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News Release

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AUSSIE BRANDS RAISE THE BAR – BRANDS REQUIRED TO EXCEED \$66 MILLION IN ANNUAL SALES TO MAKE 2007 TOP 100 LIST

Sydney, 1 February 2008 – According to the 2007 Nielsen Top 100 Brands Report, the top three supermarket brands remain unchanged, with Winfield, Coca-Cola and Longbeach taking the top three positions – these three brands have held the top positions since the inception of the Top 100 Brands Report in 1994.

The Top 100 Brands Report published biennially by leading marketing and media research firm – The Nielsen Company, also reveals that Winfield, Coke and Longbeach remain the only three supermarket brands in Australia to be valued at over \$750 million dollars after breaking through this barrier for the first time in 2005.

Although tobacco brands continue to dominate the top 100 list, there has been a slight reduction from 14 brands in 2005 to 13 brands in 2007. Other categories which have performed well in 2007 include carbonated beverages, fruit juices and bread, all having four brands in this year's top 100 list.

Growth in 2007 has slowed down to just 9.9 percent compared to the 11.8 percent growth achieved in the two years to July 2005. The value of the top 100 brands is now around \$15.5 billion which accounts for 37.5 percent of total packaged grocery, which remains fairly unchanged since 2005.

To make the 2007 top 100 brands list, brands needed to achieve annual sales in excess of \$66 million, which is up \$4 million in two years and up \$11 million since 2003. This year

saw five brands drop out from the previous top 100 list, to be replaced by new entrants Paradise Biscuits coming in at number 83 with annual sales between \$75-100 million and Devondale (92), Lean Cuisine (93), Peter Stuyvesant (97) and Mortein (98) with sales of \$50-75 million. Each of these brands enjoyed strong growth in the past two years, particularly Devondale which was up more than 60 percent and Paradise Biscuits which had a 55 percent gain on its 2005 sales. Devondale and Paradise Biscuits recorded the strongest sales growth of any brands in this year's list.

The 2007 ranking of the top 25 umbrella brands remains unchanged at the top, with Arnott's, Cadbury and Kellogg ranking as the top-selling umbrella brands. Overall the composition of the umbrella brands was relatively unchanged with just one new entrant in 2005 – Mainland.

Megan Treston, Director, Retail Client Service, Nielsen Australia, noted that "This Nielsen report highlights the importance of the ongoing investment required to build a strong brand. Today's Top 100 Brands are where they are because of years of investment in marketing and brand building. Advertising, new product development, packaging and product quality are all critical factors in the success of these brands."

"Those brands who have seen the strongest positive movements in rank over the past two years also highlight a couple of emerging consumer trends in the areas of convenience (single-serve options in frozen meals, soup, ice cream and biscuits, and snacking options in cheese) and organics (baby food, pasta and cereal)."

Concentrated ownership:

Just 43 manufacturers own the top 100 brands, with close to half of the brands (48) owned by 10 manufacturers. Nestle owns the most brands on the top 100 list of any manufacturer with an impressive seven top 100 brands within its portfolio including Peters, Nescafe and its newly acquired brand Uncle Tobys. This was followed by Unilever with six brands on the top 100 list, and Simplot, British American Tobacco and National Foods who hold five brands each.

Annual advertising expenditure:

In the past 12 months, Nielsen Media Research estimates that manufacturers of the top 100 brands spent around \$252.8 million on advertising. This expenditure is relatively unchanged since the previous year where \$252.3 million was spent by the top 100 brands.

