

CHECKOUT TOP 100 BRANDS 2011

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AUGUST 2011
VOL. 37 NO.8

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CHECKOUT

VOTED B2B MAGAZINE OF THE YEAR 2009

VOL. 37 NO.8 AUGUST 2011



There's an old adage that goes, 'the more things change, the more they stay the same'. 'Change' in this instance (if you haven't noticed the unfamiliar face peering out at you from the page) is the arrival of a new editor, myself, following the departure of John Ruddy, who has embarked on a promising career with one of the country's top legal firms.

Under John's captaincy, the good ship *Checkout* enjoyed a level of influence it hasn't seen for years, becoming a true voice of the industry through the budding years of the economic downturn. For myself, then, it's a case of big shoes to fill; nonetheless, both I and the hardworking team at *Checkout* will endeavour to continue to set the retail news agenda in this country. As always, if you have any news, comment, or if you merely want to say hello, you can catch me at the same email address, editor@checkout.ie

In terms of things 'staying the same', a quick glance at the top of this year's Top 100 Brands, compiled in association with Nielsen, indicates that in terms of brand exposure, it's getting more and more difficult to keep up with the big boys. That the top eight brands have remained unchanged since last year's table is remarkable, and a further indication, if it were needed, that when the chips are down, people stick to the brands they know and love.

Of course, the past year has also seen the continued rise of private label, increasing its grocery market share by 4.4 per cent in the past year (according to Kantar Worldpanel), and this is having a disruptive effect on particular categories, such as milk. While Avonmore still

dominate the market, retaining on to second place in the Top 100 for a second year, the market share of the Top 5 milk brands has dropped to 37.5 per cent this year, down from 44 per cent last year, and 52 per cent in 2009. Should both PL and the discounters continue their upward trajectory, you can expect to see this share drop yet further.

The other big story of the month, of course, has been the Musgrave – Superquinn deal, which appears to be nearing its conclusion. At the time of going to press, *Checkout* was still anticipating the Competition Authority's decision – a 'request for further information' from the parties involved put the kibosh on the deal being approved in time for our deadline. However, from speaking to a number of retail experts at length on the subject (including Superquinn's founder, Senator Feargal Quinn), we would be confident that the deal will be signed off sooner rather than later.

As for whether Musgrave will seek to retain the Superquinn brand or rebrand its stores to SuperValu remains a subject Chris Martin is likely keeping close to his chest for the time being, but the smart money is on the Superquinn fascia being retained at least in the short to medium term, with some underperforming stores likely to be hived off.

Long term, things may change, of course, and I believe there's a case to be made for Superquinn to be revamped in a similar style to Spain's Mercadona, arguably the European grocery success story of 2011. Based around an EDLP model, Mercadona's limited selection belies the fact that its private label brands – Deliplus, Compy, Hacendado – are amongst the highest-rated products in Spain, while its loyal staff are all highly-trained to be 'department specialists'. Look them up.

In the meantime, enjoy the issue.

Stephen Wynne Jones, Editor, *Checkout*

CHECKOUT TOP 100 BRANDS 2011

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NEWS

Top 100 Brands 2011 Revealed

No Change at Top as Confectionery and Health-Focused Brands Both Show Moderate Improvements



Coca-Cola has retained its place as Ireland's Number One brand in the 2011 Checkout Top 100 Brands, produced in association with Nielsen. In fact, for the first time, there has been no change in position across any of the top eight brands on the list, with Avonmore, Brennans, Lucozade and Tayto completing the top five. A newcomer to the top ten this year is Walkers, which claims tenth spot, after four years at No. 12. Irish brands have performed well once again – further proof of the loyalty that consumers have to homegrown produce in

tough times – while this year's chart has also seen a growth in 'snacking' products (such as Confectionery, Crisps, Biscuits and Ice Cream), as well as 'healthy-eating' related products.

"Congratulations to all the brands that made it in this year," says Karen Mooney, Consumer Insights, Nielsen. "It is a huge accomplishment given there are thousands of brands, plus the multitude of economic and financial pressures experienced by manufacturers and retailers alike over the past 12 months. The year has also been a really tough one for the consumer, and value for money has become more important than ever before with consumers much more cautious. Almost 9 in 10 Irish consumers say they have changed spending in order to save on household expenses and are actively undertaking strategies to save on the weekly shop."

In the Top 100 Categories, the growth of Private Label is making its presence felt, with the market share of top brands in several categories slipping again this year.

For the full run through of this year's Top 100 Brands, turn to page 38.

Solid Performance for Kerry Group In H1

CEO Stan McCarthy Optimistic For Growth

Kerry Group has announced its interim management report for H1 2011, with chief executive Stan McCarthy declaring himself 'very, very satisfied with the performance for the group'. McCarthy cited the adjusted earnings per share to 9.7% as a 'highlight' of the term, while acknowledging the challenges the group faced over an input and inflation level hovering around 11%.

Despite these challenges, as well as raw material costs, McCarthy insisted that he remains 'highly optimistic' about the future performance and growth of Kerry, maintaining that the firm is on track to deliver its full year growth targets. "Sometimes you go through seasonal blips. We might see some moderate dip in growth targets, but optimism hasn't changed," he said.

Key to Kerry's performance this term has been substantial growth registered in emerging markets, most notably Asia-Pacific. Despite the strong showing in the region (as well as America), McCarthy was adamant that Kerry would not lose track of its Irish roots, or place less emphasis on Western Europe. "First and foremost, we are an Irish multinational, and we are very committed to Ireland. Theoretically, you should follow the growth, but we can't walk away from our Western European business, because that would compromise our global position. Kerry is successful because it is a global organisation."

In addition, McCarthy remained defiant concerning the effect of commodity pricing to Kerry's business, citing how the group previously tackled such a threat in 2008, and positive it can do so again. "I'm not pessimistic at all, I'm very optimistic. Our business model is very sound and robust. [...] Commodities are cyclical, but demand isn't abetting that much, especially in emerging markets."



New Debit Card Charges Irk Retailers

RGDATA, CSNA Among Bodies Calling for Action

Retailers may have no choice other than to pass on price hikes associated with using the new Visa Debit cards, according to representative associations linked to the trade. The roll out of the new Visa Debit cards has caused some confusion and anger within the industry as retailers are facing higher transactional fees. The standard flat fee of 15c per Laser transaction has been increased in some cases by up to 150%. Bank of Ireland, AIB, Permanent TSB and Ulster Bank are all replacing their Laser cards with the new Visa Debit option.

RGDATA has called for an urgent meeting with debit card payment companies while Richard Bruton, the Enterprise Minister, has stated that he has already met with the National Consumer Agency (NCA) about the charges. He also said that he would be contacting the various banks about the issue. The CSNA recently called for the Financial Regulator to investigate the new rates.

According to recent data from the Irish Payment Service Organisation Limited (IPSO), more Irish consumers are switching to debit cards from cash. IPSO Chief Executive Pat McLoughlin said "The fact that there is a clear trend towards greater usage of debit cards is a sign that Ireland is embracing a new era in consumer transactions and it will come as a boost to retailers and businesses across the country as the speed and efficiency of payments improves."

NEWS BRIEFS

CAREY TO REINVEST IN FOOD SECTOR

Michael Carey, former shareholder of Jacob Fruitfield, has revealed plans to reinvest in the food sector following the sale of his company to Valeo Foods. The businessman said the deal would allow him to invest in high growth opportunities in food and other sectors. He said investing in the food sector was the smart thing to do in the current climate. The Valeo Foods takeover deal, which will create a merged business with a turnover of around €300 million, has been referred to the Competition Authority.

NESTLÉ TURNOVER BACK IN THE BLACK

Nestlé Ireland posted pre-tax profits of €703,000 last year, following losses of €6.3 million the previous year. The maker of Nescafé, Kit Kat, Aero and Rowntrees (all brands that feature in this year's Top 100 Brands), has benefited from a restructuring process implemented in 2009, which shaved costs from the business. The company's annual report noted that its 'long-standing reputation and tradition within the sector, the strength of its brands and its historical financial security continue to be positive factors.'

NEW APPOINTMENT AT AIM GROUP

The AIM Group has appointed Conor Hayes as its new Managing Director of Delivered Businesses. The Group, which owns the master franchise for the Iceland chain, recently embarked on a growth strategy in its retail and wholesale divisions.

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NEWS

Slow Summer Affects Top Retailers' Market Growth, Says Kantar

Superquinn and Dunnes Stores Record Disappointing Month As Discounters Advance

The absence of a significant summer event, such as last year's World Cup, and indifferent weather had an adverse affect on market growth and retailer performance during the Summer months, according to Kantar Worldpanel. Overall market growth dropped 40 basis points for the 12 weeks ending July 10, with the most notable decline being noticed in



alcohol sales, which fell by 7%. With the Kantar figures released prior to the Superquinn drama unfolding in the media, its dwindling market share may have proven to be a bargaining chip in the Musgrave deal. For the fifth consecutive period since the start of the year, the group has suffered a marginal decline to 5.9%, with Lidl surpassing the group for the first time. Lidl's growth can be attributed to the roll out of its in-store bakery across its

network and its recent high-profile King of the Grill mobile van campaign. While recording a marginal increase, Aldi is not enjoying the same penetration but is also doing enough to encourage consumer switching. Having reaped the rewards of a new price-focused marketing campaign in June, Dunnes Stores failed to capitalise on that footfall this time around, recording its lowest market share for the year so far, 23%. With no store openings of late, Tesco has focused on showcasing its Irish producers and recently held its first Irish Food Expo in Dublin. Reflecting the sluggish growth in the market during this period, Tesco gained 20 basis points. SuperValu, meanwhile, remained static at 19.7% despite its high profile during the GAA Championship season. On the Musgrave deal, Kantar Worldpanel's David Berry noted that the acquisition would particularly affect the Dublin area, saying "Musgrave accounts for just 10% of grocery sales in Dublin but with the addition of Superquinn it would hold 23% of sales." He also added that the Musgrave takeover would create a "fresh food powerhouse", with the combined group achieving 31.5% share of the fresh and chilled sector across Ireland, which would be seven points ahead of the current market leaders, Tesco.

	12 wk end 20/3/2011	12 wk end 17/4/2011	12 wk end 15/5/2011	12 wk end 12/6/2011
Total Multiples	88.3%	88.5%	88.7%	88.8%
TESCO	27.2%	27.1%	27.3%	27.6%
DUNNES STORES	23.3%	23.6%	23.7%	23.4%
SUPERQUINN	6.5%	6.4%	6.2%	6.1%
SuperValu	19.8%	19.5%	19.6%	19.7%
ALDI	4.0%	4.2%	4.3%	4.4%
LIDL	5.9%	6.1%	6.1%	6.2%
Total Symbols	5.1%	5.0%	4.9%	4.9%
Asda/Sainsbury	1.5%	1.5%	1.5%	1.7%



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NIIRTA Oppose Parking Price Hike

Street Parking in Belfast to Rise 40p Per Hour

The Northern Ireland Independent Retail Trade Association (NIIRTA) has spoken out against an 'excessive' hike in parking rates in Belfast, where on-street car parking is to go up by 40p an hour. Following this price rise, further increases have been discussed for Newry and Lisburn, and NIIRTA Chief Executive Glyn Roberts believes that independent traders operating in these towns will be worst affected by the rate increase. "While we expected a reasonable increase in existing on street car parking, a 20% hike is simply too much given the pressure on shoppers and hard pressed working families," he explained.

"NIIRTA has supported Translink in their efforts to provide affordable and accessible public transport as an alternative but the reality is that many people who shop in Belfast and other town and city centre still use their cars. A 20% hike on street car parking is hardly going to act as an incentive to get more shoppers to use Belfast City Centre and support hard pressed retailers"

Fees at Road Service owned car parks are also likely to increase, although independent traders are also waiting to discover if DRD Minister Danny Kennedy is to drop plans for the introduction of new on street car parking in 30 other towns across the North.

Store Openings for Lidl and SuperValu in Midlands

Both Lidl and SuperValu added to their portfolio this month with store openings in Carrick-on-Suir, Tipperary and Mountmellick, Laois respectively. Lidl only got the green light to open the 1,661 sq m purpose built store on the Clonmel Road in June. Twelve jobs were created.

Meanwhile, the €5.5 million SuperValu Mountmellick store has also opened its doors. The 1,486 outlet is owned and operated by Emmet McConville, who used to operate a SuperValu in Portllington.



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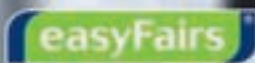
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Banks Stall Barry Expansion

The Barry Group is unlikely to proceed with its plans to double the number of Carry Out stores by the end of next year due to a lack of available bank credit, according to its MD Jim Barry.

The Cork chief revealed the company's plan following the publication of its annual accounts, which showed a 16% increase in turnover to €241 million. While not revealing the exact profit figure, Barry (pictured above, left) said that profits were up on last year (€2.57million), despite tough trading conditions.

"At the moment it's a matter of keeping the head down and getting on with things," said Barry. "We are working harder now than we ever had." Referring to the lack of finance available for businesses, he said that the country was moving closer to a 'bankless' society.

The Barry Group now operates seven Buy Lo outlets, with openings in Shannon and Dublin West earlier this year. With ambitious plans to roll out this retail concept, Barry has spoken openly about the obstacles his and other companies face with regard to planning regulations. In time, he noted, the group will open more outlets, but for the meantime it is trading well.

Poundland CEO: 'We Will Build Links With Irish Suppliers'

But Most Branded Goods To Be Sourced From UK

Poundland CEO Jim McCarthy has told *Checkout* that his company will work closely with Irish suppliers on products for its new 'Dealz' venture, details of which were announced recently. "One thing we are going to build from the start is the amount of locally sourced Irish products we can offer," he explained. "Irish consumers are very loyal, and rightly so, to their own brands, so you'll see certain products featuring in the ROI stores where they wouldn't feature in the UK stores."

McCarthy also noted that the majority of 'fresh' products on sale in its stores (such as milk, bread and eggs) will be sourced locally, saying "because of the very nature that they need to be fresh, they are very likely to be Irish-sourced."

However, Poundland will use its Northern Ireland supply chain network, with its links to mainland UK, to supply its ROI stores with branded goods, including top brand names such as Coca-Cola, Kellogg's, Colgate, Walkers and Winalot. "We will [continue to] bring over containers from the UK with the leading brands in them, and use a local carrier to distribute them to stores in Ireland" he noted. Poundland currently operates 19 stores in the North.

On the question of where Poundland's initial six stores will be located (the first of which is expected to open in October), McCarthy kept mum; he did, however, say that "Dublin features very strongly" in the company's plans for Ireland, and that a target of 50 stores in Ireland is not beyond the realms of possibility. "I think it's all about getting quality sites and understanding the market once we've entered it [...] It will have its own nuances of course so we will be modifying and improving as we go."

Each 'Dealz' store is expected to be "five to six thousand square feet" and be located "where we can reach as many Irish consumers as possible."



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Private Label Making Sizeable Gains

Kantar Data Indicates 4.4% Growth

New data from Kantar Worldpanel has found that private label has increased its grocery market share by 4.4% in the past year. Sales of private label products in Total Grocery hit the €3 billion mark in the 52 weeks to July 10, 2011 (€3.029 billion), while sales of branded goods in the same period fell by 0.94% to €4.923 billion.

In Total Alcohol, while private label's share is relatively small, it increased market share by 11% to just under €82 million, while branded alcohol sales fell 5.35% to €663 million (down from €701 million).

Private label also saw growth in Total Food, where market share rose 4.46% to €2.7 billion, while branded sales fell 0.35% to €7.1 billion. In Total Toiletries, private label recorded a significant decline of 7.4%, however, this too is a category in which PL presence is relatively small, accounting for €36.9 million, compared to the branded share of €363 million.



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Brand Development

This autumn, The Vard Partnership, in association with *Checkout* magazine and RTÉ's *The Business*, is relaunching Brand Bursary, a competition exclusively for small- to medium-sized Irish producers looking to enhance their market presence.

This autumn, The Vard Partnership, in association with *Checkout* magazine and RTÉ's *The Business*, is relaunching Brand Bursary, a competition exclusively for small- to medium-sized Irish producers looking to enhance their market presence.

Last year, Just Food, a Midleton-based artisanal producer of soups, pesto and other healthy products, was the inaugural winner of Brand Bursary, securing €10,000 worth of packaging design and brand consultation from The Vard Partnership. For Deirdre Hilliard, who runs Just Food with her husband, Kevin, winning the competition has transformed their business from a local, market-led enterprise into a potentially pan-European operation.

"It's been an amazing year for us," she explains. "Since we won the Brand Bursary, the business has been transformed. We had been growing the business very slowly up until then, getting placements in several retailers [following a trial with Hurley's SuperValu, in Midleton, Hilliard achieved placements in several Musgrave outlets nationwide, as well as Dunnes, Tesco and Superquinn], but this gave us an understanding of what we needed to do to market ourselves."

One of the key elements of the process was overhauling the packaging, with Just Food being relaunched in streamlined, customer-friendly packaging that still retained the rustic, home-made feel of the product. "I had no idea of the importance of packaging and branding yourself properly, prior to the competition," says Hilliard. "Now I know that the packaging and the branding is at least as important as the ingredients and the formulation. You need to have the full package if you want to get into the multiples."

"The reaction to the new packaging was incredible and instantaneous. I went away to BioFach [major German trade fair], and you had all these people coming over, taking pictures of my product. Everybody was just so positive."



Having such a strong support base has given Hilliard and her team the chance to expand the business. The company has taken on two extra staff members in the past year, and it is looking at extending its range to include "a healthy lunch range that would be pulse-orientated, like lentil stew, vegetarian alternatives to lunch."

"Nothing happens straight away, of course. Everything takes a long time in this business, so you just have to keep working away at it. But now, thanks to the competition, we feel we have the confidence to take it further, to really succeed as a business."

Brand Bursary

Brand Bursary returns this autumn, with the call once again going out to businesses looking to boost their offering in the highly competitive marketplace. As with last year, the prize is the same: a bursary of €10,000 in the form of packaging design and branding advice to help build and develop an Irish food or drinks brand, in conjunction with The Vard Partnership. The brand can be a new, innovative idea or an existing brand that has yet to reach its potential in the market.

However, the criteria for this year's competition is slightly different: Brand Bursary 2011 will focus on companies that are seeking to grow their business overseas – a topical approach that fits in with the government's appraisal of the food industry as a key export leader. "The export market is showing positive growth at the moment, and Irish food producers are increasingly

seeking to develop their business overseas," says Stephen Vard, managing director, The Vard Partnership. "What we're hoping with Brand Bursary is that we would attract companies that have aspirations to take their brands to export markets and would benefit from a rebranding exercise, so they can really focus on what their brand is about and who to communicate to."

If, according to the *Food Harvest 2020* report, food exports are to achieve a value of €12 billion by the end of the decade (a 42% increase on the 2007-9 period), it is going to take initiative on the part of small- to medium-sized enterprises to get out into the global marketplace. It happened for Deirdre Hilliard at Just Food – it can happen for you, too.

The closing date for applicants to Brand Bursary 2011 is Friday 7 October, and the winner will be revealed in a special broadcast of RTÉ's *The Business* at the end of November. The winner will also be profiled in *Checkout* magazine in our December 2011 edition.

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While the VAT reduction has enabled many newspapers to enjoy windfall profits due to adapting their pricing structure, those that have used the reduction to boost their promotional strategy have only served to hit themselves and the retailers. Stephen Wynne-Jones reports.

This is illustrated best in the case of Ireland's largest selling newspaper, *The Irish Independent*. The RRSP of the newspaper is now €1.85, down from €1.90, but according to the VAT application, the RRSP should be €1.82. Under this structure, and given that retailers receive a 25.4% reduction on the ex-VAT price, retailers are paying an extra 2.32 cent per copy, and are receiving 0.59 cent more per sale. Independent Newspapers, meanwhile, receive 1.73 cent extra per copy, without any additional outlay.

With distribution of around 113,000 copies per day, the windfall to INML stands at over €700k a year; however, a different pricing structure adopted by the *Evening Herald* (see below) eliminates this.

The Irish Examiner has adopted a different approach, with the wholesale price rising, but the cash and percentage margin dropping. The Examiner's method of setting prices is not seen anywhere else in the trade, and the newspaper has managed, through increasing the wholesale price, manipulating the VAT differential and reducing the retailer's margin, to earn an extraordinary 3.49 cent per copy. In this case, the retailer is paying 3.49 cent per copy, yet earning 1.17 cent less. *The Irish Examiner* is therefore 'earning' an extra 3.49 cent per copy sold by retailers dealing with them. Retailers that sell the product through EM News, which sets a different pricing structure, are paying an extra 1.70 cent per copy, and earning 0.62 cent per copy.

A third example of how newspapers have altered the pricing structure of their product is seen through the examples of the *Irish Sun* and *Evening Herald*, which lowered their RRSPs from €1 to 95 cent and from €1.20 to €1 respectively. Both RRSPs are lower than the 'real' price set by the VAT reduction, and therefore in both cases, the newspapers and retailers can be said to be taking a hit. Measured over a year, in the case of the *Irish Sun*, that 'hit' is estimated at €133,513 for the publisher and €66,308 for the retailer; in the case of the *Evening Herald*, it stands at €1,911,396 for the publisher and €672,220 for the retailer. When INML's other

newspapers are also taken into account, this adds up at a €892,572 loss for the publisher.

All told, when all totals are added up across the entire newspaper industry in Ireland, the total windfall for publishers is estimated at €1,11,847, while retailers make a loss of €57,589.

