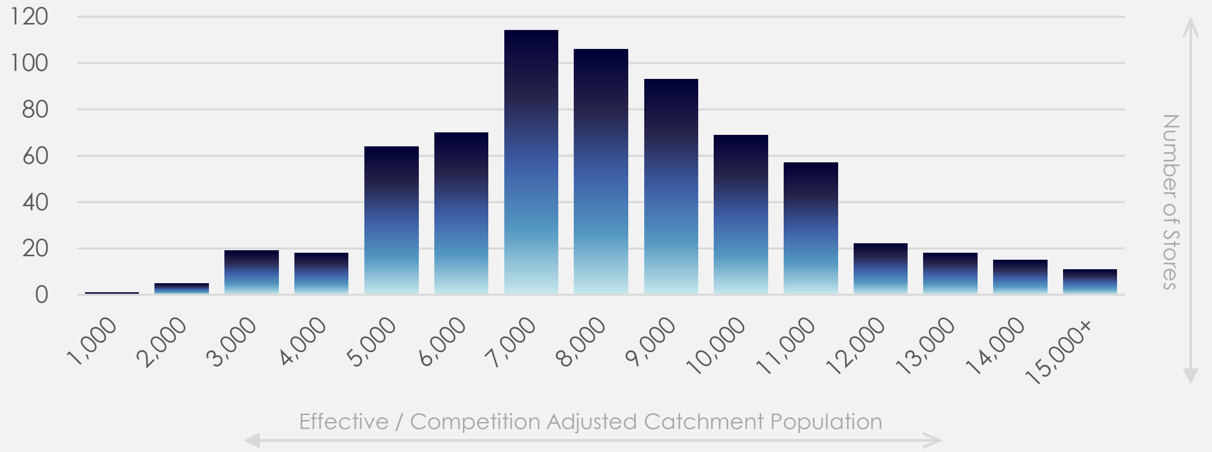
Number of Stores By Effective Population Cohort



			Average 3km Catchment Metrics				
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Baulkham Hills and Hawkesbury	35	7,785	47,421	5.0	7,237	2,760	1,788
Blacktown	41	10,175	67,186	7.0	9,871	2,739	1,632
City and Inner South	67	5,075	179,949	34.0	5,955	921	576
Eastern Suburbs	35	7,535	123,290	19.0	6,760	1,017	763
Inner South West	60	10,132	108,233	10.0	10,266	1,994	1,147
Inner West	40	7,646	130,634	18.0	7,639	1,976	883
North Sydney and Hornsby	59	7,211	81,638	12.0	7,284	2,090	1,057
Northern Beaches	38	6,925	53,211	8.0	6,760	1,759	1,021
Outer South West	45	6,764	34,757	6.0	6,262	2,061	2,252
Outer West and Blue Mountains	49	6,875	28,220	4.0	6,263	2,683	2,570
Parramatta	49	10,181	100,547	10.0	10,466	1,813	1,223
Ryde	26	7,875	85,065	10.0	8,721	2,308	1,037
South West	50	9,765	61,752	6.0	10,136	2,935	1,651
Sutherland	35	6,614	55,205	9.0	6,647	1,031	1,196
Central Coast	56	6,236	22,479	5.0	5,596	2,185	1,796

Sources: ABS / AreaSearch

June 2024

Regional New South Wales

IGA - 175

Woolworths - 132

Coles - 108

Foodworks - 82

Other - 91

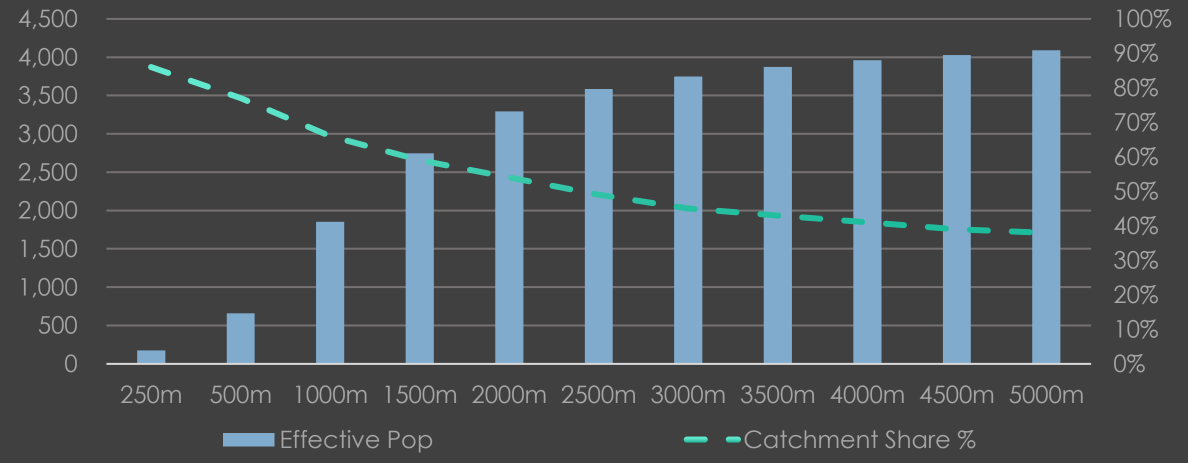
A total of 588 supermarkets were identified in Regional NSW. Significant variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per supermarket catchment ranging from an average of 2,895 in the Murray region to 6,399 in Illawarra, based on a 5.0km catchment range.

Compared to other non-metro regions analysed nationally, the effective population capture within a typical supermarket catchment in Regional NSW showed a smaller deviation (~25.8%) from the average level recorded across all of the region's supermarket locations. Most catchment effective population counts fell within the 2,100 to 6,100 range.

As indicated in the initial section, 36 existing centres in the region have potential for expansion, with an effective population count per major brand exceeding the regional average.

Average Store Catchment Capture

Jump to data



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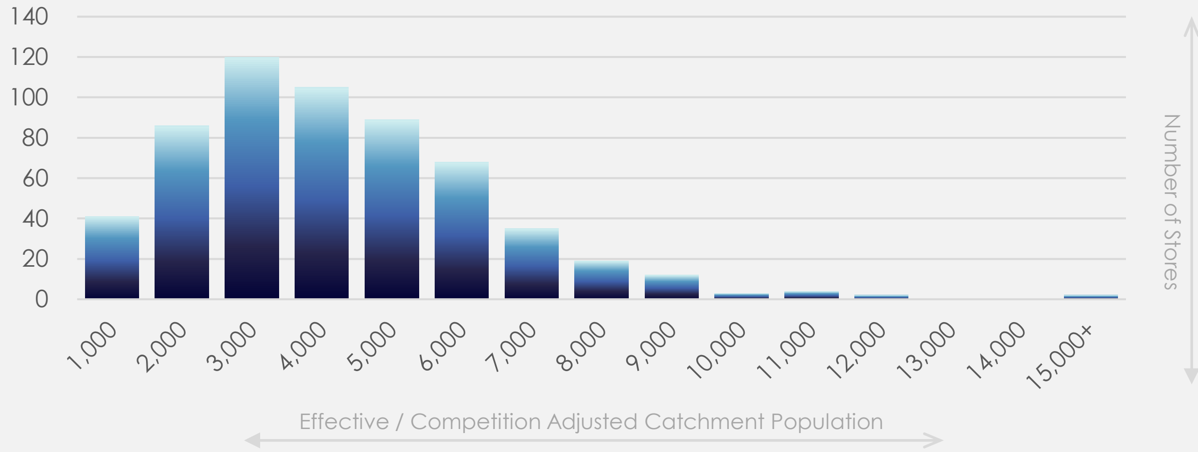
Number of Stores By Effective Population Cohort



			Average 5km Catchment Metrics				
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Capital Region	58	4,155	10,735	3.0	2,979	1,787	11,560
Central West	51	4,206	16,533	5.0	3,079	1,497	14,958
Coffs Harbour - Grafton	23	6,424	16,871	3.0	4,901	1,955	6,937
Far West and Orana	30	3,911	12,224	3.0	2,997	1,991	41,769
Hunter Valley exc Newcastle	56	5,356	19,544	4.0	4,591	2,077	6,040
Illawarra	50	6,360	52,035	8.0	6,399	1,739	2,086
Mid North Coast	48	4,849	14,222	4.0	3,888	1,937	7,238
Murray	37	3,371	14,812	4.0	2,896	1,801	19,082
New England and North West	37	5,084	13,369	3.0	3,587	2,051	24,370
Newcastle and Lake Macquarie	69	5,754	72,579	13.0	5,695	1,200	1,779
Richmond - Tweed	50	5,177	19,219	4.0	4,183	1,326	5,910
Riverina	44	3,741	16,193	4.0	3,091	1,640	15,106
Southern Highlands and Shoalhaven	35	4,641	15,874	5.0	3,767	1,076	3,833

