Brand Power: concentration continues

ACNielsen Top-100 brands now account for 34% of packaged grocery sales

BY ANTON VAN DEN BERG, MARKETING MANAGER, ACNIELSEN

The Top-100 has outgrown the average grocery brand in each of the last five years. As a result, the 100 biggest brands now account for 34% of packaged grocery sales – up from 29% in 1995/96. This is the conclusion from the ACNielsen Top-100 brands for 2001, the eight consecutive study of top-selling grocery brands.

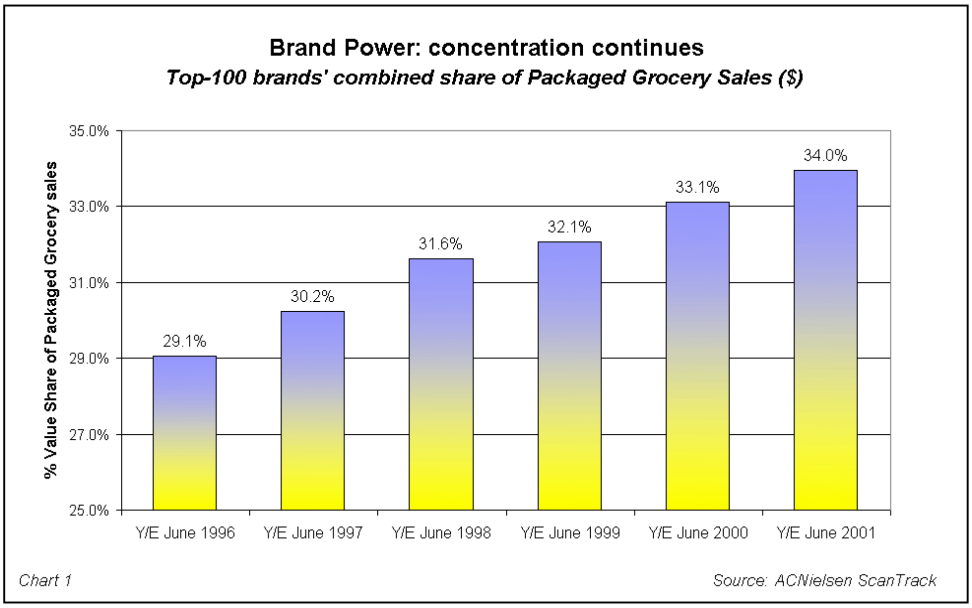
Coca-Cola remains the leading brand, with annual supermarket sales of over $634m. The brand has occupied the top spot since the establishment of the Top-100 in 1994. As in previous years, tobacco brands continue to dominate, taking up 6 spots in the top-10. Thanks to the GST, they have consolidated their position in the top.

However, the top-10 has not changed in composition compared with last year. And this is becoming one of the most fundamental characteristics of the top-10: it's hard to break into, but once you're in, you've made it. To break into the top-100 however, you will need to have annual sales of at least $49m. Last year, the minimum requirement was $45m – so for next year, you should expect $54m to be on the safe side.

As in previous years, we have also put together a top-25 of umbrella brands. This is to accommodate brands that operate in a variety of categories – none of which would necessarily make it onto the top-100 (see also Methodology). Arnott's, Kellogg's and Cadbury remain the top-selling umbrella brands. The composition of the top-25 has remained unchanged.

And for the first time, ACNielsen is offering a global perspective of brand power: which are the billion dollar global brands?

SIZE COUNTS



The top-100 brands achieved combined supermarket sales of $11.3 billion over the 2000/01 financial year. This represents 34% of total packaged grocery sales in Australian supermarkets – up from 29% in 1995/96 (see Chart 1). This growing concentration of brand power is caused by the fact that top-100 brands are outpacing the average grocery brand by a considerable margin. Over the past year, we saw the top-100 growing at 7.8% compared with the ACNielsen-defined average of 4.6% (see Chart 2).

And because top-100 brands are bigger, the difference in *absolute* growth is even more significant: the combined top-100 brands account for 34% of packaged grocery sales but are responsible for more than 50% of the total *growth* in packaged grocery sales.

