



Our ref: 61057

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**Dear Interested Party** 

# Request for submissions: BP - proposed acquisition of Woolworths' retail service station sites (local market issues)

The Australian Competition and Consumer Commission (ACCC) is seeking your views on the proposed acquisition of Woolworths Limited's (Woolworths) network of retail service station sites by BP Australia Pty Ltd (BP) (the proposed acquisition).

Further details regarding the proposed acquisition can be found in the Statement of Issues published by the ACCC on 10 August 2017, available <a href="here">here</a>.

As explained in the Statement of Issues, the ACCC has expressed preliminary concerns that the proposed acquisition may substantially lessen competition in local retail fuel markets surrounding some of the Woolworths sites that BP proposes to acquire.

These local market issues sit alongside competition issues related to broader metropolitanwide retail fuel markets, which the ACCC is continuing to investigate.

The purpose of this supplementary market inquiries letter is to seek comments on a preliminary screen of local markets. We are seeking comments from industry participants on specific local markets where the overlap between BP and Woolworths may raise local competition concerns.

BP proposes to acquire 531 existing sites from Woolworths, and 14 sites under development. The preliminary screening aims to identify which of those sites require further analysis. The screening criteria are designed to that end and should <u>not</u> be interpreted as criteria for determining whether a substantial lessening of competition is, in fact, likely to arise in a particular local market.

It is also important to recognise, as noted above, that the ACCC is also separately considering competition issues in broader metropolitan-wide markets.

Discussion of the ACCC's local market screening methodology and results are set out in **Attachment A**.

This matter is public and you can forward this letter to anybody who may be interested.

The legal test which the ACCC applies in considering the proposed acquisition is in section 50 of the *Competition and Consumer Act 2010*. Section 50 prohibits acquisitions that are likely to have the effect of substantially lessening competition in a market.

Please provide your response by no later than <u>28 September 2017</u>. Responses may be emailed to <u>BP-Woolworths-Petrol@accc.gov.au</u> with the title: Submission re: BP - proposed acquisition of Woolworths' retail service station sites - attention Mandy Bendelstein. If you would like to arrange a time to discuss the matter with ACCC officers, or have any questions about this letter, please contact Mandy Bendelstein on 02 9230 3890 or Alistair Beasley on 02 9230 3887.

Updates regarding the ACCC's investigation will be available on the ACCC's Public Mergers Register at (ACCC mergers register).

## Confidentiality of submissions

The ACCC will not publish submissions regarding the proposed acquisition. We will not disclose submissions to third parties (except our advisors/consultants) unless compelled by law (for example, under freedom of information legislation or during court proceedings) or in accordance with s155AAA of the *Competition and Consumer Act 2010*. Where the ACCC is required to disclose confidential information, the ACCC will notify you in advance where possible so that you may have an opportunity to be heard. Therefore, if the information provided to the ACCC is of a confidential nature, please indicate as such. Our <a href="Informal Merger Review Process Guidelines">Informal Merger Review Process Guidelines</a> contain more information on confidentiality.

Yours sincerely

Tom Leuner General Manager Merger Investigations

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#### Attachment A

The table in this attachment sets out a preliminary screening of local markets where the ACCC seeks further comment from industry participants.

This initial screening does *not* reflect detailed analysis of critical issues that are relevant to local market competition issues, such as:

- the closeness of competition between the BP and Woolworths sites;
- traffic flows;
- topography;
- the volumes sold at each site; and
- the degree to which the other sites compete with BP and/or Woolworths.

A more detailed analysis will be undertaken on sites identified by the initial screening as requiring further assessment, taking into consideration feedback the ACCC receives from industry participants.

In constructing this preliminary list of local markets the ACCC has taken considerable care to ensure its accuracy. This includes information requests to retailers, checks of existing site lists and data, and the use of the ACCC's compulsory information gathering powers. Nonetheless, given the large number of sites involved the list is subject to a number of assumptions and is likely to contain some inaccuracies. The ACCC also understands that in some instances sites may have opened, closed or changed hands since the ACCC obtained information about them.

The ACCC also wishes to emphasise that the list is *not* a list of local markets where the ACCC will have competition concerns. The list only reflects an initial and approximate screening methodology.

## Treatment of BP Resellers

BP supplies fuel to Australian consumers both directly through retail sites owned and operated by BP (**BP COCO**) and indirectly through a network of sites owned and operated by third-party resellers (**BP Resellers**), who set their own retail fuel prices.

Because BP operates both a retail and wholesale business, the nature of the competition between BP COCO and BP Reseller sites may be different to competition between competitors where this relationship does not exist.

The ACCC is yet to reach a concluded view on how BP Resellers should be treated for the purpose of its competition analysis. The ACCC has therefore considered two different approaches for the purpose of this screening:

- The column labelled "Primary screen: by site operator" shows the results of a screening which considers BP Resellers as separate competitors to BP COCO sites.
- The column labelled "Secondary screen: BP branded sites" shows the results of the screening analysis where both BP COCO sites and BP Resellers are aggregated for the purpose of calculating market shares.

