

Top-10 grocery suppliers account for one-third of packaged grocery sales

ACNielsen clients dominate top-10 and outperform market growth

The 10 largest grocery suppliers in Australia account for one-third of packaged grocery sales, according to a recent ACNielsen study. The top-100 accounts for a massive 74% of grocery sales. ACNielsen clients continue to dominate the top-10, with 6 out of the top-10 processing their scan data through ACNielsen.

ACNielsen ScanTrack clients have also out-performed the market's benchmark growth rate. Across the entire top-100 supplier list, ACNielsen ScanTrack clients grew by an average of 6.6% over the past year, compared with just 4.7% for non-ScanTrack clients.

TOP-10 GROCERY SUPPLIERS BY DOLLAR VALUE

NATIONAL GROCERY (INCL INDEPENDENTS) - YEAR ENDING SEPT 2002

Generics & private label excluded

RANK	SUPPLIER	MAIN BRANDS
1	BRITISH AMERICAN TOBACCO	WINFIELD, BENSON & HEDGES, HOLIDAY, DUNHILL
2	PHILIP MORRIS	LONGBEACH, PETER JACKSON, ALPINE, MARLBORO
3	NESTLE	NESCAFE, INTERNATIONAL ROAST, PETERS, MILO, MAGGI
4	UNILEVER	JOHN WEST, STREETS, FLORA, OMO, CONTINENTAL, LIPTON, SURF
5	GOODMAN FIELDER	BUTTERCUP, HELGAS, MEADOW LEA, UNCLE TOBYS, PAMPAS, PRAISE
6	ARNOTT'S CAMPBELL'S	ARNOTT'S, CAMPBELL'S SOUP, TIM TAM, SHAPES, THINS
7	CADBURY SCHWEPPE	CADBURY, SCHWEPPE, COTTEES
8	MASTERFOODS (FORMERLY EFFEM)	MASTERFOODS, DOLMIO, PAL, WHISKAS, MARS, SNICKERS
9	THE COCA-COLA COMPANY	COCA-COLA, FANTA, SPRITE, MT FRANKLIN, LIFT, POWERADE
10	IMPERIAL TOBACCO	HORIZON, DRUM

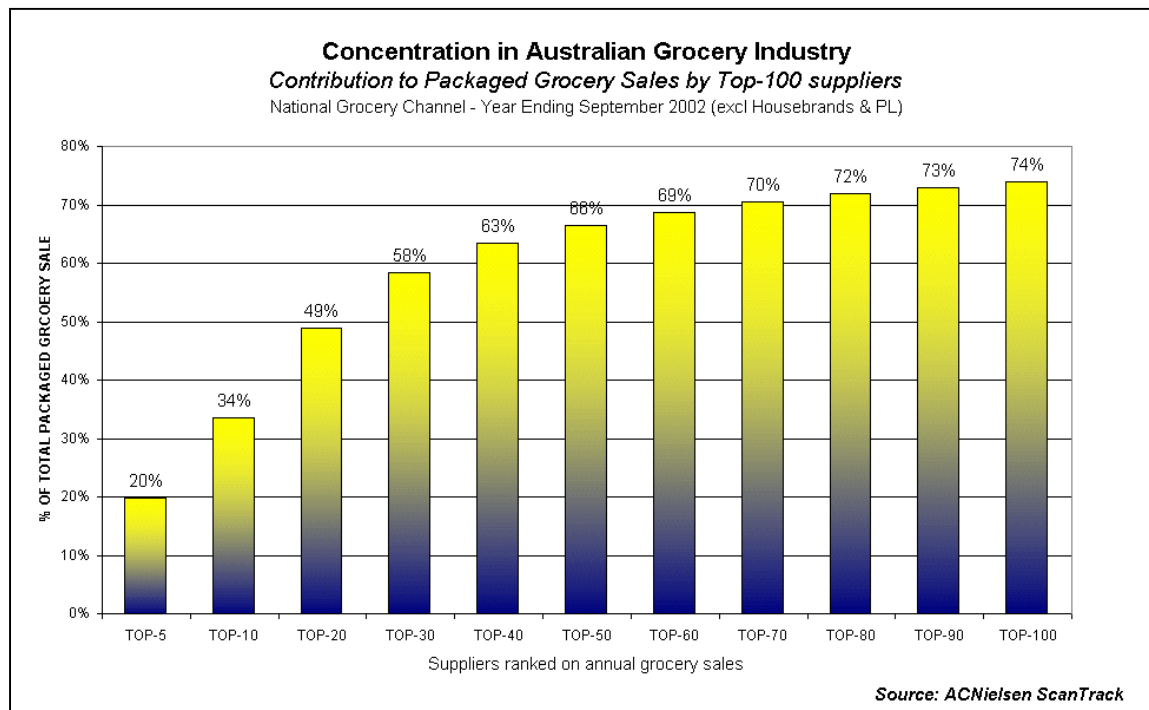
British American Tobacco is the largest supplier to the Australian grocery industry, whilst two other tobacco companies also made it into the top-10: Philip Morris and Imperial Tobacco. The top-10 also includes:

