



Grocery Report 2008
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Grocery Report 2008

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Aussie FMCG retail landscape enters new ground as global economic conditions impact local sales

By Rob Clark, Executive Director, Client Leadership, FMCG, The Nielsen Company.

Following several years of economic growth, the Australian economy has certainly taken a stumble in 2008 off the back of the global economic meltdown. Our GDP growth is in decline, housing prices are still slipping, job vacancies are beginning to slow and the Australian share market is now trading below 4000 points, while inflation is tracking at record highs – much of which can be attributed to increasing food prices.

It's not all bad though. In its November meeting, the Reserve Bank announced further rate cuts which, combined with the Government's increase to the first home buyers grant, may begin to push housing prices up – certainly the building companies have already reported an influx of inquiries thanks to a tripling of the grant for new homes.

Following continued petrol price gains early in the year, the latter part of 2008 has seen a levelling

out of fuel costs with prices tipped to fall as low as a dollar a litre in late 2008 and early 2009 thanks to a slowing in world oil demand. This may see retail spending start to recover as consumers walk away from the petrol bowser with more money in their pockets. What may slow down any real recovery to grocery sales growth, however, will be the increasing cost of food thanks to product shortages and pricey raw materials.

Australian consumer confidence dropped again in 2008, however, Australia remains one of the more optimistic countries, with Nielsen's global consumer confidence index ranking Australian consumers as one of the most confident globally in November 2008.

Overall, retail growth this year remains slow and as a result of declining confidence, consumers are spending less on out of home entertainment and have begun looking towards more dining-at-

home options as a way to reduce their household expenditure. However, although supermarkets have gained an increased 'share of stomach' in 2008, overall packaged grocery sales have been trending downwards.

In response to worsening economic conditions and higher household costs, Aldi has been one winner to emerge, attaining valuable store traffic and dollars away from the major supermarket chains. Private label is also seeing strong growth, with share reaching an all time high of 22.1 per cent as consumers look for ways to save money at the check-out.

With the full impact of the global financial crisis continuing to unfold, the cornerstones of our economic stability such as GDP, employment and wages growth, household debt, inflation and the strength of our dollar will all be tell-tale signs of our true level of exposure to global markets in the year ahead. However,



Rob Clark, Executive Director, Client Leadership, FMCG, The Nielsen Company.

if the experts are to be believed, the Australian economy is better placed than most to deal with the turmoil surrounding us, and both the RBA and Government leaders remain optimistic that Australia will not enter into a recession.

Get your complete copy of Nielsen's Grocery Report

The information published in *Retail World* is an extract from the 2008 'Nielsen Grocery Report.' The full report is available for free for Nielsen ScanTrack clients, or can be purchased for \$2500 plus GST for non-clients.

The full report contains:

- An update on the current state of the Australian economy, with a spotlight on trends in the retail and grocery sector.
- Results from the Nielsen Global Consumer Confidence and Opinions Survey, providing details of Australian consumers' perceptions surrounding the future of the

economy and an indication of their discretionary spending in light of economic concerns.

- Highlights from Nielsen's Retail Barometer study, the most in-depth study of FMCG trends in Australia capturing the views of more than 100 senior leaders from the industry and their business confidence and concerns.
- A detailed analysis on private label including: analysis on the current private label landscape in Australia; an update on Aldi's presence in Australia; emerging trends in private label manufacturing and the impact

of Aldi's entry into the Australian grocery sector.

All content in the 'Nielsen Grocery Report' is subject to copyright and may not be reproduced without permission from Nielsen. *Retail World* and Nielsen publish the Grocery Report as a service to the grocery industry. Well-informed retailers and manufacturers make better decisions, to the benefit of their own bottom-line and to that of the grocery industry.

Information within this publication has been drawn from a number of sources including

Nielsen ScanTrack, Nielsen Homescan consumer panel, The Australian Bureau of Statistics, the Reserve Bank of Australia and the International Monetary Fund.

While every effort has been made to provide accurate information, Nielsen does not accept liability or responsibility for any action taken as a result of information contained in this report.

For more information on the 'Nielsen Grocery Report,' contact your Nielsen Account Manager or email groceryreport@nielsen.com. 

Financial crisis hits local economy

The global financial crisis is taking its toll on our local economy, but experts still saying not to panic.

Australia's GDP has experienced a considerable drop in the second quarter of 2008 back to 2.7 per cent. The drop in GDP to below three per cent is the first since late 2006 and growth in the coming year is tipped at just two to three per cent.

Housing prices and construction have continued to contract in 2008 and the market is expected to remain soft in 2009. While the Government's tripling of the first home owners' grant for new homes and the latest interest rate cuts may help to stem the declining house prices, access to loans due to increased caution by the banks will more than likely put a hold on any kind of property price rally.

In labour markets, employment growth has remained on trend, however, the job vacancy rate is waning in response to economic conditions and with average weekly earnings not keeping pace with inflation, we are already beginning to see consumers tighten their belts and limit discretionary spending. Nielsen's bi-annual consumer confidence survey showed consumers had lost some faith in the local job market, with 34 per cent saying job prospects were 'bad' or 'not so good' compared to just 18 per cent six months ago. In comparison, 63 per cent of consumers rated their prospects as 'good' or 'excellent', down from 78 per cent in May 2008.

The forecast for 2009 remains uncertain, with myriad variables coming into play such as interest rates, the weakening dollar against the US dollar, inflation and GDP. Whether Australia's economy enters into a recession remains to be seen, although

with the outlooks for both inflation and GDP both showing declines, a recession would certainly not be out of the question. As for consumer spending, with strong evidence of a severe drawback by consumers on spending on discretionary items combined with the rising cost of raw materials, the retail sector will likely bear the brunt of the contracting economy in 2009.

Chart 1: Annual GDP growth down in second quarter 2008
GDP growth on previous year (seasonally adjusted)

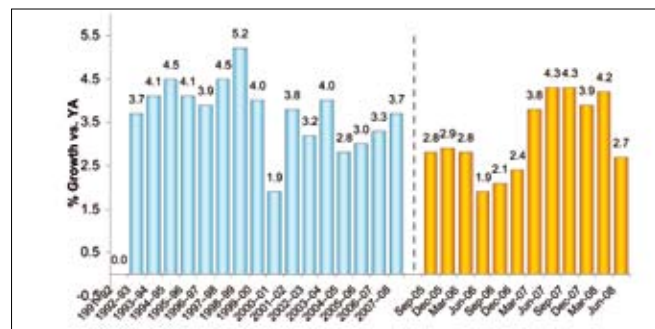


Chart 2: Economy experiencing some slowdown, especially in the housing and construction sectors

% change vs year ago for latest quarter (Q2) or month (Aug 08), except (*) showing percentage points change



Chart 3: Employment growth remains on trend. We will see the labour market starting to respond to economic slowdown

Employed persons (millions) vs employment growth rate (%) – seasonally adjusted



Chart 4: Job vacancies slowing down in the last few quarters, in response to economic conditions

Job vacancies (000's) vs job vacancies per 1000 unemployed

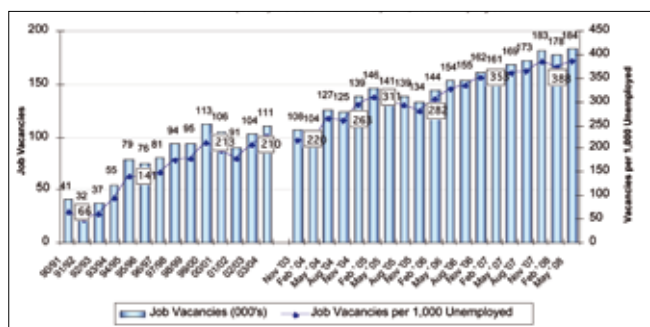
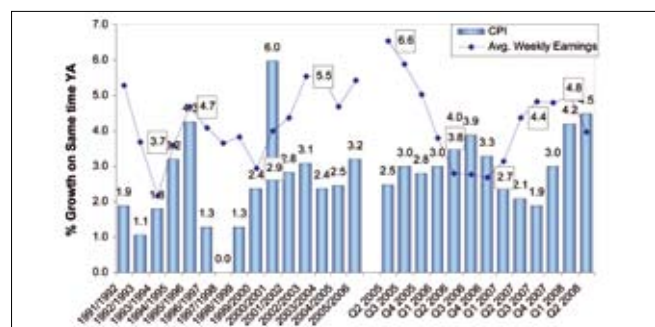


Chart 5: Average weekly earnings not keeping pace with inflation during the latest quarter

Average weekly full-time earnings vs consumer prices (% growth on last year)



Australian consumers optimistic

'Share of stomach' turns full tilt as supermarkets regain lost ground.