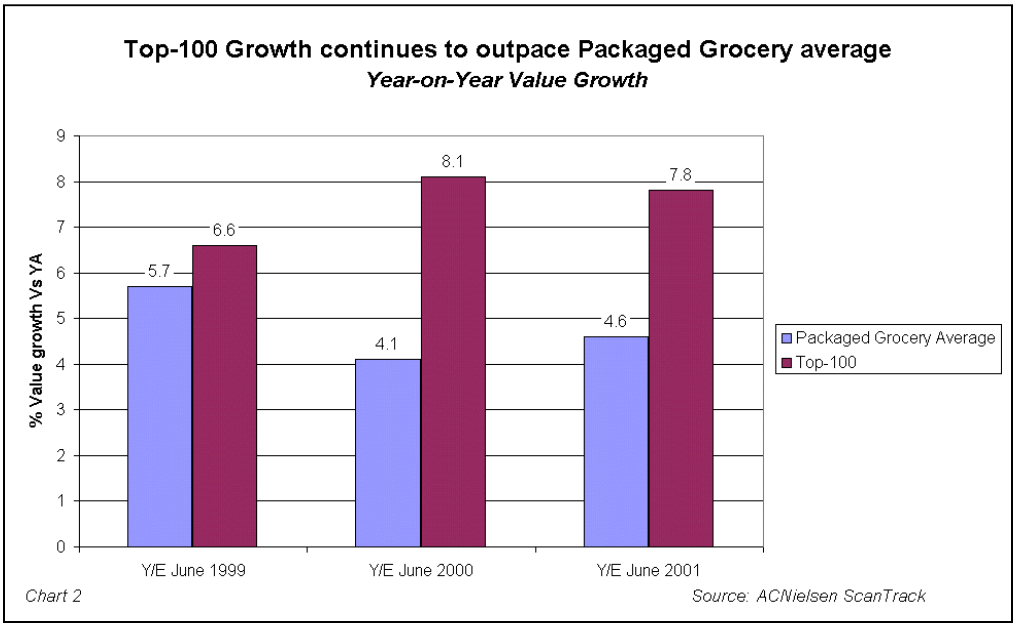


Chart 3 illustrates the spread in growth rates achieved by top-100 brands – ranging from +41% to –27%. To prove that a top-100 spot does not guarantee top performance: 19 brands remained stagnant or went backwards (compared with 23 brands last year). Even within the top-100, it is apparent that the largest brands are outpacing the smaller ones (see Chart 4). The average growth for the top-10 brands was 11.4%, the mid-order brands achieved 6% to 8%, whilst the bottom-25 brands performed worst at 5.8% (although still better than the All Grocery average of 4.6%). Like last year, brands ranked from 51 to 75 achieved better than average growth of 10%. Have they set their sights on a spot in the top-50? Or are they simply trying to avoid dropping back to the 'danger zone'? Because brands in the bottom-25 are at some risk of dropping out of the top-100 – at least temporarily. This happened to five brands this year – and their combined sales declined by 13% compared with the previous year.