The exponential rise of RRSPs during the past decade has left most publishers in an unenviable situation: how to offer cheaper prices for the consumer, without ultimately hitting both themselves and the retailer in the pocket? ■

Further analysis of the figures is below:

Income Resulting from VAT Reduction For Selected Publishers and Retailers (in €, measured over a year)

Title	Price Change	Publisher	Retailer
Irish Independent	1.90 > 1.85 2.20 > 2.15	707,223	240,797
Sunday Independent	2.70 > 2.60	53,256	19,155
Irish Times	1.90 > 1.85 2.20 > 2.15	535,297	183,223
Irish Examiner	1.90 > 1.85	456,827	(130,898)
Irish Daily Mail	1.00 > 1.00 1.20 > 1.20	453,312	157,346
Sunday Business Post	2.70 > 2.60	11,429	3,404
Irish Mirror	1.00 > 0.95	(133,513)	(50,643)
Irish Sun	1.00 > 0.95	(174,810)	(66,308)
Evening Herald	1.20 > 1.00	(1,911,396)	(672,220)
Totals (across all titles)		1,111,847	(57,589)

For the majority of newspaper and magazine publications, the recent VAT reduction has led to an increase in 'windfall' profits for titles, due to the method by which publishers and distributors calculate the wholesale price at which their products are sold to retailers.

According to data from the CSNA, in the wake of the VAT reduction from 13.5% to 9%, most publishers chose to alter the price of their product at a price point that was actually greater than the 'official' new VAT rate; a scenario in which publishers, distributors and retailers achieved a financial benefit. In many cases, however, the distributor and retailer are also paying more for the product (and as such are entitled to an additional return on investment), while the publisher has managed to achieve a not insignificant windfall, without any additional expenditure.

Picture Perfect Opportunity

ACCUSTOMED TO SELF-PRINTING IN-STORE AND ONLINE, CONSUMERS ARE LOOKING FOR CONVENIENT AND COMPETITIVE MEANS TO CARRY OUT SUCH REGULAR TASKS. GERRY O'RIORDAN FROM HAHNEL INDUSTRIES TELLS *CHECKOUT* ABOUT THE GROWING DEMAND FOR PRINTING KIOSKS IN RETAIL STORES OF ALL SIZES.



Digital camera usage in Ireland is now almost as commonplace as mobile phones, with social media and other photo sharing websites facilitating this interest. Reflecting this trend, the vast range of photo products – from wallpaper to personalised cups – has also exploded, hence why the overall global retail photo publishing market is expected to hit €56 billion by 2013. On home soil, the expectations are just as high.

No longer confined to photo specialists, nearly all retail operators are embracing this growing market, with FMCG players also recognising the economical benefits of such a service.

"Retailers are looking for ways to diversify and we see this service as a really good add-on, with huge economical potential," says Gerry O'Riordan, HP Retail Publishing Solutions Product Manager at Hahnel Industries. "With footfall already there, retailers can capitalise on that. There is also the added benefit of Homeclient, an online solution which can add revenue outside of office hours. Customers can download the software from the retailer's website or upload from a disc providing the link."

This link enables the customer to create photo products from the comfort of their own home. When purchasing their products, they can choose a HP Photo Centre stockist from a Dropdown menu and collect their products from that location. Such a walk in service may also encourage cross purchasing in other categories.

Hahnel Industries Ireland, located in Cork, is the official distributor and reseller of all HP's Retail Publishing Solutions and to date the company has installed over 20 units nationwide.

THE SOLUTIONS

There are five different equipment solutions currently available; from the basic PM 2000 to more sophisticated offerings.

"Every retailer is different so it's a case of looking at their market," says O'Riordan. "With the PM 2000, it's the basic two print size options, and so is suitable for quick and easy turnaround times."

At the other end of the scale is the CL 2000 (the baby brother of the ML2000D Minilab), which offers the aforementioned on-trend items including calendars, gift cards and photobooks. The Z3200 Wide Format printer, meanwhile, offers, posters banners, collage and canvas options in a vast array of sizes, while there is also a DVD/CD Rimage that creates beautiful gift sets with the artwork of choice. This artwork is placed on the actual DVD and is accompanied by an index booklet of the photos burned on the DVD and presented in a jewel case. Finally, there is the ML2000d - a Minilab capable of producing photos from Passport size to 12x18 inch prints (30x45cm). This is a high volume printer that can produce 1,550 prints per hour as well as greeting cards, photobooks and calendars.

Retailers have to pay the initial outlay for the equipment and such is the ease of use and workings that all training can be done within a three-hour timeframe.

Hahnel Industries provides the expertise, as well as stock

range, including paper and ink. A third party specialist company also provides a repair service.

HUB AND SPOKE

For retail chains there is an offering called 'Hub and Spoke,' where the 'Hub' acts as the main creative location and is placed where printing volume is highest.

The 'Spokes' (Compact Instant Printers) are then set up at lower volume locations to offer instant prints onsite and any larger creative products that are created at an individual 'Spoke' are then digitally sent to the Hub for completion. They are then sent back to that particular 'Spoke' for collection.

These 'Spokes' offer retailers the capability to offer a consistent array of products across many installed stores for less capital investment. This in turn leads to a significantly quick return on investment in tough economic times.

HP Retail Publishing Solutions offer the opportunity to produce low cost, high yield products in-store, at home and from associated locations. All the offerings created by the HP Photocentres are high margin and delivered quickly in-store. For 'Spoke' solutions, a 24-hour delivery/collection service is best offered. For further information, contact Gerry O'Riordan, Hahnel Industries, 023 8841606.





WHAT'S NEXT?

The debate over whether or not Superquinn is worth holding on to as a separate entity is not the only concern on new owner Musgrave's mind, as **Checkout** discovers.

The question of whether or not to retain the Superquinn brand is just one of a host of issues likely to concern Musgrave over the weeks and months ahead, now that the ink has all but dried on the Cork wholesaler's takeover of the 51-year-old retailer.

There's little doubt that the completed deal represents a conclusion of sorts, bringing to an end a turbulent few months for Superquinn, as well as closure on the will-they-won't-they takeover saga (as journalists, what are we going to write about now?). For its new owners, however, the challenge is only just beginning.

Musgrave has proven that it is capable of turning around a difficult retailer. Following its takeover of Budgens in the UK in 2002, it successfully turned the business around. Budgens opened a store a month last year, on average, and was named 'Fresh Produce Retailer of the Year'. With Superquinn, it may find the going tougher. Musgrave has also shown that it is capable of making quick decisions – the speed at which it sealed the deal is a case in point – but how quickly it manages to embrace the

challenges on the ground at Superquinn may depend on some key elements.

1. Positioning

Earlier this month, *Checkout* spoke to Superquinn founder Feargal Quinn, who had just broken his silence to extol his support for Musgrave's takeover of the retailer that he founded. Quinn was ebullient, saying that he was "quite delighted that an Irish retail business is taking it over. [...] I would be confident and certainly hopeful that they [Musgrave] would continue the business as a separate entity, and they tell me they do intend to do that."

The previous week, an *Irish Times* opinion piece asked several top advertising executives and branding experts if the takeover offered "an opportunity to reinvent or kill the Superquinn brand". The response, for the most part, supported retaining the brand, with most noting the retailer's ability to retain goodwill from a loyal consumer base, even as the social environment shifted around it. As one exec put

Analyst's View: Clive Black

Dr Clive Black, head of research at Shore Capital, offers his assessment of the weeks ahead. "Experience teaches us that it can be difficult to prejudge the decisions of competition authorities. Accordingly, we would not wish to be too assertive as to how the Irish authorities will judge Musgrave's proposed acquisition of Superquinn. Whilst this is so, and also noting the views of the other incumbent players, we would be surprised to see especially draconian recommendations, as both Dunnes and Tesco also have substantial market shares. The difference in size between Musgrave and Tesco is minimal.

"Accordingly, our central expectation is that this acquisition will be cleared. With three strong players in the market, we expect the deep-discounters to continue to gain share in Ireland whilst keeping an eye on potential new entrants in due course. Asda (Walmart) must be watching developments in Ireland with a view to a move across the border, whilst Irishman Dalton Philips, at Morrisons, could still have the Emerald Isle somewhere on his strategic to-do list"

it, "SuperValu stores around the country closely reflect their locale, while Superquinn's brand constituency is united in lifestyle and aspiration, rather than geography and community." Or, to put it another way, people shop at Superquinn to feel good about themselves.

Those who supported retaining Superquinn were also vocal on the positioning of the brand,

Left: Last month, Senator Feargal Quinn took time out to address workers at Superquinn's Knocklyon store. Quinn told Checkout he is "quite delighted that an Irish retail business is taking it over."

with many calling for it to be restructured around the same sort of 'food porn' ideals of M&S and Waitrose (or even Donnybrook Fair and Morton's), rather than around price. One voice, Damian Hanley of ad firm Rothco, said that last year, management at the retailer was eager to push a marketing strategy based around service and quality, before "bottling it at the last minute" to make it all "about price". As Hanley explained to *Checkout*, "We believed the Superquinn customer needed to be given an excuse to go back to Superquinn. There was no alternative message being put out there to say, 'This is the reason why you shop at Superquinn – it's for the quality of the food and the service.' [...] Focusing on price just wasn't believable. Essentially, they were playing the wrong pitch altogether."

2. Sourcing Issues

We now know that the €10 million fund established by Musgrave will be distributed to the uninsured trade suppliers in September, with receivers Kieran Wallace and Eamonn Richardson saying, in a recent statement, that "Payments will be made to trade suppliers within four weeks of the fund being activated."

This, hopefully, will ease the burden on countless suppliers, many of whom have not been paid since early July and were directly affected by Superquinn's receivership. But what happens next?

Given that Musgrave will have to operate both SuperValu and Superquinn concurrently in the short term, how Musgrave approaches sourcing for both retailers depends on how loyal it wants to be to Superquinn's existing suppliers. In a statement in July, Musgrave said that the deal will "protect an important route to market for suppliers and provide them with certainty for the future," while its CEO, Chris Martin, wrote an impassioned letter to *The Irish Times* illustrating the same point. But in cases where there is a clash of interest, which suppliers are going to lose out? How willing is Musgrave to retain two sets of fruit and vegetable suppliers, for example?

Of course, Musgrave will also have to be cognisant of the fact that it doesn't want to alienate a new portfolio of shoppers, who have become used to certain Superquinn products tasting a certain way. Superquinn's shoppers are arguably the most loyal in Ireland, and its returning customers are drawn back by the quality of produce available. The 'Save





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FEATURE



Superquinn Sausages' campaign on Facebook is an example of such loyalty, and Musgrave should bear it in mind before making any wholesale changes to how particular products are sourced.

In the medium to long term, the two separate sourcing operations for both SuperValu and Superquinn will almost certainly be phased out, and a joint structure will be established to serve both operations. But as many may wonder, should Superquinn be retained as a retail entity, how will its sausages taste?

3. Location

The Musgrave deal, notably, did not include the Dundalk Superquinn store (at Carroll Village Shopping Centre), and that outlet could soon be joined by a number of other outlets deemed 'surplus to requirements'.

Superquinn's outlets in Portlaoise and Carlow are thought to be first on the block, should the new owners seek to divest any stores. According to media reports, both are said to be generating turnover in the region of €10 per square foot, while the location of both, outside Dublin, could also be a detriment to their chances. In fact, a question mark could be placed on most Superquinn outlets outside the capital. Musgrave will undoubtedly be looking to divest at least a couple of them if it wants to set about overhauling the portfolio.

In Dublin, rumours have circulated around Superquinn Ballinteer (one of its strongest performers, despite the competition in the area) and/or Superquinn Knocklyon, which are located close to its SuperValu Churchtown and SuperValu Rathfarnham outlets. Blackrock could also be in the frame (owing to its proximity to SuperValu Deansgrange), and

Musgrave could certainly command a decent price for the choice outlet.

But whether Musgrave will see Dublin as the best place to offload stores is questionable. Would it dare to alienate a proportion of its SoCoDub fan base to make a quick buck?

4. Who's In Charge?

With chief executive Andrew Street (formerly of Boots and Dunnes Stores) announcing his departure on 21 July, the Superquinn operation is currently without a clear leader, which could make life difficult for the new owners. In deciding to leave the retailer, Street, perhaps, was anticipating a forthcoming executive cull. While much of the focus has been on retaining jobs in stores – around 2,800 in total – at head-office level, such positions may not be as secure. At the same time, it would be interesting to see who would want the top job at the retailer – Superquinn has been something of a revolving door in recent years, with more high-profile departures than arrivals.

At the time of going to press, the current Superquinn director line-up includes Simon Cantrell, David Courtney and Kieran Ryan, all executives with plenty of experience in the trade. However, at the time of going to press, the three have no power or control in relation to the trading of the business and assets of the company. Will they choose to stick around?

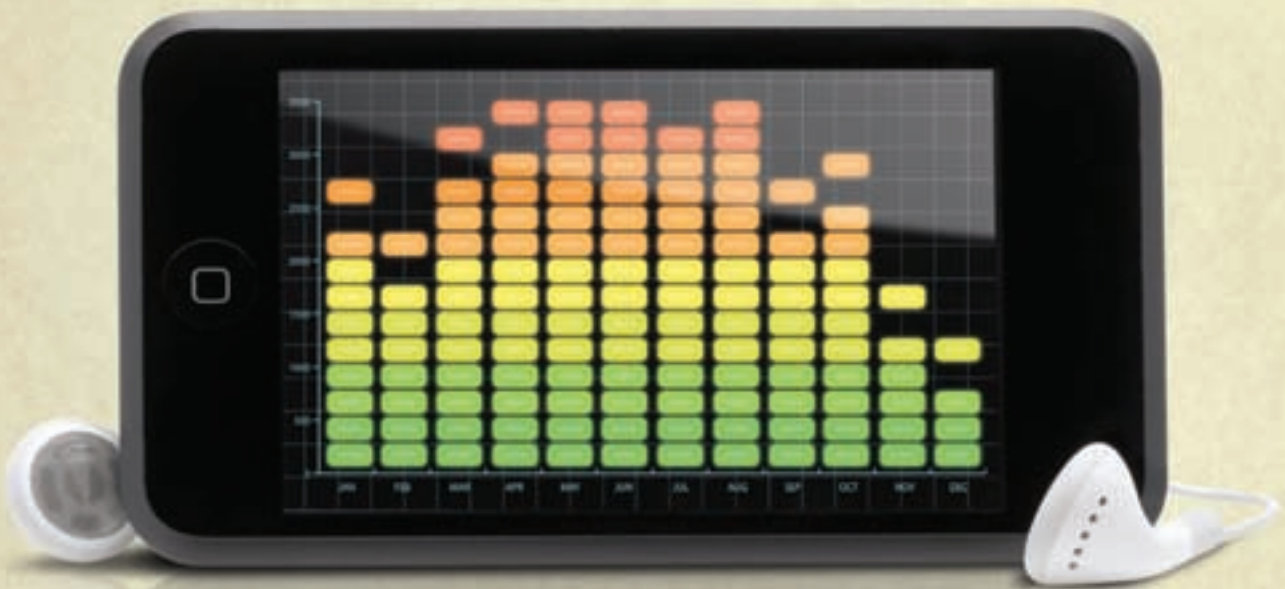
5. Other Concerns

Of course, there are other innumerable concerns to which Musgrave may have to attend. For example, what will happen to its C-stores? By focusing too much on Superquinn, will the retailer take one eye off Centra,



allowing BWG to gain a distinct advantage in the category? Or could we see one of Musgrave's main rivals, Tesco or Dunnes, for example, launch a formal objection to the Competition Authority's decision? [Tesco, it could be argued, has the most to lose from the deal going ahead, as it potentially strips it of the title of market leader some way down the line. According to Kantar Worldpanel, Musgrave's market share inclusive of Superquinn stood at 27.6% for the 12-week period to 10 July, compared to 27.8% for Tesco.] Finally, what if the decision is delayed? What could that mean for the dozens of affected suppliers living hand to mouth until their share of the €10 million fund comes through? It could be an interesting few weeks in Cork and Lucan. ■

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Fighting Back

After public awareness campaigns, Government lobbying and a sustained push by retailers, the volume of smuggled and illicit cigarettes being consumed in Ireland is now declining. However, the three large main tobacco companies insist that the fight is far from over, as **John Ruddy** writes.

The economic downturn has impacted on every aspect of Irish society, with everyone now feeling the pinch. Even sellers of illegal cigarettes are having to drop their prices, with the 'street' price of a carton now dropping to under €40. Times, it would appear, are tough for us all – even the criminal fraternity.

The fall in price of counterfeit and smuggled product may be a factor of reduced spending power, but it also shows that there is no shortage of illicit tobacco on the Irish market.

For while the volume of Non Irish Duty Paid (NIDP) product consumed in Ireland last year fell from 26% to 23%, the illicit trade is still a major problem for the Irish retail sector.

According to industry group ITMAC, the illegal trade has taken over €2 billion from the Irish economy in the last two years, with each car load of illicit tobacco yielding profits (for criminals) of almost €9,000, each van over €80,000, and each container around €1.3 million.

“The numbers are reducing, but it is still a big problem,” says Chloe Campen, corporate affairs manager with PJ Carroll and a member of the ITMAC organisation. “For 2009, we were looking at around 26% of the market being NIDP, and last year it was down to 23%. And that is a factor of the Government holding excise duty at the same level, customs being more proactive and the Gardai getting more active in the area, but it is still far too high.”

Based on seizures to date this year, ITMAC estimates that the figure for 2011 will be around 20%. This would bring it back to 2008 levels, when NIDP began to skyrocket, with volumes doubling from 9% in 2007.

The impact of this huge increase, even in the context of a reversal in the trend this year, has impacted in a number of areas.

From a Government perspective, the estimated loss in revenue is around €500 million, as €6.80 on every pack of cigarettes goes into the State coffers.

On top of this, including cross-category spend, ITMAC estimates that a similar figure is lost to the retail trade on a yearly basis.

Increasing Importance

While the issue of selling tobacco is always controversial, its importance to the trade cannot be understated.

For many small retailers, tobacco accounts for upwards of 20% of their total turnover, with this going as high as 40% for some CTNs.

Furthermore, as deli participation has taken a hammering, the relative importance of tobacco as a category has increased significantly.

“If the tobacco shopper is not going into your store, you are losing the revenue from the cigarettes themselves, but they are also not spending that additional money,” says Deirdre

Above left: Taoiseach Enda Kenny and Health Minister James Reilly won't be smiling if the current tobacco smuggling trend continues

Healy of John Player. "And when your deli counter is down, and your tobacco shopper is no longer buying in your shop, it's a double hit." As retailers are having to increasingly rely on the tobacco category, so too is the Government. In 2006, tobacco accounted for 19% of the total excise take, with this rising to 21% in 2008. By 2010, tobacco excise accounted for 24% of the €4.8 billion in excise duty collected by Government, with the decline in other revenue streams making the tobacco contribution increasingly important.

"In the past, tobacco would have been around 2-3% of the total Government tax revenue, but that is going up to 4-5% now," says Chloe Campen.

Powerful Enemies

While Government may be more reliant on tobacco excise than before, this is not to say that many of its officials are particularly grateful. Health minister James Reilly recently spoke about the 'powerful enemy' that was the tobacco sector, and while the Department of Finance (under the previous administration) froze excise in a bid to stem illicit trade, the Health lobby continues to push for higher taxation and restrictions on how tobacco is sold, presented and displayed.

This lack of joined-up thinking, or more precisely, the conflict between the positions taken by the various Government departments, has frustrated both ITMAC as an industry body and the individual tobacco firms themselves. "Health authorities here do not acknowledge our smuggling problem," Healy says. "And until they do, they will never reach their objectives on tobacco control. Their attitude is that it is a matter for the Minister for Finance. But when all the public health aspects are being bypassed completely (by smuggling), of course it is something that they need to engage with." As JTI's Cheryl Cullen puts it, it is impossible to have a tobacco policy 'which only covers 75% of the market', with neither the Department of Health or the Office of Tobacco Control acknowledging the smuggling issue at all. This, ITMAC says, is in stark contrast with the UK, where addressing the illicit trade is a core part of the Health strategy for the sector.

Smuggling Shift

What all the ITMAC members report is a distinct change in how the smuggling of tobacco into Ireland takes place.

In the past, seizures were smaller, based more around suitcases or car loads, however now it is a far more sophisticated business.

One recent seizure saw tobacco hidden within fake concrete blocks, while computer hard drives stuffed full of packs of cigarettes were also found in a haul this year.

"It is becoming far more sophisticated – we have reports from customs of smugglers changing into pilots uniforms and trying to enter the country through the employees channel," says Cullen.

This, all the ITMAC members agree, points to a number of factors. Firstly, Customs are becoming more successful at detecting smuggled shipments, with intelligence gathered at a global level through partnerships with dedicated smuggling taskforces.

This, they say, means that a shipment with a container of counterfeit cigarettes could be tracked from the Far East all the way to Ireland, so as soon as it lands, Customs are ready to pounce.

The tobacco firms, however, also suggest that the more sophisticated methods being used shows the increased level of involvement by high level criminal gangs.

"Someone is going to an awful lot of trouble to bring in this stuff," Healy says. "And as the counterfeit supply dries up, you are seeing an increase in robberies on shops. These are serious criminals."

“ We had a big seizure in Cork recently of ‘Club 88’, which no-one here has ever heard of, but looks like Dunhill Red. ”

Cheap Whites

The nature of the illicit market is also changing. Whereas before, the market was flooded with actual counterfeit product, recent seizures have been illicit 'whites' – namely products which are not sold in Ireland but may be brand names in other countries. In many cases, these 'brands' are remarkably similar to established big brands in Ireland, with similar packaging.

This trend away from counterfeit and towards cheap whites mirrors that in the UK, where these knock-offs are rampant, Campen says.