Australian consumers remain more optimistic than most, ranking eighth globally in Nielsen's consumer confidence index in November 2008, with an index score of 104, 20 points higher than the global average. However, this score is down five points in the past six months and has dropped by 16 points in the past year to the lowest level seen by Nielsen since its consumer confidence index was introduced in November 2005, mirroring concerns seen at a global level. We're still heavily in debt, with almost half of the population (44 per cent) using any spare cash they have to pay off debts, credit cards and personal loans,

while the majority are less inclined to spend any spare cash on discretionary purchases such as holidays, out of home entertainment, new clothes, or technology.

The rising cost of living and concern about the economy are taking their toll on Australian families who are struggling to make ends meet, and as a result there has been a shift in food expenditure away from cafes, restaurants and take-away back to supermarkets in the past six months as families opt to eat in.

Overall retail sales growth is subdued at around 5.9 per cent in the 12 months to August 2008, down from 7.5 per cent



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in the year to August 2007. Real growth has seen its second consecutive decline over the previous two quarters, with the most recent quarter showing a drop of 1.8 per cent. In contrast to 2007, cafes, restaurants and takeaway food services

recorded the largest fall year-on-year by sector, with a drop in turnover of 6.4 per cent. Household goods as well as clothing and soft goods also recorded large falls off the back of strong growth in 2007.

Chart 1: Retail sales growth subdued

Actual retail turnover growth minus CPI

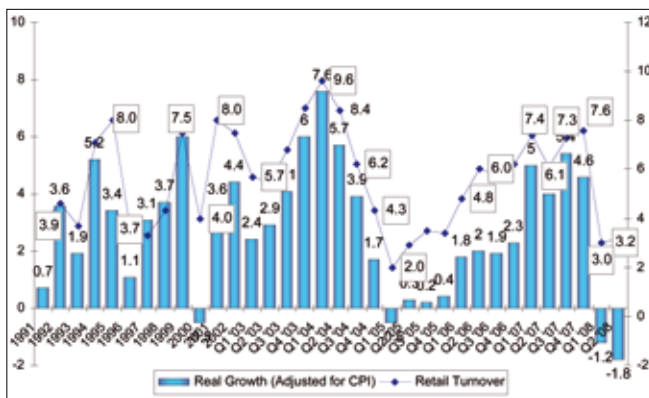


Chart 2: Australian consumer confidence falls further in second half of 2008

Nielsen Consumer Confidence Index, November 2008

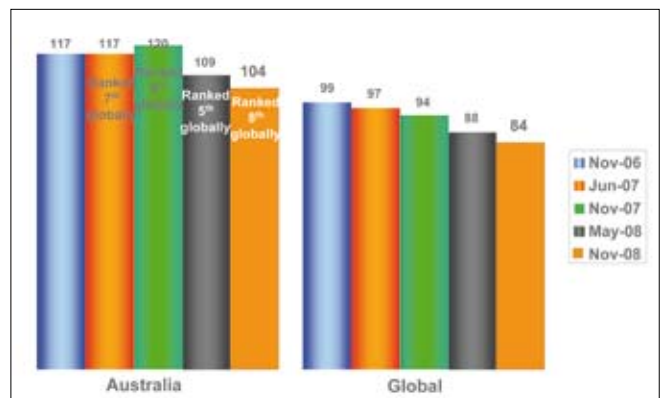


Chart 3: Supermarkets have benefited as consumers reduce their overall consumer spend – eating in is the new going out

Market share (value) by food channel, 2001–2008

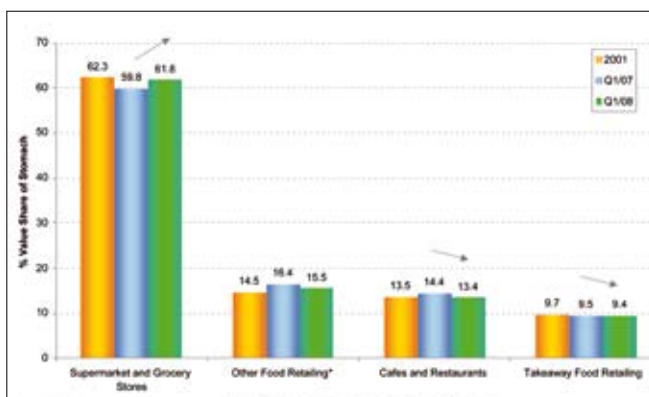
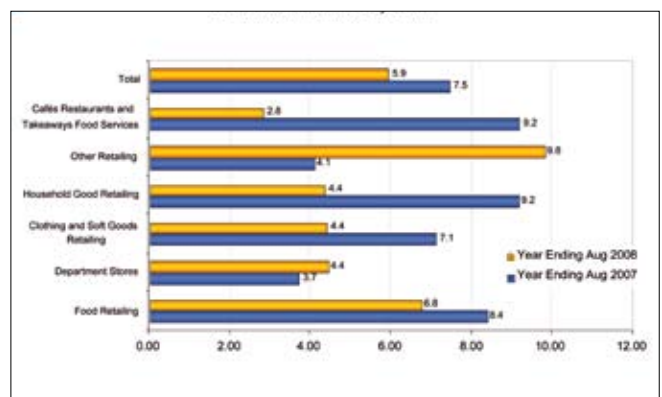


Chart 4: Cafes and restaurants have been hardest hit over the past year – consumers cutting back on out of home dining



Growth in retail turnover by sector

The Reserve Bank indicates that it expects inflation to start to fall.

Australia's inflation continues its runaway trend, reaching a 17-year high of 4.7 per cent in October 2008, however, the Reserve Bank has indicated it expects inflation to start to fall and, in line with this, has announced another reduction in interest rates to 5.25 per cent in its November meeting off the back of a 100 point reduction in October – the biggest cut in 16 years.

Grocery and liquor CPI has continued its gradual increase over the past year, mainly being driven by high food prices and an increase in taxes on RTD liquor products. Higher food prices have been seen as a result of global product shortages, the increasing cost of raw materials and other supply chain costs. Sharp spikes in liquor CPI from May 2008 reflect the Government's imposed tax changes to ready-to-drink 'alcopop' products designed to moderate consumption by younger consumers.

Inflation across both food and non-food categories has remained unpredictable and varied in 2008 with large swings seen in the personal care and drinks and snacks categories in particular.

Drinks and snacks saw negative growth between August and October 2007 which was largely a result of price wars between soft drinks manufacturers. The negative growth in this category was followed by jumps to around seven per cent early in 2008, before finishing on around five per cent in August 2008, which was off the back of price increases across the majority of soft drinks and sports drinks brands, the launch of 'enhanced waters' (eg. nutrient and vitamin fortified waters), new product development such as Red Rock Deli Olive Oil which is driving premium segment growth, and the re-launch of Mother and strong growth of V (mainly through new product development) in the energy drinks segment.

Similarly, personal care was around one per cent then spiked to around five per cent before finishing the period just below one per cent.

In contrast to other categories, chilled dairy has been the only category to record a consistent pattern, with steady increases in prices from last year, climbing from below three per cent in August 2007 to close to 11 per cent in August 2008 to finish as the primary contributor to overall growth in food and beverages CPI.

