

Retail trends in Animal Welfare

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July 2011

Quality food costs less at

The Coles logo is displayed in a white, rounded rectangular box with a subtle drop shadow. The word "coles" is written in a bold, lowercase, sans-serif font, with the letters in a vibrant red color. The logo is positioned on the right side of a horizontal red bar that spans the width of the slide.

coles

Setting the scene.....



- Over 738 stores nationwide
- Employs 98,000 team members
- 40,000 individual lines for sale
- 13m customers a week
- Sales more than \$430m a week
- World's fastest growing retailer
- Second most recognised brand in Australia

Coles Circle of Success...

Our goal:

“To give people of Australia a shop they trust, delivering quality, service and value”



“Putting the customers at the heart of everything we do”



Introducing our new **coles GRILL™** BBQ range... Free New

Try our new BBQ **GRILL™** pre-marinated meat range with mouth watering flavours for a delicious BBQ experience at a great price.

So tempt your guests with flavours such as...

Quality food costs less at **coles**

feed your family

Easter Feast

Quality food costs less at **coles**



Reasons for choosing private label brands



New statement list in Mar '11

All measures are by association

Base: Shoppers who shopped at the respective supermarkets in last 4 weeks

Source: Data from Nielsen Market Tracker, March 2011

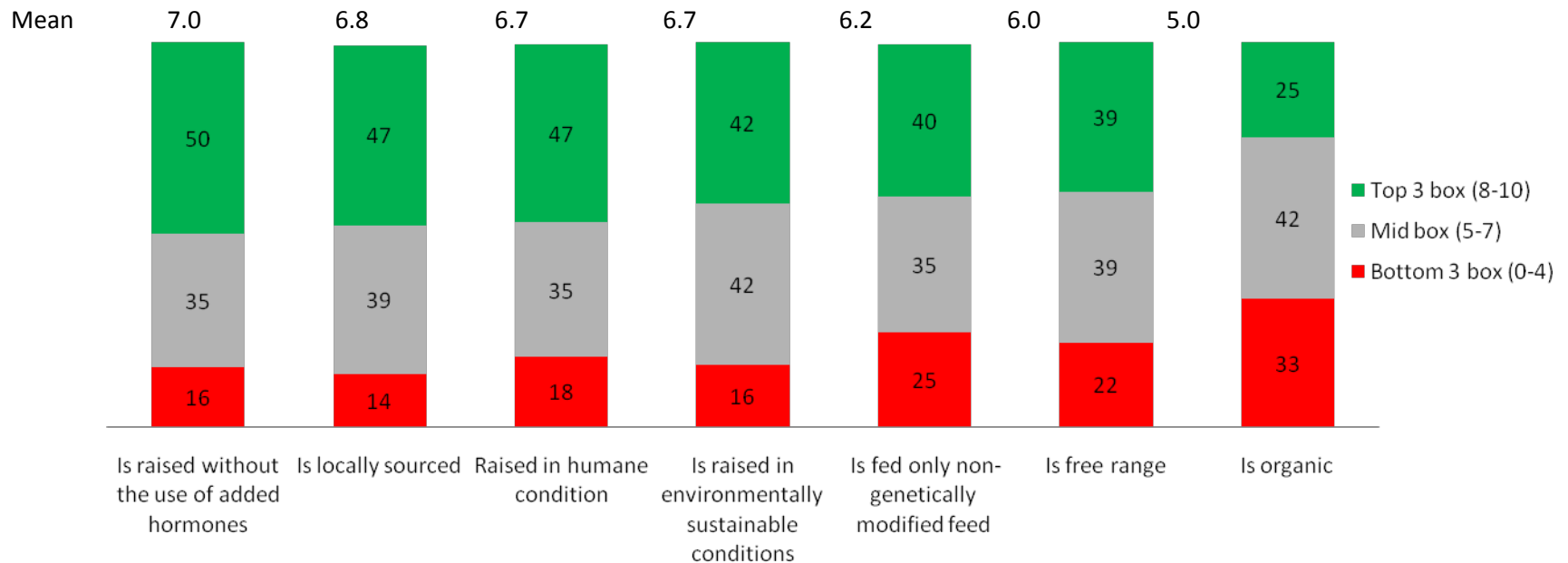
**Denotes Coles significantly different to Ww*

Customer hierarchy



What do Coles' customers say?

Average Importance of Attributes in Buying Meat



See appendix for individual products

Source: Coles Market Track, November 2010

Base: MGBs allocated to meat sections (n=455)

Q: Using the scale below, how important is to you personally that you buy <beef / pork / chicken - based on assigned product> that ...



Coles delivers on a sow stall ban



Some like it - some don't



No. 448 | 05 July 2011

PUBLISHED ARTICLE

Pig welfare: A contentious issue for Australia's farmers

What have animal rights groups, state government politics and a battle for market supremacy



between two giant retail chains got to do with the issue of welfare in the Australian pig industry? Far too much, would probably be the answer if you asked a typical Australian pig farmer. [Read more...](#)

**Animals
Australia**
the voice for animals



Cage Free Eggs


MEDIA MONITORS


back

- By 2013
- Barn, RSPCA Barn and Free Range
- Coles' unique Standard
- Independently audited.



Sydney Morning Herald
18-Nov-2010

Page: 6

Edition Changes - 4th Edition

Market: Sydney

Circulation: 211066

Type: Capital City Daily

Size: 20.77 sq.cms

MTWTFS-

Coles good egg

Coles is cutting its store brand free-range egg prices by 18 per cent to persuade customers to switch from caged eggs. The supermarket's surveys showed 95 per cent of its customers would switch to free-range if the price was lower. Coles also has announced it will phase out its own brand of caged eggs by 2013. The Free Range Farmers Association said the move was not surprising because demand for free-range eggs had been rising.

Higher Welfare Poultry

- Free range turkey - Christmas 2009
- Bendigo Valley chicken
- Lilydale Free Range
- What's next?



The Global Stage

Cow Cam



Live from Asda's

Cow cam shows the milking parlour at Barony College in Lockerbie which produces milk for our Scottish stores. It includes an automated milking machine which enables the cows to decide when they want to be milked and not the farmer!



Enter the code found on your egg below:



Leckford Farm



Step 1 No crates, no cages	Step 2 Enriched environment	Step 3 Enhanced outdoor access	Step 4 Pasture centered	Step 5 Animal centered; all physical alterations prohibited	Step 5+ Animal centered; entire life on same farm
Animals live their lives with space to move around and stretch their legs.	Animals are provided with enrichments that encourage behavior that's natural to them – like a bale of straw for chickens to peck at, a bowling ball for pigs to shove around, or a sturdy object for cattle to rub against.	Pigs and chickens might live in buildings but they all – yes, each and every one of them – have access to outdoor areas.	When living outdoors, chickens get to forage, pigs get to wallow and cattle get to roam.	Animals get to live their whole lives with all the body parts they were born with.	Animals raised to Step 5+ standards must be born and live their entire lives on one farm.



It's all about trust

- Credible multi stakeholder standards
- Science and consumer
- Independent audit
- Competent auditors
- Transparent results



Thank you

Q & A

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coles