"What we have seen there is that counterfeits went down and illicit whites started to grow, and that is what we are seeing here. For example, we had a big seizure in Cork recently of 'Club 88', which no-one here has ever heard of, but looks like Dunhill Red. And we are seeing more and more of that here," she says.

While the nature of the illicit trade may be changing, what is clear is that Ireland remains a big target market for international smugglers.

ITMAC believes that the Greenore seizure, for example, was product destined for Northern Ireland and then back into the UK, with the land border allowing for smuggled product to enter Ireland and sift back into the EU.

To counter this, officials here are now working far more closely with their counterparts in the North, which is helping to crack down on illegal shipments on either side of the border.

This evidence of multi-agency collaboration is welcomed by the tobacco companies, however they all argue that once smugglers are caught, the punishments involved are far too light.

For example, while selling counterfeit tobacco breaches a number of laws, including the trademark act and the Finance act, it is also a breach of the casual trading act, which requires all casual traders to hold a licence.

"You have guys selling tobacco at events, and they are found in breach of the casual trading act, as they don't have a proper licence," says Healy. "So they get a fine of €63, and if they get caught again it's doubled. Now if you are selling counterfeit tobacco, for which you obviously can't get a permit, getting a fine of €63, when you are selling cartons of cigarettes for €32, is a tiny operational expense. So what ITMAC wants is for this Act to be amended, so it would be prohibited to sell any excisable product at a street market, which would give far more power to the Gardai than simply looking for a permit."

Bigger Punishments

On the topic of fines, while ITMAC insists that the penalties received by many caught smuggling illicit product are far too low, recent initiatives by the State have started to kick in.

For example, while the average fine for smuggling was just over €500 in 2010, based on 96 convictions, for the actual sale of illegal product, the average fine was €2,500. This followed changes to the Finance Act whereby the maximum fine was increased to €5,000, with judges now imposing higher fines than before.

"In the future there should be very few people who get to court and are found guilty who aren't fined at least €2,500," says Campen. "And what we're waiting now to see is what happens if someone is caught with 250,000 sticks, for example, and what the fine will be when that case gets to court, because it could be up to €126,000. So while there hasn't been a big case like that yet, there are some in the system."

ITMAC is also pushing for those who are caught to have their names and addresses published, as is the case with tax defaulters. This, the organisation says, would allow for cross-checking of criminality or social welfare fraud across other Government departments, with this another example of the type of joined-up thinking which the tobacco companies desire.

International Precedents

Lobbying Government to help combat the smuggling issue (and to properly penalise those convicted of it) is one part of ITMAC's activities, but the tobacco companies have many other fish to fry.



As it stands, JTI, John Player and PJ Carroll are all watching Australia closely, where it is proposed that plain packaging for all tobacco products will be introduced next year.

With Ireland often so eager to push for early adopter status on these sort of policies, it is feared that this may be on the cards for Ireland in the near future.

“We feel that, aside from the obvious IP (intellectual property) issues, that counterfeiting would be easier if all packets look the same,” says Healy. “So while we would absolutely object to plain packs, because we have invested in our brands, we feel there are other issues there too. How can a retailer do inventory, stock control, if all the products look the same?”

A more pressing concern is the likely imposition of pictorial warnings on packs, something which has already been rolled out in other countries, and is thought to be part of the new Government’s plans.

On this topic, the ITMAC members say they will comply with whatever new rules are introduced, however if it is to happen, they insist that an appropriate lead-time is required. “We were asked in 2008 to put a submission on it, and we have heard nothing since,” says Healy. “But we are saying that if they do bring it in, we need 18 months implementation time from the date of regulation to when it goes into the shop. But we have not really heard anything since 2008.”

With the Department of Health looking after this type of legislation, the likelihood for substantive engagement between the tobacco industry and the legislators is relatively low, with the various companies frustrated by what they feel is a top-down approach instead of genuine interaction.

“We are a controversial industry, we know that, but we are a legitimate industry,” says Cullen. “So we have every right to be engaged in matters that will affect our companies in the long term, or the industry in general.”

Campen agrees: “I can understand [the Department of] Health being hesitant when it comes to tobacco policy,” she says. “But what we find is that it would be helpful for them to talk to us about some of the issues involved because we understand how our operations work.

“A good example would be the illicit market, where we have a good understanding of what’s happening. But they (Health) are not benefiting or utilizing that when they’re coming to formulating policy. The theory seems to be that any tobacco policy is good policy just because it’s a tobacco policy or tobacco regulation, and I disagree with that.”

All three also strongly deny the suggestion from some quarters that, in light of the increased regulation on tobacco display and sale, the industry is not overly unhappy with the strong illicit sector as it provides easier access for younger smokers to access cigarettes.

“We have a zero tolerance policy here. We wouldn’t be doing everything we possibly could to combat it if we didn’t,” says Cullen.

“Our interests on this front would be completely



“ We are a controversial industry, we know that, but we are a legitimate industry.”

aligned with the Department of Health’s interest,” says Campen. “None of the companies are at all interested in youth smoking, we invest a lot of money in youth access prevention. “What’s surprising to me is that we seem to be more active, proactive and focused on that issue than the Department of Health and the OTC are, and that’s shocking.”

New Government

With a new Government only recently in the door, ITMAC and its tobacco company members are now looking nervously towards the budget, with fears that the FG/Labour administration may seek to make a ‘quick buck’ by increasing excise on cigarettes.

On one hand, the organisation is optimistic that the assurances made by Enda Kenny prior to the election, where he stated his willingness to engage with the industry on the illicit trade, sends off a strong signal for the future. However, with Government’s focus (understandably) on bigger issues, it’s still a wait and see game.

“We met with Enda Kenny before the election, and he was very positive about wanting to engage with the industry,” says Cullen. “I think the Department of Finance has been too busy with other matters to be really focused on tobacco at the moment, which is

understandable, but the issue is still very high on the agenda.

“The Revenue has launched a three-year strategy, and we would be 100% behind that,” says Healy. “But what we would look for is for the Department of the Taoiseach to organize this, to put all the groups together and say ‘Ok – Justice, Health, Social Welfare, Customs, Gardai – how are we going to solve this?’ Because Health and the OTC have to acknowledge that the problem is there. And the worry would still be that, in a recession, Government will look for a quick buck and will put up the Excise, and then we will see the counterfeit and smuggling issue really rise again.”

The potential for an Excise hike may be the biggest immediate concern, but there are plenty of other issues on the table.

Later this year, all cigarettes in the EU will undergo a slight change, with tweaks to the paper formulation to make them self-extinguishing. This will not mean any real change at a retail level, however it will make the product safer from a fire-prevention perspective. The industry also faces challenges on restrictions on how it can support the retail trade. PJ Carroll recently won a court battle with the OTC over a promotion where retailers were incentivised to prompt smokers (who asked for cigarettes) about a particular other brand, however there are concerns across all the tobacco companies that more restrictions are coming down the track.

“As an industry, we want to be able to support the retail trade, absolutely,” says Healy. “And we would defend our right to do that. We can understand bans on sponsorship, of course we can. But that a retailer can’t support a customer, that that’s deemed to be illegal, is just wrong.” ■



Tuesday 19 July marked the sixth hosting of the annual *Checkout* Best in Fresh Awards, held in association with Glanbia Consumer Foods.

The awards, which honour the best fresh-food retailers in Ireland, recognise excellence, both at an overall level (based around store size or format) and a departmental level.

Checkout would like to thank our partner in the Best in Fresh process since 2006, Glanbia Consumer Foods. We would also like to thank our category sponsors, Invest Northern Ireland, Odlums Ingredients and Customer Perceptions.

This year marked one of the most competitive Best in Fresh Awards to date, with around 150 retailers competing across 19 categories. In addition to outgoing *Checkout* editor John Ruddy, the judging panel comprised:

PRELIMINARY AUDIT - CUSTOMER PERCEPTIONS

Customer Perceptions is a market leader in consumer-based market research services and specific marketplace investigations. Founded in 1995, the company is a fully accredited member of the Mystery Shopping Providers Association (MSPA), the regulatory body governing mystery-shopping providers worldwide.

JEANNE QUIGLEY

Jeanne Quigley has been involved in the food business for many years. A graduate of the College of Catering in Cathal Brugha Street, Dublin, she has worked as a cookery demonstrator, restaurant manager, food consultant and advisor. She is a freelance journalist specialising in food, travel and lifestyle writing, and a member of the Irish Food Writers' Guild. This is Jeanne's fourth year as a judge in the *Checkout* Best in Fresh Awards.

VALERIE RICE

Valerie Rice is an acknowledged expert in the development of commercial and retail strategies in the food and drink sector. She has held senior sales and marketing roles in businesses such as Diageo, working on brands such as Baileys and Guinness, and Superquinn, where she held the position of marketing director. Valerie has been successfully running her own consulting business for the past three years, working with clients in sectors as diverse as food and drink, medical devices, executive search and professional services.

Thanks to our category sponsors:





Large Supermarket SuperValu Clonakilty

WINNER

Arguably the most decorated store ever in the Checkout Best in Fresh Awards, SuperValu Clonakilty is a deserving winner in the Large Supermarket category.

The store, owned by Eugene and Catriona Scally, has continuously reinvented and improved itself every year, with the latest additions including a hot seafood deli and a chicken-wing bar.

Assessing the store, judges in this year's competition said that Scally's was a fantastic example of all that is good about Irish fresh-food retailing, with a genuine appreciation of how to handle and sell fresh food properly. In particular, the judges remarked on how the store continues to improve every year, which is a real achievement, considering the high standard it sets. Pictured are John Ruddy, *Checkout*, Adrian White, Michael Walsh, Eugene and Catriona Scally (all SuperValu Clonakilty) with Robert Jordan of Glanbia Consumer Foods.



Medium Supermarket Ardkeen Quality Food Store

WINNER

The winner in the Medium Supermarket category is Ardkeen Quality Food Store in Waterford.

Ardkeen, a 'pure' independent store, has become a genuine destination store for shoppers all over the Waterford area, with a real dedication to excellence in fresh food.

Judges remarked on aspects including the Sheridans cheese counter, the high standard of hot food to go, and excellent service and knowledge across all aspects of the store.

Pictured are Kevin Jephson, Brendan Feeney, Declan Barry and Deirdre Walsh (all Ardkeen Quality Food Store) with Shane McArdle of category sponsors Invest NI.



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Convenience Store Spar Millennium Walkway

John O'Neill's Spar store, on Millennium Walkway, Dublin 1, was one of the original winners in the early years of the Best in Fresh Awards, and it is clearly not a store that likes to rest on its laurels.

Located in a high-footfall city-centre area, the store has a superb fresh-food offering, with a particular focus on deli and food to go. Judges said that it was a store that set out to do things differently, representing the best about the symbol brand, but also the inspiration of the independent retailer himself.

Pictured are John O'Neill, Spar Millennium Walkway, and Emma Harte of category sponsors Customer Perceptions.

WINNER



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Small Supermarket Donnybrook Fair, Stillorgan

Donnybrook Fair has long been synonymous with high-quality fresh-food retailing, however this store proves that the standards set in the flagship Morehampton Road unit have been extended beyond Dublin 4.

The store only opened in May, however it is already proving hugely popular with local shoppers, with a superb fresh-food offering and excellent presentation.

Pictured are Kevin Kelly, chairman of Checkout Publications, with Joe Doyle and Joanne Hayes from Donnybrook Fair, and Robert Jordan from Glanbia Consumer Foods.

WINNER



Forecourt Store Amber/Costcutter, Fermoy

Located in the Cork town of Fermoy, this Amber forecourt and the Costcutter store that operates on it comprise one of the most modern forecourt sites in Ireland.

In particular, while hot food to go is its real unique selling point, it also demonstrated real excellence in presentation and display.

Judges in the awards remarked that the hot-food offering was truly exceptional in its freshness and quality, and represented a strong statement about both the Amber and Costcutter brands.

Pictured are John Ruddy of *Checkout* and Robert Jordan of Glanbia Consumer Foods with Colm O'Murchu, Kate Burke and David Ryan.

WINNER



Discount Retailer Aldi Stores Ireland

A new category this year, designed to reflect excellence in what is an increasingly important retail channel, the winner of the Discount Retailer category is Aldi Stores Ireland.

In particular, judges noted how Aldi had set its stall out in relation to Irish sourcing, with clear messaging about the suppliers behind its PL ranges.

The quality of the fruit and veg range was also praised, with an excellent combination of quality and low price evident across the store estate.

Pictured are Dani Sinnott, *Checkout*, with Niall O'Connor, group buying director of Aldi Stores Ireland, and Robert Jordan of Glanbia Consumer Foods.

WINNER



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Best Fresh
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Multiple Retailer Tesco Merrion

Tesco Merrion is one of the flagship stores in the Tesco network, and based on its performance in this year's Best in Fresh Awards, it's not hard to see why. Judges praised the store's cleanliness, depth of range and promotional offer, and particularly the knowledge of the staff. This, one judge said, was a store that "takes fresh food seriously"; which was high praise indeed. Pictured are Gráinne Burns, *Checkout*, Ian Logan, Dave Edmondson and William Linnane (all Tesco Ireland) with Robert Jordan, Glanbia Consumer Foods.

WINNER



Deli SuperValu Loughrea

SuperValu Loughrea is the winner in the Deli category, where it sets an exceptional standard. Judges praised the store's commitment to creating a unique and different offering, which includes an olive bar and a sushi counter. Pictured are Dani Sinnott, *Checkout*, PJ Mahoney, Cathal Farrell and Clement Connolly (all SuperValu Loughrea) with Robert Jordan of Glanbia Consumer Foods.

WINNER





Bakery

Mulrooney's Gala, Roscrea

Mulrooney's Gala store, in Roscrea, was one of the smallest stores in the Bakery category, but as one judge remarked, it proved the adage about the best of goods in the smallest packages.

The store's bakery section is of an exceptional quality, attracting shoppers from a wide catchment area, with its products famous in the local community.

Pictured are Dani Sinnott, *Checkout*, Sean Mulrooney and Deirdre Harding (both Mulrooney's Gala) with Gavin King of category sponsors Odlums Ingredients.

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WINNER



Fruit and Veg

SuperValu Dungarvan

Part of the Garvey Group, SuperValu Dungarvan is yet another winner for the Kerry-based company in the Best in Fresh process.

Judges said that the store had a real focus on a strong fruit and veg offering, including excellent value for money, superb presentation and a well-trained and knowledgeable staff who were prepared to go the extra mile for their shoppers.

Pictured are Dani Sinnott, *Checkout*, and Kevin McCarthy of the Garvey Group with Robert Jordan, Glanbia Consumer Foods.

WINNER



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Best Fresh
 AWARDS
 2011

Most Creative Retailer

The Market, Stepside

WINNER

The Market, in Belarmine, Stepside, is part of the Griffin Group, one of the largest convenience-store operators in the Dublin area.

Judges said that the store and its management had a creative eye and a talent for doing things differently, which clearly resonated with local shoppers. In particular, the creation of mini-events like Curry Night was evidence of how good ideas married with high-quality food could engineer real customer loyalty. Pictured are Trevor Kearns, Seamus Griffin and Tanya Maryshko of The Market/Griffin Group.



Meat

SuperValu Carndonagh

WINNER

A hugely impressive winner in what is a very hard-fought category, SuperValu Carndonagh stood out in a number of areas, particularly when it came to staff knowledge and interaction with shoppers.

Judges praised the range, presentation and quality of the meat on offer, which, they said, would have been impressive even in a far larger store.

Pictured are Robert Jordan, Glanbia Consumer Foods, with Declan Glackin, Chris Lyons, Gerry Doherty and Chris McGurgen (all SuperValu Carndonagh).





Non-Affiliated Retailer

Joyces, Knocknacarra

WINNER

Joyces is a byword for quality in the Galway area, with its Knocknacarra store one of the jewels in the crown of an exceptional independent retail group.

Judges said that the Knocknacarra store married the best of in-store excellence with some exceptional third-party brands, with this mix creating a store that was a pleasure to shop in.

Pictured are Patrick Jr, Pat, Breeda and Aisling Joyce.



Most Improved Retailer

Mace Greenacres, Dundalk

WINNER

A long-standing store that recently got a major revamp, Mace Greenacres was praised for the way in which the store had been refocused around strong fresh-food and food-to-go offerings.

In particular, judges said that the hot and cold deli presentation and quality was exceptional, and had given the store a new lease of life.

Pictured are Treasa Maguire, *Checkout*, Colin Fee, Mace Greenacres, and Robert Jordan of Glanbia Consumer Foods.



Hot Food To Go

Mace Ballyjamesduff

Skelly's Mace, in the Cavan town of Ballyjamesduff, won the Hot Food To Go category, and was a popular choice with all the judges.

Assessing the store, judges said that Skelly's had the ideal mix of traditional hot-food staples with high-quality, unique ranges that were prepared on-site.

Pictured are Treasa Maguire, *Checkout*, with Peter and Judy Skelly, and Robert Jordan from Glanbia Consumer Foods.

WINNER



Dairy

SuperValu Ballincollig

Part of the Quish supermarket group, SuperValu Ballincollig was a strong performer in this year's Best in Fresh Awards, and along with winning in the Dairy category, was a finalist in the Large Supermarket category.

In relation to its dairy section, judges said that Quish's had a great combination of national and local products, which were well presented and encouraged the shopper to browse the category.

Pictured are Treasa Maguire, *Checkout*, with Paul Martin, SuperValu Ballincollig, and Robert Jordan, Glanbia Consumer Foods.

WINNER



Fish

SuperValu Castletownbere

In the Fish category, the winner was SuperValu Castletownbere, with judges effusive about the quality, range, value for money and staff interaction in this West Cork store.

Of particular note was the clear desire of the staff to really engage with customers, with excellent advice and recommendations. Also, in a category where price is often something that puts customers off, the value on offer in this SuperValu store's fish section was just superb.

Pictured are Lorraine and Chris Downey of SuperValu Castletownbere with Robert Jordan of Glanbia Consumer Foods.

WINNER



Value for Money

Tesco Merrion

Tesco Merrion picked up two awards at this year's Best in Fresh Awards, in the Multiple Retailer category and the Value for Money category.

The store was praised for its competitive pricing in areas like fruit and veg and meat and fish, which was achieved without compromising on quality.

As one judge noted, the experience was like "shopping in a high-class store, but with some of the best prices around".

Pictured are Ian Logan, Dave Edmondson and William Linnane (all Tesco Ireland) with Robert Jordan, Glanbia Consumer Foods.

WINNER





Presentation

Centra Enniskeane

WINNER



A new category for this year's awards, designed to recognise excellence in showcasing fresh food to the consumer, Centra Enniskeane is a deserving winner. In particular, judges noted how categories like bakery really encouraged an upsell, with the quality of the product shining through. The store was "one of the best examples of the (Centra) brand I have ever seen," another judge said. Pictured are John Ruddy, *Checkout*, with Denise O'Donovan, Centra Enniskeane, and Robert Jordan, Glanbia Consumer Foods.

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SAY CHEESE

The winners and finalists from this year's BIF Awards pose for our cameras at the Four Seasons Hotel, Dublin, the location of this year's event.



Above - Chris and Fintan Furey from Eurospar Hartstown, finalists in the Meat category.

Below - Mike and Carla Fleming from Fleming's Butchers & Deli in Dundrum, finalists, Non-Affiliated Retailer category.



Below - Joe Stafford of Stafford's in Drogheda, finalist in the Convenience Store and Non-Affiliated Retailer categories.



Below - Terry O'Brien accepting the C-Store Finalist award for Londis in Castleknock.



Pictured are: (top) the team from Dunne's Gala, Cahirciveen, finalists in the Most Improved Retailer category; (above) Sean Mulrooney, Shane Mulrooney and Deirdre Harding from Mulrooney's Gala, Roscrea, winners in the Bakery category; (left) Liam Brennan and Betty Morgan from Mace Newbridge, finalists in the Deli category; (below) Louis Byrne, Spar Oakpark (finalists in the Hot Food category), John Prendergast and Racquel Kirwan, Eurospar Barrow Street (finalists in Deli), and John O'Neill, Spar Millennium Walkway (winner of the C-Store category).





Pictured from top are: Cormac Flanagan from Londis Ballyhaunis, finalist in the Most Improved Retailer category; Kevin and Michelle McNamee, Londis Miltown Malbay, also a finalist in the Most Improved Retailer category, and Tony Brady from Pettitt's SuperValu in Wexford, finalists in the Meat and Best Presentation categories.



Above are: (top) the team from Donnybrook Fair, finalists in the Fish and Most Creative Retailer categories, and winner in the Small Supermarket category; (left) Shane Cantillon (Mace Clonakilty), Derek Clarke (Spar Castleforbes), Thomas Ennis (Spar Merrion Row) and David Bagnall (Spar Parkwest); (right) Brian Torley and Haroon Pasha from Jan's Londis, Ballyfermot. Below are: (top left) Mick Gormely, Mark Lloyd and Philip Murray from Eurospar Fairgreen, Naas; (top right) Darragh Sampson, Gala, Anette Tobin, Marian McGarragle and Anne Marie Daly, Tobin's Gala; (bottom left) Barry O'Sullivan, Alan O'Connor and

Below - Brendan Hunt, Teresa Duffy, John Duffy, SuperValu Ballaghaderreen, finalists in the Fruit and Veg category.

Right (upper) - SV sales director Michael Morgan with Sean Quish and Niall Shanaghy, SuperValu Ballincollig, finalist in the Large Supermarket category.

Right (lower) - Shane McCarty, David Collins and Glen Lacey, SuperValu Carrigaline, finalist in the Value for Money and Fruit and Veg categories.



Right - Michael Morgan, SuperValu sales director, with Clare and Paul O'Mahony from Dano's SuperValu, Mallow, finalists in the Medium Supermarket category.
Left - Tom Higgins, SV Glanmire, and Noel O'Riordan, SV Grange.