Note: Nielsen's packaged grocery measure is derived from a fixed basket of more than 28,000 grocery lines and more than 12,000 liquor products across all departments, so that any price movement is the result of real change, rather than of changes in the composition of the basket.

Chart 1: CPI has seen a gradual increase over the past year mainly driven by high food prices and an increase in taxes for RTD liquor

CPI in packaged groceries and liquor based on a fixed basket of 28,750 grocery and 12,500 liquor products, measured through national supermarkets, liquorstores, hotels and bottleshops (Source: Nielsen ScanTrack and ScanTrack Liquor)

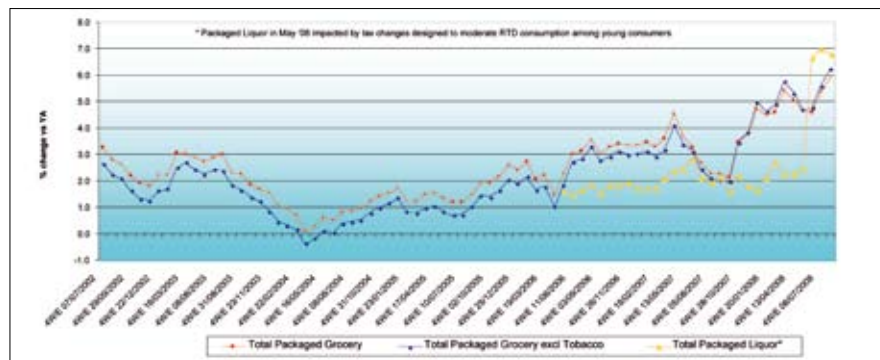


Chart 2: Constant price increases in chilled dairy have largely contributed to overall food and beverages CPI increases

CPI in food and beverages based on a fixed basket of food and beverage products, measured through national supermarkets and grocery stores (Source: Nielsen ScanTrack)

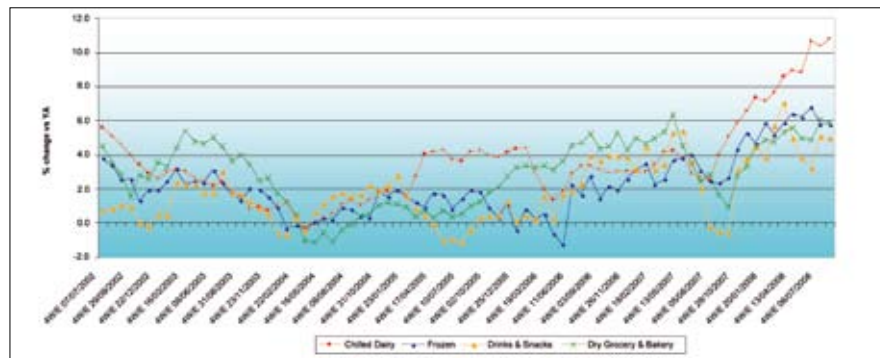
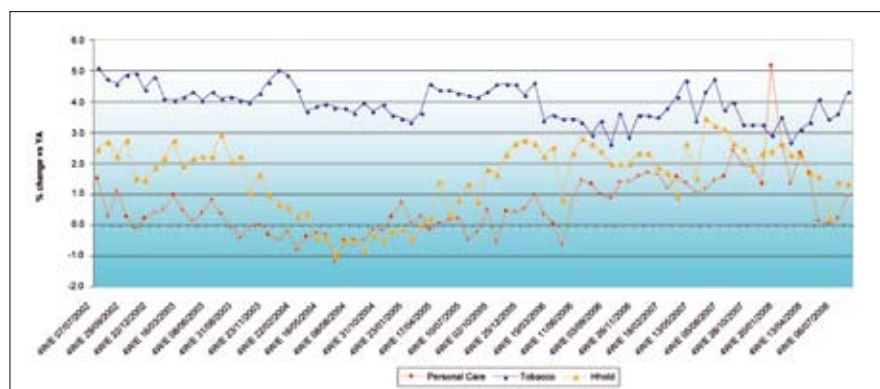


Chart 3: Personal care and household category pricing down overall

CPI in non-food based on a fixed basket of non-food products, measured through national supermarkets and grocery stores (Source: Nielsen ScanTrack)



Consumers tighten their belts

Growth falls further in 2008 as global economic conditions take their toll.

In the past six months we have begun to see growth in packaged grocery sales trending downwards due to the prevailing tough economic conditions and consumers tightening their belts. In 2008, average growth is 5.5 per cent while 2007 saw around six per cent growth.

By department, confectionery/drinks and pet food are the only two packaged grocery departments to have recorded an increase in growth in 2008, up 7.5 per cent and 3.3 per cent respectively. Growth in the confectionery/drinks category can primarily be attributed to an impressive number of new products launched in the drinks segment in 2008, while in contrast, confectionery is showing signs of slowing

as consumers curb their spend on non-essential items at the supermarket. In an August 2008 survey undertaken by Nielsen, 66 per cent of respondents said that they were reducing their purchase of non-essential items, with 73 per cent of those indicating that to be confectionery.

The largest growth recorded by category was dairy, up 7.6 per cent, which has mostly been the result of price increases due to the rising cost of goods, particularly for milk. Dairy growth was followed by confectionery/drinks, up 7.5 per cent and frozen foods, up 6.9 per cent.

Many of the categories ranked in this year's fastest growing categories list were indicative of the move towards more in-home cooking including flour, cream,

baking aids, butter, bread mixes and baking additives. Other products to make the fastest growing categories list reflected consumers' search for convenient and healthy meal solutions including hot cereals, sports and energy drinks and frozen meals.


Categories which had the biggest contribution to overall packaged grocery growth again reflected more entertaining at home (cheese, soft drink/mixers, biscuits), as well as the drive for convenience (snack foods, frozen meals). The in-home entertainment theme continued across measures of growth contribution by department – dairy case was the main contributor mainly driven by categories such as butter and chilled cream. 

Chart 1: Growth slowing down in the past six months

Defined packaged grocery growth – % value change vs year ago, Australia (Source: Nielsen ScanTrack)

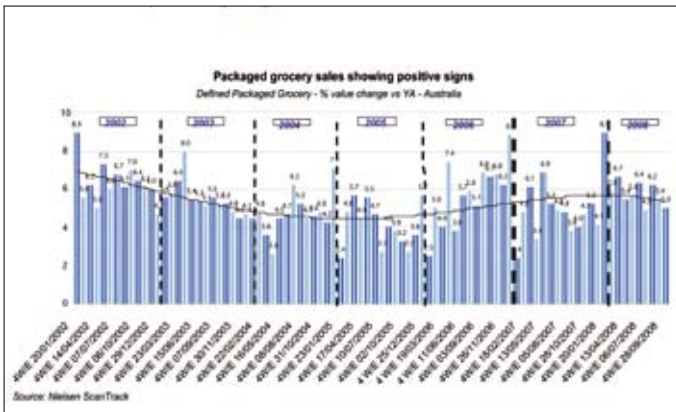


Chart 2: Confectionery/drinks and pet food only two departments to record growth vs 2007

Packaged grocery growth, Australia – MAT to 29/6/08 vs year ago, based on percentage value growth (Source Nielsen ScanTrack)

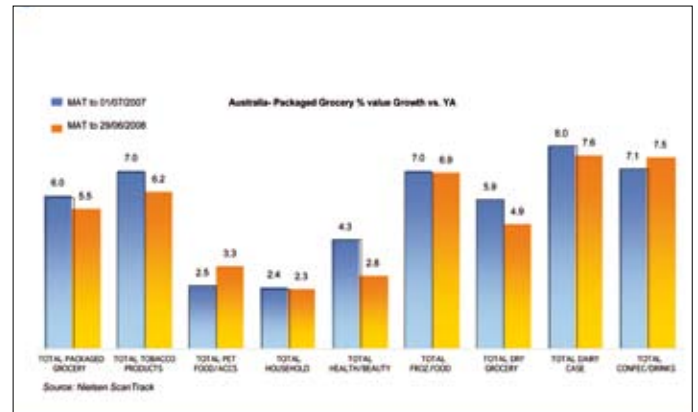


Chart 3: Dry grocery categories have demonstrated the highest growth over the past year