Chart 1: 2007 Nielsen Top 100 Brands Report

04/05 RANK (based on current database)	2007 RANK	BRAND	CATEGORY	MANUFACTURER	SALES	Est. Media Ad Spend April '06 to March '07 in \$MILL.
1	1	WINFIELD	TOBACCO	BRITISH AMERICAN TOBACCO AUSTRALIA	750m+	-
3	2	COCA-COLA	CARBONATED BEVERAGES	COCA-COLA COMPANY	750m+	12.8
2	3	LONGBEACH	TOBACCO	PHILIP MORRIS	750m+	-
4	4	PETER JACKSON	TOBACCO	PHILIP MORRIS	500 - 750m	-
5	5	HORIZON	TOBACCO	IMPERIAL TOBACCO AUSTRALIA	500 - 750m	-
6	6	BENSON & HEDGES	TOBACCO	BRITISH AMERICAN TOBACCO AUSTRALIA	250 - 500m	-
8	7	HOLIDAY	TOBACCO	BRITISH AMERICAN TOBACCO AUSTRALIA	250 - 500m	-
10	8	TIP TOP	PROPRIETARY BREAD	GEORGE WESTON FOODS	250 - 500m	0.6
9	9	CADBURY CHOCOLATE	CONFECTIONERY	CADBURY SCHWEPPE	250 - 500m	18.6
7	10	HUGGIES	DISPOSABLE NAPPIES	KIMBERLY CLARK	250 - 500m	7.5
11	11	NESTLE/PETERS	ICE CREAM	NESTLE	150 - 250m	4.6
14	12	PAULS	FRESH WHITE MILK	PARMALAT	150 - 250m	1.9
19	13	NESCAFE BLEND 43	COFFEE	NESTLE	150 - 250m	-
21	14	SMITH'S	SNACK FOODS	THE SMITHS SNACKFOOD COMPANY	150 - 250m	3.0
13	15	YOPLAIT	YOGHURT/DESSERTS	NATIONAL FOODS	150 - 250m	2.4
18	16	KLEENEX COTTONELLE	TOILET TISSUE	KIMBERLY CLARK	150 - 250m	4.9
12	17	PURA	FRESH WHITE MILK	NATIONAL FOODS	150 - 250m	0.6
16	18	PEDIGREE PAL	DOG FOOD	MARS AUSTRALIA	150 - 250m	-
29	19	DUNHILL	TOBACCO	BRITISH AMERICAN TOBACCO AUSTRALIA	150 - 250m	-
17	20	MCCAIN	FROZEN VEGE & POTATOES	MCCAIN	150 - 250m	6.5
15	21	SORBENT	TOILET TISSUE	SCA	150 - 250m	2.4
22	22	WHISKAS	CAT FOOD	MASTERFOODS ANZ	150 - 250m	2.6
20	23	BIRDS EYE	FROZEN VEGE & POT	SIMPLOT	150 - 250m	1.7
23	24	COLGATE	TOOTHPASTE	COLGATE-PALMOLIVE	150 - 250m	6.7
24	25	PEPSI	CARBONATED SOFT BEVERAGES	CADBURY SCHWEPPE	150 - 250m	11.6
33	26	BEGA	CHEESE	FONTERRA BRANDS	150 - 250m	1.3
25	27	KRAFT	CHEESE	KRAFT FOODS	150 - 250m	1.2
27	28	DAIRY FARMERS	FRESH WHITE MILK	DAIRY FARMERS	100 - 150m	1.0
28	29	SKI	YOGHURT	DAIRY FARMERS	100 - 150m	0.8
45	30	STREETS	ICE CREAM	UNILEVER	100 - 150m	5.5
35	31	JOHN WEST	CANNED FISH	SIMPLOT	100 - 150m	3.0
31	32	MAINLAND CHEESE	MAINLAND CHEESE	FONTERRA BRANDS	100 - 150m	2.4
47	33	QUILTON	TOILET TISSUE	ABC TISSUE	100 - 150m	1.3