The list attached does not include sites where a current Woolworths site may be within the local area of a BP Reseller, but not a BP COCO site. However, the ACCC welcomes submissions on such local areas where industry participants may have concerns.

#### Criteria

## Market radius

The ACCC has considered different areas around each Woolworths site depending on whether that Woolworths site is located in a metropolitan or regional area. This is because the area of close competition between sites is likely to be larger in regional areas than in metropolitan areas.<sup>1</sup>

- For each metropolitan site we have considered a 3km radius around the site (metropolitan includes major regional cities/towns).
- For each regional site we have considered a radius of 10km around the site.

The ACCC has taken this approach for the purposes of this market screening, and does not consider that the boundaries of local markets will be the same in each metropolitan market, and in each regional market. Every market has different competitive dynamics, and accordingly the market boundaries will differ in every case.

### Market concentration

Because the purpose of this document is to set out a preliminary screening only, the ACCC has considered local areas where the BP and Woolworths' combined share of sites would exceed 25%, or where there would be less than three remaining third-party retailers (i.e. not counting BP) in the local area post-acquisition. These thresholds should not be interpreted as levels above which competition concerns are likely to arise. There are likely to be many sites in the list where no competition concerns are likely to arise.

Further, there may be sites that do not reach these thresholds where there could still be competition concerns (for example, if a BP site and Woolworths site in a regional area were immediate neighbours, and there were many competing sites 9 kms away, this is a situation where there may be competition concerns, but the initial screening thresholds are not breached).

When calculating the number of remaining competitors within the local markets post-acquisition, the ACCC treats multiple sites owned by a single player as a single competitor. However, when calculating the market share columns, each individual site is given equal weighting. The ACCC has often had to treat some independent sites as if they are controlled by a single entity, as information regarding ownership of independent sites is limited in some circumstances. When a more detailed analysis is undertaken on each local market, the ACCC will investigate ownership of the local sites in the relevant local markets more carefully where relevant.

The ACCC's view on each local market will evolve as further analysis is undertaken.

<sup>&</sup>lt;sup>1</sup> For the purposes of this analysis, the ACCC defines metropolitan areas as those postcodes to which Australia Post guarantees Express Post next day delivery.

**Table 1: Results of ACCC screening analysis** 

Note: Where the criteria is met for the 'Secondary screen: BP branded sites' columns, but not under the 'primary screen by site operator' columns, these columns contain a '-'.

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
1	Woolworths Whitfords	Hillarys	Whitford Shopping Centre, 470 Marmion Ave	6025	WA	Metro	67%	1	100%	0
2	Woolworths Craigieburn Highlands	Craigieburn	300-332 Grand Boulevard (Cnr Huntington Drive)	3064	VIC	Metro	67%	1	100%	0
3	Woolworths Epsom	Epsom	16-40 Howard St	3550	VIC	Metro	67%	1	100%	0
4	Woolworths Colac	Colac	2 Bromfield St & Corangamite St	3250	VIC	Regional	50%	2	75%	1
5	Woolworths Currambine	Currambine	1244 Marmion Avenue	6028	WA	Metro	71%	2	71%	2
6	Woolworths Morley	Morley	60 Russell St (cnr Walter Rd)	6062	WA	Metro	56%	4	67%	3
7	Woolworths Lansell Plaza	Kangaroo Flat	267-283 High St	3555	VIC	Metro	67%	1	67%	1
8	Woolworths Nambucca Heads	Nambucca Heads	115 Mann St (Cnr Bent St)	2448	NSW	Regional	67%	1	67%	1
9	Woolworths Torquay North	Torquay North	Cnr Fischer St and Merrijig Drive	3228	VIC	Regional	50%	3	67%	2
10	Woolworths Miami (Falcon)	Falcon	Lot 506, No 651- 669 Old Coast Rd	6210	WA	Regional	60%	2	60%	2

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post- acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
11	Woolworths Warnbro	Warnbro	Cnr Warnbro Sound Avenue and Palm Springs Boulevard	6169	WA	Metro	40%	3	60%	2
12	Woolworths Browns Plains West	Hillcrest	92 Johnson Rd	4118	QLD	Metro	40%	4	60%	3
13	Woolworths Canberra Gateway	Lyneham	661 Northbourne Avenue	2602	ACT	Metro	60%	2	60%	2
14	Woolworths Parkes	Parkes	Cnr Currajong and Bushman Streets	2870	NSW	Regional	60%	2	60%	2
15	Woolworths Warrnambool	Warrnambool	763 Raglan Parade	3280	VIC	Regional	-	-	58%	3
16	Woolworths Braeside	Braeside	122-134 Boundary Rd	3195	VIC	Metro	43%	4	57%	3
17	Woolworths Joondalup	Joondalup	189 Winton Rd	6027	WA	Metro	44%	5	56%	4
18	Woolworths Innisfail	Innisfail	161 Edith St (Bruce Highway) (Cnr Glady St)	4860	QLD	Regional	44%	5	56%	4
19	Woolworths Mitchelton	Mitchelton	550 Samford Rd	4053	QLD	Metro	56%	3	56%	3
20	Woolworths Port Kennedy	Port Kennedy	12 Saltaire Way	6172	WA	Regional	33%	4	53%	3
21	Woolworths Kingston	Kingston	Maranoa Rd	7050	TAS	Metro	50%	2	50%	2
22	Woolworths Huonville	Huonville	45 Main Rd	7109	TAS	Regional	50%	1	50%	1

