



## NEWS RELEASE

Contact: Cindy Tourneur  
(02) 8873 7381 / 0410 457 646  
[cindy.tourneur@acnielsen.com.au](mailto:cindy.tourneur@acnielsen.com.au)

### **Brand power stronger than ever – top three grocery brands worth over \$750 million!**

- ***Coca-Cola, Longbeach and Winfield annual sales in excess of \$750million***
  - ***Seven new entrants in latest brand ranking***
  - ***Top 100 brands value up 12 percent to \$14.1 billion***
- ***Manufacturer concentration strong – 15 manufacturers own 63 brands***

**Sydney, 17 January 2006:** Coca-Cola, Longbeach and Winfield were once again the three leading Australian grocery brands, according to leading marketing information company ACNielsen's 13th biennial Top 100 Brands Report. The report also revealed that these super brands were now bigger than ever, having each broken through the \$750 million barrier for the first time (*refer to Table 1*).

Coca-Cola retained its position as Australian brand leader for the thirteenth consecutive year, driven primarily by strong performance by the traditional Diet Coke sub-brand. New product development was also been an important driver of growth, with new flavour variants including Coca-Cola Lime, Diet Coke Lime and Diet Coke Vanilla contributing about a third of the absolute dollar growth of the entire Coca-Cola brand over the last two years.

The top 100 accounted for 45 percent of total absolute dollar growth recorded by the packaged grocery sector in the past two years. The top 100 brands were worth a total of \$14.1 billion in 2005, up 12 percent from \$12.6 billion in 2003, and accounted for 38 percent of total packaged grocery, up from 37 percent in 2003.

The entry bar for a top 100 brand was \$62 million, up from \$55 million in 2003, with seven new brands entering the top 100 in 2005, including VIP chilled/frozen petfood, Philadelphia Cheese, McCain Frozen Meals, Primo Smallgoods, Champion Ruby RYO Tobacco, Bird's Eye Frozen Fish and Energizer Batteries, with six of the seven brands enjoying more than 20 percent growth over the past two years.

Brands which had achieved the most significant increase in rank versus 2003 were Quilton Toilet Tissue (up 37 places); followed by Nabsico Biscuits (up 35 places); and Hans Smallgoods (up 24 places).

Nearly half (48) of the 2005 top 100 brands were owned by just 10 manufacturers, and 15 manufacturers owned an astounding 63 brands.

“The Top 100 Brands Report provides clear indication that big brands are instrumental in driving the performance of the grocery channel,” says Anton van den Berg, Director, Client Service, ACNielsen. “And depending on the future success of private label, it is likely that the dominance of larger manufacturers will increase over time.”

The ACNielsen report also includes a top 25 umbrella brand ranking, accommodating brands which operate in a variety of categories, none of which would necessarily qualify as a top 100 brand (see methodology).

Whilst Arnott's, Cadbury and Kellogg remained the top-selling umbrella brands, the composition of the top 25 compared to 2003 was changed with the entry of Smith's, Mainland and Tip Top (*refer to Table 2*).

The most significant shift in rank within the top 25 umbrella brands was Kleenex's entry into the top 10 at number eight, from 13 in 2003. This shift was driven by the re-branding of its main toilet tissue brand to Kleenex Cottonelle.

The top 25 umbrella brands included four Australian suppliers, including Dairy Farmers, Golden Circle, Sanitarium and Murray Goulburn. With the exception of Sanitarium,

these manufacturers all slipped one to two positions in rank versus 2003. The top 25 also included new entrant Mainland, owned by New Zealand supplier Fonterra Brands (previously Bonland Dairies).

“Today’s top 100 brands are where they are because of years of investment in marketing and brand building,” van den Berg notes. “Sales and promotional activity may provide the current cashflow, but marketing investment – advertising, new product development, packaging, product quality – provides for future cashflow. Boards are increasingly recognising the ROI of their marketing spend, although more effort is needed to measure marketing spend effectiveness”.