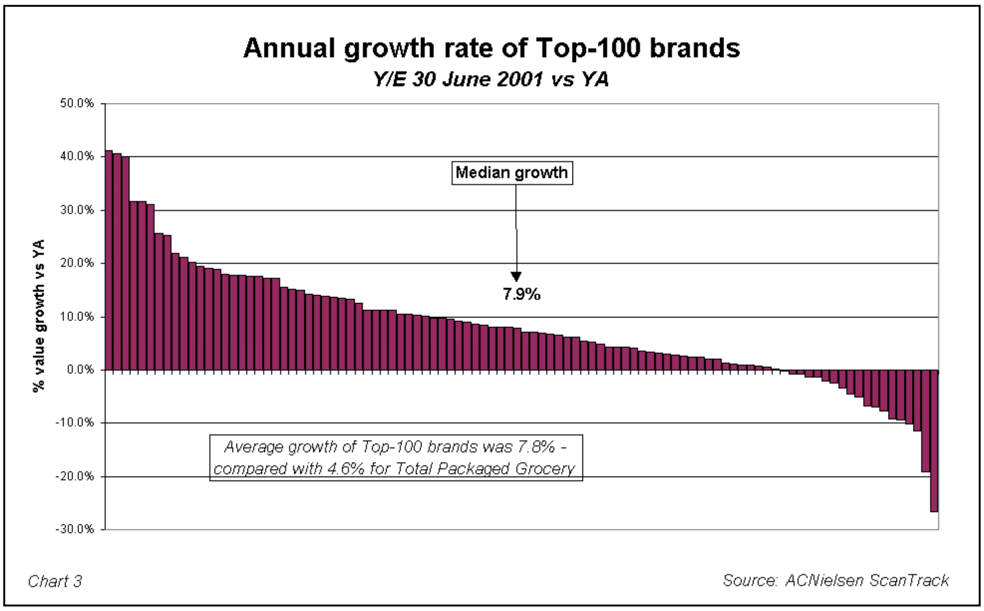


Chart 3

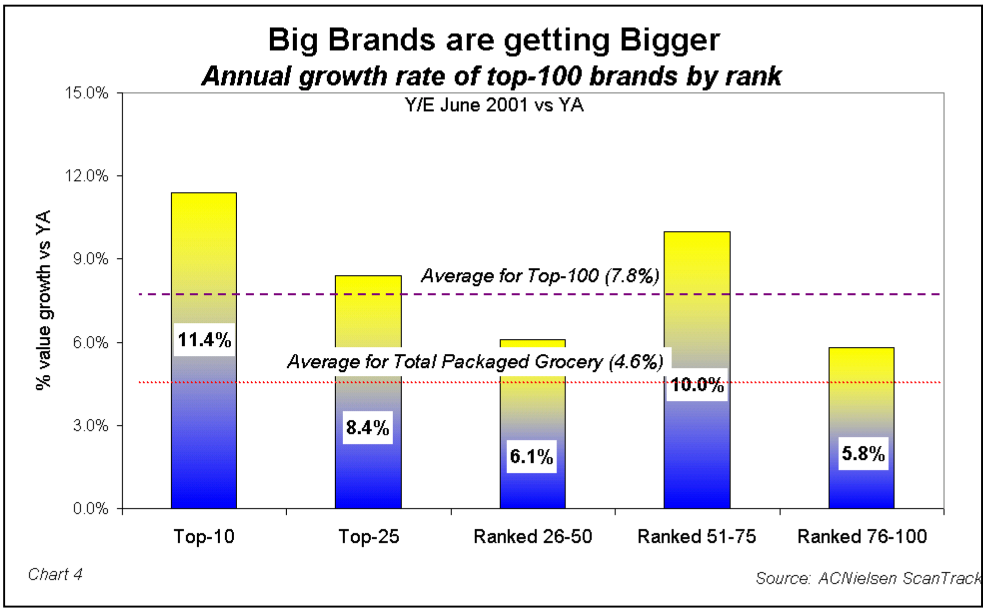


Chart 4

By contrast, the five new entrants grew sales by a combined 20%. This is another reason why the top-100 will continue to outgrow the average brand. And are the new entries completely new to the top-100? Not really: four out of the five brands have featured in the top-100 in previous years.

For various reasons, they dropped out – and have now re-entered. The five 'new' entries include Nestle yoghurt, Uncle Tobys muesli bars, My Dog petfood, Inghams frozen meals and Devondale milks.

And what about the Dick Smith brand? None of the individual brands come close to a top-100 entry at this stage. And to enter the top-25 umbrella brands, it will need annual sales of $115m. For the year ending June 2000, the brand achieved $80m so it may get in next year – although the goalpost shifts by more than 5% per annum.

The full Top-100 Brand listing can be found in Appendix 1 and Top-25 Umbrella Brands in Appendix 2

Australia mixes global brands with local touch

The world's first study of global grocery brands has revealed that 43 brands achieved annual sales in excess of one billion US dollars, and – to be called truly global - have a presence in all of the four world regions (North America, Latin America, Europe/ME/Africa, and Asia Pacific). However, being a billion-dollar global brand does not necessarily translate into a spot in Australia's top-100…

But where Australia agrees with the rest of the world is on who's number one: Coca Cola. With global sales of over US$ 15 billion, Coke is sharing the honour with Marlboro – despite the fact that Marlboro does not have sales in every country. In Australia, the cigarette brand comes in at number 44.

Of the 43 billion dollar global brands, only six do not have a presence in Australia – such as Pampers nappies (although it use to be sold in Australia), Tide detergent and Tropicana beverages. Of the remaining 37 brands, no more than 17 – or less than half - appear in Australia's top-100 brand list or top-25 umbrella brands. They include Pepsi (number 3 globally, but ranked 30 in Australia), Benson & Hedges, Huggies, Nescafe, Colgate and Lays.

The 20 global brands that did not make the Australian top-100 include many brands that are currently ranked between 101 and 200, and include brands such as Fanta, Energizer, Gatorade and Pringles. They will need to achieve consistent double-digit growth in order to make the nearly $50m cut and break into the Australian top-100.

ACNielsen's global brand study is based on grocery sales data from 30 countries on all continents. Combined they account for over 90% of the world's GDP. The full list is contained in Appendix 3 .