Above - Tomasz Kapusta and Patrick Horgan from SuperValu Midleton, finalists in the Bakery category.

Right - John Field, Adam Walsh and Paddy Twomey, SuperValu Skibbereen, also finalists in the Bakery category, with SuperValu sales director Michael Morgan.



LIST OF FINALISTS

(WINNERS HIGHLIGHTED)

LARGE SUPERMARKET

Tesco Merrion

SuperValu Glanmire

SuperValu Clonakilty

SuperValu Ballincollig

MEDIUM SUPERMARKET

Ardkeen Quality Food Store

SuperValu Tramore

SuperValu Grange

SuperValu Mallow

SMALL SUPERMARKET

Eurospar Northern Cross

Donnybrook Fair, Stillorgan

Fresh Grand Canal Dock

Centra Arden Road, Tullamore

CONVENIENCE STORE

Spar Millennium Walkway, Dublin 1

Spar Merrion Row

Londis Castleknock

Stafford's, Drogheda

FORECOURT

Amber/ Costcutter, Fermoy

Mace/Maxol Flowerhill, Navan

Topaz Frankfield, Cork

Tobin's Gala, Letterkenny

DISCOUNT RETAILER

Aldi Stores Ireland

MULTIPLE RETAILER

Tesco Merrion

BAKERY

Mulrooney's Gala, Roscrea

Eurospar Whitegate, Cork

SuperValu Skibbereen

SuperValu Midleton

DELI

Eurospar Barrow Street

SuperValu Loughrea

Garvey's Centra, Coolagh, Dungarvan

Mace/Maxol Newbridge

HOT FOOD TO GO

Spar Parkwest

Londis Ballyfermot

Spar Oakpark, Tralee

Mace Ballyjamesduff

FRUIT AND VEG

SuperValu Dungarvan

SuperValu Ballaghaderreen

SuperValu Carrigaline

MEAT

SuperValu Carndonagh

SuperValu Loughrea

Eurospar Hartstown

SuperValu St Aidan's, Wexford

Eurospar Killiney

FISH

SuperValu Oranmore

SuperValu Castletownbere

Donnybrook Fair, Morehampton Road

DAIRY

SuperValu Clonakilty

SuperValu Ballincollig

Eurospar Fairgreen, Naas

VALUE FOR MONEY

SuperValu Carrigaline

Mace/Maxol Clonakilty

Tesco Merrion

MOST CREATIVE RETAILER

The Market, Stepaside

Donnybrook Fair

SuperValu Clonakilty

BEST NON-AFFILIATED RETAILER

Fleming's Butcher & Deli, Dundrum

Ardkeen Quality Food Store

Clarke's Seafood Delicatessen, Westport

Joyces, Knocknacarra

Stafford's, Drogheda

MOST IMPROVED RETAILER

Londis Plus Ballyhaunis

Mace Greenacres, Dundalk

Gala Cahirciveen

Londis Miltown Malbay

BEST PRESENTATION

Spar Castletorbes, Dublin 1

Centra Enniskeane

SuperValu St Aidan's, Wexford

Fresh Smithfield



THE BEST OF THE BEST

DESPITE PRIVATE LABEL CONTINUING TO NIBBLE AT MARKET SHARE, AND THE DISCOUNTERS INCREASING THEIR PRESENCE IN THE MARKETPLACE, THERE'S LITTLE CHANGE AT THE SUMMIT OF THIS YEAR'S TOP 100 BRAND RANKINGS, AS STEPHEN WYNNE-JONES DISCOVERS.

Let's face it. 2011 has been a year of change, although perhaps not to the level we were hoping for. As well as having a new government (albeit one that is still attempting to find its feet amidst IMF-influenced austerity measures), the retail environment has also shifted: Musgrave now owns Superquinn, the discounters' exponential rise continues apace, and the spectre of food price inflation is becoming a very real problem as commodity prices continue to increase.

We've also had the onward march of private label, which hit the 35% mark for the first time in April (up from a now-inconceivable 9% in 2005), and is estimated to grow to as much as 40% by 2015. Consumer confidence remains low, as a result of job security worries and the Universal Social Charge. And overall market growth stood at just 0.9% in June, and 0.5% in July, an indication that the much-anticipated 'green shoots' of recovery may be many moons away.

Into this challenging environment comes our annual Top 100 Brands issue; the seventh time that *Checkout* has teamed up with Nielsen to deliver the movers and shakers across the ultra-competitive FMCG industry. The process by which Nielsen's team of analysts and data engineers has compiled this year's rankings is described in more detail on page 40, while later in the magazine, Nielsen offer their thoughts on

how pricing and promotion strategy is affecting Ireland's key brands (p82), and on the science of 'neuromarketing': analysing how consumers develop an underlying connection with certain products (p80).

But first, for the purposes of introduction, let's analyse some of the key findings from this year's chart. For the first time since *Checkout* and Nielsen began compiling the Top 100, the top eight brands have remained unchanged; a sign that Ireland's key brand owners increasingly understand how to retain market share. Coca-Cola is still Ireland's Number One, thanks to impressive campaigns for Coke Zero and Diet Coke (not to mention its red-labelled flagship), which have maintained its cult status among shoppers. Avonmore, Ireland's Number Two, has pioneered range extension across the €340 million-plus retail milk market, while Brennan's has retained third spot for a second year, having recently enhanced its Natural Recipes range of health-conscious products.

Overall, Irish brands have performed strongly; further indication that when times are tough, consumers stick to the brands they know and trust. Irish favourites such as Tayto (5th position for 2nd year in a row, and up from 10th in 2008), Lyons (up 4 places to 15th), Flahavan's (up 14 places to 65th) and Glenisk (a new entry last year, up 18 places this year to 71st) are some key performers.

Certain categories have got more competitive, too. It's been a good year for makers of snack products, such as confectionery, crisps, ice cream and biscuits. McVities rises four places to 18th, while Hunkey Dorys is up 4 to 37th. Nestlé's Rowntree is up 5 places to 69th, HB Cornetto rises 6 to 81st, and Haribo is the highest new entry in the Top 100, in 66th. At the same time, while Irish consumers seem to be snacking more, they're also keeping one eye on their waistline, as healthy-eating products have also seen a rise: Müller is up 6 places to 21st, Benecol up 10 to 84th, while smoothie maker Innocent has risen an impressive 22 places to 78th. Elsewhere, the Cheese category has performed strongly, thanks in part to Irish brands; Charleville, the market leader is up 14 places to 40th, Kilmeaden rises 8 places to 77th and Low Low Cheese is up 10 to 87th. And in Frozen Pizza, Goodfellas (17th place) has been joined in the Top 100 for the first time by rival products Chicago Town (88th) and Dr. Oetker (100th).

While the growth in private label continues to affect brand penetration (private label sales grew by 4.4% in the year to end July 11th, compared to a 0.9% drop in branded product sales) the grocery sector understands the importance of branded goods to the Irish consumer, and continues to use brands in much of its price-focused marketing. For example, Tesco has offered 2x2 litres of Coca-Cola (Ireland's Number One brand, lest we forget) for €3.50, as well as half-price 1ltr PET bottles of Lucozade (the 4th-placed brand). Dunnes has recently included brands such as Tayto and Cornetto as part of its 'Half Price' strategy. SuperValu's 'Half Price' offering has included Walkers, Müller, Birds Eye and Mi Wadi products, while Superquinn has introduced '2 for €3' deals (or similar) on brands such as Yoplait, Lyons and Batchelors, as well as 'Half Price' deals for Charleville, Fairy and HB.

Lastly, it would be somewhat amiss to ignore the inaugural presence of Panadol, a new entry in 98th place this year; a sign that while the new government means there may be cause for optimism, the situation on the ground is still enough to give anyone a headache.

In summary, then, a hearty congratulations to all the brands that made it into this year's *Checkout* Top 100 Brands, in association with Nielsen. We hope you enjoy reading it as much as we did compiling it. ■

Please note that the five-year comparison listed opposite, along with other comparisons with previous years, may include brands and categories whose classification may have changed over the five-year period. As with the grocery market, the Top 100 Brands and the method of its collation evolves with the sector, and in this context, comparisons made with previous years are for indicative purposes only, using the data as printed in the *Checkout* Top 100 Brands issue of the year in question. As such, all comparative data published in this issue is designed to offer the reader a broad reference tool rather than an exact like-for-like comparison. Within the text, 'Big Mover' refers to brands that have moved five places or more year-on-year, and new entrants refer to brands which were not in the Top 100 rankings last year, but may have featured in previous years.

CHECKOUT TOP100 BRANDS 2011

2011 Ranking	2010	2009	2008	2007
1 Coca-Cola	1	1	1	1
2 Avonmore	2	2	3	3
3 Brennans	3	4	4	4
4 Lucozade	4	3	2	2
5 Tayto	5	6	10	9
6 Cadbury D.Milk	6	7	9	8
7 7Up	7	8	8	5
8 Danone	8	5	5	7
9 Denny	10	9	6	10
10 Walkers	12	12	12	12
11 Jacobs	9	10	7	6
12 Irish Pride	13	13	20	30
13 Yoplait	11	11	14	16
14 Pampers	14	14	11	11
15 Lyons	19	23	22	22
16 Club	16	18	18	15
17 Goodfellas	15	15	13	14
18 McVitie's	22	16	17	17
19 KP	18	22	-	39
20 Pedigree	35	31	30	18
21 Muller	27	41	41	49
22 Red Bull	20	26	27	29
23 Dairygold	26	27	25	25
24 Extra	23	21	21	21
25 Nescafé	29	35	36	35
26 Pat The Baker	17	17	24	28
27 Donegal Catch	21	19	16	19
28 Barry's	25	28	23	24
29 Ballygowan	24	20	15	13
30 J M O'Brien	28	29	31	41
31 Tropicana	33	24	19	20
32 Dolmio	31	37	33	33
33 Knorr	34	32	35	37
34 Volvic	32	30	28	23
35 Milupa (Aptamil)	37	40	47	65
36 John West	42	49	59	-
37 Hunky Dorys	41	55	70	70
38 MF Galaxy	36	96	-	-
39 Nestlé Kit Kat	39	39	63	66
40 Charleville	54	51	39	52
41 Denny Bacon	44	36	29	31
42 Denny Sausages	38	34	32	27
43 Kerrygold	51	48	42	54
44 Pringles	43	42	46	34

in association with



45 Premier	30	25	26	26
46 Whiskas	49	56	56	53
47 Hellmans	60	60	69	67
48 Deep River Rock	40	50	40	36
49 Pepsi	76	80	92	76
50 Cadbury Roses	45	47	55	43
51 Cow & Gate	56	46	43	56
52 Flora	47	44	44	47
53 Weetabix	46	52	53	50
54 Kellogg's Special K	55	59	49	48
55 Persil	48	38	37	38
56 Birds Eye F. Poultry	70	89	-	-
57 Kinder	77	71	86	89
58 Maltesers	65	73	84	86
59 Mc Cain	53	58	67	63
60 Finish	64	78	75	77
61 Avonmore Cream	59	62	73	81
62 Batchelors	69	72	64	73
63 Andrex	57	53	45	42
64 Colgate	67	65	60	40
65 Flahavan's	79	99	-	-
66 Haribo	-	-	-	-
67 Cadbury Snack	58	57	62	60
68 Knorr	78	67	57	80
69 Nestlé Rowntree's	74	-	-	-
70 Ariel	83	81	71	75
71 Glenisk	89	-	-	-
72 Galtee	52	43	34	32

73 Bold	66	68	52	59
74 Fanta	71	75	77	57
75 Connacht Gold	62	64	87	93
76 Uncle Ben's	73	83	-	95
77 Kilmeaden	85	86	93	-
78 Innocent	100	-	89	-
79 Always	82	70	72	64
80 King	72	77	94	71
81 HB Cornetto	87	93	95	85
82 Birds Eye F. Fish	80	98	98	78
83 McCambridge	90	91	-	-
84 Benecol	94	97	-	-
85 Kellogg's Corn Flakes	84	87	85	79
86 Florette	93	-	-	-
87 Kerry LowLow	97	84	80	-
88 Chicago Town	-	-	-	-
89 Miwadi	-	-	-	-
90 Nestlé Aero	91	88	96	87
91 Kittensoft	81	79	61	62
92 Batchelors	92	92	99	-
93 Comfort	99	94	82	94
94 Cadbury TNCC	-	-	-	-
95 Shaws	75	63	48	58
96 Squeez	96	69	58	46
97 Huggies	-	90	83	88
98 Panadol	-	-	-	-
99 Golden Vale	68	61	76	74
100 Dr Oetker	-	-	-	-

THE TOP 100 BRANDS HOW NIELSEN PULLS IT ALL TOGETHER

First of all a big congratulations to all the brands featured in this year's Top 100 Brands / Categories. This is the seventh consecutive year Nielsen have had the pleasure of producing the 'Top 100 Brands' ranking exclusively in partnership with *Checkout Magazine*. We acknowledge it remains no mean feat and a challenge to keep your brand place in the Top 100 in this ever changing market.

ABOUT THE NIELSEN SURVEY

Over 6,700 brands from nearly 200 product classes are considered for this survey. Whilst only 100 make it into the ranking, many remain just outside. Big brands in FMCG count, and the importance of the Top 100 brands to the Irish industry is highlighted all the more when we consider that their value represents just over 50% of the total of the brands polled within this survey.

WHAT THE SURVEY INCLUDES

- 'Top 100 Brands' (Grocery & Confectionery)
- 'Top 100 Categories' is included alongside the Top 100 brands detailing the top 5 brands within each and their cumulative share of market.
- An 'alcoholic drinks' listing of the 'Top 50 Beers, Wines and Spirits', featuring a top 20 ranking within each.
- A listing of the 'Top Ranking Cigarette brands'.

MARKET SOURCE

The rankings are put together using Nielsen's Market Track and ScanTrack services which are made up as follows:

- Multiples: Census data for Tesco, Supervalu and Superquinn (Please note that for the purposes of this ranking Dunnes Stores has been excluded)
- Symbol Groups: Census / EPOS data for the BWG group (Spar, Spar Express, Eurospar and Mace), Centra, Londis and Costcutter, plus universe projection for the remaining groups (above 50 outlets).
- Forecourts: Census / EPOS data for BWG group (Spar, Spar Express, Eurospar & Mace), Centra, Londis, Costcutter, Topaz and Esso, plus universe projection for the remaining forecourt chains (above 50 outlets).
- Hard Discounters: Includes cash slip collection from both Aldi and Lidl.
- Independents: (TSNs/Forecourts) – EAN level data is collected from a sample of representative stores. The universe of which is updated annually to take account for changes in the market.

6,700

Number of brands
considered for the Top 100
Brands survey

50%

Value of the Top 100 Brands
in relation to the total
number of brands surveyed

200

Approximate number of
product classes considered
for the Top 100 Brands
survey



AT NIELSEN, WE'RE HARD
AT WORK FINDING NEW WAYS
TO MEASURE, ANALYSE
AND UNDERSTAND
TODAY'S CONSUMER

All of these accumulate to produce the most robust read of the Irish grocery market.

The Sales Value used to determine the rankings is derived from the RSP scanned or observed on the day of audit with the data relating to April 2011 MAT (Moving Annual Total).

HOW A 'BRAND' IS DEFINED

The brand definition and methodology Nielsen use remains the same as previous years. For the purpose of the survey, the following need to be noted:

- A 'Brand' is defined as every product falling under a brand banner within a specific product class.
- No cross-product class brand combinations are included.
- No Private Label brands are included.
- A product class is defined as the specific generic to which a collection of brands sharing common perceived characteristics belongs.

WHAT THE TOP 100 RANKING INCLUDES

The 'Top 100 Brands' covers all Grocery and Confectionery product classes covered by Nielsen. For example: Knorr can be found in a number of product classes including Total Sauces as well as Soups, among others. As Sauces and Soups have fundamentally different product characteristics and could not be perceived to be in direct competition, Knorr Total Sauces and Soups are defined in the survey as two distinct brands.

Similarly, a decision has to be made in instances where brands share their name with their manufacturer. In the case of Kellogg's or Jacob's for example, the business model of the companies together with the product class they compete in has been taken into consideration.

WHAT THE TOP 100 EXCLUDES

We provide separate rankings for the Liquor and Cigarettes categories. The area of food services and the issue of shrinkage are other areas that are not accounted for in the ranking. Random weight items are also excluded.

We really hope you enjoy examining the brand rankings within this issue of *Checkout* magazine. It is Nielsen's aim to provide market insight and hopefully stimulate debate in the industry in what remains a challenging time.

*Karen Mooney,
Nielsen Communications,
Nielsen Ireland*



open
happiness™

Thank you from everyone at Coca-Cola HBC Ireland.

Coca-Cola®

01 Coca-Cola

The Coca-Cola trademark (Coke, Diet Coke and Coke Zero) is Checkout's No. 1 brand for the eighth year in a row. This achievement is especially poignant this year, given that Coke is celebrating its 125th birthday. This momentous milestone was celebrated with a memorable campaign on TV, supported by outdoor media. There was also an iconic special-edition bottle sold through retail to mark the anniversary.

Diet Coke maintains its prime position amongst Diet CSD brands with a 42.9% share, and was supported by the engaging 'Love it Light' campaign, now in its second year.

The appeal of 'Love it Light' was enhanced amongst fashion-conscious female consumers with limited-edition bottles and accessories designed by Chanel's Karl Lagerfeld, as well as through Diet Coke's sponsorship of the Yahoo! Fashion channel.

Coke Zero maintains its position as the No. 3 diet carbonated brand, with 8.6% market share.

Coca-Cola is delighted to have successfully maintained its No. 1 position with 86.9% volume share of the cola category, and would like to take this opportunity to thank all its customers for their continued support.



02 Avonmore Milk

Avonmore Milk remains the clear market leader and one of the biggest brands in Ireland's retail sector. This year's performance saw Avonmore Milk positioned again at No. 1 within the milk category and No. 2 in the Checkout Top 100 brands. The importance of this category cannot be understated: milk is a retailer's 'anchor' category, and one that retailers can't afford to get wrong. One key driver of the milk category is NPD, which is at the heart of Avonmore Milk. Two main NPD launches for the brand this year were Avonmore Easy-Pour Jug Extra and Avonmore Light 1%.

Following the success of the Easy-Pour Jug (2l) and the trend towards bigger packs, Avonmore launched the Easy-Pour Jug Extra (2.75l) in April this year. Consumers can now say goodbye to drips and spills with the new Easy-Pour Jug Extra. Its 'four-finger grips' make it easy to hold, for big and small hands.

With consumers now becoming much more health-conscious and one in ten Irish adults reporting being advised by a health professional to manage their fat intake, Avonmore launched Light 1% in April. It now contains 33% less fat than other low-fat milks, but with no taste compromise. Following this successful launch, Avonmore has reduced the fat content across its range of low-fat milks to 1%. The range now includes Avonmore Light 1%, Low-Fat Super Milk, and lactose-free milk.



03 Brennans

The fresh taste of Brennans has made it Ireland's best-loved bread and kept the company as the No. 3 grocery brand in the country again this year.

As a family bakery, Brennans is committed to baking breads of the highest quality. Consistent great taste and long-lasting freshness has made Brennans the nation's favourite bread.

Brennans has established a unique place in the hearts and minds of Irish consumers, who love its quality and convenience. Its brand has been built over many years, through continuous investment in advertising. As the market leader, Brennans is purchased by all age groups, social classes and household types, and has a presence in 86% of all Irish households.



04 Lucozade



As Ireland's No. 1 energy and sports drink, with a 56.5%* share of the market, Lucozade continues to outshine the competition by delivering a range of Ireland's leading sports and energy drinks and by supporting them with exciting communications.

The year 2011 saw the launch of a new advertising campaign by Lucozade, aimed at reconnecting with its core target audience. The campaign, 'Lucozade YES' isn't just about achievement, it's about a moment when energy is created. The three ads, for Lucozade Energy, Lucozade Sport and Lucozade Sport Lite, all of which launched this year,

are all designed to inspire people to channel that energy and create 'YES' moments – those times when everything clicks and great things happen.

Lucozade Energy provides an energy boost to help keep you energised and comes in a range of convenient formats including 380ml, 500ml and multipack/large-pack offerings, ideal for those on the move and offering a choice of flavours to suit consumer tastes.

Lucozade Sport, available in orange, raspberry, tropical and cherry flavours, continues to be at the forefront of Irish sport, and is committed to supporting Irish sport at both national and local levels. Having endorsements from athletes such as Katie Taylor, Henry Shefflin and Colm Cooper proves that Lucozade Sport is not only preferred but trusted by Ireland's elite sport stars.

In addition, Lucozade Sport Lite helps you get more from your workout whilst containing 70% fewer sugars than regular sports drinks, as well as having just 50 calories per 500ml. Coupled with the popular lemon and lime flavour, new Lucozade Sport Lite Orange is sure to continue to drive the brand forward. (*Source: Nielsen, ROI ScanTrack, Value Sales, MAT 10 July 2011)



and here's the proof:

The unique freshly baked taste of Brennans has once again reaffirmed our status as Ireland's number one bestselling bread. In fact, as Ireland's favourite family bread we've retained our ranking of number three in the Checkout Top 100 Brands. So, to get your sales onto a proven winner, make sure you stock Brennans.

TODAY'S BREAD TODAY

BRENNANSBREAD.IE

05 Tayto

Tayto is the 5th largest brand in Ireland. Tayto is committed to quality and new product development and through innovative marketing and promotional campaigns, the company has secured the number 1 snackfood brand position with a 31% market share* in Ireland.