- Three predominantly food-based groups: Nestle, Unilever and Goodman Fielder
- Three beverage/snacking suppliers: Arnott's Campbell's, Cadbury Schweppes and Coca-Cola Australia
- One mixed group: Effem, the holding company of Uncle Ben's, Masterfoods and Mars Confectionery.

The ACNielsen study is based on packaged grocery sales from all supermarkets and grocery stores – including Independents – for the year ending September 2002. Direct delivery categories have been projected for non-scan sales. Generics and Private Label sales have been excluded from supplier sales, as it is not always possible to identify who supplies generic and private label brands.

Other highlights from the ACNielsen study:

- The top-100 suppliers account for some 74% of total packaged grocery sales
- Non-Food sales (excluding tobacco) are dominated by Kimberly-Clark, Colgate Palmolive, Carter Holt Harvey, Reckitt Benckiser, Procter & Gamble, Gillette and J&J.



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Rank	Supplier	Main brands
1	BRITISH AMERICAN TOBACCO	WINFIELD, BENSON & HEDGES, HOLIDAY, DUNHILL
2	PHILIP MORRIS	LONGBEACH, PETER JACKSON, ALPINE, MARLBORO
3	NESTLE	NESCAFE, INTERNATIONAL ROAST, PETERS, MILO, MAGGI
4	UNILEVER	JOHN WEST, STREETS, FLORA, OMO, CONTINENTAL, LIPTON
5	GOODMAN FIELDER	BUTTERCUP, HELGAS, MEADOW LEA, UNCLE TOBYS, PAMPAS
6	ARNOTT'S CAMPBELL'S	ARNOTT'S, CAMPBELL'S SOUP, TIM TAM, SHAPES, THINS
7	CADBURY SCHWEPPE	CADBURY, SCHWEPPE, COTTEES
8	MASTERFOODS (FORMERLY EFFEM)	MASTERFOODS, DOLMIO, PAL, WHISKAS, MARS, SNICKERS
9	THE COCA-COLA COMPANY	COCA-COLA, FANTA, SPRITE, MT FRANKLIN, LIFT, POWERADE
10	IMPERIAL TOBACCO	HORIZON, DRUM
11	KIMBERLY CLARK	KLEENEX, HUGGIES, WONDERSOFT
12	NATIONAL FOODS	PURA, YOPLAIT
13	GEORGE WESTON FOODS	TIP TOP, WESTONS
14	COLGATE-PALMOLIVE	COLGATE, PALMOLIVE, COLD POWER, AJAX, SPREE
15	KRAFT FOODS	KRAFT, VEGEMITE
16	DAIRY FARMERS	DAIRY FARMERS, SKI, COON
17	SIMPLOT	EDGELL, BIRDSEYE, LEGGO