UK HERITAGE DOES NOT TRANSLATE TO GROCERY BRANDS

A comparison between the UK top-50 and the Australian top-100 shows a surprising lack of similarity. Despite our UK heritage, and the presence of a large number of UK-born residents in Australia, 50% of the UK top-50 does not even sell in Australia. They include Walkers, the largest crisps brand in the UK (made by PepsiCo) and Andrex, the number one toilet tissue brand (made by Kimberly Clark).

Of the remaining 25 brands that have a presence in Australia, 15 appear in the top-100. Many of these brands also appear on the global list, with some notable exceptions: Cadbury chocolate, Heinz, Flora, Birdseye and Chum appear high on the list in both Australia and the UK – but do not make it onto the global list.

And isn't it good to see that two famous Australian brands have made it into the hearts and minds of UK consumers: Fosters is coming in at number 37 (the fourth biggest beer brand in the UK grocery channel), whilst Jacobs Creek is ranked number 46. It is now the second most popular wine brand in UK grocery.

The full UK Top-50 can be found in Appendix 4 .

ABOUT THE TOP-100: METHODOLOGY AND COVERAGE

Definitions

Defining a brand is tough. Manufacturers have different views of what makes up a brand, a sub label or an umbrella brand. As in previous years, we have compiled two lists. The top-100 list defines a brand within a single category (for example, John West Canned Fish). Range extensions under the same name are included – for example, Diet Coke is included in the Coca-Cola brand.

The top-25 umbrella brands apply to brand names that cross grocery categories (e.g. Kleenex Toilet and Facial Tissue), or where sub-brands can be viewed as brand names in their own right. An example of this is Kellogg's, which has individual entries in the Top-100 (e.g. Nutrigrain) but the Kellogg's umbrella brand is included in the top-25.

Coverage

The top-100 and top-25 brands are based on annual sales through supermarkets and grocery stores for the year ending 30 June 2001. 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.

These non-grocery channels are without doubt important to some categories and brands, and their inclusion would result in a very different top-100. The scope of this study is however confined to supermarkets and grocery stores only.

"DAMNED IF YOU DO, DAMNED IF YOU DON'T"

Providing feedback to the grocery industry on consumer and retail trends has been an area of focus for ACNielsen over recent years. The top-100 is now in its eight year and continues to generate much interest, feedback and the occasional animated debate and some criticism. On request from a number of clients, we are now publishing a sales range – rather than the actual sales value.

ACNielsen has made every effort to ensure the data in this analysis is accurate. However, due to the magnitude of this analysis, we cannot guarantee that all errors or omissions have been corrected. Comparisons with last year's compilation should be treated with some care. Due to the inclusion of some brands which arguably should have been included in previous years, as well as to some definitional changes, comparisons with last year may not be valid and should be avoided.

Any questions or feedback should be directed to Anton van den Berg, Marketing Manager for ScanTrack. Contact details:

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- Appendix 1 -

ACNielsen 2001 Top-100 Brands

2000/01 RANK	BRAND	MANUFACTURER	CATEGORY	NAT SALES Y/E JUNE 2001
1	COCA-COLA	THE COCA-COLA COMPANY	CARB. BEVS.	$600m+
2	LONGBEACH	PHILIP MORRIS	TOBACCO	$500m<$600m
3	WINFIELD	BRITISH AMERICAN TOBACCO AUSTRALIA	TOBACCO	$500m<$600m
4	PETER JACKSON	PHILIP MORRIS	TOBACCO	$400m<$500m
5	HORIZON	IMPERIAL TOBACCO AUSTRALIA	TOBACCO	$400m<$500m
6	PURA	NATIONAL FOODS	FRESH MILK	$200m<$300m
7	BENSON & HEDGES	BRITISH AMERICAN TOBACCO AUSTRALIA	TOBACCO	$200m<$300m
8	HUGGIES	KIMBERLY-CLARK	DISP NAPPIES	$200m<$300m
9	HOLIDAY	BRITISH AMERICAN TOBACCO AUSTRALIA	TOBACCO	$200m<$300m
10	TIP TOP	GEORGE WESTON FOODS	BREAD	$200m<$300m
11	BUTTERCUP	GOODMAN FIELDER	BREAD	$200m<$300m
12	NESCAFE BLEND 43	NESTLE	COFFEE	$150m<$200m
13	DAIRY FARMERS	DAIRY FARMERS	FRESH MILK	$150m<$200m
14	PAULS	PARMALAT	FRESH MILK	$150m<$200m
15	SORBENT	CARTER HOLT HARVEY	TOILET ROLLS	$150m<$200m
16	CADBURY	CADBURY SCHWEPPES	CHOCOLATE BLOCKS	$150m<$200m
17	PEDIGREE PAL	UNCLE BEN'S OF AUSTRALIA	PETFOOD	$150m<$200m
18	KRAFT	KRAFT FOODS	CHEESE & DIPS	$150m<$200m
19	YOPLAIT	NATIONAL FOODS	YOGHURT	$100m<$150m
20	BIRDS EYE	SIMPLOT	FROZEN VEGES & POTATO	$100m<$150m
21	WHISKAS	UNCLE BEN'S OF AUSTRALIA	PETFOOD	$100m<$150m
22	KLEENEX	KIMBERLY-CLARK	TOILET ROLLS	$100m<$150m
23	MCCAIN	MCCAIN	FROZEN VEGES & POTATO	$100m<$150m
24	SMITH'S CRISPS	THE SMITH'S SNACKFOOD COMPANY	SNACK FOODS	$100m<$150m
25	COLGATE	COLGATE PALMOLIVE	TOOTHPASTE	$100m<$150m
26	ALPINE	PHILIP MORRIS	TOBACCO	$100m<$150m
27	SKI	DAIRY FARMERS	YOGHURT	$100m<$150m
28	BEGA	BONLAND DAIRIES	CHEESE & DIPS	$100m<$150m
29	JOHN WEST	UNILEVER	CANNED FISH	$100m<$150m
30	PEPSI	PEPSI COLA BOTTLERS	CARB. BEVS.	$100m<$150m
31	SCHWEPPES	CADBURY SCHWEPPES	CARB. BEVS.	$100m<$150m
32	NESTLE PETERS	NESTLE	ICECREAM	$80m<$100m
33	ARNOTT'S SHAPES	ARNOTT'S CAMPBELL'S	BISCUITS	$80m<$100m
34	BERRI	BERRI LIMITED	FRUIT JUICES	$80m<$100m
35	KLEENEX	KIMBERLY-CLARK	FACIAL TISSUES	$80m<$100m
36	MAINLAND	BONLAND DAIRIES	CHEESE & DIPS	$80m<$100m
37	LIBRA	SANCELLA	SAN.PRO	$80m<$100m
38	WEETBIX	SANITARIUM	CEREALS	$80m<$100m
39	STREETS	UNILEVER	ICE CREAM	$80m<$100m
40	FLORA	UNILEVER	MARGARINE	$80m<$100m
41	DUNHILL	BRITISH AMERICAN TOBACCO AUSTRALIA	TOBACCO	$70m<$80m
42	BULLA	REGAL CREAM PRODUCTS	ICECREAM	$70m<$80m
43	PANTENE	PROCTER & GAMBLE	SHAMPOO/COND	$70m<$80m
44	MARLBORO	PHILIP MORRIS	TOBACCO	$70m<$80m
45	KELLOGGS NUTRI-GRAIN	KELLOGG AUSTRALIA	CEREALS	$70m<$80m
46	GOLDEN CIRCLE	GOLDEN CIRCLE	FRUIT JUICES	$70m<$80m
47	HEINZ	HEINZ WATTIES	BABY FOODS	$70m<$80m