The brand continues its commitment to the Irish economy through its employment of over 500 people in its production facilities in Ashbourne, Co. Meath and Gweedore, Co. Donegal and its purchasing of over 30,000 tonnes of Ireland's potato crop.

Tayto managed another European first this year with the release of Tayto Occasions Whole Grain Chips, a highly innovative whole grain snack. Other new products launched this year include the increasingly popular Tayto Mini Me's, Tayto Microwave Popcorn and the new low calorie rice and corn snack, Tayto Love Bites.

In 2011, Tayto opened Tayto Park and The Tayto Factory Tour in Ashbourne, Co. Meath. All activity was hugely supported with in-store promotions and advertising. 2012 will see the brand continue to build on its ever increasing popularity among consumers with an intensive series of new campaigns.

(*Source: AC Nielsen, Markettrack, Value, MAT 26th June 2011)



07 7UP

7UP is Ireland's No. 1 lemon and lime soft drink, with 83.4% value share of the category (Source: Nielsen ScanTrack period 10 July 2011), and following a successful year, 7UP is positioned at No. 7 in this year's Top 100 Grocery brands. 7UP is the best-selling lemon and lime brand, and is the preferred lemon and lime carbonated soft drink. In the take-home market, 7UP is purchased by more homes than any other soft drink (source Kantar Worldpanel). Lemon and lime carbonated soft drinks account for 15% of the total carbonated soft-drink category.

Earlier this year, both 7UP and 7UP Free relaunched with a brand-new look and feel. The new design, which was unveiled in April, showcased the refreshing qualities of the 7UP product.

The continued success of the 7UP brand is attributed to a commitment to highly visible national marketing campaigns that engage with consumers. In the past year, 7UP has implemented a number of strong campaigns including the 7UP Free 'Bring them Back for the Craic' campaign, the 7UP 'Live Life on the Up' summer campaign, as well as ongoing targeted consumer marketing communications.

To keep up with all latest news and events, follow 7UP on Facebook.



06 Cadbury Dairy Milk



This September, Ireland's favourite chocolate brand (Source: Nielsen Market Track W/E 25/5/11), Cadbury Dairy Milk, will launch its biggest-ever Irish marketing campaign. The 12-week campaign will see an investment of €2 million, and will

include a specially created new TV ad, as well as extensive support in outdoor, press, digital, direct mail and sampling.

Cadbury Dairy Milk holds 16.8% of the total chocolate market (Source: Nielsen Market Track W/E 25/5/11) and has long been the chocolate of choice for Irish consumers, due to its unique taste and heritage.

The new, high-impact TV creative was developed exclusively for Irish viewers and is filled with evocative imagery of irresistible flowing chocolate shots, using the latest technology available. The campaign will also see the launch of the first Irish smartphone application for Cadbury Dairy Milk, an exciting new development that will bring the magic and taste of Cadbury Dairy Milk to an ever-increasing population of Irish smartphone users. In addition, to create visibility in-store, there is a full point-of-sale suite available, including a floor stand, counter units and in-store theatre.



08 Danone

Nowhere is the dairy revolution more apparent than in the market figures. Danone, as a yogurt manufacturer, is the clear leader in the fresh dairy market, with Danone Actimel the No. 1 brand and Danone Activia the No. 2 brand (*Nielsen).

The unique probiotic cultures in Danone Actimel and Danone Activia make them an automatic choice for consumers who want to take care of specific aspects of their health. Danone is scoring full marks with consumers for quality, taste and flavours, too.

This 'cultural' revolution in the Irish dairy market has been further driven by the strong Danone commitment to constant innovation, together with a programme of heavyweight marketing support. With Danone,

consumers are now getting more from their yogurts than ever before.

*Source: Nielsen Scanning Data July 2011



SAY YES TO IRELAND'S #1 ENERGY & SPORTS BRAND*



Lucozade
YES

*Source: Nielsen, ROI Scantrack, Value Sales, MAT 10 July 2011.

09 Denny Sliced Cooked Meats



Denny stands out as brand leader in the pre-packed sliced cooked meat category, with a market share of 21%. The brand continues to offer consumers a wide array of solutions for all the family's needs. The hero range, Deli Style, accounts for 14% of the total sliced cooked meats category and 39% of the everyday segment. Denny

launched its Denny Simply range of sliced cooked meats in May of this year, and has seen the range grow from strength to strength. The offering is based on the premise of great quality at an affordable price.

Additionally in 2011, Denny launched into white meat slices and pieces, to extend its range outside of ham products. The launch of Deli Style white meat has strengthened the Deli Style range and is contributing significant growth gains for the brand. Denny sliced cooked meats featuring in the Top 10 brands and its status as the No. 1 brand in the €214 million sliced cooked category is testament to its ability to relate to, and remain relevant to, consumers, even in tougher times. The brand continues to support its sliced cooked meats business through strong activity plans to year-end. (Source: AC Nielsen, W/E 10 July 2011, Value MAT)

10 Walkers

Flavour is synonymous with Walkers. From its core range, including salt & vinegar, ready salted and prawn cocktail, to the latest new product developments; flavour is central across the range.

The launch of new products, such as Walkers Extra Crunchy, has helped the brand take a bigger bite of the sharing market (+8.5%*), elevating Walkers to Number 10, up two places from last year in Checkout's Top 100 Brands.

Walkers is now the No. 1 supplier in the 'Sharing Bag' category – the fastest growing area in the category - growing +23% YoY and generating an additional €2m in Sales MAT.



With an expansive range of products in the category, Walkers product strength is clear, occupying the No. 1 Sharing Bag position with Sensations Thai Sweet Chilli. Doritos Extreme Chilli Heatwave is also the No. 1 Sharing Bag Snack in the market.

In a matter of months, Walkers Extra Crunchy has become the No. 3 sharing Crisp brand in Ireland (No.1 NP), delivering an additional €0.5 million in sales. Its Multipack product, Walkers Crinkles, is the No. 2 ridged crisp in the market, generating €0.38 million in additional category sales to date this year. With further innovations and exciting promotions planned in 2011, Walkers has flavour and innovation 'in the bag'. *(in Value terms versus YAGO).

(Source: Nielsen Marketrack Total Market MAT W/E 26 Jun 2011)

11 Jacob's

The Jacob Fruitfield food group's enviable portfolio includes leading brands such as Chef sauces, Fruitfield preserves and Silvermints, but is perhaps best known for its array of well-loved biscuit brands, which include, among others, Fig Rolls, Mikado, Kimberley, Coconut Creams, Elite, Cream Crackers, Bolands, Club Milk and Jaffa Cakes.

Jacob's Fig Rolls and Jacob's Mallows range, including Kimberley, Mikado and Coconut Creams, have been among Ireland's favourite biscuits for over 100 years. The range continues to see new innovations, including the relaunch of the Fig Bar.

The Jacob's Elite range offers consumers a diverse selection of indulgent tastes and textures in a quality chocolate biscuit. Elite is the largest brand in the luxury end of the Irish biscuit market. Biscuits in the Elite range include several individually wrapped options, such as Chocolate Kimberley, Tea Cakes and Chocolate Dreams, as well as the new Chocolate Mikado, one of the most successful new biscuit launches to date.

This year, Jacob's also launched Why Not?, a range of three tasty new low-calorie bars that offer the ideal solution to sensible snacking. Three varieties are available in the Why Not? range: Fruit & Nut (which is half-coated in chocolate), Chewy Chocolate and Chocolate & Orange. Tasting these bars, you would never believe that each bar contains fewer than 100 calories and that a box of six is priced at only €2.79. Jacob Fruitfield is fully committed to supporting its brands with campaigns including 'The Fig Taste Buds' and 'Come Play with Us' TV ads. Coupled with highly innovative in-store point-of-sale displays and strong promotions, Jacob Fruitfield offers you a sure-fire recipe for generating strong sales.





Refresh your sales.

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12 Irish Pride

Irish Pride is one of the leading bread brands in Ireland and a favourite with Irish consumers. The brand demonstrated its strength by moving up one more spot in this year's Top 100. Irish Pride's performance is attributed to the brand's commitment to producing fresh high-quality breads every day and its focus on innovation and new product development.

This year Irish Pride introduced two new exciting breads: Irish Pride Vita Kids, a soft white bread developed to address the specific nutritional needs of Irish children, and Irish Pride Oat Bread, Ireland's first oat bread to be available nationwide. Irish Pride will continue to invest in its brand to drive sales and grow the bread category because ... it's a matter of pride.



13 Yoplait



The Yoplait brand comes in at No. 13 in the Checkout Top 100 this year and No. 2 in the overall yogurt category. Proud to be a member of the Love Irish Food organisation, Yoplait boasts a strong portfolio including Yoplait Fruit Yogurt, Petits Filous and YOP.

Yoplait Fruit Yogurt has been a favourite in Irish households for more than 30 years. Available in a range of nine flavours, it is made with real fruit or nut pieces and fresh Irish milk.

Yoplait Petits Filous has been trusted by mothers around the country for 20 years. Petits Filous for Strong Bones now provides 25% of the recommended daily allowance of Vitamin D and calcium (based on 2x60g pots). YOP is the original yogurt drink and the perfect refreshing low-fat summer snack. YOP is enjoyed by kids of all ages and is perfect to keep in mind for healthy lunch boxes at back-to-school time.



14 Pampers

For the third consecutive year, Pampers holds on to the No. 14 spot and remains at the helm of the category listing. The launch of promotional codes for its free newborn packs and associated sponsorship on TV3's morning show has raised brand awareness and favour amongst parents.

15 Lyons

Lyons moves another four places this year. The brand's portfolio expansion to tap into new markets, such as decaffeinated and flavoured offerings, has proved fruitful for the company, which also retains its leader's spot in the category listing.

16 Club Orange



In 2011, Club Orange exploded with a refreshing new look and a digital ad campaign, the 'Best Bits in the World'. The ad became a global viral sensation within days of its release, and it is this summer's most talked about viral ad campaign, clocking up over 750,000 collective hits on YouTube and related sites. Famous for its real fruit bits and unique flavour, Club, which comes in at No. 16 in the Checkout Top 100, retains its position as Ireland's No. 1 orange carbonate. Since its creation in 1945, the bits that are found in Club Orange have always been at the heart of its superior taste and unique flavour. With an overall market share of 65% (Source: AC Nielsen ScanTrack MAT Value Share of Citrus to

12 June 2011), Club Orange continues to be one of Ireland's most well-loved and iconic brands.

Club's soft-drink family also extends to include an array of delicious flavours, such as lemon and the classic Rock Shandy, as well as the newly improved Diet Club Orange. Check out Club's 'Best Bits' online at www.facebook.com/cluborange or www.youtube.com/cluborange.



17 Goodfella's



Goodfella's, Ireland's No. 1 pizza brand (48% AC Nielsen July 2010), will launch a new range and campaign in September 2011. Investment in product improvements

coupled with a new look makes this launch the biggest in frozen this year.

The brand has been heavily supported with a relevant mix of media including TV and outdoor, as well as in-store activity. Goodfella's, which has a portfolio of products to cover all meal occasions, remains the No. 1 frozen pizza brand.

In keeping with the consumer trends towards eating in, Goodfella's 'Takeaway' product delivers an authentic takeaway taste, while the new 'Ciabatta' range is also available for those who enjoy exciting new toppings.

The 'Deep Pan' product is still No. 1 within the sector, giving the same great taste you'd expect from the brand, while 'Thin', with its stonebaked base, delivers a quality pizza for all the family.

Also new to the range is the first flatbread pizza offering, targeting those who enjoy a lighter eat with all the fun of pizza.

Make sure your fridge is stocked with your customers' favourite brands.



KERRY
FOODS

6 Kerry Foods Brands feature in Checkout's Top 100.
No.1 in respective categories.

18 McVitie's

Enjoyed by Irish families for generations, McVitie's remains a popular household name, with a portfolio of much-loved iconic brands including McVitie's Digestives, Jaffa Cakes, Rich Tea, Hobnobs and Penguin. Climbing a fantastic four places from last year, McVitie's continues to invest in product quality and new product development, along with strong advertising and promotional initiatives.

2011 is yet another significant year for McVitie's, with the launch of two new brands, Medley and Quirks. Mixing it up, the new range of Medley bars combines the great taste of McVitie's favourite biscuits, Digestives and Hobnobs, with the goodness of cereals and other delicious ingredients, such as raisins, nuts and milk chocolate. Quirks is a unique new range of crunchy biscuits with a yummy smooth chocolate-flavoured centre – perfect for an anytime treat.

McVitie's made tea breaks even more rewarding in 2011 with the launch of its VIP club (www.mcvities.co.uk/vipclub). Running across the popular McVitie's Digestives, Jaffa Cakes, Hobnobs, Rich Tea and Penguin ranges, the McVitie's VIP Club promotion rewards Irish biscuit lovers with the chance to collect points to earn lots of exciting tea-break treats (*T&Cs apply).



19 KP



The KP brand is valued at almost €23 million (Nielsen NAT June 11). The KP umbrella includes Hula Hoops, McCoy's, Skips, Rancheros, Meanies, Jawz and, of course, KP nuts. Hula Hoops, KP's No. 1 snack brand, is made with 100% sunflower oil and contains no artificial colours, flavours or MSG. Hula Hoops' 7pk range now features 30% less

packaging, but the same amount of Hula Hoops. The new packs have been welcomed by both consumers and retailers, with the new addition of Sweet Chilli and Sour Cream & Chive flavours.

McCoy's, the No. 2 ridged crisp in the market, continues to grow in popularity. Watch out for McCoy's Rugby Road Trips on-pack instant-win promotion, whereby consumers will be offered a chance to win rugby road trips around New Zealand. Details are available at www.mccoys.co.uk.

Skips Prawn Cocktail Flavour corn snack (MV €3.6 million) and Rancheros bacon-flavoured potato snacks (MV €2.4 million) are two much-loved snacks with wide consumer appeal. Skips and Rancheros are running a major promotion, giving away a Samsung Galaxy Mini phone every hour from 8am to 8pm for six weeks from 20 August. Full details at facebook.com/skipsireland.

The Meanies brand (MV €4m) continues to experience strong growth year on year, thanks to strong value-for-money consumer proposition and the launch of Mega Meanies Hot and Spicy. Jawz, the big-bite triangle-shaped corn snacks available in bacon and cheese & onion flavours, is new to the market this year. Skips, Rancheros, Meanies and Jawz are all made in Ireland by Robert Roberts, in Tallaght.

KP nuts make a perfect snack choice, bursting with fibre and protein, as well as vitamins and minerals. Watch out for further growth driving NPD from KP in the autumn.

20 Pedigree



Big Mover

Worth over €24 million, Pedigree is the largest and fastest-growing petcare brand, and continues to deliver strong growth year after year.

A favourite with Irish dogs and their owners, and also a winner with the trade, the brand continues to perform well in all segments and pack formats, and remains the No. 1 dog-food brand in Ireland.

Strong marketing campaigns including 'Doggie Dentures', Pedigree Dentamonth, World Animal Week and the annual Pedigree Adoption Drive ensure that the brand stays top of mind for consumers.

"Pedigree is the most valuable and fastest-growing brand in the petcare market, and all retailers who are stocking the full Pedigree range and implementing our category planograms are benefiting considerably from this growth," says Jennifer Power, marketing manager at Mars Ireland.

"This performance can be attributed to strong growth in core main-meal segments, increased advertising spend and successful high-margin innovation, such as Dentastix in the expanding 'care and treats' category. We are confident we will continue to grow our retailers' petcare business and drive substantial sales uplift for them with the Pedigree range into 2012 and beyond."

21 Müller



Big Mover

Following its massive 14-place jump last year, Müller's rapid rate of growth has slowed somewhat in 2011. However, moving up a further six places is nothing to sniff at, especially given the level of competition in the yogurt market. Müller has successfully tapped into the healthy-eating market with its focus on low-fat options.

22 Red Bull

Red Bull slips for the first time in the Top 100 in five years, but at No. 22, it is still a very strong brand. The sports/energy market has become crowded with new players and a slow growth in PL lines, and while Red Bull's brand presence remains strong, the hard work starts again.

IF YOU HAVE A STORY FOR INCLUSION IN CHECKOUT MAGAZINE, WE WOULD LOVE TO HEAR FROM YOU.

CHECKOUT

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23 Dairygold

Dairygold is the market leader in the Irish spreads category, and with an exceptionally loyal consumer base, it's a firm family favourite, found in almost 40% of all fridges in Ireland.

This loyalty to Dairygold is a result of its great taste. Dairygold is traditionally made with churned cream and natural ingredients, combining to deliver a great-tasting spread. Dairygold Original is available in 227g, 454g and 908g tub sizes, with the 908g tub delivering excellent value for money to loyal Dairygold consumers in the current economic climate.

The Dairygold range also includes Dairygold Lighter, delivering on the great Dairygold taste but with less fat. Dairygold Lighter is available in a 454g tub size.

2011 saw a redesign of the Dairygold packaging. The new design is both confident and authoritative, giving Dairygold real taste credibility, whilst retaining the brand elements that Irish consumers have come to associate with Dairygold – the 'buttercup' and 'churn'. The gold on the tubs is slightly lighter, ensuring that the new Dairygold packaging is eye-catching on supermarket shelves.



24 Extra

Although it remains a market leader in the gum category by a considerable distance, Extra's stake fell yet again in 2011, dropping one place. However, as indicated by the drop in the category as a whole, this slide will not worry Wrigley's too much. In its bid to rekindle impulse purchasing again, Extra has launched a number of new lines in recent years, thus helping to cement its position and facings in-store.

25 Nescafé

Nescafé, Ireland's leading brand of soluble coffee, is going from strength to strength, with another year of impressive market-share growth and a 57.1% value share of the soluble-coffee market (Source: Nielsen MAT 10 July 2011). The soluble-coffee market is worth approximately €42 million in the year to date, with value growing by 5.8% and volume up 2.4%. Renowned for its coffee expertise, Nescafé was launched by Nestlé in Switzerland in 1938, and now, over 70 years later, Nescafé boasts an outstanding portfolio of in-home and out-of-home coffees. The leading portfolio of brands includes Nescafé Gold Blend, Nescafé Black Gold, Nescafé Original, Nescafé Café Menu, Nescafé Alta Rica, Nescafé Cap Colombie, Nescafé Espresso, Nescafé Café Parisien and Nescafé Green Blend, launched last year, which is a blend of roasted and unroasted green beans that are high in antioxidants. Nescafé Gold Blend is the brand leader in the soluble-coffee market and is the beacon brand within the coffee aisle. A recent pulse survey amongst consumers aged 30 to 50 years showed just how strong consumer loyalty to the brand is in Ireland, with over 50% unanimously declaring Nescafé Gold Blend their favourite brand of coffee (Empathy June 2011, all coffee brands). This autumn, Nescafé enters another exciting phase with the launch of its new-look jar and richer aroma, which hits the shelves in August. All of the Nescafé premium and super-premium range will take on the new-look shape, which gives the range great shelf standout. Nescafé has also recently launched Nescafé Original 3 in 1, a portion-controlled sachet containing coffee, milk and sugar 'in one'. This is proving to be particularly appealing to 18- to 25-year-olds on the go. Nescafé continues to invest significantly in both innovative media and shopper marketing activities, acknowledging how important it is to appeal to both consumer and shopper along the path to purchase.



26 Pat the Baker

With bakery still a top-three finisher in the Top 100 categories list, it's not surprising to see Pat the Baker coming a commendable 26th, however, the fact that the brand has managed to slip nine places since last year is an indication of the increasing threat of private label in the category. More marketing could be necessary to remind consumers of the brand's core 'So Fresh, It's Famous' USP.

27 Donegal Catch

Donegal Catch, the No.1 Frozen Fish brand in Ireland with 52%* market share is getting a refreshing new look and feel this Autumn. The brand is investing heavily in an integrated marketing campaign across the Donegal Catch portfolio, including TV, Outdoor, in-store and a comprehensive trade and consumer programme.

Donegal Catch's new brand identity retains all the key elements that make Donegal Catch recognisable to consumers – that it's natural, authentic and best in quality. The redesign will help consumers to navigate both fixture and Donegal Catch more effectively.

Donegal Catch is synonymous with sourcing 100% natural fillets and strives to source Atlantic Natural Fillets as much as possible from the Irish coastline. Donegal Catch will also be launching a new range of insight focused NPD which will drive incremental value and recruit new consumers to the category. Donegal Catch: it's all about the fish. (*Source: Nielsen July 11)



Retail Intelligence



Retail Intelligence is Ireland's only weekly newsletter for the FMCG & grocery trade. Published weekly, Retail Intelligence makes it easy for busy brand owners, distributors and retailers to stay well informed on the latest news, industry trends and competitor activity.

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proud to
watch our
bread
RISE



We're incredibly proud of all of our bread, particularly the success of recent innovations such as Vita Kids and Oat Bread. So we're fit to burst at the news that Irish Pride has risen to 12th place in the Checkout Top 100 brands list. So big congratulations to everyone who worked so hard day in, day out to make it happen.

TIME TO CELEBRATE WITH A BIG TOAST!



it's a matter of pride

28 Barry's

Barry's Tea is the nation's favourite Irish blended tea, accounting for 37% of all tea sales in Ireland. Consistently producing the highest quality teas since 1901, Barry's are master tea blenders, with a range of teas selected specifically for the Irish palate. Quality is and always has been a priority for the brand, to ensure that the flavour and taste of the range is unrivalled. The dedication of Barry's tea blenders ensures that the range offers consumers great-tasting teas, from the renowned Barry's Gold Blend, which is the market leader in the premium sector of the tea category, to the lively refreshing taste of Barry's Original Blend. Barry's Decaf is the No. 1 decaf tea on the market, offering consumers no compromise on taste. Classic Blend is a luxurious tea, blended from the finest leaves.