Sources: ABS / AreaSearch

June 2024

Greater Melbourne

Woolworths - 198

Coles - 173

IGA - 146

ALDI - 116

Other - 88

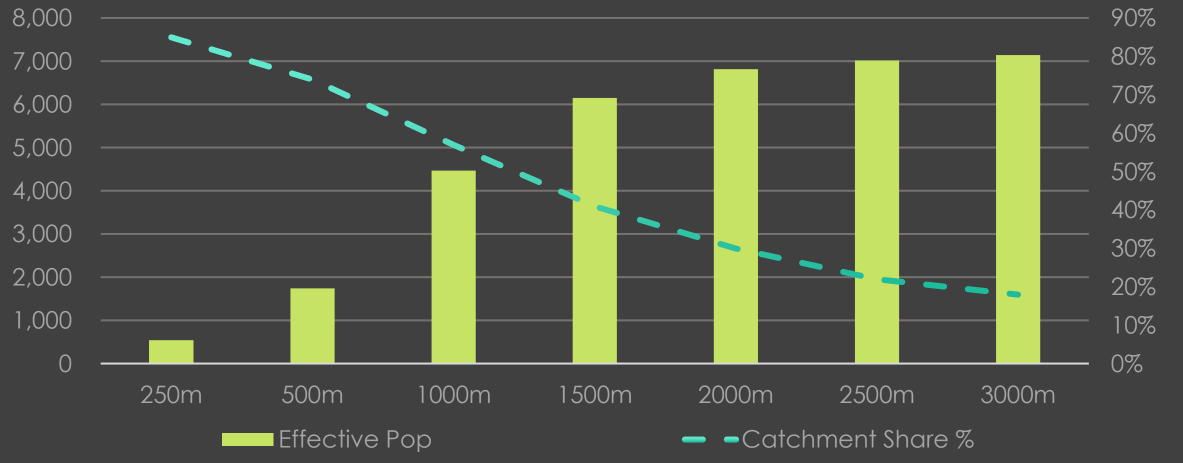
A total of 721 supermarkets were identified in Greater Melbourne. Moderate variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per supermarket catchment ranging from an average of 5,679 in the Melbourne - Inner region to 8,334 in Melbourne - South East, based on a 3.0km catchment range.

Compared to other metropolitan regions analysed nationally, the effective population capture within a typical supermarket catchment in Greater Melbourne deviated by 32.9% from the average level recorded across all of the region's supermarket locations. Consequently, most catchment effective population counts fall within the 4,800 to 9,500 range.

As noted at the beginning of the report, the region ranks highly for expansion potential across its existing shopping centre assets, with 68 centres having a higher-than-average ratio of people per supermarket. Additionally, the typical resident in the region enjoys highly convenient access, with the nearest supermarket located just 0.83km from home.

Average Store Catchment Capture

Jump to data



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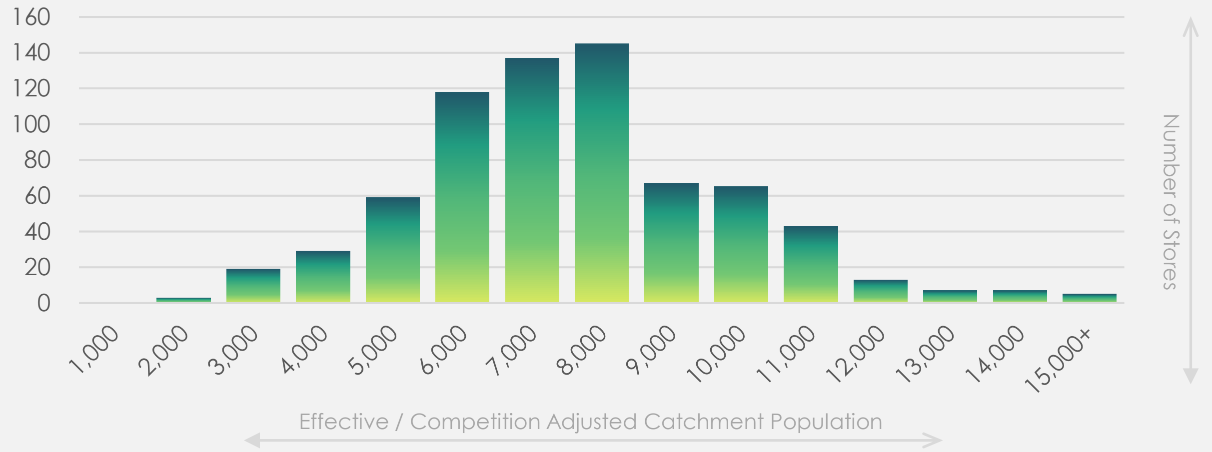
Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 3km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Inner	122	5,218	148,193	29.0	5,680	1,117	707
Inner East	49	7,742	81,128	10.0	8,313	1,256	1,205
Inner South	61	7,034	73,096	10.0	7,205	1,814	1,322
North East	77	7,180	53,087	8.0	7,053	1,886	1,713
North West	63	6,926	46,255	7.0	7,090	2,982	1,907
Outer East	79	6,602	40,719	7.0	6,412	1,950	2,220
South East	109	8,118	50,266	6.0	8,335	2,465	2,169
West	115	7,707	52,824	7.0	7,975	2,679	1,281
Mornington Peninsula	46	6,763	23,936	4.0	6,206	2,605	2,129

Sources: ABS / AreaSearch

June 2024

Regional Victoria

Our latest research has identified a total of 344 supermarkets in Regional Victoria, revealing significant variance in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per supermarket catchment ranges from an average of 2,565 in the Warrnambool and South West region to 5,441 in Geelong, based on a 5.0km catchment range.

Compared to other non-metro regions analysed nationally, the effective population capture within the typical supermarket catchment in Regional Victoria deviates to a lesser extent (~27.8%) from the average level recorded across all of the region's supermarket locations. This results in most catchment effective population counts falling within the 1,700 to 5,700 range.

As noted in the initial section, 17 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

IGA - 119

Woolworths - 75

Coles - 51

ALDI - 49

Other - 50

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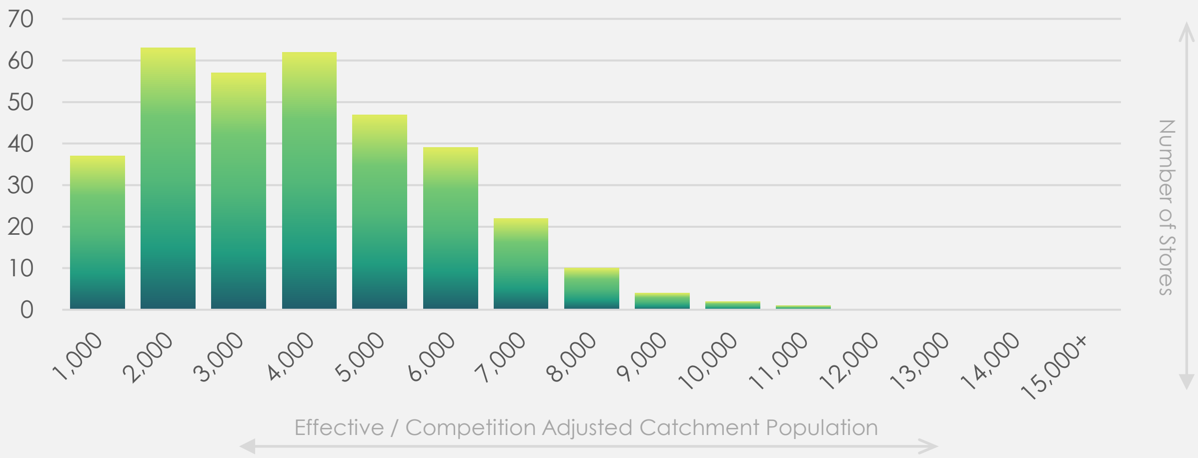
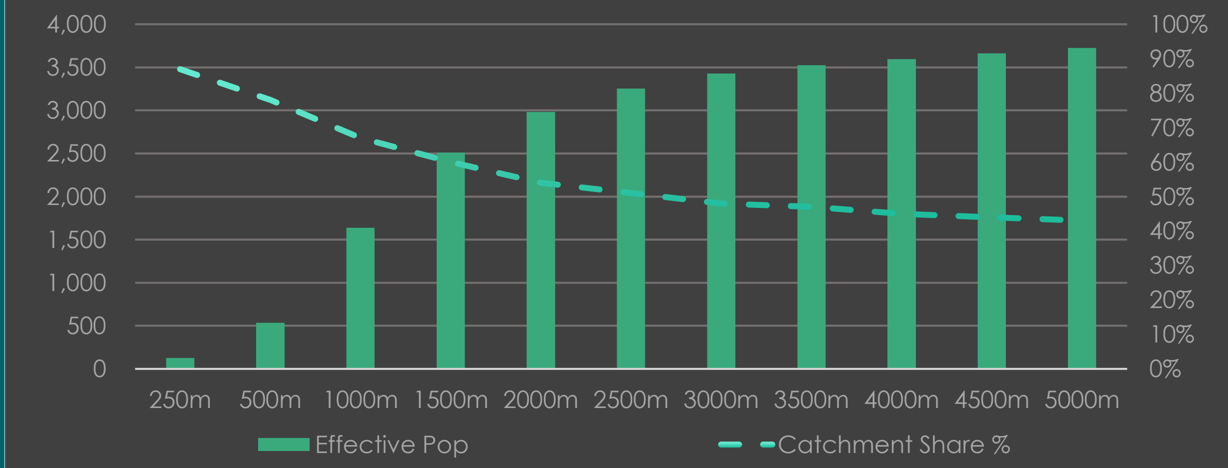
Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 5km Catchment Metrics				
			Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Ballarat	31	5,686	41,639	10.0	4,451	1,647	4,715
Bendigo	31	5,452	23,135	4.0	4,512	2,335	9,550
Geelong	60	5,590	46,556	9.0	5,442	1,543	3,471
Hume	40	4,643	11,688	3.0	3,309	1,829	13,872
Latrobe - Gippsland	74	4,114	9,946	3.0	3,038	1,936	8,329
North West	44	3,518	10,462	3.0	2,712	1,797	22,882
Shepparton	28	4,926	18,670	5.0	3,846	1,591	7,611
Warrnambool and South West	36	3,549	11,768	4.0	2,566	1,238	10,803

Average Store Catchment Capture

Jump to data



Sources: ABS / AreaSearch

June 2024

Greater Brisbane

Woolworths - 132

Coles - 88

IGA - 73

ALDI - 68

Other - 34

A total of 395 supermarkets were identified in Greater Brisbane. Low variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per supermarket catchment ranging from an average of 5,668 in the Moreton Bay - North region to 7,324 in Brisbane - South, based on a 3.0 km catchment range.