48	VEGEMITE	KRAFT FOODS LTD	YEAST SPREAD	$70m<$80m
49	HEINZ	HEINZ WATTIES	BAKED BEANS & SPAGHETTI	$70m<$80m
50	SAN REMO	SAN REMO	PASTA	$70m<$80m
51	HELGAS	GOODMAN FIELDER	BREAD	$70m<$80m
52	COON	DAIRY FARMERS	CHEESE & DIPS	$70m<$80m
53	OMO	UNILEVER	LAUNDRY DETERGENT	$70m<$80m
54	MOCCONA	DOUWE EGBERTS	COFFEE	$60m<$70m
55	THINS	SNACK BRANDS AUSTRALIA	SNACK FOODS	$60m<$70m
56	OLD EL PASO	PILLSBURY AUSTRALIA	MEXICAN FOODS	$60m<$70m
57	INGHAMS	INGHAMS ENTERPRISES	POULTRY	$60m<$70m
58	DAILY JUICE	BERRI LIMITED	FRUIT JUICES	$60m<$70m
59	MEADOW LEA	GOODMAN FIELDER	MARGARINE	$60m<$70m
60	DORITO'S	THE SMITHS SNACKFOOD COMPANY	SNACK FOODS	$60m<$70m
61	CONTINENTAL	UNILEVER	DRY SOUP	$60m<$70m
62	GREENSEAS	HEINZ WATTIES	CANNED FISH	$60m<$70m
63	LAYS	THE SMITHS SNACKFOOD COMPANY	SNACK FOODS	$60m<$70m
64	MILO	NESTLE	MILK MODIFIERS	$60m<$70m
65	COTTEE'S	CADBURY SCHWEPPES	CORDIALS	$60m<$70m
66	INTERNATIONAL ROAST	NESTLE	COFFEE	$60m<$70m
67	GLAD	CLOROX	PLASTIC WRAPS & BAGS	$60m<$70m
68	STRADBROKE	BRITISH AMERICAN TOBACCO AUSTRALIA	TOBACCO	$60m<$70m
69	CAMPBELL'S	ARNOTT'S CAMPBELL'S	WET SOUP	$60m<$70m
70	ARNOTT'S TIM TAM	ARNOTT'S CAMPBELL'S	BISCUITS	$60m<$70m
71	GOULBURN VALLEY	ARDMONA	CANNED FRUIT	$60m<$70m
72	LIPTON	UNILEVER	TEA	$60m<$70m
73	CHUM	UNCLE BEN'S OF AUSTRALIA	PETFOOD	$60m<$70m
74	SAKATA	SAKATA	SNACK FOODS	$50m<$60m
75	BROWNES	PB FOODS	FRESH MILK	$50m<$60m
76	EDGELL	SIMPLOT	CANNED VEGES	$50m<$60m
77	JUST JUICE	BERRI LIMITED	FRUIT JUICES	$50m<$60m
78	SO GOOD	SANITARIUM	MILKS	$50m<$60m
79	LATINA	PILLSBURY AUSTRALIA	PASTA	$50m<$60m
80	WONDERSOFT	KIMBERLY-CLARK	TOILET ROLLS	$50m<$60m
81	REV	PARMALAT	FRESH MILK	$50m<$60m
82	NESTLE	NESTLE DAIRY	YOGHURT	$50m<$60m
83	SURF	UNILEVER	LAUNDRY DETERGENT	$50m<$60m
84	REXONA	UNILEVER	DEODORANTS	$50m<$60m
85	PUREX	CARTER HOLT HARVEY	TOILET ROLLS	$50m<$60m
86	DOLMIO	MASTERFOODS	TOMATO PRODS	$50m<$60m
87	COLD POWER	COLGATE PALMOLIVE	LAUNDRY DETERGENT	$50m<$60m
88	UNCLE TOBYS	GOODMAN FIELDER	MUESLI BARS	$50m<$60m
89	KRAFT	KRAFT FOODS	SALAD DRESSINGS	$50m<$60m
90	CSR	SUGAR AUSTRALIA	SUGAR	$50m<$60m
91	BIRDS EYE	SIMPLOT	FROZEN FISH	$50m<$60m
92	MY DOG	UNCLE BEN'S OF AUSTRALIA	PETFOOD	$50m<$60m
93	SARA LEE	SARA LEE	FROZEN PASTRY	$50m<$60m
94	INGHAMS	INGHAMS	FROZEN MEALS	$45m<$50m
95	LEGGOS	SIMPLOT	TOMATO PRODS	$45m<$50m
96	KR DARLING DOWNS	DARLING DOWNS	SMALLGOODS	$45m<$50m
97	GOLDEN CIRCLE	GOLDEN CIRCLE	CANNED FRUIT	$45m<$50m
98	DEVONDALE	MURRAY GOULBURN	MILKS	$45m<$50m
99	DEVONDALE	MURRAY GOULBURN	DAIRY SPREADS	$45m<$50m
100	DRUM	IMPERIAL TOBACCO AUSTRALIA	TOBACCO	$45m<$50m