### **Methodology:**

The Top 100 Brands Report is now in its thirteenth year and whilst ACNielsen has made every effort to ensure the data in this analysis is accurate – the Company cannot guarantee that all errors or omissions have been corrected, due to the constant shifting of the marketplace and the magnitude of the analysis. Comparisons with the 2003 compilation should be treated with some care, and consideration should be given to brand and definitional changes.

### **Definitions:**

As in previous years, ACNielsen has compiled two lists. The top 100 brands list defines a brand within a single category (eg Colgate toothpaste). Range extensions under the same name are included: Diet Coke, for example, is included in the Coca-Cola brand.

The top 25 umbrella brands apply to brand names that cross grocery categories (eg Heinz baked beans/spaghetti and soup), or where sub-brands can be viewed as brand names in their own right. An example of this is Arnott’s, which has individual entries in the entries in the top 100 (eg Shapes and Tim Tam), but the Arnott’s umbrella brand is included in the top 25 list.

### **Coverage:**

The top 100 brands and top 25 umbrella brands lists are based on annual sales through supermarkets and grocery stores for the year ending 3 July 2005. For direct-delivery categories such as bread and milk, the data is projected for warehouse accounts.

The coverage is national (including Tasmania) and covers all grocery accounts. The non-grocery channels not covered are the route trade (milk bars, newsagents, service stations), convenience stores, mass merchandisers (Kmart, Big W, Target), department stores, food service, vending and exports.