Compared to other metropolitan regions analysed nationally, the effective population capture within a typical supermarket catchment in Greater Brisbane deviated by 31.4% from the average level recorded across all of the region's supermarket locations. This results in the majority of catchment effective population counts falling within the 4,400 to 8,300 range.

As noted in the beginning section, 46 existing centres in the region have potential for expansion, with an effective population count per major brand exceeding that of the region's average.

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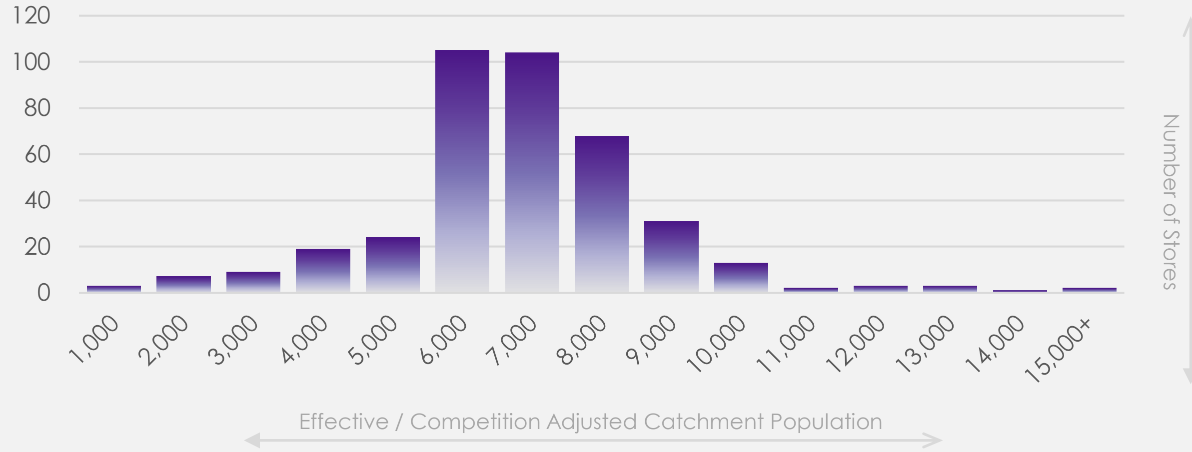
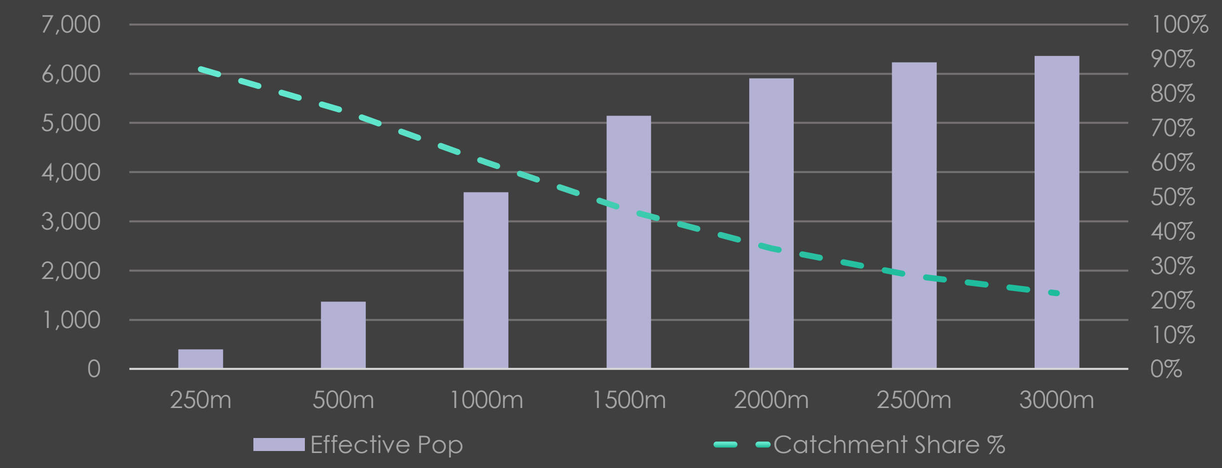
Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
			Average 3km Catchment Metrics				
East	38	6,494	29,255	5.0	6,071	2,059	2,639
North	31	7,477	56,677	8.0	7,010	1,796	1,431
South	52	7,651	63,953	9.0	7,324	1,113	1,153
West	28	6,925	43,477	7.0	6,626	1,409	1,469
Inner City	50	6,142	115,039	20.0	6,327	703	800
Ipswich	62	6,498	27,472	5.0	5,745	2,266	3,818
Logan - Beaudesert	55	6,941	30,959	5.0	6,531	2,893	1,889
Moreton Bay - North	46	6,059	25,883	5.0	5,669	2,444	2,868
Moreton Bay - South	33	6,896	39,604	7.0	6,276	1,030	1,728

Average Store Catchment Capture

Jump to data



Sources: ABS / AreaSearch

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Regional Queensland

IGA - 131

Woolworths - 128

Coles - 97

Foodworks - 72

Other - 66

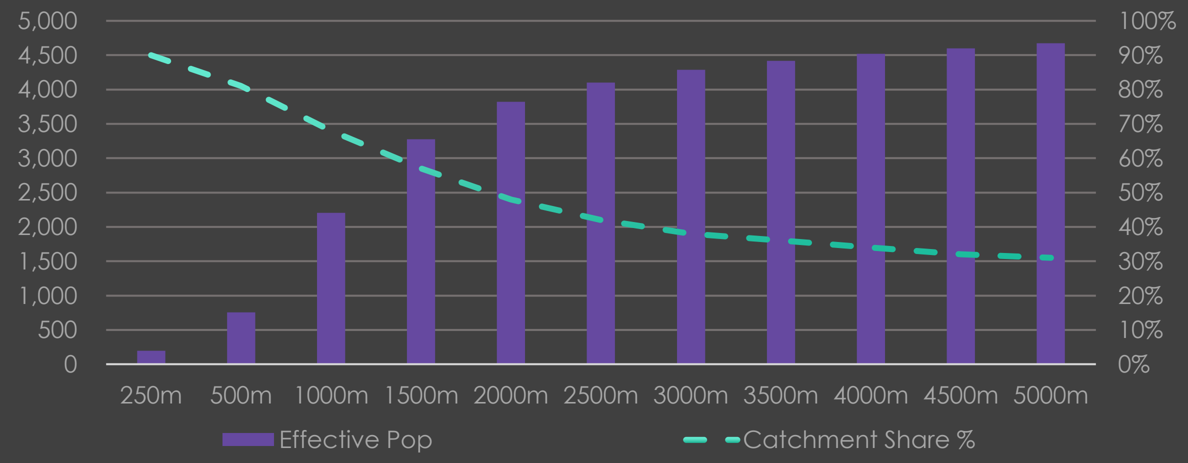
A total of 494 supermarkets were identified in Regional Queensland. Significant variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition-adjusted) population per supermarket catchment ranging from an average of 1,980 in the Darling Downs - Maranoa region to 6,123 in the Gold Coast, within an adopted 5.0km catchment range.

Compared to other non-metro regions analysed nationally, the effective population capture within the typical supermarket catchment in Regional Queensland deviated to a lesser extent (~32.9%) from the average level recorded across all of the region's supermarket locations. The majority of catchment effective population counts fell within the 2,600 to 6,800 range.