Top 20 fastest growing grocery categories, Australia – MAT to 29/6/08 vs year ago, based on percentage value growth (Source Nielsen ScanTrack)

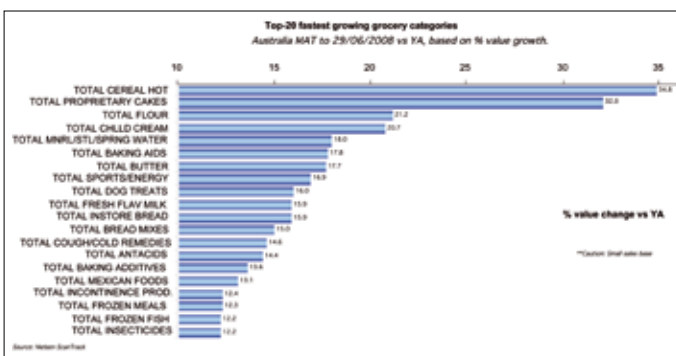
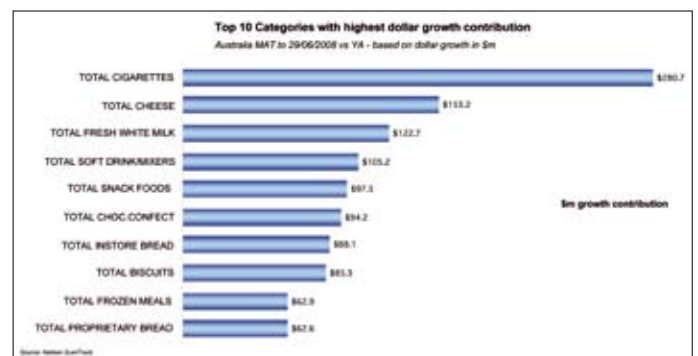


Chart 4: Dairy leads the way for category growth

Top 10 categories with highest growth contribution, Australia MAT to 29/6/08 vs year ago, based on dollar growth in \$m (Source Nielsen ScanTrack)



Packaged Grocery Growth

Chart 5: Dairy case leads share of growth, driven by categories such as butter and chilled cream

Growth contribution by department, indexed against share of sales, based on value sales/growth – MAT to 29/6/08 vs year ago, Australia

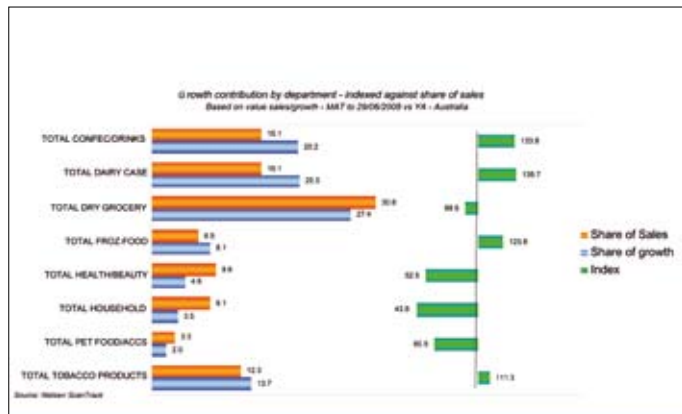


Chart 6: Household products – Top five categories by value growth

Australia, MAT to 29/6/08 vs year ago

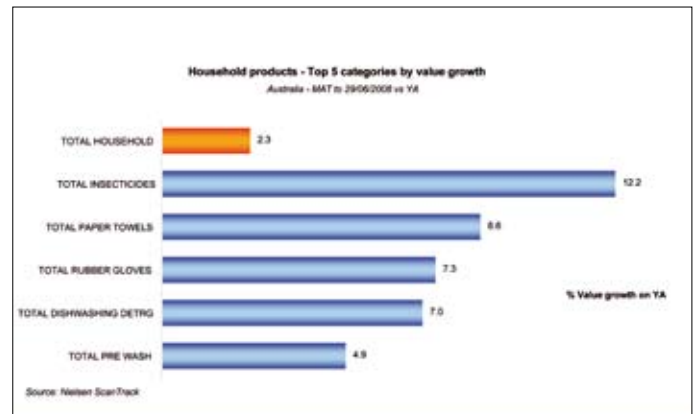


Chart 7: Health and beauty – Top five categories by value growth

Australia, MAT to 29/6/08 vs year ago

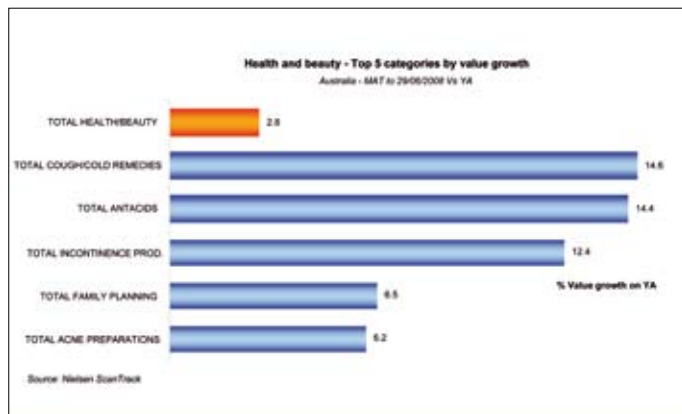


Chart 8: Confectionery/drinks – Top five categories by value growth

Australia, MAT to 29/6/08 vs year ago

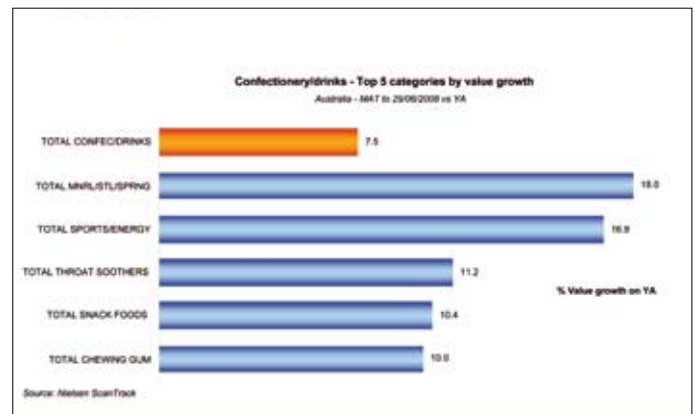


Chart 9: Dry grocery – Top 10 categories by value growth

Australia, MAT to 29/6/08 vs year ago

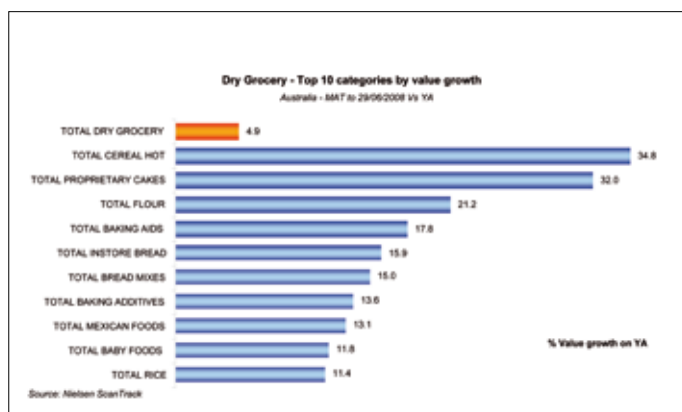
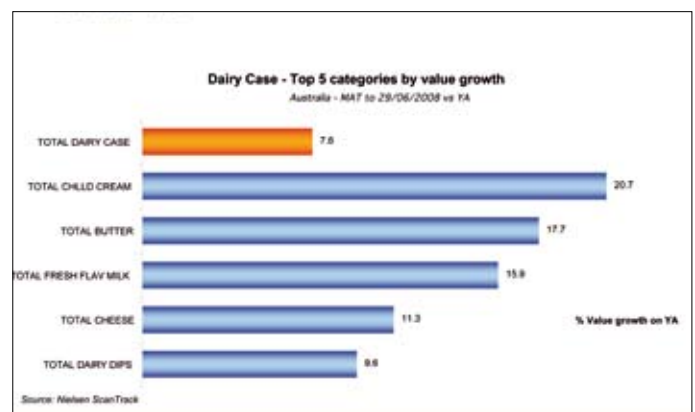


Chart 10: Dairy case – Top five categories by value growth

Australia, MAT to 29/6/08 vs year ago



Private label share reaches an all time high

As the weight of the economic slowdown hits consumers' wallets, one of the few winners to emerge has been Aldi.