**Table 1: ACNielsen 2005 Top 100 Brands Report**

| 02/03 RANK | 04/05 RANK | BRAND                | CATEGORY                | MANUFACTURER                       | RANGE          |
|------------|------------|----------------------|-------------------------|------------------------------------|----------------|
| 1          | 1          | COCA-COLA            | CARBONATED BEVERAGES    | COCA-COLA COMPANY                  | \$750M +       |
| 2          | 2          | LONGBEACH            | TOBACCO                 | PHILIP MORRIS                      | \$750M +       |
| 3          | 3          | WINFIELD             | TOBACCO                 | BRITISH AMERICAN TOBACCO AUSTRALIA | \$750M +       |
| 4          | 4          | PETER JACKSON        | TOBACCO                 | PHILIP MORRIS                      | \$500 - \$750M |
| 5          | 5          | HORIZON              | TOBACCO                 | IMPERIAL TOBACCO AUSTRALIA         | \$500 - \$750M |
| 7          | 6          | BENSON & HEDGES      | TOBACCO                 | BRITISH AMERICAN TOBACCO AUSTRALIA | \$250 - \$500M |
| 8          | 7          | HUGGIES              | DISPOSABLE NAPPIES      | KIMBERLY CLARK                     | \$250 - \$500M |
| 9          | 8          | HOLIDAY              | TOBACCO                 | BRITISH AMERICAN TOBACCO AUSTRALIA | \$250 - \$500M |
|            | 9          | TIP TOP*             | PROPRIETARY BREAD       | GEORGE WESTON FOODS                | \$250 - \$500M |
| 10         | 10         | CADBURY              | CHOCOLATE CONFECTIONERY | CADBURY SCHWEPPES                  | \$150 - \$250M |
| 15         | 11         | NESTLE/PETERS        | ICE CREAM               | NESTLE                             | \$150 - \$250M |
| 6          | 12         | PURA                 | FRESH MILK              | NATIONAL FOODS LIMITED             | \$150 - \$250M |
| 18         | 13         | PAULS                | FRESH MILK              | PARMALAT                           | \$150 - \$250M |
| 13         | 14         | YOPLAIT              | YOGHURT                 | NATIONAL FOODS LIMITED             | \$150 - \$250M |
| 14         | 15         | SORBENT              | TOILET TISSUE           | SCA                                | \$150 - \$250M |
| 11         | 16         | PEDIGREE PAL         | DOG FOOD                | MASTERFOODS ANZ                    | \$150 - \$250M |
| 12         | 17         | NESCAFE BLEND 43     | COFFEE                  | NESTLE                             | \$150 - \$250M |
| 26         | 18         | SMITH'S              | SNACK FOODS             | THE SMITHS SNACKFOOD COMPANY       | \$150 - \$250M |
| 21         | 19         | KLEENEX COTTONELLE** | TOILET TISSUE           | KIMBERLY CLARK                     | \$150 - \$250M |
| 17         | 20         | MCCAIN               | FROZEN VEGE & POTATOES  | MCCAIN                             | \$150 - \$250M |
| 19         | 21         | BIRDS EYE            | FROZEN VEGE & POTATOES  | SIMPLOT                            | \$150 - \$250M |
| 30         | 22         | PEPSI                | CARBONATED BEVERAGES    | CADBURY SCHWEPPES                  | \$150 - \$250M |
| 20         | 23         | WHISKAS              | CAT FOOD                | MASTERFOODS ANZ                    | \$150 - \$250M |