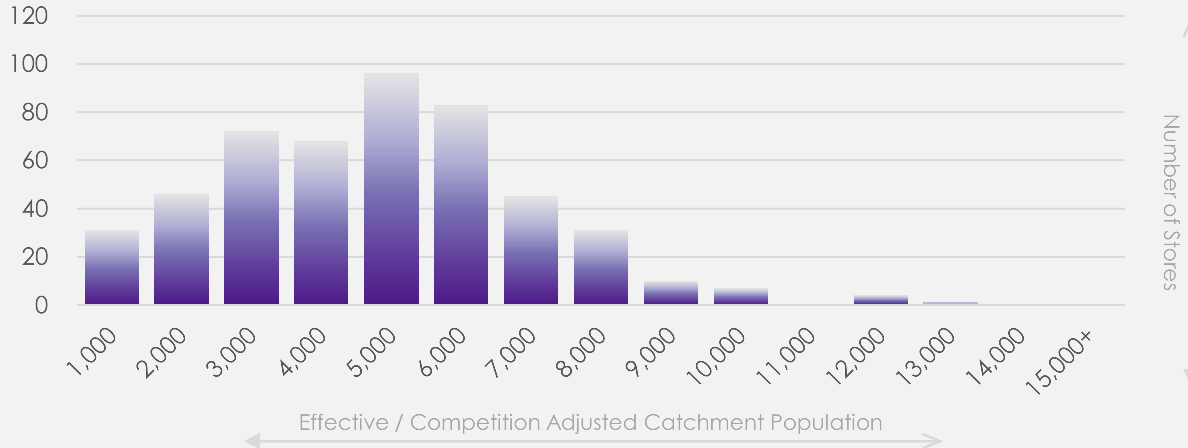
As illustrated at the beginning of the report, 58 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

Average Store Catchment Capture

Jump to data



Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 5km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Cairns	37	7,104	28,220	4.0	5,937	3,092	10,717
Darling Downs - Maranoa	40	3,296	5,946	3.0	1,980	944	28,246
Central Queensland	53	4,439	22,802	6.0	3,628	1,647	13,636
Gold Coast	106	6,288	87,571	14.0	6,123	912	1,535
Mackay Isaac Whitsunday	33	5,907	21,364	5.0	4,503	2,027	19,318
Outback	19	4,358	5,352	2.0	2,137	1,595	143,167
Sunshine Coast	73	5,748	42,972	9.0	5,341	1,490	2,615
Toowoomba	29	5,788	52,501	10.0	5,159	1,413	2,674
Townsville	36	6,699	45,676	8.0	5,812	2,521	10,018
Wide Bay	68	4,699	21,975	6.0	3,383	1,480	10,010

Sources: ABS / AreaSearch

June 2024

Greater Perth

A total of 359 supermarkets were identified in Greater Perth. There was low variance in the average market composition among the region's SA4 subregions, with the effective (competition adjusted) population per supermarket catchment ranging from an average of 5,503 in the Mandurah region to 6,507 in Perth - South East, based on a 3.0 km catchment range.

Compared to other metropolitan regions analysed nationally, the effective population capture within a typical supermarket catchment in Greater Perth deviated by approximately 26.8% from the average level recorded across all of the region's supermarket locations. This results in the majority of catchment effective population counts falling within the 4,500 to 7,800 range.

As shown at the beginning of the report, 58 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

IGA - 123

Woolworths - 82

Coles - 79

ALDI - 46

Other - 29

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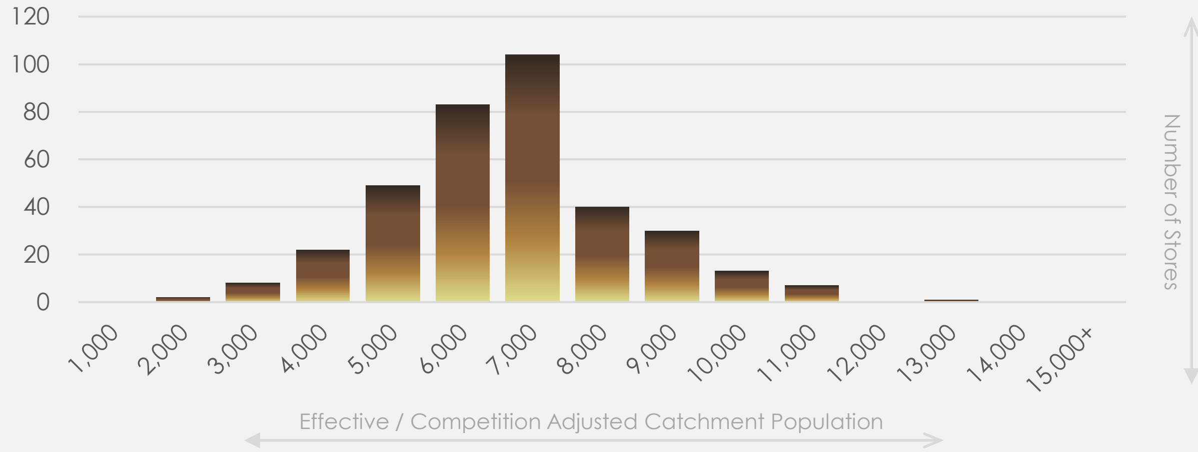
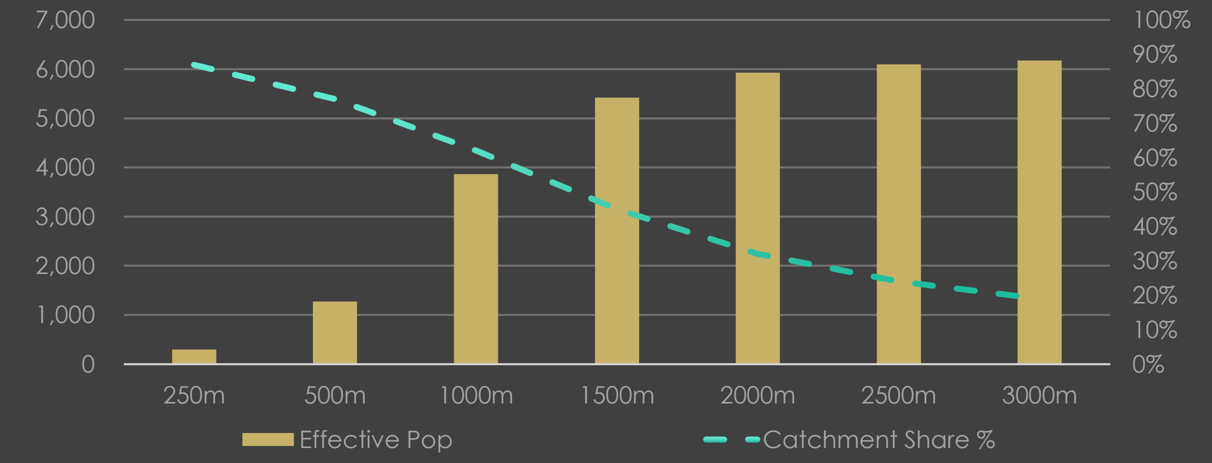
Number of Stores By Effective Population Cohort



Average Store Catchment Capture

Jump to data



Average 3km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Mandurah	20	5,705	20,362	4.0	5,503	1,125	2,882
Inner	35	5,452	58,476	10.0	6,363	792	1,122
North East	47	6,233	34,936	7.0	5,743	2,353	1,733
North West	97	6,227	47,393	8.0	6,079	1,346	1,357
South East	86	6,484	40,641	6.0	6,507	1,678	1,466
South West	74	6,433	35,675	6.0	6,282	1,793	1,486

Sources: ABS / AreaSearch

June 2024

Regional Western Australia

IGA - 123

Woolworths - 82

Coles - 79

ALDI - 46

Other - 29

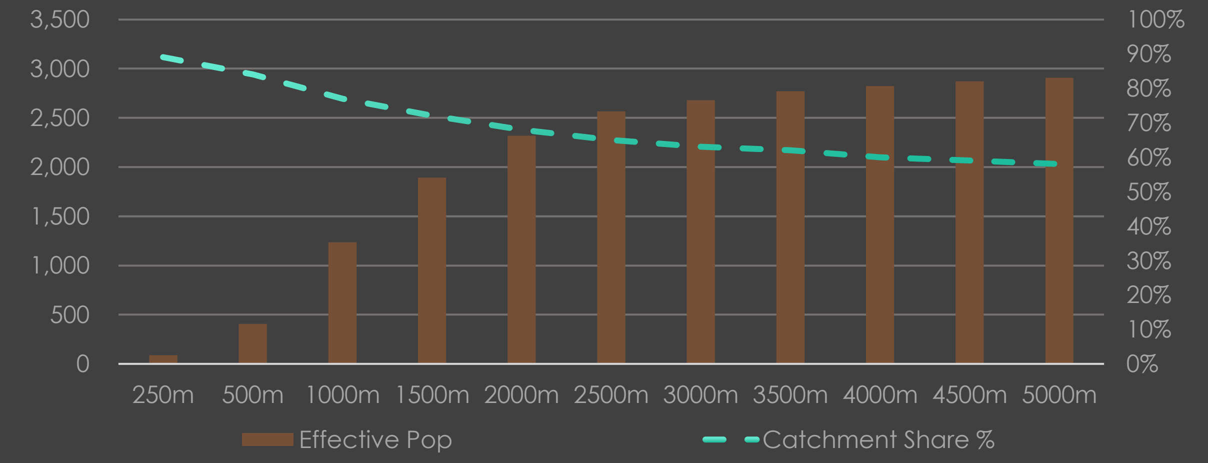
Our latest research has identified a total of 144 supermarkets in Regional Western Australia (WA) and significant variance in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per supermarket catchment ranges from an average of 1,645 in the Western Australia - Wheat Belt region to 4,366 in Western Australia - Outback (North), based on an adopted 5.0 km catchment range. Please consider the region's remoteness when assessing these results, as further investigation into factors such as customer travel distance and store size will likely be helpful in fully understanding the uniqueness of each region and operation.

In comparison to other non-metro regions analysed nationally, the effective population capture within the typical supermarket catchment in Regional WA was found to deviate to a lower extent (~35.8%) from the average level recorded across all of the region's supermarket locations. This results in the majority of catchment effective population counts falling within the 700 to 5,000 range.