Chart 1: Private label continues to grow ahead of branded products. Trended growth rate, total grocery vs private label, value percent

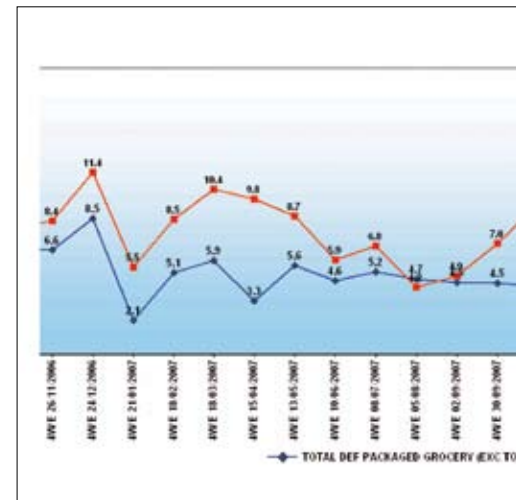
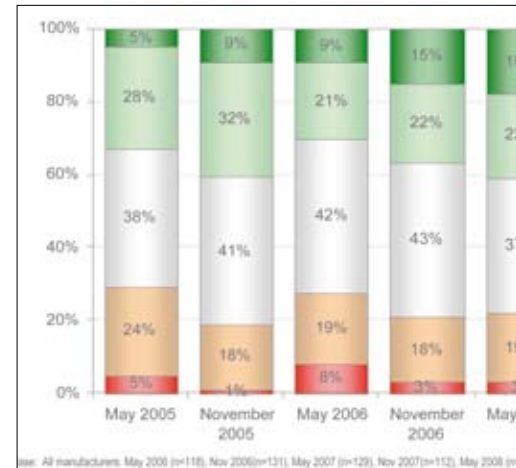


Chart 2: Suppliers expecting the trend towards premium Private Label products

Source: Nielsen Retail Barometer survey, 1H2008 – likelihood that suppliers will increase their share of private label products



The discount supermarket chain, Aldi, continues to drive footfall through its stores (Aldi has attracted an additional 172,000 households to its stores in the past 12 months) on the back of communication around value and its increased store footprint. Aldi has secured strong penetration in categories that shoppers see as the main reason for choosing a retailer such as fresh fruit and vegetables and its shoppers are actually spending more in-store as they broaden the range of Aldi products in their trolleys. And as more stores open around the country, Aldi is benefiting from strong word of mouth within the market place while retailers are losing to Aldi as more shoppers choose it for their main shop.

Within the major supermarket chains, private label is increasingly representing an attractive alternative to branded products. In an August 2008 online survey conducted by Nielsen, consumers were asked how they were changing their shopping habits in the face of rising household costs – 43 per cent of respondents said they were purchasing more supermarket-branded products in an effort to contain their household budgets.

In the latest quarter to June 2008, private label achieved a record share of 22.1 per cent, with the

average household increasing its spend on private label products by a massive \$11.20. In particular, adult households and younger singles and couples are now allocating a greater proportion of their grocery spend to private label, with their spend up by 1.3 per cent and 1.2 per cent respectively.

In line with the growth in popularity of private label products, and as supermarkets expand and improve their private label offerings, growth has continued to outstrip that of branded products. In the year to August 2008, private label growth is up 5.9 per cent compared to the same time in 2007, while total packaged grocery grew 5.5 per cent in the same period. We have also seen private label begin to gain traction in traditionally brand-dominated categories such as confectionery and baby products, while private label mainstay categories such as milk, frozen meat, packaged cheese and cooking needs have all maintained their foothold.

By category, packaged cakes maintains the highest private label share, while party and picnic ware enjoyed a significant growth in share of 15.1 per cent to 61.9 per cent, the second highest category share holding. This was followed by the more traditional categories of eggs (56.1 per cent)

and milk (50.9 per cent). Other categories to have enjoyed large share growth in 2008 include frozen meat and poultry and packaged cheese, most likely due to the expansion of products and improved quality. Private label continues to expand category coverage and consumers' confidence in product quality is increasing their trialling of private label products in traditionally low share private label categories such as baby products. Disposable nappies/liners saw a 21.9 per cent jump in share vs a year ago and confectionery share jumped by 17

Products as consumers seek value for money
 year-on-year percentage change vs year ago to 3/8/08

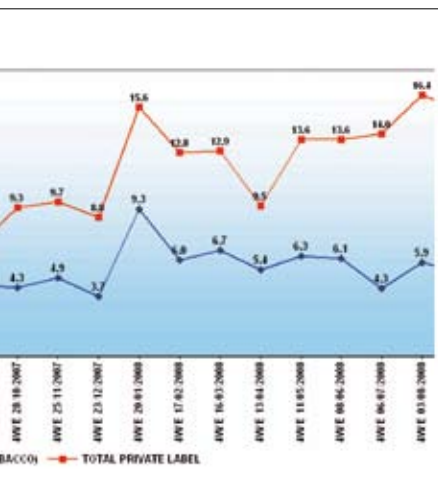
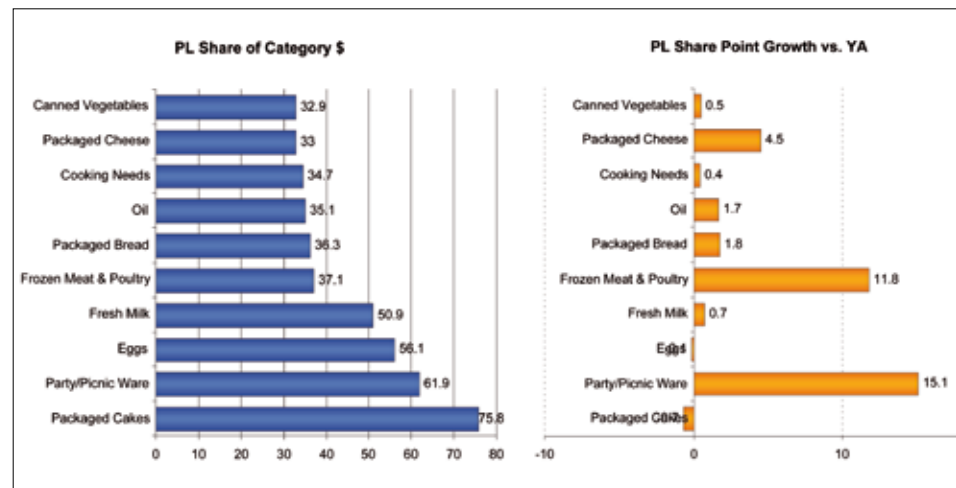


Chart 3: Packaged cakes maintains highest category share for private label
 Private Label share and growth by category in quarter ending 21/6/08