The Barry's Speciality range continues to go from strength to strength, giving consumers the reassurance of Barry's expertise in blending only the best ingredients available. Green Tea continues to grow in popularity, with Barry's offering the following options: Organic Green Tea, Green Tea & Lemongrass and Green Tea & Jasmine. Barry's Fruit and Herbal ranges, from South African Rooibos to 'Very Berry', have been carefully created to suit any mood and keep apace with Irish consumers' changing needs and tastes. Barry's Tea is part of the Love Irish Food campaign.



29 Ballygowan

Water is the biggest category in the Beverages market and Ballygowan continues to be Ireland's No. 1 water brand (Nielsen Scantrack July 2011) leading this dynamic market. Despite the recession consumers are continuing to buy into the category as they see it as a lifestyle choice and place real value on the category.

This year, Ballygowan has continued its very successful campaign supporting the Marie Keating Foundation with Ballygowan Pink.

Ballygowan continues to be the Innovator in the water category and as market leader continues to drive the value agenda in water to appeal to the consumers of today. In the Licensed Trade, the company led with the launch an upsized 330ml bottle to offer better value to consumers. 2012 will be a big year for the brand with exciting plans, which will be unveiled soon.



30 Johnston Mooney & O'Brien

Johnston Mooney & O'Brien have been baking since 1835, and so have been feeding Irish families for centuries. Today, in every corner of the country, Johnston Mooney & O'Brien is trusted for freshness, taste, quality and service.

From the breakfast essential, Toastie, to wholesome Wholemeal and the innovative Goodness of Both to name but a few, Johnston Mooney & O'Brien has a full product portfolio to meet any consumer taste.

Johnston Mooney & O'Brien recently announced the return of Butterkrust, due to both consumer and customer demand, and will support the welcome return with a TV/radio/outdoor/press and online marketing campaign to drive awareness during the key back-to-school period.

Johnston Mooney & O'Brien also bakes Bundys, Ireland's No. 1 brand of bun. Johnston Mooney & O'Brien products are baked daily by highly skilled master bakers using only the finest ingredients, where baking isn't just a business, it's a passion.



31 Tropicana

As the No. 1 chilled juice brand in Ireland, Tropicana has moved up two places this year into the No. 31 spot. The brand's continued focus on quality products and only selecting the sweetest, juiciest oranges has secured Tropicana the No. 1 position for growth, with +12% (volume) and +15% (value) increases.

This significant performance reflects consumers' consistent demand for Tropicana products. Sitting in the chilled category, Tropicana also scores highly on functionality with the leading juice brand offering consumers one of their five a day. In 2011, seven of the top-ten-selling category SKUs were Tropicana products.

In 2011, Tropicana refreshed the chilled fruit-juice category with the launch of the first-ever range of still lemonades, made from 100% natural fruit juice. Delivering healthier fruit-based refreshments, Tropicana lemonade has delivered €200,000 in sales already and is the No. 1 chilled-juice-category NPD launch this year.

By offering excellent value for money and quality, and by bringing innovation to the market, Tropicana is proving to be a winning brand in the sector, growing its share and the category.

(Source: Nielsen ScanTrack Total Market YTD W/E 10 July 2011)



NEW

McVitie's

Quirks



They're
Special
on the
inside

Crunchy biscuit
with a *smooth* chocolatey
centre

NEW

McVitie's

NEW McVitie's Digestives
medley

NEW McVitie's Hobnobs
medley

get the right mix of tasty sales!

A new range of 'on the go' bars. Medley uniquely combines the great taste of McVitie's biscuits with the goodness of cereals and other delicious ingredients.

STOCK THE RANGE – IT'S GOOD TO MIX IT UP!

McVITIE'S BISCUITY,
CHOCOLATEY, CEREAL BARS



UB

YOUR ROUTE TO SNACKING SUCCESS

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32 Dolmio



Dolmio, from Mars Incorporated, is Ireland's leading pasta-sauce brand, with 67% market share of Italian sauces, and has continued to increase this share throughout 2011. Dolmio owes its success to the strength of its extensive portfolio, which provides consumers with a range of nutritious, tasty and easy-to-prepare meals.

Bolognese sauces are at the core of the Dolmio brand, and were relaunched in 2011, containing only 100% natural ingredients. Meanwhile, Dolmio lasagne meal kits have driven growth in the total lasagne category very successfully, and Dolmio now has 80% of the lasagne ambient market.

The premium segment of the Italian-sauce market has grown significantly over the last number of years, and Dolmio has responded to consumer needs and changing trends by introducing a range of premium, ready-made pasta sauces, Taste of Italy.

Offering a complete meal solution in a matter of minutes, Dolmio Express is perfect for those occasions when consumers want a quick and easy-to-prepare meal without compromising on taste or nutrition. The Dolmio Express range consists of a wide choice of pasta sauces and pasta.

The Dolmio range also includes an innovative range of microwaveable pasta and pasta sauces for kids. The My Dolmio range offers a complete meal solution for parents who struggle to find convenient, healthy food that children will also enjoy.

33 Knorr Soups

The bad winter weather proved a positive for the soup category as a whole, including Knorr, which regained one position in 2011. Leading the category listings, Knorr's pack-format variety is a clear driver for the brand. Clever marketing campaigns built around mealtimes have given the brand a competitive edge.

34 Volvic

Volvic continues on a downward spiral in 2011, with PL taking a huge chunk out of the mineral water category year on year. As with other water brands, Volvic has introduced a number of new flavoured variants, however, not even such investment can overcome the drastic drop in consumer spend on discretionary items of late.

35 Milupa Aptamil

The decline in cross-border shopping has facilitated growth in the baby food category, with Milupa Aptamil one of the main brand benefactors. Climbing a further two places, the brand remains the leading product of choice in what is a broad consumer base, thanks to our baby boom of recent years. However, with new players entering the fray of late, the brand will have to continue its marketing and product investment to retain this position.



36 John West



Big Mover

Another strong sales performance from John West over the past year combined with an intensive media campaign

have all factored in the brand's upward progression in the Checkout Top 100 brands, moving up six places in 2011. It's the fourth

consecutive year that John West has moved upward in the Top 100, demonstrating the brand's favour amongst Irish consumers.

The award-winning media campaign, entitled 'Because sometimes their brains need a little extra help,' promotes the brand's website, www.brainfood.ie, which offers advice and tips on how Omega 3 helps the brain.

Most of John West's products are rich in Omega 3.

37 Hunky Dorys



Hunky Dorys, Ireland's fastest growing crisp brand, has certainly created a lot of stir within the crisp market within the past year. As the nations Number One crinkle cut crisp, the brand continues its very strong growth pattern of recent years and now commands 15.5% crisp share*. The brand has certainly captured the hearts of consumers who like tucking into the larger Share Bag formats as the brand is now the Number One best seller within this sector with a year-on-year growth rate of a massive 60%*.

The brand has also introduced a new Smokey Bacon flavour to its core range which has resulted in a significant increase in sales in recent

months. Further exciting news is on the horizon as the brand intends to shake up the savoury snacks market in the coming months with some exciting new product launches. (*Source: AC Nielsen, Marketrack, Value, MAT 26th June 2011)



**BECAUSE SOMETIMES
THEIR BRAINS NEED
A LITTLE EXTRA HELP.**

WITH OMEGA 3.

www.brainfood.ie

38 MF Galaxy

Having shot into the rankings at No. 96 in 2009, MF Galaxy has enjoyed the dizzy heights of this competitive category over the last two years. However, that rate of growth and ascendancy has hit a stumbling block this year, slipping two places. At No. 2 in the confectionery category, the brand is still a formidable force, and will be eager to rectify this blip next year.

39 Nestlé Kit Kat

Kit Kat is Nestlé Ireland's leading confectionery brand. The wafer and chocolate combination of Kit Kat is available in four finger and two finger formats as well as a chunky size.

More recently, Kit Kat has been extended to a bite size offering with the launch of Kit Kat Pop Choc sharing and impulse bags. While milk chocolate is the most popular flavour Kit Kat also comes in dark chocolate, mint, orange and caramel variants. While the world debates whether Kit Kat is a "biscuit or a bar" – it has the best loved and most iconic advertising strapline - Have a break have a Kit Kat.



40 Charleville

Charleville, Ireland's favourite cheese brand, is enjoyed by over 55% of households in Ireland.

Charleville relaunched in 2011 with a new packaging design to bring more warmth to the chilled aisle, and a heavyweight integrated advertising campaign that includes the new 'Céilí' TV execution.

Charleville, the original innovator in convenient formats, offers consumers the very best in block, sliced and grated cheese. Ziplock packaging is available across the block and grated ranges, providing added freshness for longer and helping to reduce unwanted wastage. In addition, with value for money a top priority for consumers, Charleville Family Value Packs are a great solution to feed the hordes. Such innovations make it a winner in the family home.

In August 2011, Charleville expanded beyond Cheddar with the launch of three new ranges: Charleville Deliciously Spreadable (125g) – Select, Ham and Garlic & Herbs; Charleville Deliciously Munchable Wedges (140g and 280g) and Charleville Deliciously Cheesy Select Singles (200g and 400g).

Testament to the strength of the brand and with a strong calendar of activity in 2011, Charleville has jumped 14 places to No. 40, its highest ranking for five years.



Big Mover

41 Denny Bacon

Denny continues to be the brand leader in the rasher category, and is purchased by nearly half of all Irish households an average of 5.9 times a year (Source: Kantar Worldpanel July 2011). The range comprises the ever-popular Denny Traditional Rashers, available in both VAC and CAP formats, as well as delicious hickory and maple-cured flavours. Denny continues to invest in the category, and its Bord Bia-approved rashers continue to offer consumers everyday value. Its growth in volume

market share, from 12.5% to 15.4% YTD (Source: Nielsen July 2011), shows that Denny rashers are still an essential part of Irish family life and the morning breakfast. Denny. The Taste of Home.



42 Denny Sausages

Denny Gold Medal continues to be Ireland's No. 1 Sausage brand (21% volume share; Source: Nielsen ROI MAT July 2011) and is an essential part of the traditional Irish breakfast, loved by all the family.

This trend is set to continue as the brand continues to innovate in order to offer value to the consumer. In July 2011, Denny launched its new Easy Open & Close Sausage Packs, the first of its kind worldwide in the sausage category. With the Easy Open & Close Packs, no knife or scissors is required, so now the nation's favourite sausage is even easier to get onto the pan or under the grill. Still with the same great trusted taste, the new Denny Gold Medal Sausage Packs are sure to be a firm favourite with families across Ireland.

To drive awareness of the new-pack functionality, Denny has invested in a heavyweight radio and outdoor campaign communicating the single-minded message that 'The Taste of Home is now easier to enjoy'. This campaign, coupled with in-store tasting demonstrations and compelling consumer promotions, is sure to get more packs into consumers' hands. Denny. The Taste of Home.



Ireland loves Love Irish Food



Congratulations to all the Love Irish Food brands who've made the Top 100.
And here's to seeing a whole lot more on next year's list.



43 Kerrygold

Available in over 50 countries around the globe, Kerrygold is one of the best-loved Irish brands in the international marketplace. Produced by the Irish Dairy Board (IDB), a major international exporter of Irish dairy products, Kerrygold is one of the Irish dairy industry's most important marketing assets. Since its formation in 1961, the IDB has developed in response to an ever-changing global business environment to become one of Ireland's foremost food exporters. The IDB was awarded Exporter of the Year 2010 by the Irish Exporters Association in recognition of its export achievements and economic contribution.

The IDB is organised across three focused business platforms: consumer foods, dairy trading and Distribution Plus Inc., a US specialty food distribution company. Group subsidiaries in Europe and the US market a wide selection of branded consumer products, dairy ingredients, and specialised grocery, delicatessen and gourmet food items of both Irish and non-Irish origin.



44 Pringles

Pringles has suffered its third consecutive drop, albeit by only one position each time. While dominant in the tube sub category, its share is gradually being eaten away by its competitors and PL, even with the launch of the new Xtreme line. Perhaps its new owners, California-based Diamond Foods, will give the iconic brand a new lease of life?

45 Premier Milk



A truly iconic brand, Premier is synonymous with Dublin and continues to be at the heart of fridges across the country. It is this loyalty that continues to make Premier Milk the No. 2 milk brand in Ireland, as well as No. 45 in the overall Checkout Top 100 Brands list.

Due to consumer demand, Premier reran its hugely successful 'Rediscover Dublin' promotion in 2011. Through this campaign, Premier Milk invited customers to 'fall in love with Dublin' again. There was a huge response to the campaign, with consumers across Dublin and surrounding counties collecting tokens from special packs to receive the 'Rediscover Dublin' booklet, which allowed them to rediscover Dublin while saving up to €40. Attractions in the booklet included Dublin Zoo, Dublinia, Sea Safari, Dublin Wax Museum, the National Aquatic Centre and many more. For over 40 years, Premier Milk has been supplying the best-quality milk across Dublin and the surrounding areas. Much has changed in Dublin since then, but one thing remains constant: Premier Milk's dedication to tradition, quality and the local supply of milk.



46 Whiskas



The Whiskas brand, No. 1 in the cat category and worth €16 million, includes high-quality products across the pouch, complete, can and 'care and treats' segments. Pouch is one of the fastest-growing segments within the cat-food sector, and Whiskas continues to innovate strongly in this area. It has added a new dimension of tastes to its iconic Whiskas brand with the introduction of a new pouch

range, Whiskas Simply. The Whiskas Simply collection delivers more choice, value and quality for consumers, as well as driving category growth and boosting profits for retailers. The new range features a selection of recipes that are grilled and steamed to provide a tastier meal for cats. Another key driver for the Whiskas brand has been the growth of cat 'care and treats'. The Whiskas range, including Whiskas Temptations and Whiskas Cat Milk, is growing at 36% and presents a very valuable opportunity for retailers, as these purchases are incremental to main-meal options. "The mix of heavyweight advertising, strong in-store promotions and continuous innovation ensure that Whiskas continues grow our retailers' sales and margins," comments Jennifer Power, marketing manager at Mars Ireland.



47 Hellmann's



Big Mover

With a value share of over 80%, it is no surprise that Irish consumers love Hellmann's. Its products are convenient to use, whether at the dining table, barbecue, picnic or on the move.

While there is a lot of emphasis on product quality, Hellmann's also understands that consumers are looking for recipes and ideas on how they use those products. This past year, the company has shared some really innovative communication with consumers, which has not only highlighted what great products it offers, but also inspiration on how the consumers can try them in different ways. Hellmann's has also extended its range of flavoured

mayonnaise with fantastic feedback from the consumers. Moving from No. 60 to No. 47 in the Checkout Top 100 Brands is a remarkable achievement, and Hellmann's is confident that it will continue to delight its consumers in 2012.

48 Deep RiverRock

Deep RiverRock is a leading Irish water brand, bottled from source in Co. Antrim, which currently holds the No. 1 position in the bottled water category year-to-date in Ireland, in terms of value. For the latest period, Deep RiverRock's volume share stands at 13.4%, while its value share stands at 18.5% (Source: AC Nielsen Market Track A/M 2011 ROI & NI Data). This year, Deep RiverRock's marketing strategy includes TV and cinema campaigns supported by a quirky summer outdoor campaign, which has rolled out across Ireland. The creative was developed to reinforce the brand's image of quality local water with a fun personality, just like the brand's target consumers, 18- to 34-year-olds. Deep RiverRock is also committed to supporting a number of local events.

Deep RiverRock is available in a range of pack sizes suitable for all occasions (single and multipacks, still and sparkling, plain and flavoured). The brand's 750ml sports-cap pack holds the position of No. 1 impulse sports-cap water in Ireland (Source: AC Nielsen Market Track A/M 2011 ROI & NI Data). This is the ideal size for hydrating active on-the-go consumers.



51 Cow & Gate



Big Mover

Another brand that is benefiting from the baby boom and the decline in cross-border shopping, Cow & Gate moves up five places this year. Backed by a vast marketing campaign, the brand continues to expand its portfolio range to capitalise on every aspect of the baby market.

52 Flora

Flora slides a further five places this year, which will be a cause of concern to owners Unilever. With global dairy prices rising and RRP dropping, the value of butter brands, including Flora, is being eroded.

53 Weetabix

Having regained some ground last year, Weetabix drops seven places in 2011, while retaining its top spot in the category listing. The brand has extended its portfolio of products in recent years, but with so much choice on the market and the prevalence of PL, it is not yielding the desired return.

54 Kellogg's Special K



Special K is the No. 1 individual cereal brand in Ireland (AC Nielsen ScanTrack MAT w/e 7 Aug 2011), with a value share of 13.7% and penetration of 33.7% (Kantar Worldpanel data).

An ally for 'shape managers' in Ireland, Special K is now offering women a new way to help maintain a healthy lifestyle through its personal weight management website, My Special K. My Special K Personal Plans is a free service that has been created with expert dieticians, nutritionists and behaviour-change experts to harness the latest in scientific thinking. It offers women a new way to watch their shape through personalised meal plans, forums, food diaries, tracker systems and a

detailed eating-out guide. The plans are based on sensible calorie-controlled meals. With €2.5 million marketing spend and innovation, including the introduction of Chocolate & Strawberry and Fruit & Nut to its portfolio, Special K is perfectly positioned for growth.

55 Persil

Another detergent brand that is suffering from the new world of price promotions, Persil drops a further seven places this year, falling out of the Top 50 ring for the first time in five years. While still top of the leader board in the detergent category, and remaining a brand of choice for consumers, Persil will find it hard to relinquish ground in the face of such a price-focused market.

49 Pepsi



Big Mover



Pepsi Max's 2011 success, reflected in the brand jumping 27 places to No. 49 on Checkout's Top 100, is down to the company's great global marketing collateral, strong in-store activation for the brand and ATL support. Perhaps the best example of this was Pepsi's 2010 football campaign, which featured top footballers including Fernando Torres and Didier Drogba in a spectacular body-paint campaign. The eye-catching promotion positioned the colourfully painted players on billboards and buses around Ireland. In addition, these lively images were featured on limited-edition packs of Pepsi Max throughout the summer. Pepsi Max has also strived to deliver value for money for the value-conscious consumer, with highly competitive price offers, such as the 440ml €1 can offer. Constant innovation in pack design has also delivered for the brand. Sales of four-pack cans have surpassed expectations, and this summer the new 500ml Pepsi Max bottle was introduced to the market. The new packaging is a real game-changer, with a unique design that stands out on-shelf and gives Pepsi Max a more exciting, masculine, outgoing image.

Pepsi is the fastest-growing cola in the market, significantly outperforming total market growth of 4.8%. In addition, Pepsi Max has a market share of 8.9% in value and 10.5% in volume (Source: Nielsen ScanTrack). This growth is fuelled by an increase in penetration, from 17% of households purchasing to 22.3% (Source: Kantar Worldpanel).

50 Cadbury Roses

It's proved a rather topsy-turvy year for Roses, having scrapped its eco-friendly cardboard packaging proposal late last year. It also fell slightly short of last year's performance on this list, with calls from certain quarters for the reinstatement of removed varieties and flavours.

56 Birds Eye Frozen Poultry



Big Mover

Birds Eye is the market leader in the frozen poultry market, with a 49.5% value share, growing its value sales by a massive 17%* in the last 12 months. Birds Eye's growth is the primary driver for returning the frozen poultry market to growth over the last 12 months*. Birds Eye is the leading

kids' brand in frozen poultry, with 61% value share, which is almost four times more popular than the next brand*. This is thanks to its very successful Dippers, Nuggets and Chicken Burgers ranges. Birds Eye is also the No. 1 brand in the adult frozen-poultry sector, with 53% value share*. Birds Eye has grown its market share in poultry due to a combination of heavy investment in marketing campaigns featuring the Birds Eye Polar Bear, the launch of successful NPDs, such as Chargrills, and continued in-store activity. *(AC Nielsen value sales MAT 10 July 11)

57 Kinder



Big Mover

The year 2011 saw a remarkable resurgence for Kinder, a brand that found itself falling rather gracelessly down the confectionery pecking order just last year. In this unprecedented comeback, the international confectionery giant and kid-friendly brand amassed a tremendous 20 places.

58 Maltesers



Big Mover

Despite being widely hailed as a lighter form of indulgence, Maltesers continues to hold plenty of weight in the retail market, having ascended seven spots this year. The brand wisely persisted with its style of fun-filled TV ads this year, a move that appears to work well for a consistently strong brand.

59 McCain

With its huge 66% value share of the frozen oven-chip market and a 33% value share of the prepared potato market, McCain's pre-eminence in the frozen potato category continues. Holding firmly to the No. 1 position amongst Irish consumers, McCain Home Chips (formerly known as McCain Home Fries) are a real family favourite and a must-stock product for any retailer. Consumers' ongoing interest in healthier options in frozen has also seen a healthy growth in McCain Rustic Chips, due to the product's 'only 3% fat' and 'gluten-free' proposition. To build on the success of the brand this year, McCain has launched an eye-catching new pack design with a distinctive new brand identity and ranging structure across its entire frozen potato range. This will be supported with new heavyweight TV advertising throughout the year.

Continuing to drive innovation in the category and maximise growing food trends, McCain has also recently launched new limited-edition Mexican Wedges, adding further growth to the wedges category. This category is currently experiencing +10% year-on-year volume growth, driven by a broader range of flavours and the expansion from 'side of plate' to snacking occasions, including parties and barbecues.



With fewer people eating out nowadays, consumers continue to look for premium, restaurant-quality foods at home. Sales of McCain Simply Gorgeous Chips and Goose-Fat Roast Potatoes have increased year on year as a result.

No surprise, then, that McCain is such a big name in so many freezers – and such a popular one on so many plates.