As displayed at the beginning of the report, nine existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

Average Store Catchment Capture

Jump to data



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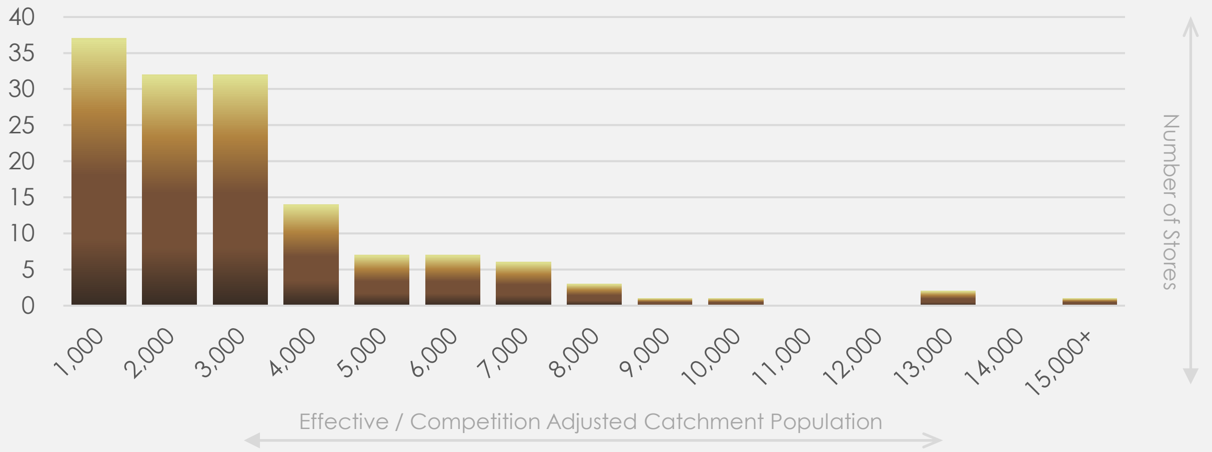
Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 5km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Bunbury	40	4,960	15,843	4.0	4,064	2,142	11,056
Wheat Belt	51	2,800	5,729	3.0	1,645	1,297	38,006
Outback North	17	5,755	7,423	2.0	4,366	3,219	128,190
Outback South	36	3,465	11,922	3.0	2,718	1,883	52,074

Sources: ABS / AreaSearch

June 2024

Greater Adelaide

Foodland - 55

Woolworths - 48

Coles - 45

Drakes - 39

Other - 44

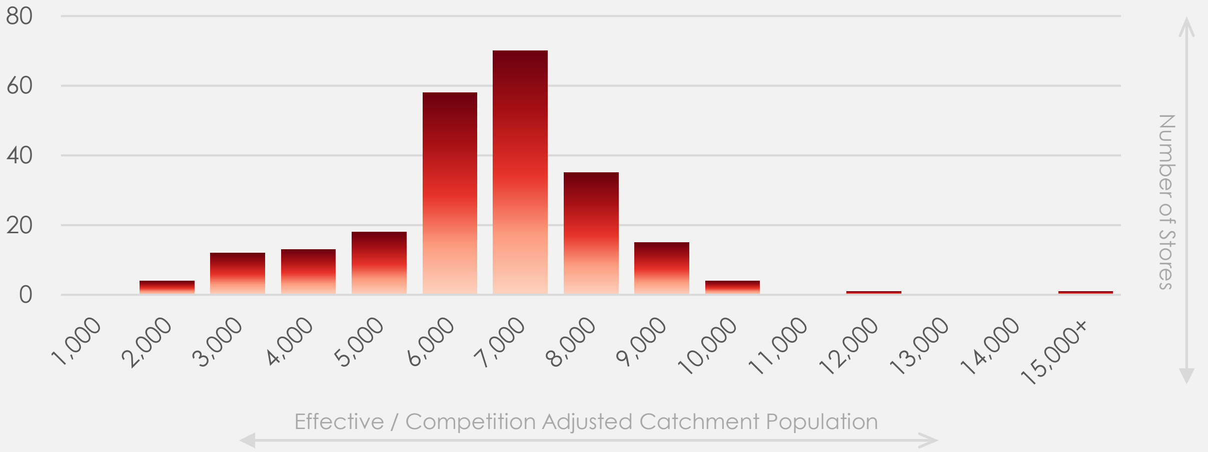
A total of 231 supermarkets were identified in Greater Adelaide. Low variance was observed in the average market composition among the region's SA4 subregions. The effective (competition-adjusted) population per supermarket catchment ranged from an average of 5,612 in the Adelaide - Central and Hills region to 6,630 in Adelaide - North, based on a 3.0 km catchment range.

Compared to other metropolitan regions analysed nationally, the effective population capture within a typical supermarket catchment in Greater Adelaide deviated to a lesser extent (~28.3%) from the average level recorded across all of the region's supermarket locations. This results in the majority of catchment effective population counts falling within the 4,300 to 7,700 range.

As noted in the beginning section, 53 existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

Return to Introduction

Number of Stores By Effective Population Cohort

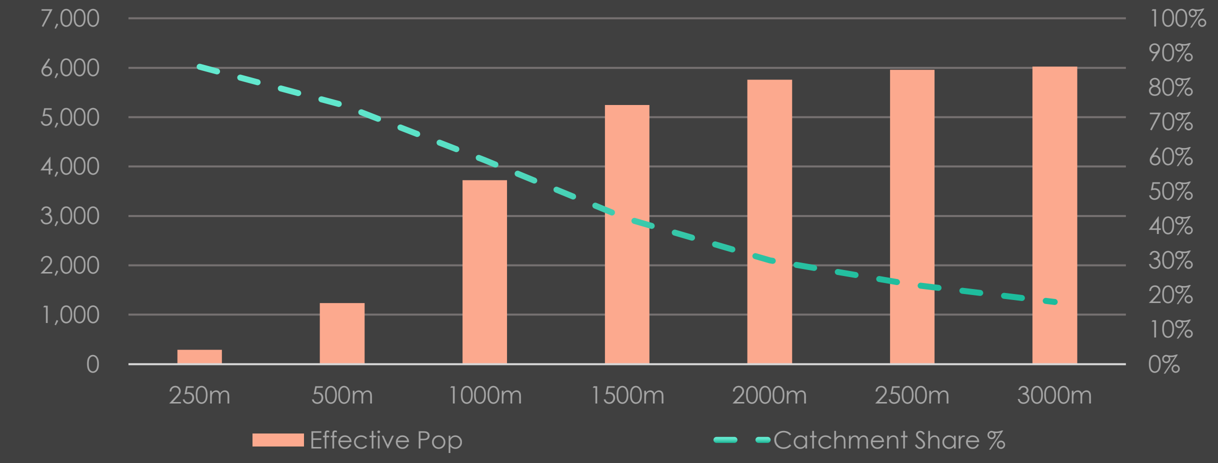


Average 3km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Central and Hills	56	5,710	47,954	8.0	5,612	2,102	1,914
North	68	6,903	43,867	7.0	6,630	1,450	1,481
South	65	5,886	39,787	7.0	5,858	1,446	1,311
West	42	5,970	53,354	10.0	5,856	1,658	1,255

Average Store Catchment Capture

Jump to data



Sources: ABS / AreaSearch

Regional South Australia

Foodland - 37

Woolworths - 20

ALDI - 8

Coles - 8

Other - 10

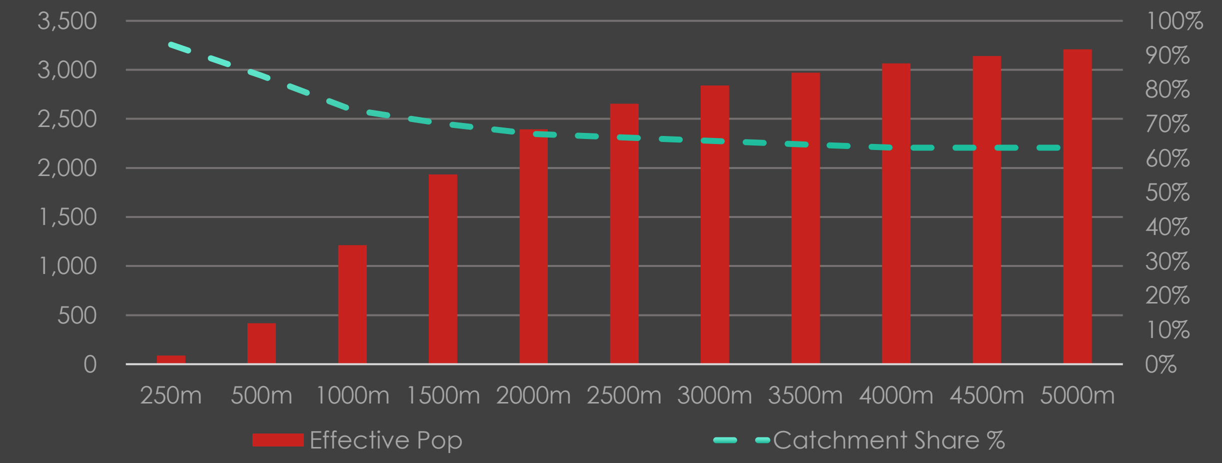
Our latest research has identified a total of 83 supermarkets in Regional SA, revealing noticeable variance in the average market composition among the region's SA4 subregions. The effective (competition adjusted) population per supermarket catchment ranges from an average of 2,529 in the Barossa - Yorke - Mid North region to 3,586 in South Australia - Outback, based on an adopted 5.0 km catchment range. Given the significant distances between supermarket locations in the region, relative remoteness is a crucial factor to consider. Further investigation into typical customer travel trends is likely to provide additional clarity on the performance of specific locations within the region.