30	34	ALPINE	TOBACCO	PHILIP MORRIS	100 - 150m	-
37	35	SCHWEPPE	CARBONATED BEVERAGES	CADBURY SCHWEPPE	100 - 150m	5.6
34	36	GILLETTE	RAZOR & BLADE	PROCTOR & GAMBLE	100 - 150m	9.6
32	37	COON	CHEESE	DAIRY FARMERS	100 - 150m	1.1
26	38	UNCLE TOBYS	NUTRITIOUS SNACKS	NESTLE	100 - 150m	3.3
39	39	MIGHTY SOFT	PROPRIETARY BREAD	GOODMAN FIELDER	100 - 150m	-
40	40	KLEENEX	FACIAL TISSUE	KIMBERLY CLARK	100 - 150m	2.3
36	41	GOLDEN CIRCLE	FRUIT JUICES	GOLDEN CIRCLE	100 - 150m	1.1
42	42	HELGA'S	PROPRIETARY BREAD	GOODMAN FIELDER	100 - 150m	-
43	43	BERRI	FRUIT JUICES	NATIONAL FOODS	100 - 150m	0.1
38	44	WINFIELD	RYO TOBACCO	BRITISH AMERICAN TOBACCO AUSTRALIA	100 - 150m	-
44	45	ARNOTT'S SHAPES	BISCUITS	CAMPBELL ARNOTT'S	100 - 150m	3.2
41	46	WONDER WHITE	PROPRIETARY BREAD	GOODMAN FIELDER	100 - 150m	0.9
63	47	BULLA	ICE CREAM	REGAL CREAM PRODUCTS	100 - 150m	2.0
57	48	WEET-BIX	CEREAL	SANITARIUM	100 - 150m	6.0
49	49	HANS	SMALL GOODS	HANS CONTINENTAL SMALLGOODS	100 - 150m	0.2
46	50	NESTLE	YOGHURT	NESTLE	100 - 150m	2.4
55	51	OLD EL PASO	MEXICAN FOODS	GENERAL MILLS	100 - 150m	3.4
54	52	GOULBURN VALLEY	PACKAGED FRUIT	SPC ARDMONA	100 - 150m	1.6
62	53	SAN REMO	PASTA	SAN REMO	100 - 150m	2.3
53	54	GREENSEAS	CANNED FISH	H.J. HEINZ & CO. AUSTRALIA	100 - 150m	1.2
51	55	MILK	MILK MODIFIERS	NESTLE	100 - 150m	1.4
59	56	FLORA	MARGARINE	UNILEVER	100 - 150m	3.0
74	57	PRIMO	SMALL GOODS	P & M QUALITY SMALL GOODS	75 - 100m	0.1
52	58	KIRKS	CARBONATED BEVERAGES	COCA-COLA COMPANY	75 - 100m	1.7
65	59	MCCAIN	FROZEN MEALS	MCCAIN	75 - 100m	3.7
50	60	LIBRA	SANITARY PROTECTION	SCA	75 - 100m	5.9
64	61	LEGGOS	TOMATO PRODUCTS	SIMPLOT	75 - 100m	1.8
73	62	FINISH	DISHWASHING DETERGENT	RECKITT BENCKISER	75 - 100m	5.0
58	63	HEINZ	BAKED BEANS & SPAGHETTI	H.J. HEINZ & CO. AUSTRALIA	75 - 100m	0.5
61	64	PHILADELPHIA	CHEESE & DIPS	KRAFT FOODS	75 - 100m	4.4
66	65	MOCCONA	INSTANT COFFEE	SARA LEE	75 - 100m	1.4
56	66	JUST JUICE	FRUIT JUICES	NATIONAL FOODS	75 - 100m	-
77	67	COTTEE'S	CORDIAL	CADBURY SCHWEPPE	75 - 100m	2.0
72	68	VEGEMITE	YEAST SPREADS	KRAFT FOODS	75 - 100m	1.5
82	69	EDGELL	CANNED VEGETABLES	SIMPLOT	75 - 100m	0.6
70	70	MARLBORO	TOBACCO	PHILIP MORRIS	75 - 100m	-