*(AC Nielsen ScanTrack, 10 July 2011)



60 Finish

The consumer loyalty that Finish has generated in previous years was maintained in 2011, with the brand putting further distance between itself and its competitors in the process. The favourable end result is a four-point leap that bodes promisingly for future years.

Brand new packs for tasty sales.



Watch out! Ireland's No.1 brand in frozen potato has just had an exciting makeover.

Innovative and eye-catching designs help to improve freezer stand out. And makes it easier than ever for consumers to shop the frozen section.

What's more, McCain is launching a big new TV campaign in October with heavyweight radio and outdoor support. So make sure to stock up on family favourites from the No. 1 brand in Frozen Potato.

It's all good.

*AC Nielsen Scantrack July 2011.

61 Avonmore Cream

Continuing to lead the category, Avonmore Cream comes in at No. 61 in the Top 100 this year. Produced by Glanbia Consumer Foods, the range boasts a very strong portfolio, including Fresh Cream, Double Cream, Sour Cream, Light Cream and Freshly Whipped Cream.

An important addition to the portfolio this year comes in the form of Avonmore Cooking Cream. With 50% less fat than standard cream but with no compromise on taste or texture, it has a smooth, thick consistency, ensuring great results every time. With the huge growth in entertaining at home, Avonmore Cooking Cream is perfect for savoury dishes such as curries, pastas and sauces.

Avonmore has also launched a new website, www.cookwithavonmore.ie, which includes lots of recipes, as well as tips and tricks, chefs' secrets, consumer polls and great competitions. Avonmore Cream is also featured on RTE's *Weatherline*, with its 'Simply Irresistible, Simply Avonmore' suite of stings that focus on the broad range of everyday occasions in which cream can be used, as well as the appetite appeal that Avonmore Cream adds to any occasion.

Available nationwide, the Avonmore Cream range offers the great fresh taste that shoppers expect from Avonmore in convenient formats and pack sizes suitable for today's lifestyles.



62 Batchelors Baked Beans



Big Mover

Batchelors is an iconic Irish brand and dominant market leader. This year sees the brand move up seven places in Checkout's Top 100. Batchelors is Ireland's No. 1 brand in canned baked beans, peas and pulses. With an impressive 57% market share*, it continues to hold its No. 1 position in baked beans. With attractive ongoing in-store promotions, ranging from price-downs on single cans to special offers on multipacks, Batchelors has something to suit everyone.

Batchelors is expected to roll out a design refresh across the entire range of peas and pulses in coming months, with which it will seek to rejuvenate the respective categories. The brand is strongly supported by the ongoing TV campaign 'The Secret's in the Sauce', as well as targeted bursts of outdoor activity, focusing on key shopping locations nationwide. Batchelors has also been busy investigating some NPQ avenues, and is very excited about upcoming launches later in 2011. Strong brand values and high product standards, coupled with an ability to adapt to changing market needs and a commitment to continual investment in the brand, is key to ensuring that Batchelors remains Ireland's No. 1. [*Source: Nielsen ScanTrack (MULT/GRP/4CT) (Value) MAT 12 June 2011]



63 Andrex

Andrex is the UK and Ireland's favourite toilet tissue. The Andrex Puppy, recently voted the most-loved brand icon, embodies the brand's strong, caring and fun-loving nature since first appearing on TV screens in 1972. Andrex continues to lead the tissue market by providing great quality, outstanding value and exceptional product innovation for consumers young and old.

Andrex is reinvigorating the 'added benefits' bath segment with new benefit-led positioning and packaging across three of the premium variants: Gorgeous Comfort (Quilts), Skin Kind (Aloe) and Touch of Luxury (Shea Butter). The newest addition to the portfolio is Andrex Limited Collections, a range of printed bath-tissue rolls with designs

and colour palettes inspired by the latest trends from the worlds of fashion and design. This product was launched in March 2011 with a complete support package and is available in a store near you.

The year 2012 will see more improvements to the portfolio, and Andrex will continue to invest in communications, reminding consumers of the real reasons to continue to love and believe in one of the nation's favourite tissue brands.



64 Colgate

Colgate has reversed the decline of the previous two years, moving up three places this year. Its affiliation with the Irish Dental Association has helped the brand's standing in what is a crowded market, but it has found its feet in a category that is now dominated by price promotions and bulk buying.



Thank you for voting us number 1* (again)

finish



Quantum



Max in 1



All in 1



Quantummatic

*Based on IPSOS study 2011 (2012 respondents)

65 Flahavan's



Big Mover

Flahavan's, Ireland's favourite porridge-oat company, continues to drive development in the oats category with its focus on quality and innovation. Flahavan's has launched a delicious new multi-seed porridge as part of its Quick Oats range to meet the evolving needs of consumers for

a healthy breakfast.

The new multi-seed range is available in sachet, portable porridge pot and bag formats, and combines Flahavan's Porridge Oats with sunflower, flax, pumpkin and hemp seeds to provide an additional tasty and healthy boost to breakfast time. The new seeded range is a source of Omega-3 fatty acids, protein and fibre. Flahavan's multi-seed porridge contains no added salt, sugar, artificial flavourings, colourings or preservatives, and is completely natural. Flahavan's Quick Oats Multi-Seed Sachets (10 x 40g) and Quick Oats Multi-Seed Portable Porridge Pots, which come in a 40g serving, have a crunchy texture that is simply delicious. Simple preparation in just three easy steps helps make a breakfast packed full of taste and goodness. Flahavan's Quick Oat Sachets, which come with a reusable liquid measure, are ready in just two minutes, while Flahavan's Multi-Seed Pot can be made by simply microwaving or adding boiling water and is ready in just 90 seconds. The cool-to-the-touch exterior makes the Multi-Seed Pot a truly portable product, ideal to enjoy in the office or home. These single-serving dual microwaveable and hot-water options provide a quick and nutritious breakfast that releases energy in the body throughout the morning. Flahavan's has a loyal Irish customer base, with over three million servings consumed each week.



66 Haribo



Big Mover

Haribo's phenomenal debut in the Top 100 this year demonstrates the power of promotional pricing, as well as the Irish penchant for all things sweet. Promoting the brand under the low-gluten banner has also helped the brand propel into favour. It will be interesting to see how Haribo can maintain this momentum over the next 12 months.

67 Cadbury Snack

It has not been a great year for Cadbury Snack, dropping nine places in the Top 100 list and edged out of the Top 5 in the confectionery category by Kinder. While the traditional brand has embraced new media to affiliate itself with younger consumers, it is finding it hard to compete on the new confectionery playing field, with price dictating volume.

68 Knorr Sauces



Big Mover

A veritable king of convenience, Knorr's sauce range moves up ten places in the charts, adding further weight to its commanding brand power. Its extensive ranges, augmented by a popular TV ad campaign fronted by chef Marco Pierre White, have played a pivotal role in securing a successful rise this year.

69 Nestlé Rowntree

With TNCC and Haribo raising their market profiles of late, Nestlé Rowntree has fought back with its own product launches, such as Randoms. It also rolled out its first TV campaign in four years, and this is clearly already paying dividends, as the brand has jumped five places.

70 Ariel



Big Mover

Ariel has reversed its bad fortunes over the last two years, jumping 13 places this year. While innovative pack formats backed by an expensive marketing campaign have helped the cause, price has proved a key factor in fighting off the competition, including the growth of PL in the category.

71 Glenisk



Big Mover

A new entrant last year, at No. 89, Glenisk has built on this performance dramatically over the last 12 months. With listings across all retail outlets, the family-owned brand has successfully engineered its position within the Top 5 yoghurt rankings, while extending its portfolio across other dairy subcategories. One brand to watch over the next 12 months.

Ireland's favourite beans



The secret's in the sauce

*Batchelors is Ireland's No.1 baked
beans brand and we've moved up 7 places
in this year's Checkout Top 100*

72 Galtee



The Galtee range has a tasty variety of products that satisfies an array of hungry taste buds. Be it breakfast, lunch or dinner or that sneaky snack between meals, Galtee has something for you.

Galtee has been campaigning to celebrate the Irish rasher with the famous Galtee Tender Cure leading the crusade. The brand's latest television advertisement does just this, transforming the quiet streets of a

small town with an explosion of fun and colour in celebration of the humble rasher.

Galtee has launched all-new packaging to ensure that everything is packed to perfection so that it can be kept fresh in your fridge and ready to sizzle. The Galtee brand delivers on great quality, great taste and great value in its entire range of rashers, sausages, puddings and sliced cooked meats. As a result, Galtee remains a firm favourite in Irish fridges.

Galtee ... Irresistible Grub!

73 Bold

The ongoing price war between detergent players has led to Bold losing seven places in 2011, its worst performance in five years. The '2in1' brand is trying to strengthen its appeal with new scented variants and marketing campaigns, but it is clear that some more work is required.

74 Fanta

While Fanta may have lost considerable ground since the highs of 2006, and having fallen three places this year, the brand's tenure in the Top 100 is still remarkable, given the level of competition in the carbonated market. With its global 'Less Serious' marketing campaign gaining traction, Fanta is doing well to attract younger consumers to the brand.

75 Connacht Gold

Connacht Gold is one of Ireland's best-loved brands in the dairy category. The unique taste and flavour of Connacht Gold milk, cream and butter products are the key strengths behind the brand's continued success. Its butter products are growing at +22% year on year (source: AC Nielsen ScanTrack April 2011), clearly showing a growing consumer demand for the Connacht Gold branded offering.

Connacht Gold's most recent additions to the butter category in August 2011 are three new and exciting butter products: Connacht Gold Spreadable Lighter, Connacht Gold Unsalted Butter Tub and Connacht Gold Continental Butter. These three new products will be strongly promoted and will further drive consumer choice, category value and volume growth. Enjoy continued success with Connacht Gold, one of Ireland's leading dairy brands.



76 Uncle Ben's

Uncle Ben's, from Mars Incorporated, is Ireland's leading rice and non-Italian sauce brand, with 57% and 22% market share, respectively.

Rice is at the core of the Uncle Ben's brand, and it has introduced convenient rice solutions for the consumer, driving growth not only through the Uncle Ben's brand, but through the rice category itself. Both the boil-in-the-bag and express-rice segments now make up over 50% of the total value sales of the rice category, and Uncle Ben's has a strong presence within both, holding 73% and 87% market share, respectively.

Uncle Ben's sauces offer a wide range of inspirational meals from around the world, and contain no artificial colours or flavours, preservatives or MSG. The company provides consumers with great-tasting, healthy, high-quality products that can be ready in minutes.

The latest addition to the Uncle Ben's sauce family is the Stir Fry range, which has performed very well, driving value sales growth – in the year to date, it is currently delivering volume sales growth of 11%.

Uncle Ben's offers great value-for-money solutions for all consumers. Its breadth of range, coupled with the high quality of Uncle Ben's products, ensures that consumers can get a great-value meal for their families while not compromising on taste or quality.



Ireland's *Favourites*



Kimberly-Clark

77 Kilmeaden



Big Mover

Multi-award-winning Kilmeaden cheese continues to perform strongly in the Checkout Top 100 Brands, up eight places from last year to No. 77. The quality and uniqueness of Kilmeaden can be attributed to a strict selection process that ensures that only the best Cheddar goes into Kilmeaden, hence the promise that 'we select the best, and take away the rest'.

Kilmeaden is matured for up to ten months, giving it all the time it needs to develop its distinctive flavour and unique taste.

Kilmeaden cheese has now further solidified its reputation as the 'fillet of Cheddar' by providing Irish cheese-lovers with even more options.

Kilmeaden Lighter Mature has only half the fat of standard Cheddar, which is perfect for Kilmeaden-lovers who are looking for a low-fat alternative. Kilmeaden Smooth & Mature is an irresistibly tasty Cheddar with subtle sweet notes, perfect for Cheddar-lovers who are looking for a new taste sensation.

Kilmeaden Lighter and Kilmeaden Smooth & Mature both carry the heritage, craft and taste credentials of the No. 1 selling block in Ireland.



78 Innocent

Innocent has had a turbulent few years in the Top 100. It shot in at No. 89 in 2007, only to disappear in 2009 and return at No. 100 last year. This year it moves an impressive 22 places, with Coca-Cola's investment in the brand already paying off. New pack sizes and price promotions throughout the year have clearly worked. All eyes will be on its performance next year.

79 Always

Always notches up three places in the 2011 charts, with its competitors failing to put any form of dent in its market share. The introduction of three new pack designs - Freshelle, Freshness and With Silk - has served to further bolster its status on the Irish market in a category where it remains a commanding figure.

80 King Crisps

King Crisps, affectionately known as 'The Crisp Lovers Crisp', is performing well with a market share in crisps of over 10%*. King crisps proudly claims the No. 1 best-selling impulse pack in the greater Dublin area, while nationally, King impulse Cheese & Onion is the No. 2 choice of the Irish consumer.* The brand continues to gain new followers across the country with 55%* of sales coming from outside its traditional Dublin heartland. Valued at over €12 million, the brand comes in two flavours, the much loved famous Cheese & Onion, and Salt & Vinegar. The healthier option King Lites Cheese & Onion offering which in a recent *Irish Times* retail survey, was given an incredible '4 Stars' - 'A Regal Choice.**' (*Source: AC Nielsen, Markettrack, Value, MAT 26th June 2011) (**Source: Irish Times, June 6th 2011)



81 HB Cornetto



Big Mover

2011 brought more excitement to the ice cream cone sector with the launch of Cornetto Enigma Chocolate & Caramel, with indulgent caramel sauce running

through the middle, covered by delicious dark chocolate ice cream and topped with delicious toffee pieces. This new multipack adds to our

existing variants of Vanilla & Chocolate and Vanilla & Raspberry. Market share for Cornetto multipacks grew to 10.2% of the sector (+34.8% versus last year). Cornetto continues to impress with an OOH market value share of 88.7% (+2.1% versus last year) in the Irish cone market, which is valued at €8.3m. The iconic cone brand jumped up 6 places to 81 in 2011 thanks to the second year of the Cornetto Enigma advertising campaign. The new TV ad played on the soft centre of the Cornetto Enigma and shows a woman's boyfriend turning into a soft teddy bear. The campaign used the tagline: "Try the irresistible soft side" and was rolled out on TV and digital.



82 Birds Eye Frozen Fish



Big Mover

Birds Eye has continued its strong performance in the fish category, growing its share from 21% to 24.3% in less than two years*.

The growth has been driven by a combination of driving core products, like Birds Eye Fish Fingers, launching successful NPDs, such as the 'Bake to Perfection' range, and relaunching into coated fish.

Birds Eye Fish Fingers are Ireland's best-selling and most-loved fish fingers, with almost 80% market share*. Launched in October 2009, the Birds Eye 'Bake to Perfection' range has turned the natural fish sector from -15% decline to +14% growth*, and is now worth over €2.5 million MAT, making it one of the most successful launches in recent years in the frozen fish category.

The success of Birds Eye 'Bake to Perfection' has been driven by a heavyweight, consistent TV advertising campaign coupled with in-store activity.

* (AC Nielsen value sales MAT 10 July 11)





A tradition made
fresh everyday.

John W. Cambridge

www.mccambridge.ie

83 McCambridge



Big Mover

McCambridge bread has been available for over 60 years. Its product delivers the best Irish bread has to offer, consistently to consumers. McCambridge is the market leader in its category and is a key part of any retail offering. Its product is yeast-free, high in dietary fibre, low in fat and has no added sugar. McCambridge bread is an ideal accompaniment to any meal. It tastes great served with a hearty soup, eaten as an open sandwich with smoked Irish salmon or Irish farmhouse cheese, or lightly toasted and spread with butter and jam or marmalade.



84 Benecol



Big Mover

Benecol continues to grow and remains the No. 1 cholesterol-lowering brand in Ireland (Source: Nielsen, July 11).

Benecol is launching a new logo and livery, which will appear on shelves in coming weeks. In addition, new delicious, thick and fruity yoghurt pots will be available for consumers in two variety packs: Fruit Medley and Summer Fruits. A new fat-free variety four-pack, containing peach, strawberry, black cherry and rhubarb flavours, will also be added to the range.

Benecol is a range of foods containing the unique ingredient plant stanol ester, which works with the body to actively lower cholesterol. No other food is more effective at lowering cholesterol.

The Benecol range of foods is also available in spreads and one-a-day drinks. The range includes three varieties of spreads, Light, Olive and Buttery Taste, and Benecol yoghurt drinks, in Original, Light, Strawberry, Peach & Apricot, Raspberry and, coming soon, Blueberry. Dairy-free drinks are also available, in Tropical Fruits and Mixed Berries flavours.



85 Kellogg's Corn Flakes



Kellogg's Corn Flakes continue to hold a special place in the hearts of Irish consumers, with strong volume and value sales, household penetration and market share. Kellogg's has recently launched a new heavyweight TV advertising campaign, which emphasises how generations of Irish families have grown up enjoying the taste of 'the Sunshine Breakfast'. With all the chaos of getting ready for the day ahead, ready-to-eat-cereals such as Corn Flakes are the best bet for stress-free morning meals, allowing consumers to make their days great. The Corn Flakes brand traditionally houses Kellogg's CSR initiatives, including

Kellogg's Fun Raise 4 Kids, in aid of Our Lady's

Children's Hospital, Crumlin. In 2011, the campaign is set to get bigger and better and will feature on-pack.

The brand offers fantastic value for consumers and retailers alike, and during a period when many households in Ireland are challenged financially, Kellogg's has focused on offering added value, particularly with the addition of a 33%-extra fill pack, available this autumn. Corn Flakes 500g and 750g are must-stock lines for all retailers.

86 Florette



Florette remains Ireland's No. 1 salad brand, commanding just under a 25% share (Source: AC Nielsen) of total Irish salad sales. The brand's shining star is Florette Crispy, which is the No. 1-selling line within the bagged salad category. It is an iconic core product with a versatile mix of crisp and sweet lettuce leaves that is perfect for serving as an accompaniment to any meal base. Florette is famous for its freshness and product innovation, working hard to create salads that deliver superior quality and taste,

so that consumers can enjoy freshness throughout the life of the product. Breadth of range is also vital, to inspire existing customers, as well as attracting new users to the category, and the Florette portfolio boasts a variety of mixes and single-leaf products, from sweet to peppery, to meet these varying needs and tastes. Contact nicooke@florette.com for more fresh thinking.

New look on the outside...



... same delicious cholesterol lowering goodness on the inside.

Benecol.
Proven to **reduce cholesterol**

Here's some more useful information: Each day, enjoy Benecol[®] (one mini-drink, 2 yogurts or 4 slices of bread with spread as recommended for 1.5g - 2.4g plant stanols). As heart disease has multiple risk factors, you may need to alter more than one to lower overall risk.

87 Kerry LowLow



Big Mover

January 2010 saw LowLow's range of cheese and butter spreads reach out

to its female audience through a contemporary and playful new look. This fresh, feminine makeover stands out effectively on-shelf and ensures that consumers won't miss out on LowLow's great-tasting lower-fat products.

LowLow understands that modern women want to live life to the full, but still make a conscious effort to eat healthier. The brand's versatile range of cheese and butter spreads provide a no-compromise solution by offering delicious products that each have at least 1/3 less fat. In addition, Kantar reports that the consumer spend on cheese from new LowLow shoppers has been instrumental to the category, making LowLow a winning brand for retailers too. The launch of LowLow's delicious new range of Cheddar Spreads, in Original Mature and Cracked Black Pepper variants, also demonstrates the brand's commitment to innovation. The Cheddar Spreads can simply be spread on to bread or crackers for a quick bite to eat or heated in their handy microwaveable tubs for a great snack with nachos or for use as a deliciously creamy sauce.



88 Chicago Town



Big Mover

Chicago Town is the No. 2 frozen pizza brand in Ireland,

and has continued its exceptional growth since Dr. Oetker took over the brand. At the heart of the brand's phenomenal success is Chicago Town Takeaway, which grew by 132%*** and increased its brand value by €3 million** in 2010, boosted by a series of limited

editions and special on-pack promotions. Now famous for its fresh dough base that rises in the oven and real takeaway taste, Chicago Town Takeaway is worth €5.6 million*, and this is no wonder, given that three Chicago Town Takeaways are sold every minute in Ireland*.

Chicago Town Takeaway is proud to announce the return of its X Factor Limited Edition Pizza, in stores again this year from August. The popular product was the No. 1 NPД launch in the frozen pizza category in 2010**.

Chicago Town Deep Dish is Ireland's No. 1 snacking pizza. With four flavours available and full of taste from brim to base, Deep Dish is a great convenience product for mums and kids. Don't forget to check out our 'Free Tuck In Stuff' on-pack offer currently in store.

New-look packaging and continued innovative support through an engaging microsite and Facebook page, as well as promotion, advertising and PR, make Chicago Town one to watch in the coming months. Chicago Town has got the X Factor.

* Source: Nielsen ROI ScanTrack Value MAT 52 w/e 10 July 2011 (excluding Dunnes and Discounters); ** Source: Nielsen ROI ScanTrack Value MAT 52 w/e 23 January 2011 (excluding Dunnes and Discounters)

89 MiWadi



Big Mover

MiWadi is the leading brand within the squash and cordial category, with a market share of 41% (AC Nielsen MAT July 2011, Value). From small beginnings in 1927, when it was filled by hand in Nassau Place (Dublin) and distributed by horse and cart, MiWadi has become one of Ireland's best-loved brands. It is still produced in Dublin to this day, and around 16.5 million litres of MiWadi are consumed every year.