- Appendix 2 -

ACNielsen 2001 Top-25 Umbrella Brands

2000/01 rank	Umbrella Brand	Manufacturer	2000/01 Sales Band ($m)	Main Categories
1	Arnott's	Arnott's	$600m+	Biscuits & Snack Foods
2	Kelloggs	Kellogg	$400m<$450m	Cereal & Nutritious Snacks
3	Cadbury	Cadbury	$400m<$450m	Confectionery & Icecream
4	Uncle Tobys	Uncle Tobys	$250m<$300m	Cereal, Bread & Nutritious Snacks
5	Dairy Farmers	Dairy Farmers	$250m<$300m	Dairy products
6	Nescafe	Nestle	$250m<$300m	Coffee
7	Kraft	Kraft Foods	$250m<$300m	Cheese, Spreads, Salad Dressing & Meals
8	Pauls	Parmalat	$250m<$300m	Dairy products
9	Heinz	Heinz Watties	$200m<$250m	Various Dry Grocery
10	McCain	McCain Foods	$200m<$250m	Frozen Foods
11	Huggies	Kimberly-Clark	$200m<$250m	Nappies & Wipes
12	Kleenex	Kimberly-Clark	$200m<$250m	Paper products
13	Nestle	Nestle	$200m<$250m	Yoghurt, Confectionery, Icecream
14	Birds Eye	Simplot	$200m<$250m	Frozen Foods
15	Golden Circle	Golden Circle	$200m<$250m	Beverages, Fruit and Vegetables
16	Sorbent	Carter Holt Harvey	$150m<$200m	Paper products
17	Continental	Unilever Foods	$150m<$200m	Various Dry Grocery
18	Sanitarium	Sanitarium	$150m<$200m	Cereal, Spreads & Nutritious Snacks
19	Colgate	Colgate-Palmolive	$150m<$200m	Oral Care
20	Inghams	Inghams	$100m<$150m	Poultry & Meals
21	Smiths	Smiths	$100m<$150m	Snack Foods
22	Cottee's	Schweppes Cottee's	$100m<$150m	Beverages & Jam
23	Devondale	Murray Goulburn	$100m<$150m	Dairy products
24	John West	Unilever Foods	$100m<$150m	Herbs & Spices, Canned Fish & Fruit
25	Berri	Berri	$100m<$150m	Beverages & Fruit

- Appendix 3 -

Global Brands Reaching the Billion Dollar Mark

Brand* (# of Countries Included 30 Maximum)	Segment	Sales YE Q1 2001 (in constant US $)	Growth Rates***		Largest Market
			99- 00	00 - 01	
Total Coke (30)		Over $15 billion	+	+	Europe, Middle East & Africa
Coke (Regular)**	Carbonated Beverages				
Diet Coke/Coke Light**					
Marlboro (25)			++	++	Europe, Middle East & Africa
Marlboro (Regular)**	Tobacco				
Marlboro Lights**					
Total Pepsi (30)		$5 - 10 billion	+	+	North America
Pepsi (Regular)**	Carbonated Beverages				
Diet Pepsi/ Pepsi Light**					
Budweiser (25)	Beer	$3 - 5 billion	+++	++	North America
Campbell's (21)	Soup		-	++	North America
Kelloggs (27)	Cereal		-	+	North America
Pampers (27)	Diapers		-	-	Europe, Middle East & Africa
Benson & Hedges (21)	Tobacco	$2 - 3 billion	-	-	Europe, Middle East & Africa
Camel (24)	Tobacco		+	+	Europe, Middle East & Africa
Danone (25)	Yoghurt		++	+++	Europe, Middle East & Africa
Fanta (29)	Carbonated Beverages		+	++	Europe, Middle East & Africa
Friskies (24)	Pet Food		+	+	North America
Gillette (29)	Blades & Razors		+++	+	North America & Europe
Huggies (25)	Diapers		+++	+	North America
Nescafe (29)	Coffee		+	+	Europe, Middle East & Africa
Sprite (30)	Carbonated Beverages		+	+	North America
Tide (11)	Laundry Detergent		+	+	North America
Tropicana (17)	Still Beverages		+++	+++	North America
Wrigley's (27)	Chewing Gum		++	+++	Europe, Middle East & Africa
Colgate (29)	Toothpaste	$1.5 - 2 billion	++	++	North America
Duracell (28)	Batteries		+++	-	North America
Heineken (26)	Beer		++	++	Europe, Middle East & Africa
Kodak (13)	Consumer Films		++	+	North America
Lay's (22)	Chips & Snacks		++	+++	North America
Pedigree (25)	Pet Food		+	+	North America & Europe
Always (25)	Sanitary Protection	$1 - 1.5 billion	+	+	North America & Europe
Doritos (20)	Chips & Snacks		++	+++	North America
Energizer (28)	Batteries		+++	+	North America
Gatorade (21)	Sports Beverages		+++	+++	North America
Guinness (23)	Beer		+	+	Europe, Middle East & Africa
Kinder (28)	Chocolate		-	-	Europe, Middle East & Africa
Kleenex (26)	Facial Tissue		+	++	North America
L'Oreal (27)	Colorants		+++	++	North America
Maxwell House (19)	Coffee		++	+	North America
Minute Maid (16)	Still Beverages		+++	+++	North America
Nivea (29)	Moisturizers & Cleansers		+	+++	Europe, Middle East & Africa
Pantene (30)	Shampoo & Conditioners		+	+	North America
Philadelphia (25)	Cheese		++	+	North America
Pringles (30)	Chips & Snacks		++	-	Europe, Middle East & Africa
Seven-Up/ 7-Up (30)	Carbonated Beverages		+	+	North America
Tylenol (9)	OTC Pain Remedies		+	+	North America
Whiskas (24)	Pet Food		++	++	Europe, Middle East & Africa