Compared to other non-metro regions analysed nationally, the effective population capture within a typical supermarket catchment in Regional SA deviates to a lesser extent (~32.3%) from the average level recorded across all of the region's supermarket locations. This results in the majority of catchment effective population counts falling within the 1,400 to 5,100 range.

As indicated in the initial section, two existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

Average Store Catchment Capture

Jump to data



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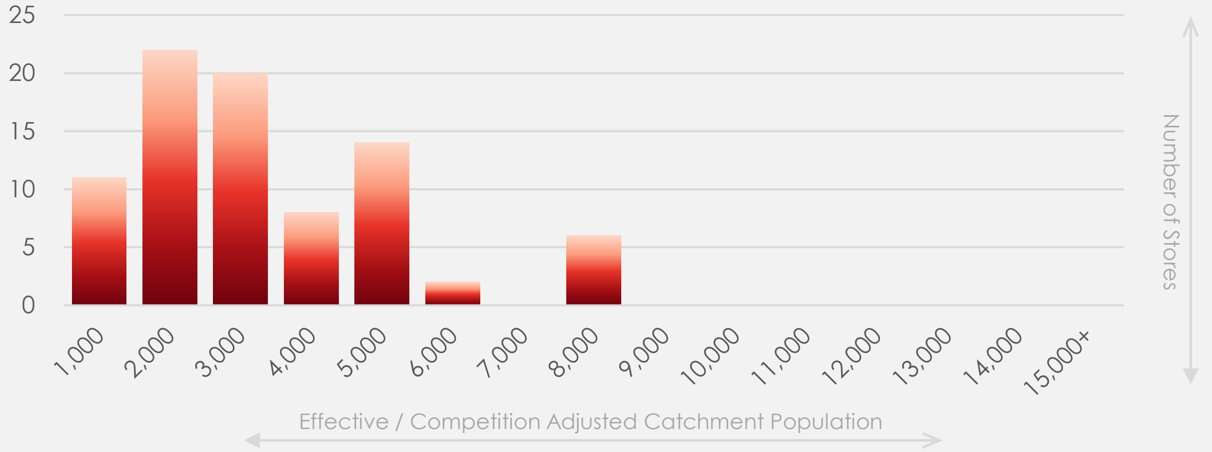
Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 5km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Barossa Yorke - Mid North	25	4,722	4,760	2.0	2,530	1,513	22,815
Outback	17	5,036	10,592	3.0	3,586	2,156	64,187
South East	41	4,880	9,262	2.0	3,468	2,091	22,845

June 2024

Greater Hobart

Woolworths - 16

Coles - 8

IGA - 3

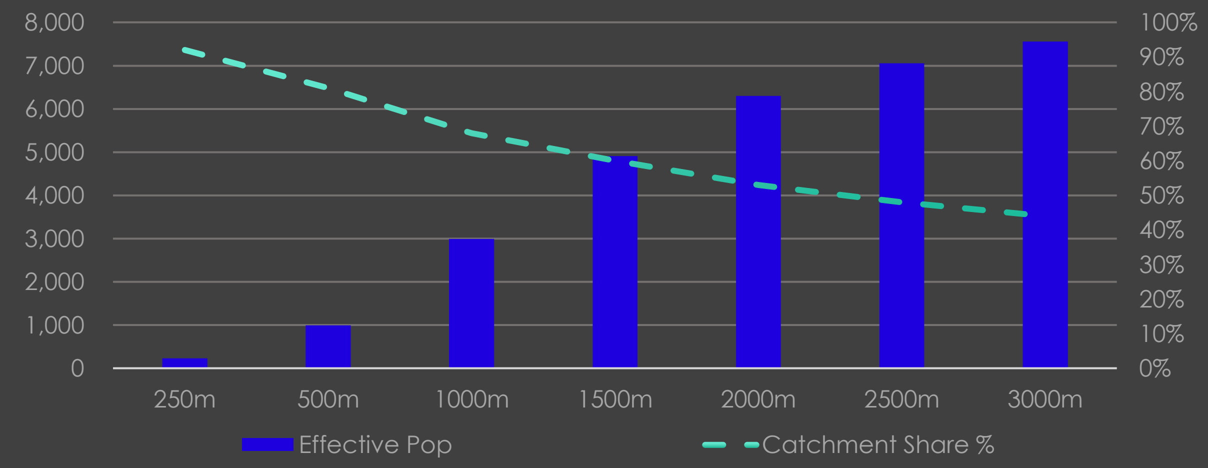
Despite the small relative sample size, a total of 27 supermarkets were identified in Greater Hobart, with significant variance observed in the average market composition among them. The effective (competition-adjusted) population per supermarket catchment ranged from 2,390 to 18,793 within an adopted 3.0 km catchment area.

Compared to other metropolitan regions analysed nationally, the effective population capture within the typical supermarket catchment in Greater Hobart deviated more significantly (~39.5%) from the average level recorded across all its supermarket locations. Most catchment effective population counts fell within the 4,900 to 10,500 range.

As noted at the beginning of the report, one existing centre in the region has potential for expansion, with an effective population count per major brand exceeding that of the region.

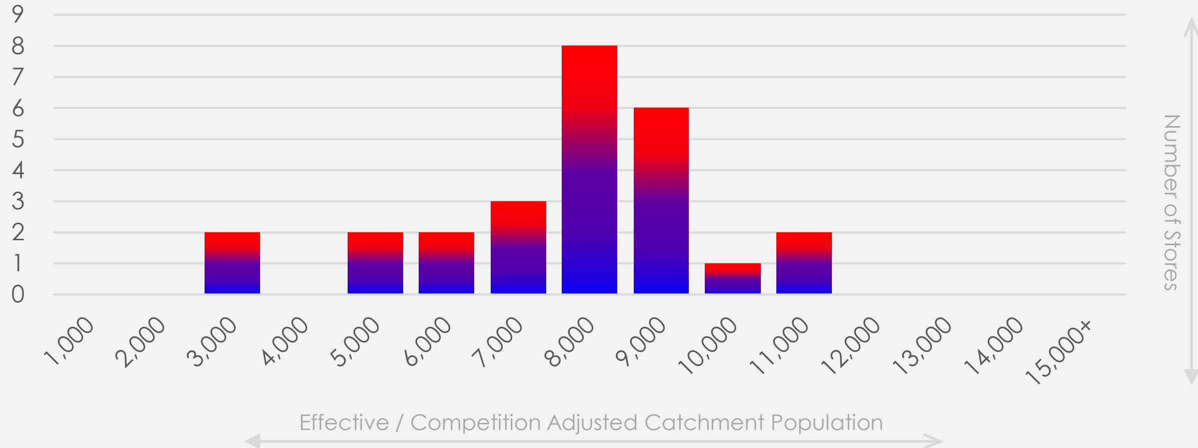
Average Store Catchment Capture

Jump to data



Return to Introduction

Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 3km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Hobart	27	9,391	21,776	3.0	7,557	2,986	3,730

Regional Tasmania

IGA - 31

Woolworths - 16

Coles - 9

Foodworks - 2

A total of 58 supermarkets were identified in Regional Tasmania. Significant variance was observed in the average market composition among the region's SA4 subregions, with the effective (competition-adjusted) population per supermarket catchment ranging from an average of 1,764 in the South East region to 4,236 in Launceston and North East, based on a 5.0km catchment range. The considerable distances between operators suggest that effective catchments may extend beyond the adopted 5.0km range, a factor that should be considered by those seriously evaluating opportunities in the region.

Compared to other non-metro regions analysed nationally, the effective population capture within a typical supermarket catchment in Regional Tasmania deviated to a lesser extent (~23.5%) from the average level recorded across all of the region's supermarket locations. Most catchment effective population counts fell within the 1,900 to 5,700 range.

As indicated in the initial section, one existing centre in the region has potential for expansion, with an effective population count per major brand exceeding the regional average.