Private Label will continue
 as Australian consumers would purchase premium

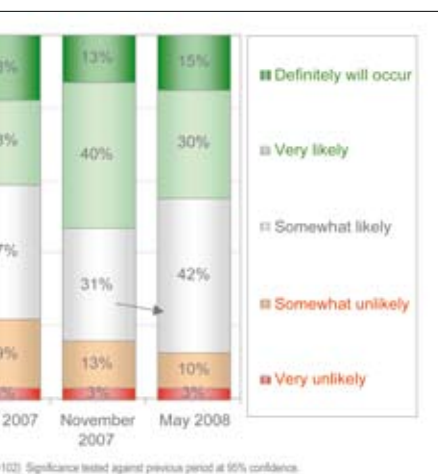
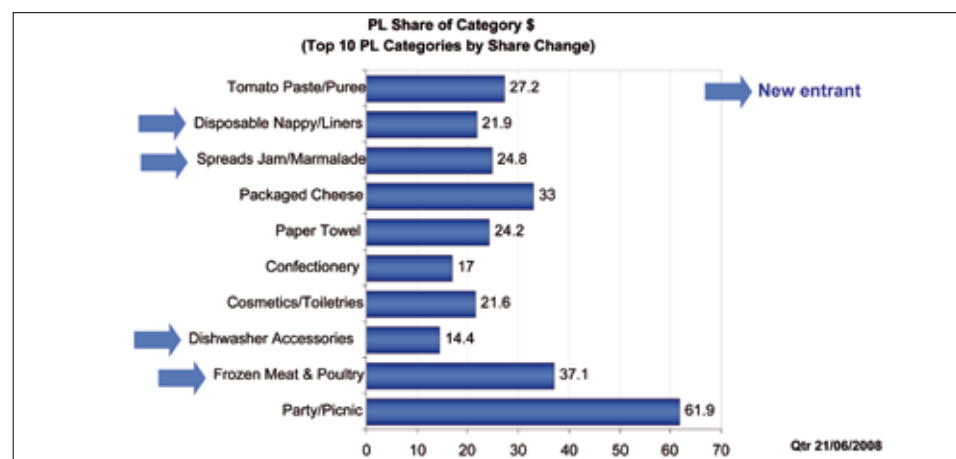


Chart 4: Private label continues to expand category coverage

Top 10 private label categories by value share change (% of category dollars vs year ago – quarter ending 21/6/08), all supermarkets including Aldi (Source Nielsen Homescan)



per cent with new product launches such as You'll Love Coles chocolate blocks – both categories have historically had a strong lean towards branded products.

Australian FMCG manufacturers seem to be resigned to the march of private label brands – in Nielsen's latest Retail Barometer survey, only 13 per cent of respondents said they thought it was unlikely that Australian consumers would purchase premium private label products. This was down three percentage points vs. the previous six months

and down nine percentage points compared to the same time in 2007.

Looking ahead into 2009, private label sales growth is expected to continue, particularly as the economic climate forces consumers to re-think their shopping habits and spend at the supermarket check-out. With the major retailers seemingly committed to expanding their private label range and focusing on producing quality offerings, it is more critical than ever for manufacturers of branded products to invest in

defending their category position, improving their understanding of shoppers' needs, and looking at how to work with the retailers to attract more shoppers.

NOTE: The Nielsen Private Label Report provides an in-depth review of private label purchasing behaviour by Australian grocery shoppers. To find out more about private label trends in Australia or to purchase a copy of the Private Label Report contact your Nielsen Account Manager or phone (02) 8873 7000. 🛒

Top 10 manufacturers unchanged

Consistency at the top with leading 10 manufacturers unchanged in 2008.



The top five grocery suppliers in 2008 account for around 23.5 per cent of packaged grocery sales (down slightly from 24.1 per cent in 2007), while the top 100 suppliers remained fairly consistent at 90.6 per cent. This is a sign that the smaller suppliers are maintaining their share of packaged grocery sales while the bigger players shift around within their existing share of the market.

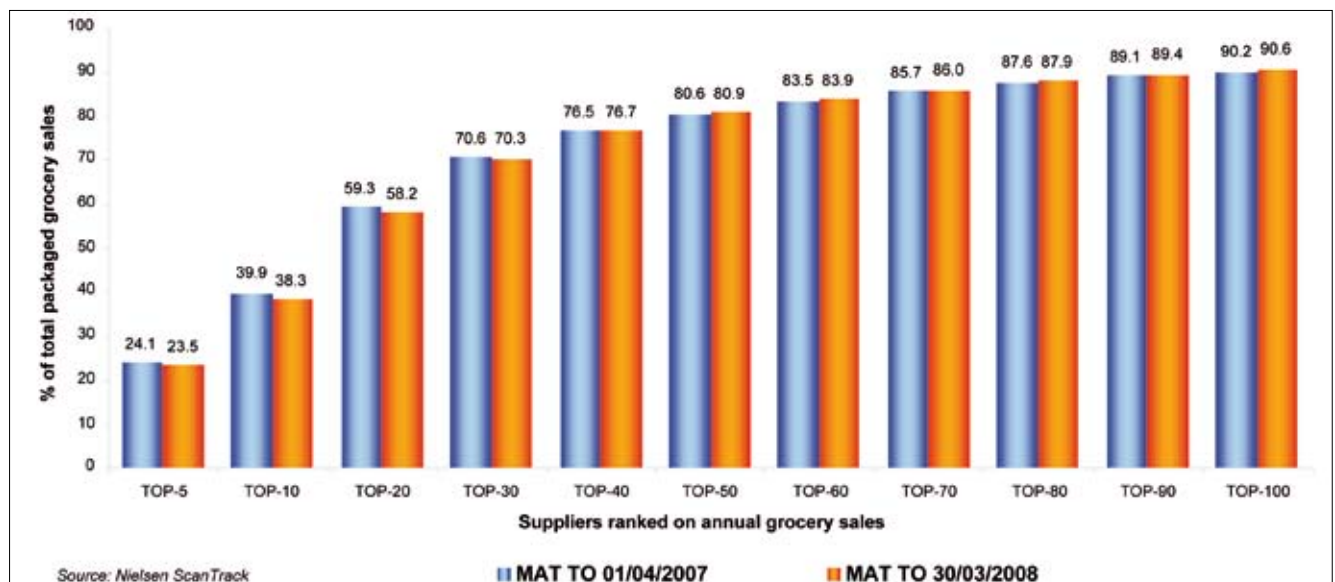
After a number of changes between 2006 and 2007, the top 100 suppliers list in 2008 has seen few, if any, alterations to last year's rankings. The top 10 suppliers remain the same, although Nestlé and BAT have switched places with BAT once again taking the lead and Nestlé dropping back to second position. Looking at the top 20 suppliers there was only one new entrant – Heinz Wattie's – which jumped from 22 in 2007 up to 19 in 2008, pushing Kraft out of the top 20.