18	BERRI	BERRI, DAILY JUICE, JUST JUICE
19	KELLOGG	KELLOGG, NUTRI-GRAIN
20	CARTER HOLT HARVEY	SORBENT, PUREX, LIBRA, DEEKO,
21	RECKITT BENCKISER	MORTEIN, PINE-O-CLEAN, STERADENT, AEROGARD
22	HEINZ WATTIE'S	HEINZ, GREENSEAS
23	BONLAND DAIRIES	BEGA, ALLOWRIE, MAINLAND
24	PARMALAT	PAULS, SOY LIFE
25	THE SMITH'S SNACKFOOD CO	SMITH'S, TWISTIES, DORITOS, LAYS
26	SARA LEE/DE	MOCCONA, SARA LEE, AMBI-PUR, WHITE KING
27	MCCAIN FOODS	MCCAIN
28	GOLDEN CIRCLE	GOLDEN CIRCLE
29	PROCTER & GAMBLE	PANTENE, HEAD & SHOULDERS, VICKS, PRINGLES
30	SANITARIUM HEALTH FOOD CO	SANITARIUM, SO GOOD, WEET-BIX
31	SPC ARDMONA OPERATIONS	SPC, GOULBURN VALLEY, ARDMONA
32	GILLETTE AUST	GILLETTE, MACH3, ORAL-B, BRAUN, DURACELL
33	JOHNSON & JOHNSON	J&J, CAREFREE, BAND AID, CLEAN & CLEAR, REACH, STAYFREE
34	SAN REMO	SAN REMO
35	PURE & NATURAL BEVERAGES	P&N, CLASSIC HITS, WATERFORDS
36	GENERAL MILLS	OLD EL PASO, LATINA, NOBLE HOUSE
37	MANASSEN FOODS AUST	TRIDENT, SAN ESU, TWININGS
38	MURRAY GOULBURN CO-OP CO	DEVONDALE
39	CUSSONS	IMPERIAL LEATHER, RADIANT
40	CLOROX AUSTRALIA	GLAD, CHUX
41	PETERS & BROWNES FOODS	BROWNS, CONNOISEUR
42	CEREBOS FOODS	FOUNTAIN, GRAVOX, SALAD MAGIC
43	S C JOHNSON WAX INC	GLADE, DUCK, RAID, WINDEX
44	ACP PUBLISHING	WOMEN'S WEEKLY, COSMOPOLITAN, WOMAN'S DAY
45	REGAL CREAM PRODUCTS	BULLA
46	GLAXOSMITHKLINE	PANADOL, MACLEANS
47	ABC TISSUE PRODUCTS	ABC
48	WRIGLEY CO	EXTRA, PK, AIRWAVES, ECLIPSE
49	VALCORP FINE FOODS	DILMAH, LAVAZZA, LA GINA
50	CAMPBELL BROS	CASTLE, BUSHLAND, HURRICANE
51	L'OREAL MARIGNY	L'OREAL. FERIA, PLENTITUDE
52	INGHAM ENTERPRISES	INGHAM'S
53	RICEGROWERS CO-OP	SUNRICE
54	ENERGIZER AUST	ENERGIZER, EVEREADY
55	PFIZER CONSUMER HEALTHCARE	LISTERINE, ROSKEN, SCHICK, MYLANTA
56	RIVIANA FOODS	ADMIRAL, SHARWOODS
57	DARLING DOWNS FOODS	KR DARLING DOWNS
58	F H FAULDING & CO	CENOVIS, BANANA BOAT
59	SCHWARZKOPF	SCHWARZKOPF, FA
60	MCCORMICK FOODS	MCCORMICK, AEROPLANE JELLY
61	PACIFIC PUBLICATIONS	NEW IDEA, THAT'S LIFE
62	GREEN'S FOODS	GREEN'S, NANDA, VETTA
63	AUST PACIFIC PAPER PRODUCTS	BABYLOVE

64	BEIERSDORF AUST	NIVEA
65	FERRERO AUST	KINDER SURPRISE, TIC TAC, NUTELLA
66	DICK SMITH	DICK SMITH
67	STUART ALEXANDER & CO	ROSELLA, MENTOS, GUYLAIN
68	SUGAR AUSTRALIA	CSR
69	MULTIX	MULTIX
70	HANS CONTINENTAL SMALL GODS	HANS
71	HERRON PHARMACEUTICALS	HERRON, GOANNA
72	HENRY JONES FOODS	IXL
73	PACE FARMS	PACE FARM, LIBERY
74	MERINO	SAFE, BOUQUET
75	ALBERTO CULVER	VO5, ALBERTO SALON FORMULA
76	LOWAN WHOLE FOODS	LOWAN
77	ORIENTAL MERCHANT	AYAM, LEE KUM KEE, YEO'S
78	WYETH AUSTRALIA	S-26
79	CANTARELLA BROS	VITTORIA, KING OSCAR
80	SAKATA RICE SNACKS	SAKATA
81	CONGA FOODS	MORO
82	LACTOS	ST CLAIRE, TASMANIAN HERITAGE
83	NOVARTIS NUTRITION	JARRAH; OVALTINE
84	SAFCOL AUST	SNAPPY TOM, SAFCOL
85	NOVO FOODS	EGGBERT, FARM FRESH EGGS
86	BOOTS HEALTHCARE	STREPSILS, CLEARASIL
87	TETLEY AUSTRALIA	TETLEY
88	BAYER AUSTRALIA	BAYGON
89	JALNA DAIRY FOODS	JALNA
90	WELLA AUSTRALIA	WELLA, DECORE
91	HILTON HOSIERY CO	RAZZAMATTAZ
92	THE ANGAS PARK FRUIT CO	ANGAS PARK
93	AUST DRIED FRUIT SALES	SUNBEAM
94	SUNRISE CONFECTIONERS	BINKAS
95	NATURE'S ORGANICS	NATURE'S ORGANICS
96	YAKULT CO.	YAKULT
97	KODAK AUSTRALASIA	KODAK
98	STEGGLES	STEGGLES
99	BLACKMORES LABS	BLACKMORES
100	ROCHE	ASPRO, BEROCCA, CEPACOL