| 22         | 24         | COLGATE              | TOOTHPASTE              | COLGATE PALMOLIVE                  | \$150 - \$250M |
| 25         | 25         | KRAFT                | CHEESE & DIPS           | KRAFT FOODS                        | \$100 - \$150M |
| 16         | 26         | DAIRY FARMERS        | FRESH MILK              | DAIRY FARMERS                      | \$100 - \$150M |
| 37         | 27         | DUNHILL              | TOBACCO                 | BRITISH AMERICAN TOBACCO AUSTRALIA | \$100 - \$150M |
| 23         | 28         | SKI                  | YOGHURT                 | DAIRY FARMERS                      | \$100 - \$150M |
| 44         | 29         | UNCLE TOBYS          | NUTRITIOUS SNACKS       | GOODMAN FIELDER                    | \$100 - \$150M |
| 29         | 30         | ALPINE               | TOBACCO                 | PHILIP MORRIS                      | \$100 - \$150M |
| 27         | 31         | JOHN WEST            | CANNED FISH             | SIMPLOT                            | \$100 - \$150M |
| 33         | 32         | MAINLAND             | CHEESE & DIPS           | FONTERRA BRANDS                    | \$100 - \$150M |
| 31         | 33         | COON                 | CHEESE & DIPS           | DAIRY FARMERS                      | \$100 - \$150M |
| 35         | 34         | GILLETTE             | RAZORS & BLADES         | GILLETTE                           | \$100 - \$150M |
| 24         | 35         | BEGA                 | CHEESE & DIPS           | FONTERRA BRANDS                    | \$100 - \$150M |
| 34         | 36         | GOLDEN CIRCLE        | FRUIT JUICES            | GOLDEN CIRCLE                      | \$100 - \$150M |
| 43         | 37         | SCHWEPPES            | CARBONATED BEVERAGES    | CADBURY SCHWEPPES                  | \$100 - \$150M |
| 28         | 38         | MIGHTY SOFT          | PROPRIETARY BREAD       | GOODMAN FIELDER                    | \$100 - \$150M |
| 32         | 39         | BERRI                | FRUIT JUICES            | NATIONAL FOODS LIMITED             | \$100 - \$150M |
| 38         | 40         | KLEENEX              | FACIAL TISSUE           | KIMBERLY CLARK                     | \$100 - \$150M |
|            | 41         | WINFIELD***          | RYO TOBACCO             | BRITISH AMERICAN TOBACCO AUSTRALIA | \$100 - \$150M |
| 41         | 42         | WONDER WHITE         | PROPRIETARY BREAD       | GOODMAN FIELDER                    | \$100 - \$150M |
| 42         | 43         | ARNOTT'S SHAPES      | BISCUITS                | CAMPBELL ARNOTT'S                  | \$100 - \$150M |
| 45         | 44         | HELGA'S              | PROPRIETARY BREAD       | GOODMAN FIELDER                    | \$100 - \$150M |
| 39         | 45         | STREETS              | ICE CREAM               | UNILEVER                           | \$100 - \$150M |
| 83         | 46         | QUILTON              | TOILET TISSUE           | ABC TISSUE                         | \$100 - \$150M |
| 52         | 47         | KELLOGG NUTRI-GRAIN  | CEREALS                 | KELLOGG AUSTRALIA                  | \$75 - \$100M  |
| 63         | 48         | KIRKS                | CARBONATED BEVERAGES    | COCA-COLA COMPANY                  | \$75 - \$100M  |
| 51         | 49         | NESTLE               | YOGHURT                 | NESTLE                             | \$75 - \$100M  |