The biggest movers in the 2008 ranking were Conga Foods which jumped a massive

16 places to 57 this year, while Frucor enjoyed a 12 place gain to 78. Pacific Publications also saw an impressive gain, up nine places to 68. New entrants to the top 100 suppliers ranking this year included Harvey Fresh which debuted at 92, Poseidon Tarama coming in at 93, The Copperpot Pate at 97 and Bundaberg Brewed Drinks at 98. This saw Mildura, Novo, Capilano and Tetley pushed out of the top 100 this year. There were only three new suppliers to the top 10 best performing companies in 2008, including Poseidon Tarama, Bundaberg Brewed Drinks and McCain Foods. Reflecting broader trends in the industry, all of the top 10 fastest movers in 2008 were food and beverage companies, specifically those offering 'cook-it-from-scratch' meal solutions, in-home entertainment products or health and convenience offerings. Three of the top 10 fastest growing manufacturers were also new to the top 100 suppliers list this year, including Poseidon Tarama, Bundaberg Brewed Drinks and Harvey Fresh. 🛒

Chart 1: Contribution to packaged grocery sales by Top 100 Suppliers

National grocery channel MAT to 30/3/2008 vs year ago excluding housebrands and private label (Source Nielsen ScanTrack)



Top 100 Suppliers

Chart 2: Top 25 Food vs Non Food

National grocery (including independents) – MAT to 29/06/2008 (excluding private label and housebrands)
Food/non-food classification based on where the majority of sales are made

2007 RANK	2008 RANK	SUPPLIER
1	1	NESTLÉ LTD
2	2	CADBURY SCHWEPES
3	3	NATIONAL FOODS
5	4	UNILEVER
6	5	MARS CO
7	6	ARNOTT'S CAMPBELL'S
4	7	THE COCA-COLA COMPANY
8	8	GOODMAN FIELDER LTD
11	9	GEORGE WESTON FOODS
9	10	SIMPLOT P/L
10	11	FONTERRA BRANDS AUST
12	12	DAIRY FARMERS LTD
15	13	HEINZ WATTIE'S
13	14	KRAFT FOODS
17	15	THE SMITH'S SNACKFOOD CO LTD
16	16	PARMALAT P/L
14	17	KELLOGG P/L
18	18	MCCAIN FOODS
19	19	GOLDEN CIRCLE P/L
10	20	SARA LEE CORP
21	21	SANITARIUM HEALTH FOOD CO
	22	MANASSEN FOODS
22	23	SPC ARDMONA
23	24	GENERAL MILLS P/L
24	25	SAN REMO P/L

2007 RANK	2008 RANK	SUPPLIER
1	1	BRITISH AMERICAN TOBACCO
2	2	PHILIP MORRIS
3	3	IMPERIAL TOBACCO
4	4	KIMBERLY CLARK
5	5	COLGATE-PALMOLIVE P/L
6	6	RECKITT BENCKISER
7	7	PROCTER & GAMBLE
8	8	SCA
9	9	JOHNSON & JOHNSON P/L
10	10	CUSSONS P/L
11	11	CLOROX P/L
12	12	ENERGIZER AUST P/L
14	13	ABC TISSUE PROD P/L
16	14	L'ORÉAL AUSTRALIA
17	15	S C JOHNSON WAX INC
15	16	GLAXOSMITHKLINE
18	17	BEIERSDORF AUST LTD
21	18	PFIZER CONSUMER HEALTHCARE
23	19	MULTIX P/L
22	20	SYMBION CONSUMER
25	21	NATURE'S ORGANICS P/L
	22	SCHWARZKOPF P/L
24	23	PHARM-A-CARE LABS P/L
	24	AUST PACIFIC PAPER PROD
	25	ALBERTO CULVER

Chart 3: Best Performing Companies (out of Top 100 Manufacturers – based on value growth)

National grocery (including independents) – MAT to 29/6/08 (excluding private label and housebrands)

MANUFACTURER	GROWTH %
CONGA FOODS	39.6
FRUCOR BEVERAGES LTD	36.3
SUNNY QUEEN LTD	27.2
WEIGHT WATCHERS P/L	23.4
POSEIDON TARAMA P/L	16.9
BUNDABERG BREWED DRINKS P/L	16.7
MCCAIN FOODS	16.5
ORIENTAL MERCHANT P/L	16.1
HARVEY FRESH P/L	15.9
MENORA FOODS P/L	15.4



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Chart 4: Top 100 Grocery Suppliers by dollar value

National grocery (including independents) – MAT to 29/6/08 (excluding private label and housebrands)

2008 Rank (2007 Rank)	SUPPLIER	KEY BRANDS
1 (2)	BRITISH AMERICAN TOBACCO	WINFIELD, BENSON & HEDGES, HOLIDAY, DUNHILL
2 (1)	NESTLÉ LTD	NESTLÉ, NESCAFÉ, INTERNATIONAL ROAST, PETERS, MILO, MAGGI, LEAN CUISINE, UNCLE TOBYS
3 (3)	PHILIP MORRIS	LONGBEACH, PETER JACKSON, ALPINE, MARLBORO
4 (4)	CADBURY SCHWEPES	CADBURY, SCHWEPES, COTTEE'S, PEPSI, PASCALL, THE NATURAL CONFECTIONERY CO
5 (5)	NATIONAL FOODS	PURA, JUST JUICE, DAILY JUICE, YOPLAIT, BERRI, FARMERS UNION
6 (6)	THE COCA-COLA COMPANY (including Amatil)	COKE, DIET COKE, SPRITE, LIFT, FANTA, POWERADE, PUMP, MOUNT FRANKLIN
7 (7)	UNILEVER	DOVE, BERTOLLI, FLORA, LYNX, CONTINENTAL, LIPTON, SUNSILK, OMO, STREETS, REXONA
8 (8)	MARS CO	MARS, SNICKERS, STARBURST, TWIX, M&M'S, WHISKAS, PEDIGREE
9 (9)	ARNOTT'S CAMPBELL'S	ARNOTT'S, CAMPBELL'S SOUP, SHAPES, TIM TAM, TASTY JACKS, COUNTRY LADLE, REAL STOCK
10 (10)	IMPERIAL TOBACCO	HORIZON, CHAMPION RUBY, DRUM, ESCORT, PETER STUYVESANT
11	GOODMAN FIELDER LTD	HELGA'S, MIGHTY SOFT, WONDERWHITE, MEADOW LEA, PAMPAS, PRAISE
12	KIMBERLY CLARK	KLEENEX, HUGGIES, KLEENEX COTTONELLE, WONDERSOFT, SNUGGLERS
13	GEORGE WESTON FOODS	TIP TOP, SUNBLEST, DON, GOLDEN, NOBLE RISE, BURGEN
14	COLGATE-PALMOLIVE P/L	COLGATE, PALMOLIVE, SPREE, COLD POWER, DYNAMO, FLUFFY
15	SIMPLOT P/L	BIRDS EYE, JOHN WEST, EDGELL, LEGGO'S, I&J
16	FONTERRA BRANDS AUST	MAINLAND, BEGA, WESTERN STAR, PERFECT ITALIANO, BROWNES
17	RECKITT BENCKISER	MORTEIN, PINE-O-CLEEN, FINISH, NUROFEN, NAPISAN, FINISH
18	DAIRY FARMERS LTD	COON, DAIRY FARMERS, SKI, CRACKER BARREL, MOOVE, OAK
19	HEINZ WATTIE'S	HEINZ, GREENSEAS, WATTIE'S, NURTURE, STEAM FRESH, HAMPER, TOM PIPER
20	PROCTER & GAMBLE	PANTENE, HEAD & SHOULDERS, PRINGLES, CLAIROL, OLAY, METAMUCIL, MUM, VICKS, PRINGLES
21	KRAFT FOODS	KRAFT, VEGEMITE, PHILADELPHIA, NABISCO, OREO, TOBLERONE
22	THE SMITH'S SNACKFOOD CO LTD	SMITH'S, DORITOS, RED ROCK DELI, NOBBYS, TWISTIES, SAKATA
23	PARMALAT P/L	PAULS, VAALIA, REV, BREAKA, SOY LIFE, RUSH
24	KELLOGG P/L	KELLOGG'S, NUTI-GRAIN, JUST RIGHT, SPECIAL K, COCO POPS, SULTANA BRAN
25	SCA	SORBENT, PUREX, HANDEE, LIBRA, TENA LADY, DEEKO
26	MCCAIN FOODS	MCCAIN, GRIFFS
27	GOLDEN CIRCLE P/L	GOLDEN CIRCLE, ORIGINAL JUICE CO, POPPER
28	SARA LEE CORP	SARA LEE, MOCCONA, WHITE KING, AMBI PUR, KIWI, HARRIS, RADOX
29	SANITARIUM HEALTH FOOD CO	SANITARIUM, WEET-BIX, SO GOOD, UP & GO, LIGHT N TASTY
30	MANASSEN FOODS	TRIDENT, THOLSTRUP, KING OSCAR, MARGARET RIVER
31	SPC ARDMONA	SPC, GOULBURN VALLEY, ARDMONA, IXL
32	JOHNSON & JOHNSON P/L	JOHNSON'S, STAYFREE, CAREFREE, BAND-AID, NEUTROGENA, SPLENDA
33	GENERAL MILLS P/L	OLD EL PASO, LATINA, PATAK'S, BETTY CROCKER, WRAPS OF THE WORLD
34	SAN REMO P/L	SAN REMO, ZAFARELLI, BALDUCCI, LA PASTA, FANTASTIC
35	MURRAY GOULBURN CO-OP	DEVONDALE
36	PURE & NATURAL BEVERAGES	P&N, FRANTELLE, PUB SQUASH, POP TOPS, LA ICE, LIDO
37	REGAL CREAM PROD	BULLA
38	CLOROX P/L	GLAD, OSO, CHUX, ARMOR ALL, ASTRA, ANT-RID, GUMPTION
39	ENERGIZER AUST P/L	ENERGIZER, EVEREADY, SCHICK
40	CUSSONS P/L	MORNING FRESH, RADIANT, DUO, IMPERIAL LEATHER, CUSSONS, TRIX
41	ACP PUBLISHING P/L	WOMAN'S DAY, TV WEEK, THE AUSTRALIAN WOMEN'S WEEKLY, NEW WEEKLY, TAKE 5
42	CEREBOS FOODS	FOUNTAIN, SAXA, GRAVOX, RIVA
43	ABC TISSUE PROD P/L	QUILTON, SYMPHONY, SOFTLY, SOFTEX, ABC, NATURALE
44	WRIGLEY CO	EXTRA, PK, ECLIPSE, HUBBA BUBBA, JUICY FRUIT
45	L'ORÉAL AUSTRALIA	L'ORÉAL, GARNIER
46	GLAXOSMITHKLINE	PANADOL, RIBENA, SENSODYNE, MACLEANS, LUCOZADE, ZOVIRAX
47	PATTIES BAKERY	FOUR'N TWENTY, NANNA'S, PATTIES
48	VALCORP FINE FOODS P/L	SIRENA, DILMAH, LAVAZZA, LA GINA
49	S C JOHNSON WAX INC	BAYGON, DUCK FRESH, RAID, MR MUSCLE, PLEDGE, WINDEX, GLADE
50	RIVIANA FOODS	ALWAYS FRESH, RIVIANA, SHARWOODS, ADMIRAL