Average Store Catchment Capture

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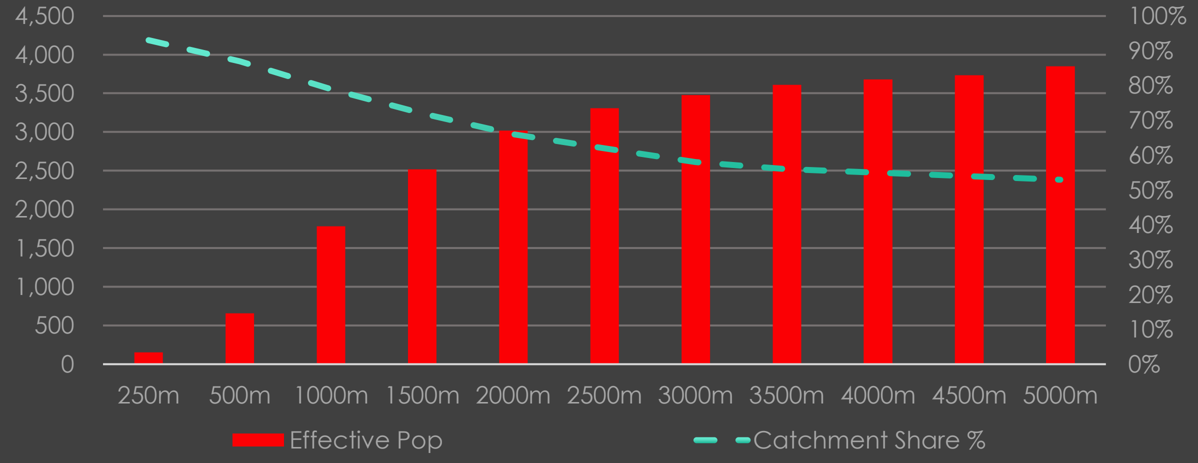
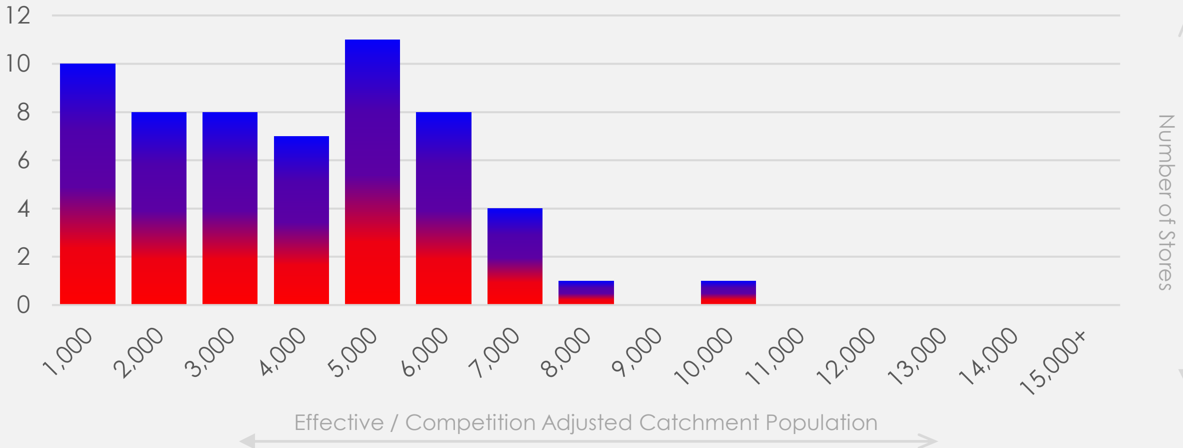


Return to Introduction

Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 5km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Launceston and North East	28	5,581	30,806	7.0	4,236	1,958	12,186
South East	7	6,237	1,765	1.0	1,765	1,620	37,439
West and North West	23	5,218	11,453	3.0	4,015	1,842	20,817

Greater Darwin

While the relatively small sample size should be noted, our latest research has identified a total of 19 supermarkets in Greater Darwin. There is significant variance in the average market composition among them, with an effective (competition-adjusted) population per supermarket catchment ranging from 186 to 12,859 within a 3.0km catchment area.

In comparison to other metropolitan regions analysed nationally, the effective population capture within a typical supermarket catchment in Greater Darwin deviates more significantly (~49.6%) from the average level recorded across all its supermarket locations. The majority of catchment effective population counts fall within the 4,400 to 10,600 range.

As displayed in the initial section, four existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

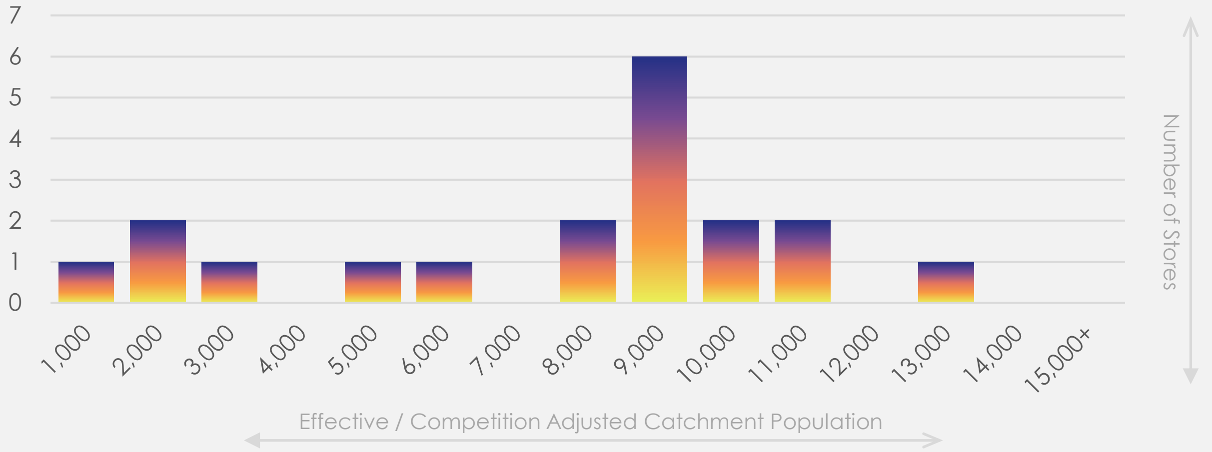
Woolworths - 9

Coles - 7

IGA - 3

Return to Introduction

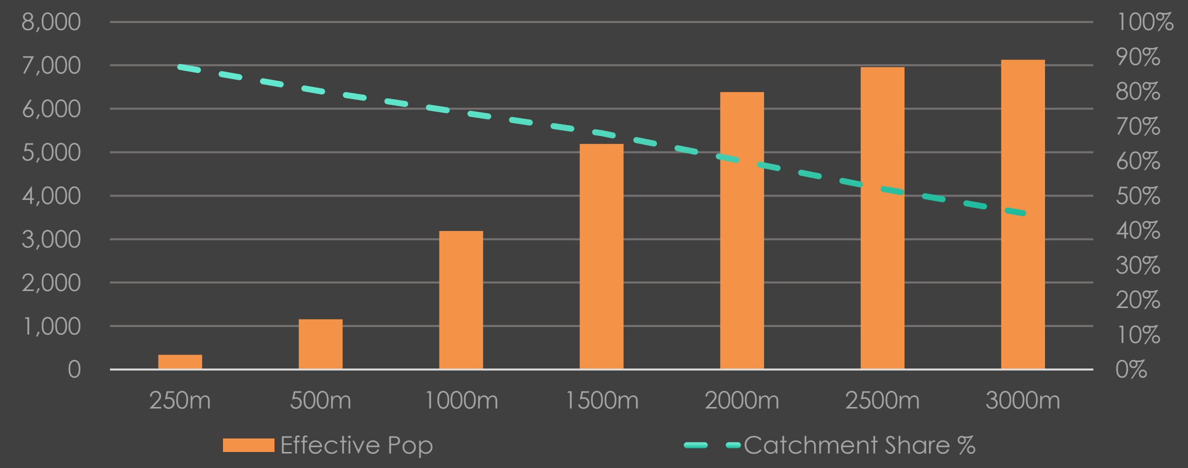
Number of Stores By Effective Population Cohort



	Stores Assessed	Population Per Store	Average 3km Catchment Metrics: Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Darwin	19	7,883	21,233	3.0	7,126	3,531	3,822

Average Store Catchment Capture

Jump to data



Return to Introduction

Regional Northern Territory

IGA - 6

Woolworths - 3

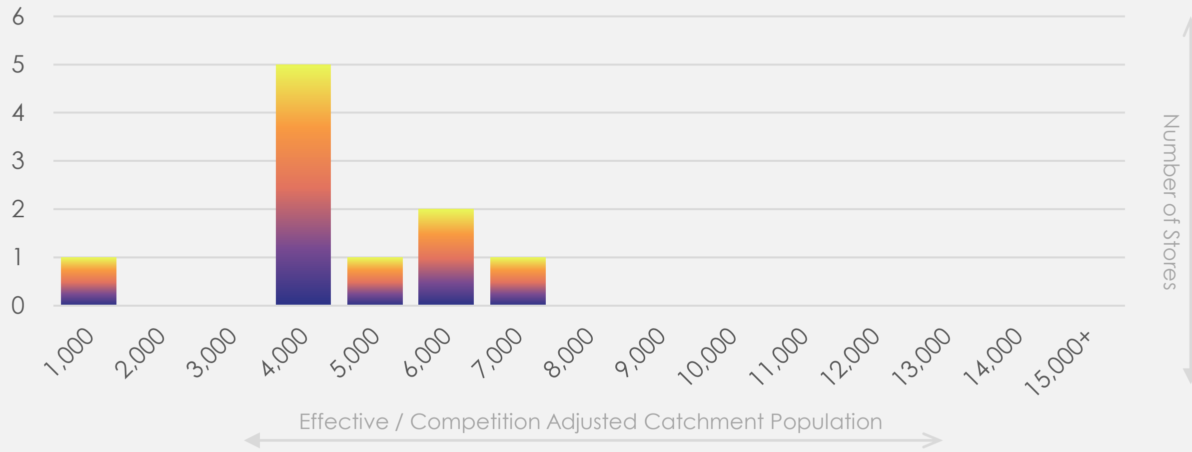
Supabarn - 2

Coles - 1

A total of 12 supermarkets were identified in Regional NT, exhibiting significant variance in average market composition. The effective (competition-adjusted) population per supermarket catchment ranged from 0 to 7,596 within an adopted 5.0km catchment area. It is important to consider the region's remoteness and the relatively small sample size when evaluating these results. Further investigation into factors such as customer travel distance and store size could provide a more comprehensive understanding of each operation's uniqueness.