							Primary screen	by site operator	_	een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
23	Woolworths Dianella	Dianella	Dianella S./Centre, 372 Grand Promenade	6059	WA	Metro	40%	5	50%	4
24	Woolworths Floreat	Floreat	Floreat Forum S/Centre, The Boulevarde	6014	WA	Metro	50%	1	50%	1
25	Woolworths Beckenham	Beckenham	63 William St	6107	WA	Metro	50%	3	50%	3
26	Woolworths Emerald	Emerald	Cnr Hospital Rd and Scant St	4720	QLD	Regional	38%	5	50%	4
27	Woolworths Highfields	Highfields	Cnr Lauder Drive and Balmoral St	4352	QLD	Regional	50%	2	50%	2
28	Woolworths Emerald East	Emerald	6-10 Codenwarra Rd	4720	QLD	Regional	38%	5	50%	4
29	Woolworths Roma	Roma	20 Bowen St (Cnr of Gregory St)	4455	QLD	Regional	33%	4	50%	3
30	Woolworths Keperra	Keperra	577 Settlement Rd	4054	QLD	Metro	50%	3	50%	3
31	Woolworths Blackwater	Blackwater	48-50 Railway St	4717	QLD	Regional	50%	2	50%	2
32	Woolworths Melton Gateway	Melton	66-84 High St (cnr Melton Hwy)	3337	VIC	Metro	50%	2	50%	2
33	Woolworths Rye	Rye	2479-2481 Point Nepean Rd	3941	VIC	Regional	50%	4	50%	4
34	Woolworths Noble Park	Noble Park	Cnr Chandler St and Heatherton St	3174	VIC	Metro	30%	5	50%	4

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
35	Woolworths Kyabram	Kyabram	70-72 Union St	3620	VIC	Regional	50%	2	50%	2
36	Woolworths Drysdale	Drysdale	110-112 High St	3222	VIC	Regional	50%	2	50%	2
37	Woolworths Pakenham	Pakenham	53 Main St	3810	VIC	Metro	30%	5	50%	4
38	Woolworths Rosebud Central	Rosebud	Cnr Point Nepean 1-3 Fourth Avenue	3939	VIC	Regional	40%	5	50%	4
39	Woolworths Wellington	Wellington	79 Lee St	2820	NSW	Regional	50%	2	50%	2
40	Woolworths Singleton	Singleton	Cnr Ryan Avenue and Burn Lane	2330	NSW	Regional	38%	5	50%	4
41	Woolworths Newington	Newington	1 Avenue of the Americas	2127	NSW	Metro	33%	5	50%	4
42	Woolworths Dickson	Dickson	Cnr Cape and Woolley St	2602	ACT	Metro	50%	3	50%	3
43	Woolworths Mawson	Mawson	15 Mawson Place	2607	ACT	Metro	50%	2	50%	2
44	Woolworths Kellyville	Kellyville	Cnr Windsor Rd and Meriville Rd	2155	NSW	Metro	50%	2	50%	2
45	Woolworths Silverwater (development site)	Silverwater	154 Silverwater Rd	2128	NSW	Metro	36%	7	50%	6
46	Woolworths Victoria Point	Victoria Point	480-490 Cleveland Redland Bay Rd	4165	QLD	Regional	-	-	47%	4

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post- acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
47	Woolworths Greenbank	Greenbank	235 Treviot Rd (Cnr Pub Lane)	4124	QLD	Regional	33%	5	47%	4
48	Woolworths Enoggera	Enoggera	6 Browns Dip Rd ( Cnr Wardell St)	4051	QLD	Metro	31%	5	46%	4
49	Woolworths Karingal	Karingal	Cnr Cranbourne Rd and Karingal Drive	3199	VIC	Metro	31%	6	46%	5
50	Woolworths Blackburn North	Blackburn North	5-15 Blackburn Rd	3108	VIC	Metro	31%	5	46%	4
51	Woolworths Karratha	Karratha	15 Warambie Rd (cnr Macroy Rd)	6714	WA	Regional	-	-	45%	5
52	Woolworths Browns Plains	Browns Plains	27 Browns Plains Rd	4118	QLD	Metro	27%	4	45%	3
53	Woolworths Alexandra Hills	Alexandra Hills	Cambridge Dr	4161	QLD	Metro	36%	6	45%	5
54	Woolworths Rosebud West	Rosebud West	4-10 Boneo Rd	3939	VIC	Regional	36%	6	45%	5
55	Woolworths Spring Farm	Spring Farm	254A Richardson Rd	2570	NSW	Regional	35%	5	45%	4
56	Woolworths Port Hedland	Port Hedland	150 Anderson St	6721	WA	Regional	33%	4	44%	3
57	Woolworths South Lake	South Lake	752 North Lake Rd	6164	WA	Metro	-	-	44%	3
58	Woolworths Horsham	Horsham	113-115 Wilson St	3400	VIC	Regional	33%	4	44%	3
59	Woolworths Woodlands	Deeragun	Cnr Rangeview St and Bruce Hwy	4818	QLD	Regional	38%	5	44%	4