Top 100 Suppliers

2008 Rank	SUPPLIER	KEY BRANDS
51	FERRERO AUST	NUTELLA, FERRERO, TIC TAC, KINDER
52	HANS CONTINENTAL SMALL GOODS	HANS
53	P & M QUALITY SMALLGOODS	PRIMO
54	BEIERSDORF AUST LTD	NIVEA, ELASTOPLAST, DUO
55	SUNRICE	SUNRICE, KOALA
56	GREENS FOODS P/L	GREENS, SUPERCOAT, POPPIN'
57	CONGA FOODS	MORO, VAL VERDE, SOL MARE, GREEN VALLEY, SACLA
58	AB FOODS & BEVERAGES	TWININGS, JARRAH, ULTRA SLIM, OVALTINE
59	STUART ALEXANDER & CO P/L	MENTOS, ROSELLA, GUYLIAN, WERTHER'S, TABASCO, FISHERMAN'S FRIEND
60	WYETH AUSTRALIA P/L	S-26, CENTRUM, ADVIL, INFASOY
61	LINDT & SPRUNGLI P/L	LINDT, LINDOR
62	NATURE'S ORGANICS P/L	EARTH CHOICE, NATURE'S ORGANICS, BLAST
63	WEIGHT WATCHERS P/L	WEIGHT WATCHERS
64	PHARM-A-CARE LABS P/L	NATURE'S WAY, BRUT, EASE A COLD, NORSCA
65	MULTIX P/L	MULTIX, TIGER
66	PARADISE FOOD IND P/L	PARADISE
67	SYMBION CONSUMER	CENOVIS, NATURE'S OWN, FAULDING, EPSOM SALTS, FORD PILLS
68	PACIFIC PUBLICATIONS P/L	NEW IDEA, THAT'S LIFE, GIRLFRIEND, FAMOUS, K-ZONE
69	VIP PETFOODS P/L	VIP
70	PFIZER CONSUMER HEALTHCARE	LISTERINE, MYLANTA, STINGOSE, ROSKEN
71	PACE FARMS P/L	PACE FARMS, LIBERTY
72	SAFCOL AUST P/L	SAFCOL, SNAPPY TOM
73	MCCORMICK FOODS	MCCORMICK, AEROPLANE, KEENS, RICE A RISO
74	SCHWARZKOPF P/L	SCHWARZKOPF, TAFT, FA, NAPRO
75	CANTARELLA BROS	VITTORIA, JARLSBERG, AURORA
76	SUGAR AUSTRALIA P/L	CSR
77	KR CASTLEMAINE FOODS	CASTLEMAINE, KR DARLING DOWNS, OTTO WURTH
78	FRUCOR BEVERAGES LTD	V, MIZONE, H2GO, EVIAN
79	AUST PACIFIC PAPER PROD	BABY LOVE, LULLABY
80	INGHAM ENT P/L	INGHAM, BARON'S TABLE
81	MENORA FOODS P/L	WATTLE VALLEY, JINDI, MAILLE
82	ALBERTO CULVER	VOS, TRESEMME, ST IVES, ANDREW COLLINGE
83	ORIENTAL MERCHANT P/L	AYAM BRAND, INDOMIE, LEE KUM KEE, VALCOM, YEO'S, ASIAN HOME GOURMET
84	JALNA DAIRY FOODS	JALNA
85	BLACKMORES LABS	BLACKMORES
86	HERRON PHARM	HERRON, GOANNA
87	SUNNY QUEEN LTD	EGGS
88	BAYER AUSTRALIA	BEROCCA, ASPRO, AM-O-LIN, PLURAVIT
89	CPS HOUSEWARES P/L	WILTSHIRE, AI DE CHEF
90	FREUDENBERG HOUSEHOLD PROD	VILEDA, ANSELL
91	SARGENTS PIES P/L	SARGENTS, BIG BEN, SCOTT'S
92	HARVEY FRESH P/L	HARVEY FRESH, VITAL, SUNRICH, SMARTER WATER, ORCHARD FRESH, STONE GULLY
93	POSEIDON TARAMA P/L	BLACK SWAN CHEESE, BLACK SWAN DIPS
94	BIC AUSTRALIA	CIGARETTES LIGHTERS, RAZORS & BLADES, STATIONERY, KITCHEN & LAUNDRY ACCESSORIES
95	MERINO P/L	MERINO, SAFE, BOUQUETS
96	YAKULT CO.	YAKULT
97	THE COPPERPOT PATE	COPPERPOT CLASSIC DIPS, COPPERPOT CHUNKY DIPS, COPPERPOT GOURMET DIPS
98	BUNDABERG BREWED DRINKS P/L	BUNDABERG
99	SO NATURAL FOODS LTD	SO NATURAL, SMOOTH WHITE, AUSTRALIA'S OWN, VITALIFE SOY MILK
100	DÉCOR CORP P/L	DÉCOR

TRUE OR FALSE: THREE IN 10 AUSSIE SUPERMARKET SHOPPERS SHOP ELSEWHERE FOR FRUIT.



WANT THE ANSWER?
JUST ASK NIELSEN.
.....

It's no surprise that the demand for fresh produce is growing as more and more consumers are jumping on the health bandwagon, but accurately measuring consumers' purchasing habits of fresh produce has always been a difficult task. Imagine the potential of tracking who bought what fresh product from where, when and how much they spent.

Answer: **TRUE**. Analysing shopper spend habits has shown that 30 percent of all supermarket shoppers are buying their fruit elsewhere. Can you afford to lose 30 percent of your customers?