|     |     |                          |                        |                                    |               |
|-----|-----|--------------------------|------------------------|------------------------------------|---------------|
| 40  | 50  | PANTENE                  | SHAMPOO/CONDITIONER    | PROCTOR & GAMBLE                   | \$75 - \$100M |
| 75  | 51  | HANS                     | SMALLGOODS             | HANS CONTINENTAL SMALLGOODS        | \$75 - \$100M |
| 49  | 52  | OLD EL PASO              | MEXICAN FOODS          | GENERAL MILLS                      | \$75 - \$100M |
| 50  | 53  | SAN REMO                 | PASTA                  | SAN REMO                           | \$75 - \$100M |
| 46  | 54  | LIBRA                    | SANITARY PROTECTION    | SCA                                | \$75 - \$100M |
| 48  | 55  | MILO                     | MILK MODIFIERS         | NESTLE                             | \$75 - \$100M |
| 54  | 56  | GOULBURN VALLEY          | CANNED FRUIT           | SPC ARDMONA                        | \$75 - \$100M |
|     | 57  | VIP                      | CHILLED/FROZEN PETFOOD | VIP PETFOODS                       | \$75 - \$100M |
| 69  | 58  | JUST JUICE               | FRUIT JUICES           | NATIONAL FOODS LIMITED             | \$75 - \$100M |
| 55  | 59  | WEET-BIX                 | CEREALS                | SANITARIUM                         | \$75 - \$100M |
| 57  | 60  | MOCCONA                  | COFFEE                 | SARA LEE                           | \$75 - \$100M |
| 47  | 61  | FLORA                    | MARGARINE              | UNILEVER                           | \$75 - \$100M |
|     | 62  | PHILADELPHIA             | CHEESE & DIPS          | KRAFT FOODS                        | \$75 - \$100M |
| 67  | 63  | GREENSEAS                | CANNED FISH            | HEINZ WATTIE'S                     | \$75 - \$100M |
| 64  | 64  | LEGGOS                   | TOMATO PRODUCTS        | SIMPLOT                            | \$75 - \$100M |
| 100 | 65  | NABISCO (FORMERLY LANES) | BISCUITS               | KRAFT FOODS                        | \$75 - \$100M |
|     | 66  | MCCAIN                   | FROZEN MEALS           | McCAIN                             | \$75 - \$100M |
| 53  | 67  | HEINZ                    | BKD BEANS/SPAGHETTI    | HEINZ WATTIE'S                     | \$75 - \$100M |
| 68  | 68  | DAILY JUICE              | FRUIT JUICES           | NATIONAL FOODS LIMITED             | \$75 - \$100M |
| 70  | 69  | CAMPBELL'S               | SOUP                   | CAMPBELL ARNOTT'S                  | \$75 - \$100M |
| 59  | 70  | MARLBORO                 | TOBACCO                | PHILIP MORRIS                      | \$75 - \$100M |
| 60  | 71  | VEGEMITE                 | YEAST SPREADS          | KRAFT FOODS                        | \$75 - \$100M |
| 65  | 72  | EDGEELL                  | CANNED VEGETABLES      | SIMPLOT                            | \$75 - \$100M |
| 84  | 73  | DRUM                     | RYO TOBACCO            | IMPERIAL TOBACCO AUSTRALIA         | \$75 - \$100M |
| 56  | 74  | OMO                      | LAUNDRY DETERGENT      | UNILEVER                           | \$75 - \$100M |
| 62  | 75  | COTTEE'S                 | CORDIAL                | CADBURY SCHWEPPEES                 | \$75 - \$100M |
| 86  | 76  | EXTRA                    | CHEWING GUM            | WRIGLEY                            | \$75 - \$100M |
| 82  | 77  | REXONA                   | DEODORANTS             | UNILEVER                           | \$75 - \$100M |
| 61  | 78  | CONTINENTAL              | PACKET SOUP            | UNILEVER                           | \$50 - \$75M  |
|     | 79  | PRIMO                    | SMALLGOODS             | P & M QUALITY SMALL GOODS          | \$50 - \$75M  |
| 89  | 80  | FINISH                   | DISHWASHING DETERGENT  | RECKITT BENCKISER                  | \$50 - \$75M  |
| 74  | 81  | CONTINENTAL              | PACKET MEALS           | UNILEVER                           | \$50 - \$75M  |
| 80  | 82  | FRISKIES                 | CAT FOOD               | NESTLE                             | \$50 - \$75M  |
| 71  | 83  | DORITOS                  | SNACK FOODS            | THE SMITHS SNACKFOOD COMPANY       | \$50 - \$75M  |
| 78  | 84  | LATINA                   | PASTA                  | GENERAL MILLS                      | \$50 - \$75M  |
| 76  | 85  | GLAD                     | PLASTIC BAGS & WRAPS   | CLOROX                             | \$50 - \$75M  |
| 98  | 86  | HEINZ                    | SOUP                   | HEINZ WATTIE'S                     | \$50 - \$75M  |
| 99  | 87  | ESCORT                   | TOBACCO                | IMPERIAL TOBACCO AUSTRALIA         | \$50 - \$75M  |
| 72  | 88  | MCCAIN                   | FROZEN PIZZA           | McCAIN                             | \$50 - \$75M  |
| 88  | 89  | ARNOTT'S TIM TAM         | BISCUITS               | CAMPBELL ARNOTT'S                  | \$50 - \$75M  |
|     | 90  | CHAMPION RUBY            | RYO TOBACCO            | IMPERIAL TOBACCO AUSTRALIA         | \$50 - \$75M  |
| 79  | 91  | STRADBROKE               | TOBACCO                | BRITISH AMERICAN TOBACCO AUSTRALIA | \$50 - \$75M  |
| 93  | 92  | GOLDEN                   | BAKERY SNACKS          | GEORGE WESTON FOODS                | \$50 - \$75M  |
| 94  | 93  | DEVONDALE                | DAIRY SPREADS          | MURRAY GOULBURN                    | \$50 - \$75M  |
| 96  | 94  | SARA LEE                 | FROZEN DESSERTS        | SARA LEE                           | \$50 - \$75M  |
|     | 95  | BIRDS EYE                | FROZEN FISH            | SIMPLOT                            | \$50 - \$75M  |
|     | 96  | ENERGIZER                | BATTERIES              | ENERGIZER AUSTRALIA                | \$50 - \$75M  |
| 87  | 97  | MEADOW LEA               | MARGARINE              | GOODMAN FIELDER                    | \$50 - \$75M  |
| 73  | 98  | INGHAM                   | FROZEN POULTRY         | INGHAMS ENTERPRISES                | \$50 - \$75M  |
| 91  | 99  | MY DOG                   | DOG FOOD               | MASTERFOODS ANZ                    | \$50 - \$75M  |
| 58  | 100 | BULLA                    | ICE CREAM              | REGAL CREAM PRODUCTS               | \$50 - \$75M  |