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
60	Woolworths Chipping Norton (development site)	Chipping Norton	147 Newbridge Rd	2170	NSW	Metro	31%	6	44%	5
61	Woolworths Birkdale	Birkdale	118 Birkdale Rd	4159	QLD	Metro	43%	3	43%	3
62	Woolworths Forbes	Forbes	26 Dowling St, (Cnr Newell Hwy)	2871	NSW	Regional	29%	4	43%	3
63	Woolworths Erindale	Erindale	Cnr McBryde Cres and Denigan St	2903	ACT	Metro	43%	3	43%	3
64	Woolworths Cowra	Cowra	13 Railway Lane	2794	NSW	Regional	43%	4	43%	4
65	Woolworths Blair Athol (Liberty)	Blair Athol	355 Prospect Rd	5084	SA	Metro	-	-	42%	5
66	Woolworths Canning Vale	Canning Vale	Cnr Armherst Rd and Nicholsons Rd	6155	WA	Metro	33%	4	42%	3
67	Woolworths Burwood East	Burwood East	50 Middleborough Rd	3151	VIC	Metro	-	-	42%	5
68	Woolworths Chatswood East	Chatswood	364-366 Eastern Valley Way	2067	NSW	Metro	-	-	42%	5
69	Woolworths Moorebank	Moorebank	Cnr Dredge and Stockton Avenue	2170	NSW	Metro	29%	6	41%	5
70	Woolworths Queanbeyan	Queanbeyan	196 Crawford St	2620	NSW	Regional	-	-	41%	8
71	Woolworths Northam	Northam	86 Wellington St	6401	WA	Regional	40%	3	40%	3

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post- acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
72	Woolworths Ooralea	Ooralea	Cnr Canecutters Rd and Boundary Rd	4740	QLD	Regional	-	-	40%	6
73	Woolworths Underwood	Underwood	3215 Logan Rd, (Cnr Beenleigh Rd)	4119	QLD	Metro	-	-	40%	5
74	Woolworths Currimundi	Currimundi	Bellara Drive (Cnr Nicklin Way)	4551	QLD	Regional	28%	6	40%	5
75	Woolworths Laverton North	Laverton North	4 Leakes Rd	3026	VIC	Metro	40%	3	40%	3
76	Woolworths Glen Waverley	Glen Waverley	Cnr Rose Av and High St Rd	3150	VIC	Metro	-	-	40%	4
77	Woolworths Eastland (Ringwood)	Ringwood	Eastland Shopping Centre, 379 Maroondah Hwy	3134	VIC	Metro	30%	5	40%	4
78	Woolworths St Helena	Diamond Creek	307 Diamond Creek Rd	3088	VIC	Metro	40%	3	40%	3
79	Woolworths Doncaster East	Doncaster East	987 Doncaster Rd	3109	VIC	Metro	30%	5	40%	4
80	Woolworths Melton	Melton	Cnr Coburns Rd and High St	3337	VIC	Metro	40%	2	40%	2
81	Woolworths Newport	Newport	348 Barrenjoey Rd	2106	NSW	Metro	40%	2	40%	2
82	Woolworths Ballina	Ballina	44 Pacific Highway (cnr Kerr St and Bangalow Cres)	2478	NSW	Regional	30%	4	40%	3
83	Woolworths Werrington	Werrington	574 Great Western Hwy	2747	NSW	Metro	-	-	40%	5