Compared to other non-metro regions analysed nationally, the effective population capture within a typical supermarket catchment in Regional NT showed a lower deviation (~29.8%) from the average level recorded across all its supermarket locations. Consequently, the majority of catchment effective population counts fall within the 3,500 to 5,100 range.

Number of Stores By Effective Population Cohort

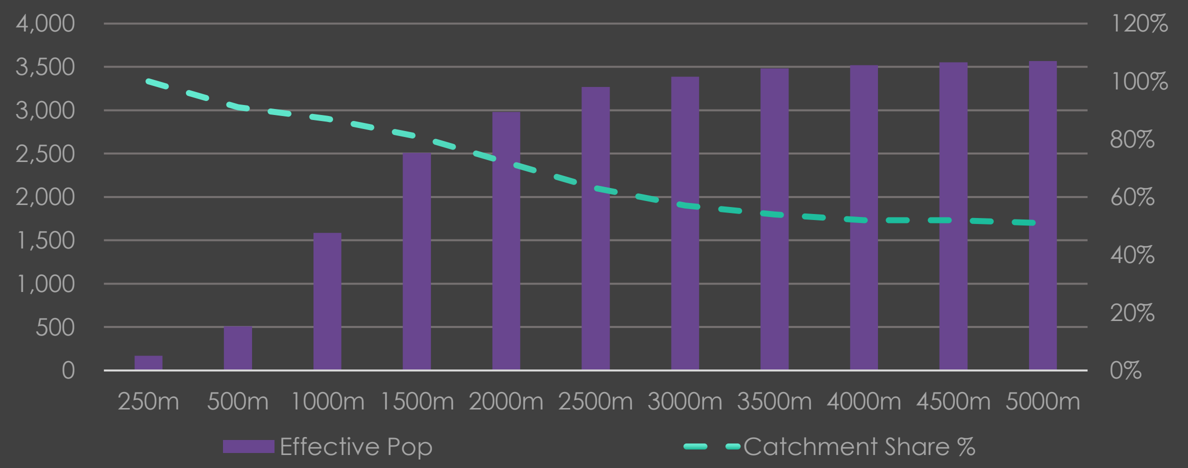


Average 5km Catchment Metrics

	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Outback	12	10,992	13,758	4.0	3,567	2,244	160,964

Average Store Catchment Capture

Jump to data



Sources: ABS / AreaSearch

June 2024

Australian Capital Territory

A total of 82 supermarkets were identified in the Australian Capital Territory, with significant variance observed in the average market composition among them. The effective (competition-adjusted) population per supermarket catchment ranged from 607 to 10,147 within an adopted 3.0 km catchment range.

Compared to other metropolitan regions analysed nationally, the effective population capture within the typical supermarket catchment in the Australian Capital Territory deviated at a fairly standard rate of 32.8% from the average level recorded across all its supermarket locations. Consequently, most catchment effective population counts fell within the 3,900 to 7,500 range.

As noted at the beginning of the report, four existing centres in the region have been identified as having potential for expansion, with an effective population count per major brand exceeding that of the region.

IGA - 22

Woolworths - 20

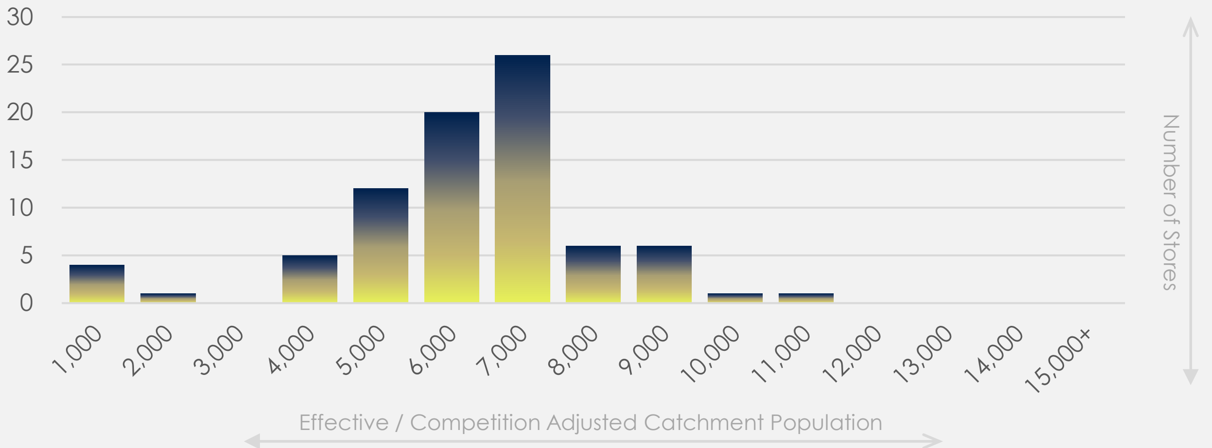
Coles - 13

ALDI - 12

Other - 15

Return to Introduction

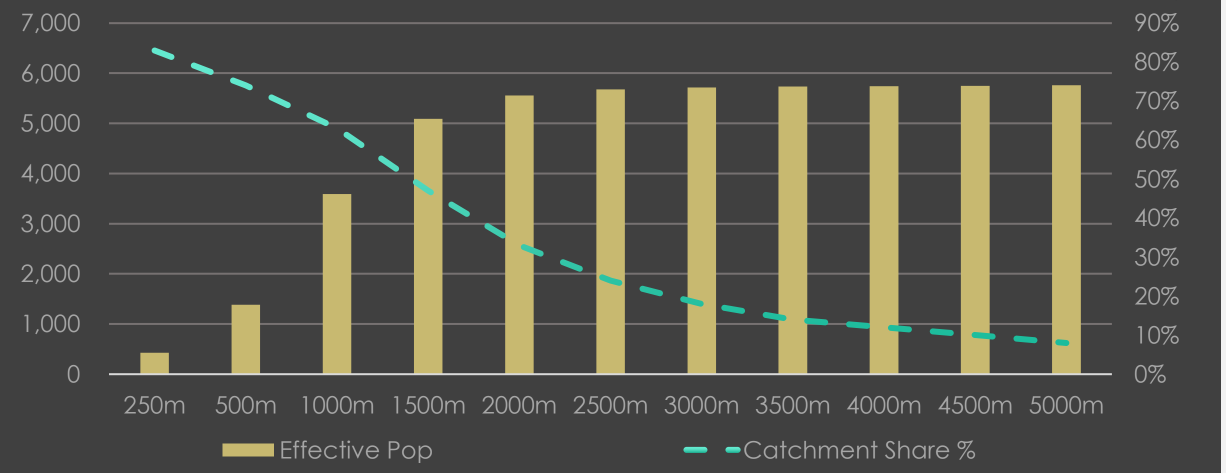
Number of Stores By Effective Population Cohort



			Average 3km Catchment Metrics				
	Stores Assessed	Population Per Store	Population Count	Store Count	Effective Population	Std Deviation	Competition Dist. (m)
Australian Capital Territory	82	5,594	33,240	6.0	5,717	1,874	1,458

Average Store Catchment Capture

Jump to data



Sources: ABS / AreaSearch

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Click for individual brand detail

Brand	Count	Nearest Peer *	Nearest Network *	Nearest to Residents **
Woolworths	1,116	0.31	2.55	1.83
IGA	1,062	1.41	3.86	2.72
Coles	852	0.24	2.9	2.09
ALDI	594	0.18	3.57	2.59
Foodworks	325	1.37	10.72	9.8
Foodland	93	1.59	3.67	909.14
Drakes	67	1.01	4.67	604.77
Harris Farm	28	0.17	4.38	247.08
NQR	26	0.24	9.62	640.53
Supabarn	19	1.04	4.53	399.35
Spudshed	17	0.62	8.69	2979.46
Costco	15	0.8	33.73	25.12
Farmer Jacks	11	1.11	6.29	3039.95
Fresh & Save	7	0.49	28.44	1090.25
Bernardis	4	0.16	63.94	500.41
Leos Fine Food & Wine	4	0.77	4.66	685.88
Blake Family Grocers	2	0.89	37.68	732.49

Here we have sorted the top operators by number of stores in Australia showing total count, distance to other brand locations, network locations, and the distance of the typical resident in the country to the nearest location of each brand (note: this may seem particularly high for certain brands if operating in a limited number of states). Please click the above link for further detail, and for interested users, please reach out if seeking further detail on aggregated supply and demand relativities per brand.

* Median ** Distance of median populated mesh block in Australia to nearest store

Sources: ABS / AreaSearch

Disclaimer

1.1 Whilst AreaSearch have no reason to believe that any information contained in this report is inaccurate, we do not warrant the accuracy, adequacy or completeness of such information, nor do we undertake to keep the included data updated at a particular frequency.
1.2 The data provided within this report stems from third parties and could be sourced directly by yourself. AreaSearch provides convenient access to information and analysis as opposed to raw data.
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Effective Population Per Supermarket

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