\* Brand redefined vs 2003 - now a combination of Tip Top Up and Sunblest

\*\* Rank compared to Kleenex toilet tissue brand listed in 2003

\*\*\* Brand re-defined vs 2003

**Table 2: ACNielsen 2005 Top 25 Umbrella Brands Report**

| 02/03 rank | 04/05 rank | Umbrella Brand | Supplier          | Main Categories                           | Range          |
|------------|------------|----------------|-------------------|---|----------------|
| 1          | 1          | Arnott's       | Campbell Arnott's | Biscuits and snack foods                  | \$500 - \$750M |
| 2          | 2          | Cadbury        | Cadbury Schweppes | Confectionery and ice cream               | \$500 - \$750M |
| 3          | 3          | Kelloggs       | Kellogg Australia | Cereal and nutritious snacks              | \$500 - \$750M |
| 6          | 4          | Nestle         | Nestle            | Yoghurt, confectionery and ice cream      | \$250 - \$500M |
| 7          | 5          | Kraft          | Kraft Foods       | Cheese, spreads, salad dressing and meals | \$250 - \$500M |
| 4          | 6          | Uncle Tobys    | Goodman Fielder   | Cereal, bread and nutritious snacks       | \$250 - \$500M |
| 5          | 7          | Dairy Farmers  | Dairy Farmers     | Dairy products                            | \$250 - \$500M |
| 10         | 8          | Huggies        | Kimberly Clark    | Nappies and wipes                         | \$250 - \$500M |
| 8          | 9          | McCain         | McCain            | Frozen foods                              | \$250 - \$500M |

|    |    |               |                              |                                       |                |
|----|----|---------------|------------------------------|---------------------------------------|----------------|
| 13 | 10 | Kleenex       | Kimberly Clark               | Paper products                        | \$250 - \$500M |
| 9  | 11 | Golden Circle | Golden Circle                | Beverages, fruit and vegetables       | \$250 - \$500M |
| 11 | 12 | Heinz         | Heinz Wattie's               | Various dry grocery                   | \$250 - \$500M |
| 12 | 13 | Nescafe       | Nestle                       | Coffee                                | \$250 - \$500M |
| 14 | 14 | Sanitarium    | Sanitarium                   | Cereal, spreads and nutritious snacks | \$250 - \$500M |
| 17 | 15 | Pauls         | Parmalat                     | Dairy products                        | \$150 - \$250M |
| 15 | 16 | Birds Eye     | Simplot                      | Frozen foods                          | \$150 - \$250M |
| 18 | 17 | Sorbent       | SCA                          | Paper products                        | \$150 - \$250M |
| 16 | 18 | Continental   | Unilever                     | Various dry grocery                   | \$150 - \$250M |
| 19 | 19 | Colgate       | Colgate Palmolive            | Oral care                             | \$150 - \$250M |
|    | 20 | Smiths        | The Smiths Snackfood Company | Snack foods                           | \$150 - \$250M |
| 20 | 21 | Devondale     | Murray Goulburn              | Dairy products                        | \$150 - \$250M |
| 22 | 22 | Gillette      | Gillette                     | Personal care                         | \$150 - \$250M |
|    | 23 | Mainland      | Fonterra Brands              | Dairy products                        | \$100 - \$150M |
|    | 24 | Tip Top       | George Weston Foods          | Bread, flour and baking aids          | \$100 - \$150M |
| 25 | 25 | John West     | Simplot                      | Canned fish and fruit                 | \$100 - \$150M |

### About ACNielsen

ACNielsen, a VNU business, is the world's leading marketing information provider. Offering services in more than 100 countries, the unit provides measurement and analysis of marketplace dynamics and consumer attitudes and behaviour. Clients rely on ACNielsen's market research, proprietary products, analytical tools and professional service to understand competitive performance, to uncover new opportunities and to raise the profitability of their marketing and sales campaigns.

To view this and other ACNielsen media releases online go to [www.acnielsen.com.au](http://www.acnielsen.com.au)