							Primary screen	by site operator	_	een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post- acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
84	Woolworths Dural	Dural	532 Old Northern Rd (cnr Kenthurst Rd)	2158	NSW	Metro	40%	3	40%	3
85	Woolworths Glenmore Park	Glenmore Park	Cnr Glenmore Parkway and Main St	2745	NSW	Metro	40%	2	40%	2
86	Woolworths Campbelltown	Campbelltown	48 Blaxland Rd	2560	NSW	Metro	40%	4	40%	4
87	Woolworths Plumpton	Plumpton	Plumpton Market Place, Jersey Rd	2761	NSW	Metro	40%	2	40%	2
88	Woolworths Hume	Hume	94-96 Sheppard St (Cnr Monaro Hwy)	2620	ACT	Regional	29%	8	40%	7
89	Woolworths Belconnen	Belconnen	4 Luxton St (Cnr Coulter St)	2617	ACT	Metro	40%	1	40%	1
90	Woolworths Coomera West (development site)	Coomera West	1-41 Days Rd	4209	QLD	Regional	32%	7	39%	6
91	Woolworths Mt Cotton	Capalaba	420-426 Mt Cotton Rd	4157	QLD	Regional	27%	6	39%	5
92	Woolworths Grafton	Grafton	75-77 Fitzroy	2460	NSW	Regional	-	-	38%	5
93	Woolworths Campbelltown Mall	Campbelltown Mall	90-94 Queen St (Cnr Broughton St)	2560	NSW	Metro	31%	6	38%	5
94	Woolworths Caloundra	Caloundra	37 Caloundra Rd (Cnr Browyn St)	4551	QLD	Regional	-	-	38%	5

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
95	Woolworths Hermit Park	Hermit Park	Cnr Charters Towers Rd & Ahearne Street	4812	QLD	Regional	28%	8	38%	7
96	Woolworths Capalaba	Capalaba	2948 Old Cleveland Road	4157	QLD	Metro	38%	4	38%	4
97	Woolworths Charters Towers	Charters Towers	111 Gill Street (Cnr Church St)	4820	QLD	Regional	25%	4	38%	3
98	Woolworths Swan Hill	Swan Hill	108-112 Beveridge Street	3585	VIC	Regional	25%	4	38%	3
99	Woolworths Waurn Ponds	Waurn Ponds	173-199 Pioneer Road, Grovedale	3216	VIC	Metro	38%	4	38%	4
100	Woolworths Forest Hill	Forest Hill	Cnr Glebe St and Loomes St	3131	VIC	Metro	-	-	38%	4
101	Woolworths Wangaratta	Wangaratta	73 Tone Rd	3677	VIC	Regional	38%	3	38%	3
102	Woolworths Byron Bay	Byron Bay	76-78 Shirley St	2481	NSW	Regional	25%	5	38%	4
103	Woolworths Seven Hills	Seven Hills	240 Prospect Highway	2147	NSW	Metro	25%	7	38%	6
104	Woolworths Emu Plains	Emu Plains	283 Great Western Hwy (cnr Russell St)	2750	NSW	Metro	38%	2	38%	2
105	Woolworths Narrabeen North	Narrabeen North	1412-1414 Pittwater Rd	2101	NSW	Metro	38%	3	38%	3
106	Woolworths Coomera East (development site)	Coomera	Foxwell Rd	4209	Qld	Regional	28%	7	38%	6

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post- acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
107	Woolworths Castletown	Pimlico	35 Kings Road	4812	QLD	Regional	27%	8	37%	7
108	Woolworths Legana	Legana	Legana Grove	7277	TAS	Regional	36%	4	36%	4
109	Woolworths Treendale	Treendale	Lot 23 Grand Entrance (cnr The Promenade)	6233	WA	Regional	27%	6	36%	5
110	Woolworths Murarrie	Murarrie	225 Wynnum Rd	4172	QLD	Metro	-	-	36%	4
111	Woolworths Eagle Vale	Eagle Vale	Eagle Vale Drive	2558	NSW	Metro	36%	5	36%	5
112	Woolworths Nathan Plaza (Aitkenvale)	Aitkenvale	240 Ross River Rd	4814	QLD	Regional	26%	8	36%	7
113	Woolworths Warragul	Warragul	53 Smith St	3820	VIC	Regional	-	-	36%	5
114	Woolworths Marayong	Kings Park	Vardys Rd	2148	NSW	Metro	-	-	36%	4
115	Woolworths Seven Hills North	Seven Hills	1/155 Prospect Highway	2147	NSW	Metro	-	-	36%	4
116	Woolworths Kawana Waters	Kawana Waters	196-198 Nicklin Way, Warana	4575	QLD	Regional	26%	7	35%	6
117	Woolworths Mountain Creek	Mountain Creek	Karawatha Drive (Cnr Golf Links Rd)	4557	QLD	Regional	26%	8	35%	7
118	Woolworths Eaton Fair	Eaton	Eaton Fair Shopping Centre, Lot 7 Eaton and Recreation Drives	6232	WA	Regional	-	-	35%	7