04/05 RANK (based on current database)	2007 RANK	BRAND	CATEGORY	MANUFACTURER	SALES	Est. Media Ad Spend April '06 to March '07 in \$Mill.
69	71	CAMPBELL'S	WET SOUP	CAMPBELL ARNOTT'S	75 - 100m	2.1
67	72	DAILY JUICE	FRUIT JUICES	NATIONAL FOODS	75 - 100m	0.8
80	73	REXONA	DEODORANTS	UNILEVER	75 - 100m	4.0
75	74	McCAIN	FROZEN PIZZA	McCAIN	75 - 100m	2.2
86	75	CHAMPION RUBY	RYO TOBACCO	IMPERIAL TOBACCO AUSTRALIA	75 - 100m	-
60	76	VIP	PETFOOD	VIP PETFOODS	75 - 100m	0.3
79	77	EXTRA	CHEWING GUM	WRIGLEY	75 - 100m	4.6
88	78	HEINZ	SOUP	H.J. HEINZ & CO. AUSTRALIA	75 - 100m	2.2
91	79	BIRDS EYE	FROZEN FISH	SIMPLOT	75 - 100m	2.9
96	80	MY DOG	DOG FOOD	MARS AUSTRALIA	75 - 100m	1.1
94	81	ENERGIZER	BATTERIES	ENERGIZER AUSTRALIA	75 - 100m	5.0
85	82	ARNOTT'S TIM TAM	BISCUITS	CAMPBELL ARNOTT'S	75 - 100m	3.5
106	83	PARADISE	BISCUITS	PARADISE FOOD INDUSTRIES	75 - 100m	1.2
76	84	OMO	LAUNDRY DETERGENTS	UNILEVER	75 - 100m	1.4
90	85	LATINA	PASTA	GENERAL MILLS	75 - 100m	1.7
92	86	DEVONDALE	DAIRY SPREADS	MURRAY GOULBURN	75 - 100m	0.6
99	87	HEINZ	BABY FOODS	H.J. HEINZ & CO. AUSTRALIA	75 - 100m	1.1
48	88	PANTENE	SHAMPOO & CONDITIONER	PROCTOR & GAMBLE	75 - 100m	7.7
97	89	MEADOW LEA	MARGARINE	GOODMAN FIELDER	75 - 100m	2.0
81	90	CONTINENTAL	PACKET SOUP	UNILEVER	50 - 75m	3.0
83	91	GLAD	PLASTIC BAGS & WRAPS	CLOROX	50 - 75m	1.7
107	92	DEVONDALE	MILK & CREAMS	MURRAY GOULBURN	50 - 75m	2.7
103	93	LEAN CUISINE	FROZEN MEALS	NESTLE	50 - 75m	0.7
71	94	DRUM	RYO TOBACCO	IMPERIAL TOBACCO AUSTRALIA	50 - 75m	-
68	95	KELLOGG NUTRI-GRAIN	CEREAL	KELLOGG AUSTRALIA	50 - 75m	7.1
98	96	DORITOS	SNACK FOODS	THE SMITHS SNACKFOOD COMPANY	50 - 75m	-
104	97	PETER STUYVESANT	TOBACCO	IMPERIAL TOBACCO AUSTRALIA	50 - 75m	-
102	98	MORTEIN	INSECTICIDES/PEST KILLERS	RECKITT BENCKISER	50 - 75m	4.2
78	99	CONTINENTAL	PACKET MEALS	UNILEVER	50 - 75m	3.8
100	100	ALLEN'S	SUGAR CONFECTIONERY	NESTLE	50 - 75m	1.1