*** Brands are in alphabetical order within each range**
**** Subbrands which independently meet the Global Billion Dollar mark**
**** Growth Rates: +++: >=10%; ++: 5 - 9%; +: 0 - 4%; -: < 0%**

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- Appendix 4 -

Which brands sell well in the UK?

Top 50 British Brands 2001

Rank	Manufacturer	Brand	Year to April 2001 (£m)
1	COCA-COLA COMPANY	COCA-COLA	665-670
2	PEPSICO	WALKERS CRISPS	480-485
3	NESTLE	NESCAFE	315-320
4	INTERBREW	STELLA ARTOIS	310-315
5	MULLER	MULLER	285-290
6	LEVER BROTHERS	PERSIL	230-235
7	KIMBERLY CLARK	ANDREX TOILET TISSUE	200-205
8	BRITVIC SOFT DRINKS	ROBINSONS	180-185
9	NESTLE ROWNTREE	KIT KAT	170-175
10	PEPSICO	PEPSI	170-175
11	BASS	CARLING	165-170
12	PROCTER & GAMBLE	PAMPERS	165-170
13	CADBURY	CADBURY DAIRY MILK	165-170
14	PROCTER & GAMBLE	ARIEL	155-160
15	GLAXOSMITHKLINE	RIBENA	155-160
16	PEDIGREE PETFOODS	WHISKAS	140-145
17	BIRDS EYE WALL'S	WALL'S ICE CREAM	135-140
18	HEINZ	HEINZ CANNED SOUP	130-135
19	GLAXOSMITHKLINE	LUCOZADE	125-130
20	HEINZ	HEINZ BAKED BEANS	125-130
21	FRISKIES PETCARE	FELIX	125-130
22	VAN DEN BERGHS	P G TIPS	120-125
23	PROCTER & GAMBLE	PRINGLES	120-125
24	VAN DEN BERGHS	FLORA	120-125
25	MCCAIN FOODS	MCCAIN CHIPS	120-125
26	KIMBERLY CLARK	HUGGIES	110-115
27	PROCTER & GAMBLE	BOLD	110-115
28	COLGATE	COLGATE	110-115
29	UDV	BELLS 8 YR.	110-115
30	TETLEY GB	TETLEY	110-115
31	BIRDS EYE	BIRDS EYE FROZEN POULTRY	105-110
32	MARS	MARS BAR	105-110
33	ANHEUSER-BUSCH	BUDWEISER	105-110
34	MD FOODS	LURPAK	105-110
35	PEDIGREE PETFOODS	CHUM	100-105
36	KRAFT FOODS	DAIRYLEA	100-105
37	SCOTTISH COURAGE	FOSTER'S	95-100
38	LEVER BROTHERS	COMFORT	95-100
39	ERNEST & JULIO GALLO	ERNEST & JULIO GALLO	95-100
40	UDV	SMIRNOFF RED LABEL	95-100
41	MANOR BAKERIES	MR KIPLING	90-95
42	PROCTER & GAMBLE	SUNNY DELIGHT	90-95
43	SCA	VELVET	90-95
44	MAXXIUM	THE FAMOUS GROUSE	90-95
45	TROPICANA	TROPICANA	90-95
46	CAXTON WINES	JACOBS CREEK	85-90
47	BIRDS EYE	BIRDS EYE FROZEN READY MEALS	85-90
48	BIRDS EYE	BIRDS EYE FROZEN VEG	85-90
49	KIMBERLY CLARK	KLEENEX FACIAL	85-90
50	MARS	CELEBRATIONS	85-90