							Primary screen	by site operator		een: BP branded tes
No	Site name	Suburb	Address	Postcode	State	Site Type	Approximate post- acquisition market share	Approximate post-acquisition remaining competitors	Approximate post-acquisition market share	Approximate post-acquisition remaining competitors
119	Woolworths Mandurah Forum	Mandurah	318 Pinjarra Rd (Cnr Arnold St)	6210	WA	Regional	35%	5	35%	5
120	Woolworths Willows	Kirwan	172 Thuringowa Dr (Cnr Carlton St),	4817	QLD	Regional	30%	8	35%	7
121	Woolworths Kwinana	Kwinana	Lot 14 Chisham Way	6966	WA	Regional	26%	7	35%	6
122	Woolworths Wilsonton	Wilsonton	Cnr Erin and Hooper Streets	4350	QLD	Regional	-	-	35%	10
123	Woolworths Maddington	Maddington	Attfield St	6989	WA	Regional	26%	8	34%	7
124	Woolworths Chancellor Park	Sippy Downs	University Way and Chancellor Park Rd	4556	QLD	Regional	25%	7	34%	6
125	Woolworths Mowbray	Mowbray	262 Invermay Rd	7248	TAS	Regional	-	-	34%	7
126	Woolworths Kings Meadows	Kings Meadows	111 Hobart Rd	7249	TAS	Regional	-	-	34%	7
127	Woolworths Range	Toowoomba	19 James St	4350	QLD	Regional	-	-	34%	9
128	Woolworths Fairfield Waters	Idalia	2-30 Lakeside Drive	4811	QLD	Regional	-	-	34%	7
129	Woolworths Burnie	Burnie	Cnr North Terrace and Mount St	7320	TAS	Regional	25%	5	33%	4
130	Woolworths Bunbury	Bunbury	Cnr Pennant and Sandridge Rds	6230	WA	Regional	-	-	33%	6
131	Woolworths Osborne Park	Osborne Park	401 Scarborough Beach Rd	6017	WA	Metro	33%	4	33%	4

							Primary screen	by site operator		een: BP branded tes
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132	Woolworths Cannington (Carousel)	Cannington	Carousel Shopping Centre, 1358 Albany Hwy	6107	WA	Metro	33%	5	33%	5
133	Woolworths Maddington West	Maddington	207 Burslem Drive	6109	WA	Metro	33%	4	33%	4
134	Woolworths Mackay Canelands	Mackay	3 Mangrove Rd	4740	QLD	Regional	-	-	33%	7
135	Woolworths Oxley	Oxley	Cnr Alban and Blunder Roads	4075	QLD	Metro	25%	7	33%	6
136	Woolworths Northgate	Northgate	17 Toombul Rd	4013	QLD	Metro	-	-	33%	7
137	Woolworths Nambour	Nambour	178 Currie St	4560	QLD	Regional	-	-	33%	7
138	Woolworths Bellpost	Bell Post Hill	Bell Post Shopping Centre, 290-306 Anakie Rd	3214	VIC	Metro	-	-	33%	5
139	Woolworths Roxburgh Park	Roxburgh Park	260 Somerton Rd	3064	VIC	Metro	33%	4	33%	4
140	Woolworths Frankston	Frankston	41 McMahons Rd	3199	VIC	Metro	-	-	33%	5
141	Woolworths Shepparton East	Shepparton	106 Benalla Rd	3630	VIC	Metro	33%	4	33%	4
142	Woolworths Kelso	Kelso	171 Sydney Rd (Great Western Hwy) (near Pat O'Leary Drive)	2795	NSW	Regional	33%	6	33%	6

							Primary screen	by site operator	Secondary screen: BP branded sites	
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143	Woolworths Peakhurst	Peakhurst	742 Forest Rd	2210	NSW	Metro	-	-	33%	5
144	Woolworths Woolooware	Woolooware	449 Captain Cook Drive	2230	NSW	Metro	33%	4	33%	4
145	Woolworths Young	Young	Cnr Lovell St and Thornhill St	2594	NSW	Regional	33%	4	33%	4
146	Woolworths Bathurst	Bathurst	74 Bentinck St (Cnr Russell)	2795	NSW	Regional	33%	6	33%	6
147	Woolworths Prestons	Prestons	Cnr Camden Valley Way and Ash Rd	2170	NSW	Metro	-	-	33%	5
148	Woolworths Turramurra	Turramurra	1233 Pacific Highway	2074	NSW	Metro	25%	5	33%	4
149	Woolworths Clifford Gardens	Harristown	320 James St	4350	QLD	Regional	-	-	33%	10
150	Woolworths Yamanto	Yamanto	Warwick Rd	4305	QLD	Regional	-	-	32%	7
151	Woolworths Cornubia	Cornubia	121 Bromley St	4130	QLD	Regional	-	-	32%	9
152	Woolworths Ormeau	Ormeau	(Tenancy 8) 19-21 Peachey Rd	4208	QLD	Regional	27%	9	32%	8
153	Woolworths Gracemere	Gracemere	19 McLaughlin St (Cnr Capricorn Highway)	4702	QLD	Regional	-	-	32%	7
154	Woolworths Bowen Hills	Bowen Hills	136-146 Abbotsford Rd	4006	QLD	Metro	26%	8	32%	7
155	Woolworths Deception Bay	Deception Bay	3 Bay Av and Deception Bay Rd	4508	QLD	Regional	26%	8	32%	7