Chart 2: 2007 Nielsen Top 25 Umbrella Brands Report

UMBRELLA BRAND	SUPPLIER	MAIN CATEGORIES	SALES	2007 RANK	04/05 RANK (based on current database)
ARNOTT'S	CAMPBELLS ARNOTT'S	BISCUITS & SNACK FOODS	\$500 - \$750m	1	1
CADBURY	CADBURY SCHWEPPES	CONFECTIONERY & ICE CREAM	\$500 - \$750m	2	2
KELLOGG	KELLOGG AUSTRALIA	CEREAL & NUTRITIOUS SNACKS	\$500 - \$750m	3	3
NESTLE	NESTLE	YOGHURT, CONFECTIONERY & ICE CREAM	\$250 - \$500m	4	4
DAIRY FARMERS	DAIRY FARMERS	DAIRY PRODUCTS	\$250 - \$500m	5	7
NESCAFE	NESTLE	COFFEE	\$250 - \$500m	6	14
KRAFT	KRAFT FOODS	CHEESE, SPREADS, SALAD DRESSING, BOTTLED SAUCE & PACKET MEALS	\$250 - \$500m	7	5
HEINZ	H.J. HEINZ & CO. AUSTRALIA	VARIOUS DRY GROCERY	\$250 - \$500m	8	11
McCAIN	McCAIN	FROZEN FOOD	\$250 - \$500m	9	9
HUGGIES	KIMBERLY CLARK	NAPPIES & MOIST TOWELETTE	\$250 - \$500m	10	8
KLEENEX	KIMBERLY CLARK	PAPER PRODUCTS	\$250 - \$500m	11	12
UNCLE TOBYS	NESTLE	CEREAL, NUTRITIOUS SNACKS, SNACK FOOD	\$250 - \$500m	12	6
TIP TOP	GEORGE WESTON FOODS	BREAD, FLOUR & BAKING AIDS	\$250 - \$500m	13	13
SANITARIUM	SANITARIUM	CEREAL, SPREADS & NUTRITIOUS SNACKS	\$250 - \$500m	14	16
GOLDEN CIRCLE	GOLDEN CIRCLE	BEVERAGES, FRUIT & VEGETABLES	\$250 - \$500m	15	10
PAULS	PARMALAT	DAIRY PRODUCTS	\$250 - \$500m	16	15
BIRDS EYE	SIMPLOT	FROZEN FOOD	\$150 - \$250m	17	17
SORBENT	SCA	PAPER PRODUCTS	\$150 - \$250m	18	19
COLGATE	COLGATE-PALMOLIVE	ORAL CARE	\$150 - \$250m	19	21
PURA	NATIONAL FOODS	DAIRY PRODUCTS	\$150 - \$250m	20	18
DEVONDALE	MURRAY GOULBURN	DAIRY PRODUCTS	\$150 - \$250m	21	23
SMITH'S	THE SMITHS SNACKFOOD COMPANY	SNACK FOODS	\$150 - \$250m	22	24
CONTINENTAL	UNILEVER	VARIOUS DRY GROCERY	\$150 - \$250m	23	20
BULLA	REGAL CREAM PRODUCTS	ICE CREAM, YOGHURT & CHEESE	\$150 - \$250m	24	22
MAINLAND	FONTERRA BRANDS	DAIRY PRODUCTS	\$150 - \$250m	25	27

Methodology:

Nielsen has been providing information to the grocery industry on consumer and retail trends for many decades. The Top 100 Brands is now in its thirteenth year and continues to generate much interest, feedback and the occasional animated debate.

Nielsen has made every effort to ensure the data in this analysis is accurate. However, due to the constant shifting of the marketplace and the magnitude of the analysis, the Company cannot guarantee that all errors or omissions have been corrected.

Comparisons with the 2005 compilation should be treated with some care, and consideration should be given to brand and definitional changes.

Definitions:

Defining a brand can be difficult. Manufacturers often have different views of what makes up a brand, a sub-label or an umbrella brand.

As in previous years, Nielsen 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 April 2007. 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.

Sources:

Brand retail sales – Nielsen Retail Measurement Services

Estimated advertising expenditure – Nielsen Media Research. Main media estimated advertising expenditure in major metropolitan and regional TV and newspapers, consumer magazines, metro radio, cinema and outdoor.

About The Nielsen Company

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