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156	Woolworths Acacia Ridge	Acacia Ridge	1150 Beaudesert Rd	4110	QLD	Metro	26%	7	32%	6
157	Woolworths North Orange	Orange	1 Hanrahan Place (cnr Leeds Parade)	2800	NSW	Regional	25%	8	31%	7
158	Woolworths Morisset	Morisset	125 Dora St	2264	NSW	Regional	-	-	31%	7
159	Woolworths West Ryde	West Ryde	924 Victoria Rd	2114	NSW	Metro	-	-	31%	6
160	Woolworths Oxenford	Oxenford	Cnr Old Pacific Hwy and Cottonwood Place	4210	QLD	Regional	-	-	31%	7
161	Woolworths Toowoomba	Toowoomba	629 Ruthven St (cnr James St)	4350	QLD	Regional	-	-	31%	10
162	Woolworths MacGregor	MacGregor	Cnr Kessels Rd and Springfield St	4109	QLD	Metro	-	-	31%	6
163	Woolworths St Kilda	St Kilda	99 Chapel St (cnr Inkerman)	3182	VIC	Metro	-	-	31%	3
164	Woolworths Glen Huntley	Caulfield	Cnr Glen Huntly and Bambra Rd	3163	VIC	Metro	-	-	31%	5
165	Woolworths Margate	Margate	9-11 Baynes St	4019	QLD	Regional	-	-	30%	5
166	Woolworths Wodonga South	Wodonga	81 Victoria Cross Parade	3690	VIC	Regional	-	-	30%	5
167	Woolworths Prospect Vale	Prospect Vale	360-364 Westbury Rd	7250	TAS	Regional	-	-	30%	7

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168	Woolworths Mandurah	Mandurah	Cnr Freemantle Rd and Magenta Terrace	6210	WA	Regional	30%	5	30%	5
169	Woolworths Warwick	Warwick	62 Albion St	4370	QLD	Regional	-	-	30%	5
170	Woolworths Caboolture South	Caboolture	61-65 Morayfield Rd	4510	QLD	Regional	30%	7	30%	7
171	Woolworths Shepparton	Shepparton	292-294 High St	3630	VIC	Metro	30%	4	30%	4
172	Woolworths Park Ridge	Park Ridge	12 Park Ridge Rd	4125	QLD	Regional	-	-	30%	9
173	Woolworths Beenleigh	Beenleigh	Lot 1 George St	4207	QLD	Regional	-	-	30%	9
174	Woolworths Taigum	Zillmere	396 Beams Rd	4034	QLD	Metro	-	-	29%	5
175	Woolworths Orange	Orange	357-361 Summer St (cnr William St)	2800	NSW	Regional	-	-	29%	7
176	Woolworths Goonellabah	Goonellabah	2 Simeoni Drive	2480	NSW	Regional	-	-	29%	7
177	Woolworths Meadowbrook	Meadowbrook	6-10 Logandowns Drive (cnr Loganlea Dr)	4131	QLD	Regional	-	-	29%	9
178	Woolworths Albury	Albury	515 Young St	2640	NSW	Regional	-	-	29%	8
179	Woolworths Belmont	Belmont	397 Pacific Highway	2280	NSW	Regional	-	-	29%	7

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180	Woolworths Ingham	Ingham	75 Herbert St (Bruce Hwy), (Cnr Gedge St)	4850	QLD	Regional	29%	5	29%	5
181	Woolworths Goodna	Goodna	Cnr Redbank Plains Rd and Eagle St	4300	QLD	Metro	29%	4	29%	4
182	Woolworths Wodonga	Wodonga	27-29 High St (cnr Huon St)	3690	VIC	Regional	-	-	29%	7
183	Woolworths Golden Square	Bendigo	226 - 232 High St	3555	VIC	Metro	-	-	29%	5
184	Woolworths Wendouree	Wendouree	1253 Howitt St	3355	VIC	Metro	-	-	29%	7
185	Woolworths Glenrose (Belrose)	Belrose	60 Glen St	2085	NSW	Metro	29%	4	29%	4
186	Woolworths Bateau Bay	Bateau Bay	Pad Site P101 Bateau Bay Square 12 Bay Village Rd	2261	NSW	Regional	29%	7	29%	7
187	Woolworths Cardiff	Cardiff	43 Macquarie Rd	2285	NSW	Regional	-	-	28%	9
188	Woolworths Holmview	Holmview	17 Gardiner Rd (Cnr Logan River Rd)	4207	QLD	Regional	-	-	28%	9
189	Woolworths Allenstown	Allenstown	171 Denham St	4700	QLD	Regional	-	-	28%	8
190	Woolworths Bankstown	Bankstown	1618 Canterbury Rd	2196	NSW	Metro	-	-	28%	6

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191	Woolworths Glendale	Glendale	Stockland Shopping Centre, Stockland Drive	2285	NSW	Regional	-	-	28%	8
192	Woolworths Slacks Creek	Slacks Creek	124 Paradise Rd	4127	QLD	Metro	-	-	28%	5
193	Woolworths Charlestown	Charlestown	93 Pacific Highway	2290	NSW	Regional	-	-	28%	9
194	Woolworths Corrimal	Corrimal	275-277 Princess Highway	2518	NSW	Regional	-	-	28%	8
195	Woolworths Surry Hills	Redfern	475 Cleveland St	2016	NSW	Metro	-	-	28%	6
196	Woolworths Dubbo	Dubbo	Cnr Mitchell Hwy and Wheelers Lane	2830	NSW	Regional	-	-	28%	6
197	Woolworths Park Beach Plaza	Park Beach	Pacific Highway	2450	NSW	Regional	-	-	28%	5
198	Woolworths Ulverstone	Ulverstone	20-22 Eastland Drive	7315	TAS	Regional	27%	7	27%	7
199	Woolworths Runaway Bay	Runaway Bay	10 Lae Drive (Runaway Bay Shopping Centre)	4216	QLD	Regional	-	-	27%	8
200	Woolworths Geelong North	Geelong North	Cnr Thompson Rd and Victoria St	3220	VIC	Metro	27%	4	27%	4
201	Woolworths Hampton Park	Hampton Park	70 Hallam Rd	3976	VIC	Metro	-	-	27%	4
202	Woolworths Bulli	Bulli	261 - 265 Princes Highway	2516	NSW	Regional	-	-	27%	8

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203	Woolworths Ingleburn	Ingleburn	12-14 Norfolk St	2565	NSW	Metro	-	-	27%	4
204	Woolworths Mount Druitt	Mount Druitt	Mt Druitt Market Place, North Parade	2770	NSW	Metro	27%	3	27%	3
205	Woolworths Helensvale	Helensvale	Part Lot 4, 1-29 Millaroo Dr (Cnr Phillip Gray Rd)	4212	QLD	Regional	-	-	27%	8
206	Woolworths Edgeworth	Edgeworth	736-742 Main Rd	2285	NSW	Regional	-	-	27%	8
207	Woolworths Mango Hill	Mango Hill	Cnr Anzac Avenue and Josey Roads	4509	QLD	Regional	-	-	27%	6
208	Woolworths Lavington	Lavington	370 Griffith Rd	2641	NSW	Regional	-	-	27%	7
209	Woolworths Kirkwood	Kirkwood	Cnr Kirkwood Rd and Dixon Drive	4680	QLD	Regional	27%	5	27%	5
210	Woolworths Booval	Booval	139 Brisbane Rd and South Station Rd	4304	QLD	Regional	-	-	27%	8
211	Woolworths Burpengary	Burpengary	177-183 Station Rd	4505	QLD	Regional	27%	8	27%	8
212	Woolworths Raymond Terrace	Raymond Terrace	39-41 Port Stephens Rd (Cnr Bourke St)	2324	NSW	Regional	27%	6	27%	6
213	Woolworths Woodridge	Woodridge	398 Kingston Rd	4114	QLD	Metro	-	-	26%	5
214	Woolworths Hope Island	Hope Island	69-71 Crescent Ave	4212	QLD	Regional	-	-	26%	8

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215	Woolworths Kenmore	Kenmore	2005 Moggill Rd	4069	QLD	Regional	-	-	26%	7
216	Woolworths Fairy Meadow	Fairy Meadow	47 Princes Highway	2519	NSW	Regional	-	-	26%	9
217	Woolworths Mount Hutton	Mount Hutton	Lake Macquarie Fair, Wilsons Rd	2290	NSW	Regional	-	-	25%	9
218	Woolworths Northside Plaza	Rockhampton North	222-236 Musgrave Rd	4700	QLD	Regional	-	-	25%	8
219	Woolworths Chermside	Chermside	725 Webster Rd (Cnr Gympie)	4032	QLD	Metro	-	-	25%	5
220	Woolworths Wollongong West	Wollongong West	425 Crown St	2500	NSW	Regional	-	-	25%	9
221	Woolworths Miranda	Miranda	Cnr Kingsway and Port Hacking Roads	2228	NSW	Metro	-	-	25%	5
222	Woolworths Minto	Minto	2 Cary Grove (Cnr Ben Lomond Dr)	2566	NSW	Metro	25%	7	25%	7
223	Woolworths Deagon	Deagon	180 Braun St	4017	QLD	Regional	-	-	25%	9
224	Woolworths Karalee	Karalee	Lot 266 Junction Rd (Cnr Langlands Rd)	4306	QLD	Regional	-	-	24%	8
225	Woolworths Green Hills	Maitland East	Molly Morgan Drive	2323	NSW	Regional	-	-	24%	9
226	Woolworths Kingswood	Kingswood	66 Parker St	2747	NSW	Metro	-	-	17%	3