MiWadi fruit squashes are all prepared from sun-ripened fruit and contain real fruit juice. MiWadi has been a fruity and flavoursome part of childhood in Ireland for over 90 years, and has always remained relevant to Irish families, with a wide range of flavours in both regular and no-added-sugar formulations. In April, MiWadi launched its new MiWadi Double Concentrate, which comes in a handy 1-litre bottle, but now makes twice as much squash, with 40 servings of delicious MiWadi in every



bottle. As well as offering consumers great value, MiWadi Double Concentrate comes in a new, innovative bottle that has been ergonomically designed for easy pouring. This new, smaller bottle is easier to store at home and will fit neatly into your kitchen fridge.

In the 16 weeks since its launch, MiWadi Double Concentrate has made huge impact on the double-concentrate squash market, taking a 40% share (AC Nielsen, 12 WK July 2011).

MiWadi is proud to be an Irish brand and a key brand in the Love Irish Food campaign.



90 Nestlé Aero

Having lost considerable ground last year, Aero has stemmed that decline with a host of new product launches, such as Aero Caramel. Nestlé is investing a significant amount in the ROI and UK markets to support its new ranges, so Aero could return to the dizzy heights of the Top 100 very soon.

91 KittenSoft

KittenSoft is back where it belongs, as one of Ireland's favourite bathroom tissue brands.

As a matter of fact, in the latest quarter, KittenSoft was not only the No. 1 brand in both volume and value, it was also the fastest-growing brand in the market*.

KittenSoft has been synonymous with bathroom tissue in Ireland for many years and remains a brand that is made exclusively for Irish consumers. KittenSoft's range of products satisfies a broad range of consumer needs, with the great-value KittenSoft 24R, appealing to bargain-hunters, through to KittenSoft Ultra Soft, which appeals to 'bathroom indulgers.'

KittenSoft will also continue to support the brand in 2012 with a new dedicated Irish TV advertising campaign. KittenSoft: Ireland's favourite bathroom tissue. (*Source: Nielsen Quarter to 10/07/2011)



Kittensoft

one of Ireland's favourite brands



made
exclusively
for Irish
customers

92 Batchelors Canned Veg



Batchelors is an iconic Irish brand and dominant market leader. This year sees the brand move up seven places in Checkout's Top 100. Batchelors is Ireland's No. 1 brand in canned baked beans, peas and pulses. With an impressive 57% market share*, it continues to hold its No. 1 position in baked beans. With attractive ongoing in-store promotions, ranging from

price-downs on single cans to special offers on multipacks, Batchelors has something to suit everyone. Batchelors is expected to roll out a design refresh across the entire range of peas and pulses in coming months, with which it will seek to rejuvenate the respective categories. Strong brand values and high product standards, coupled with an ability to adapt to changing market needs and a commitment to continual investment in the brand, is key to ensuring that Batchelors remains Ireland's No. 1.

[*Source: Nielsen ScanTrack (MULT/GRP/4CT) (Value) MAT 12 June 2011]

93 Comfort



Big Mover

A firm favourite in Ireland and beyond, Comfort's popularity was further bolstered this year, with the brand rising by a promising six spots. Its 'Better Together' mother-and-baby initiative, with Persil, and broad varieties have clearly served to help boost its profile with its core target market.

94 The Natural Confectionery Company

On sale this August, Guzzle Puzzle from The Natural Confectionery Company (TNCC) is a unique and exciting addition to the sugar confectionery category. This 'magical' product features different jelly shapes in different flavours, which can be combined to produce entirely new taste sensations: cinnamon and lime create cola; orange and banana give you bubblegum; raspberry and lime make 'pink lemonade'. The Guzzle Puzzle concept is unique and certain to drive interest in the sugar category. To maximise sales potential, the product is available in both pre-filled HODs and counter units, as well as by cases of 36.



The sugar confectionery category is currently in growth and The Natural Confectionery Company is capitalising through exciting product innovation. "It is important to continue to innovate, offering consumers real points of difference in the product offer," says Niamh Twyford, Senior Brand Manager at Kraft Foods, underlining the necessity for NPD in the category. "Guzzle Puzzle, like all our concepts, delivers on key drivers of sugar consumption – natural, texture, colours, flavours, variety, fun, playful, innovative – as well as on key consumer trends."

TNCC also launched Fruity Choos this summer; a product that features individually wrapped chews in a range of fruity flavours, which are free from artificial colours and flavours. The Natural Confectionery Company has been the No.1 Sugar Hanging Bags brand for almost seven years and Kraft Foods is the No.1 manufacturer with over 26% market share. (Nielsen Markettrack w/e 17/04/11). TNCC brands will be supported this summer with a €500k campaign, including TV, online/digital and press advertising

95 Shaws

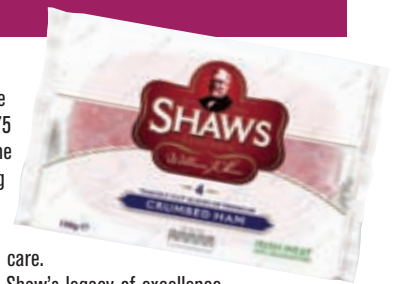
When William J Shaw opened his first shop, in 1831, he realised the importance of excellence. Over 175 years later, Shaws remains a name of substance and uncompromising quality, the purveyors of full-flavoured food, created and selected through expert craft and care.

Today, the company continues Mr Shaw's legacy of excellence, with the relaunch of Shaws Parchment, Carvery and Breakfast ranges for Summer 2011. Shaws has driven in-store awareness with a fantastic new

'Quality Seal' design; the aim of which is to communicate the premium nature of the brand and its products through a new 'Quality Seal' brand mark.

The Breakfast range redesign has been coupled with a new, improved sausage recipe. To date, feedback from consumers and retailers on the new premium Shaws sausage has been excellent.

Overall, Shaws continues to perform resiliently at the deli counter and in pre-packed sliced meats, where it remains No. 2 in value share in the total PPSCM category on the MAT, and No. 1 in premium PPSCM category. Excellence is our Tradition.



96 Squeez

The Squeez range has been a firm favourite in Ireland for nearly 30 years and remains the No. 1 brand in the ambient juice market. Squeez is proud to be part of the Love Irish Food initiative.

The Squeez brand attributes its ongoing success to a number of factors, including a continued commitment to quality, offering value for money for consumers, and the importance of new product innovation that meets changing consumer needs.

Recently Squeez released a fun and fresh new range of thirst-quenching juice drinks.

Ideally priced at €1, the Squeez Fusion juice drinks offer shoppers fantastic value for money, whilst providing a great opportunity for retailers to grow their ambient juice sales. For more details on the Squeez Fusion range, visit Facebook/Squeez.





Ireland's **No.1** sugar hanging bags brand*

new



€500k marketing support including TV, press & digital

on tv

5 different flavours that combine to make 3 more flavours

raspberry + lime
= pink lemonade

orange + banana
= bubblegum

lime + cinnamon
= cola



STOCK UP NOW!

97 Huggies

Huggies breaks into the chart this year on the back of an extensive advertising campaign and price promotions. Price is the only factor that is stemming the tide of cross-border shopping, but thanks to our baby boom, volume is rising. With so many new players in the market, Huggies has done well to secure this spot.

98 Panadol

Panadol, a new entrant, shoots into No. 98. The brand has successfully branched out from its core 'headache' association in recent years, and this has proved a positive move for the company. With medical professionals including pharmacists now encouraged to promote own-brand alternatives, Panadol and similar brands may struggle next year.

99 Golden Vale

Golden Vale has always been one of the more unpredictable brands in the Top 100, moving up and down over the last number of years. However, the brand has reached a new low in 2011, dropping a dramatic 32 places from No. 68. On the other side of the coin, it has climbed one place in category listings to No. 4. It is clear that Golden Vale is losing out to the rapid growth of PL and competition in this category. It will be interesting to see what the brand's position will be next year.

100 Dr. Oetker Ristorante



Irish consumers love the real Italian pizzeria experience that is often promised but rarely delivered. Acclaimed as Italy's best-loved pizza*, Ristorante delivers an authentic Italian pizzeria taste and premium quality straight into the homes of Irish consumers.

Inspired by authentic Italian recipes, Ristorante offers a true pizzeria taste with a delightfully thin and crispy base and mouth-watering toppings across

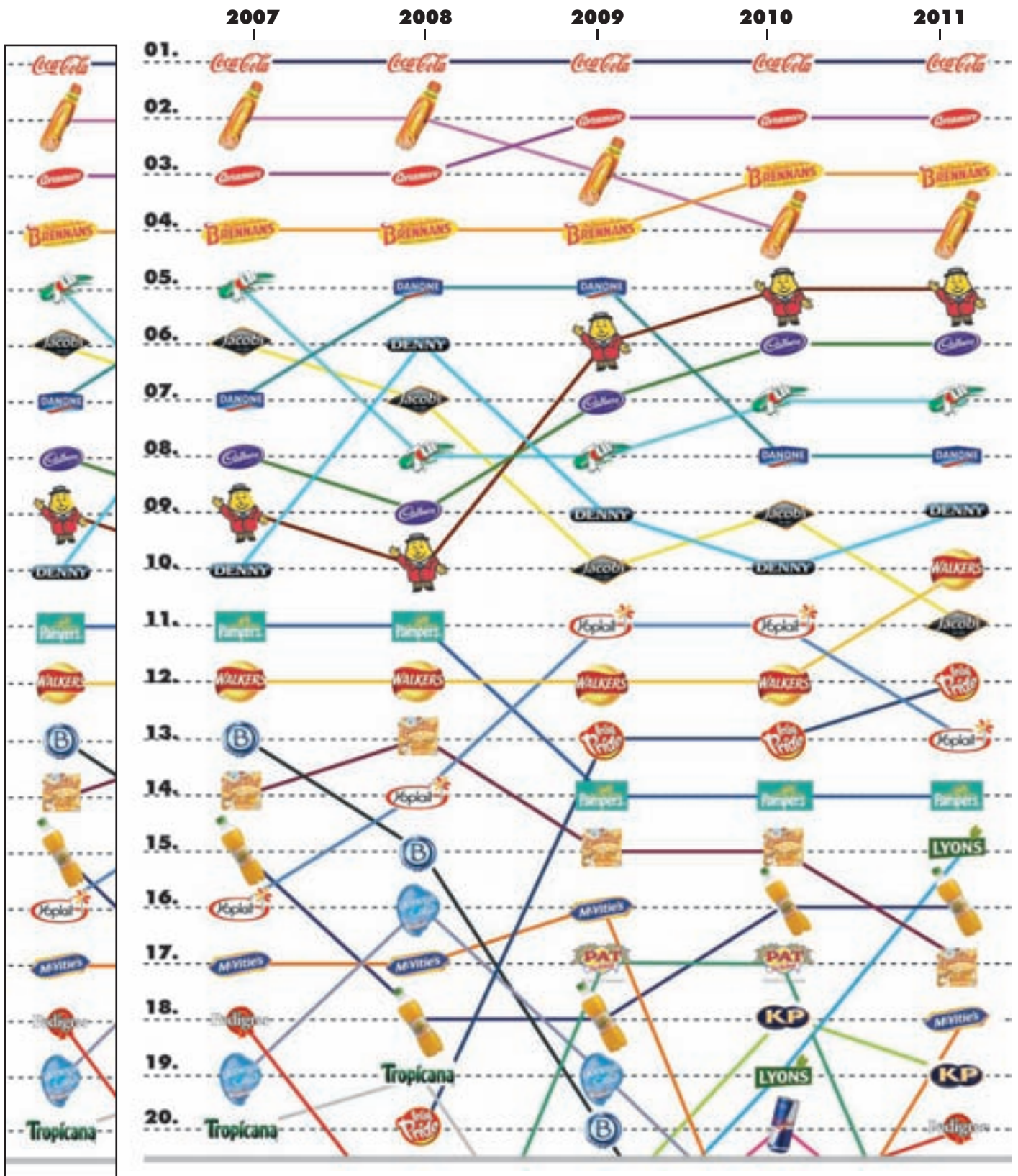
its range of seven flavours. With the addition of two new flavours in 2011, Pepperoni Salame and Vegetale, Ristorante pizza has a flavour to suit all tastes and is as delicious as it is convenient.

Featuring award-winning Italian chef Marco Roccasalvo, of Campo de' Fiori, the Italy's Best-Loved Pizza campaign in 2011 will be brought to life through an exciting mix of TV and innovative digital, PR, promotions and experiential events in the coming months. Ristorante by Dr. Oetker - Italy's Best-Loved Pizza*.

*Source: IRI, MAT w/e 1 May 2011; **Source: Nielsen ROI ScanTrack Value MAT 52 w/e 10 July 2011 (excluding Dunnes and Discounters).



BRAND TRACKER - THE TOP 20 BRANDS 2007-2011



ALL IN THE MIND

While those brands in the upper echelons of the Top100 understand the value of a multichannel marketing strategy, how they engage with the customer could be set to change, with the advent of neuromarketing. *Checkout* speaks to **Thom Noble**, managing director of NeuroFocus Europe, a company recently acquired by Nielsen.



unconscious responses. The ability to do that now in a quantitative fashion is what's so exciting."

HOW IT WORKS

The research is carried out on test subjects using an electroencephalogram (EEG), a brain scan that enables researchers to monitor electrical impulses within the brain. Such scans are commonplace within the realm of medical science, where they are frequently used to diagnose epilepsy.

Its applications for neuromarketing have only been recently realised, but could well be invaluable for consumer research. The EEG scan takes place while the subject is shown a selection of advertisements for various brands, measuring factors such as subconscious response, attentiveness and memory function.

It is administered through a cap fitted with 64 to 128 sensors, with eye-tracking equipment also employed to provide further verification of the EEG readings. The results from these two sources are then aggregated via a connected computer, which can also calibrate previous findings. A typical sample group comprises at least 24 volunteers, whose reactions to certain brands are gauged in order to deduce if that brand (and its marketing strategy) strikes a chord within their subconscious.

NeuroFocus' practitioners also readily acknowledge the limits of the research, as deducing the exact criteria that dictate consumer choice remains difficult, even with these developments. However, researchers maintain that neuromarketing's primary applications include uncovering what marketing forms and advertisements are most effective for which brands, thus serving to complement more orthodox forms of research.

"What we're providing is an extra layer of information," says Noble, "that, put together with other findings and research, can give a multiplying effect in terms of robustness and the ability to deliver insights you just can't get from anywhere else."

With the proliferation of advertising in modern society, in its plethora of forms, there is a consensus among some quarters that consumers are growing increasingly immune to traditional forms of advertising and promotion, decreasing their effectiveness as a consequence. With that in mind, the work being carried out by NeuroFocus could have groundbreaking implications for marketing in the future, which in turn could prove to be a shrewd investment for Nielsen. ■

Nielsen will be hosting a dedicated live event on Wednesday 7 September, at which Thom Noble, managing director of NeuroFocus Europe, will introduce the concept of neuromarketing and its potential effects. For further information, email NielsenIrelandCommunications@nielsen.com.



With the purchase of innovative neuromarketing firm NeuroFocus in May of this year, Nielsen has expanded into one of the few major areas of market research in which it did not (until now) have a significant presence, and embraced a new, unique approach to consumer marketing.

Simply put, NeuroFocus' speciality, neuromarketing, involves the study of a subject's subconscious reactions to certain brands in order to deduce whether or not they share an underlying connection. The implications for consumer research are monumental, affording companies with access to information not readily available through standard market research means, such as questionnaires or focus groups.

"Only 2% of thoughts are above the level of consciousness," Thom Noble, managing director of NeuroFocus Europe, explains. "The vast

majority of what we do is lying beneath. With the advent of neuroscience over the last 20 years, particularly within the last five years or so, there's been such an upsurge in the ability of neuroscience to understand how the brain works."

Think about your typical focus group: when an individual is asked to think about a certain product, their feeling towards the product may change. The more they think about it, the more it changes. Neuromarketing seeks to delve behind this, offering a subconscious analysis of the relationship between that potential customer and the product in question.

"This has quite profound implications, when you're really trying to understand the emotional response of consumers and how they're thinking and feeling," says Noble. "It's extremely difficult to extract that without looking at the

BrandBursary



€10,000

worth of packaging
design to be won.

Could it be your brand?

The Vard Partnership, Brand Design Consultants, are once again offering one Irish brand a fantastic opportunity to win €10,000 worth of Packaging Design.

This year, we are particularly interested in helping an Irish FMCG brand with strong export potential. This area offers Irish companies the best potential for growth in these challenging times.

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www.brandbursary.ie

Closing date 7th October 2011

in association with
CHECKOUT and
RTÉ THE BUSINESS



The Vard Partnership
The Brand Design Consultants



SUSTAINABLE TRADE MARKETING – PRICE AND PROMOTIONS



Never has it been more crucial for brand owners to have a clear vision of the options for pricing and promotion strategies and tactics. In the following article, **Oonagh Walsh** of Nielsen demonstrates some key facts relating to promotional activity. By understanding the key concepts and the implications for your brand you can better manage and balance sales goals with spending/ROI goals.

THE ECONOMIC BACKDROP

External forces impacting shoppers - The recession

Falling demand

- House price deflation
- Much tighter credit
- Rising unemployment
- Wage cuts so less spending power



Increased costs

- Taxes
- Food prices
- Fuel and travel costs
- Cost of credit
- Weakening €



The recession has changed shopping behaviour:

In Home Behaviour

- In-home entertaining is growing
- Trading up in treats is increasing

Shopping Behaviour

- Shoppers are becoming less loyal
- Online, Discounters and mobile applications are growing

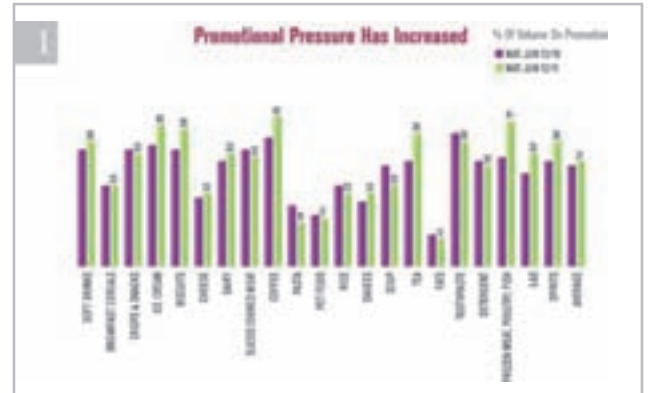
In-Store Behaviour

- Health and environment concerns have declined
- Economic concerns are driving the search for 'Value For Money'
- Private Label is becoming increasingly accepted.

MARKET RESPONSE

What has been the strategy for most FMCG categories so far during the recession?

- Higher levels of promotion
- Deeper price cuts
- Both



Increased promotions are becoming the norm across categories and the level of promotional purchasing has increased (see above). This increase has been driven as much by brand owners and retailers as by consumers. Our nearest neighbour, the UK, has cemented its position as the most promotionally intense market in Europe, where 39% of all FMCG expenditure is now purchased on offer. Ireland's average is 31%.

As we can see from the above graph, Alcohol categories are in the 'high promotion' group, or are above average categories in terms of promotional volume. Alcohol is also one of the most responsive categories. This at least means that some promotions are making money but it is by no means the case in all Food & Drink categories.

Retailers too continue to focus on driving the discount/low price message. This is clearly seen in the majority of retailer advertising (as seen below).



A BETTER WAY?

Which promotional mechanic works better?

- Price reduction
- Multi-buy
- Depends on the product

The focus has shifted from multi-buy to price cuts as retailers attempt to drive footfall with low prices. But the right promotional offer depends on the product and the occasion. A loyal customer is more likely to respond to multi-buys and opportunities to increase consumption. A trialist or occasional buyer is more likely to trial at an attractive price point (see below).



The mechanic used also depends on the promotion's objective. High sales velocity or uplift does not always equate to profitability. In the example below, this promotion lost money every time.



Finally, understanding the relationship between everyday and promotional price is vital for a successful brand strategy. A brand with low response to price promotion and a high response to everyday price change points to 'EDLP' and no promotion strategy. Conversely, a brand with high promotional response and low shelf price response points to 'Hi-Lo' strategy. This means maintaining a high everyday price and use low price promotional activity as the volume driving lever.

WHAT IS THE BEST STRATEGY?

Short term sales growth is not the only objective. Different choices will achieve the strategic and tactical goals of manufacturer and retailer. If the brand objective is to grow penetration, gain trial and (for the retailer) get shoppers into stores, we could focus on short-term price discounts, multi-buys and loyalty card offers. If, on the other hand, the key brand objective is to increase purchase frequency and number of transactions for the retailer, we could also use sampling, bonus packs, coupons and cross category promotions.

The top UK/Ireland brands have seen baseline erosion and increased promotional dependency. This is an unhealthy trend.



The real brand winners are those whose strategy has seen improved marketing mix performance whilst protecting their baseline (see below). Now that costs have been reduced, media is increasingly becoming more effective at driving base performance and is an alternative volume driver to ever increasing promotions.



WHAT DOES THIS MEAN FOR YOU?

- Stop promoting? In short... **No**. This is not a practical option in the current environment.
- The most sensible option is to **stabilise baseline and promotional activity**, and do more with what you have, rather than promoting more.
- Understanding how your brand responds to **all sales levers** is essential to making **informed decisions**:
 - Regular Price (baseline)
 - Promoted Price (promotional activity)
 - Range changes (baseline)
 - Media (promotional activity)
 - NPD (baseline)
 - In-store support (promotional activity)

WHAT'S AHEAD?

- Promotions will continue to be the engine maintaining brand performance
- Critical to balance the spend behind promotion mechanics – higher efficiency can offset rising costs
- Winning companies will protect their baseline and drive increasing returns from media
- Critical to understand which marketing vehicles deliver sales ROI alongside in-store factors

CHANGING TIMES FOR CATEGORIES

PRIVATE LABEL LINES ARE PUTTING MORE THAN A SIMPLE DENT INTO CATEGORY SHARE, WITH BRANDS RELYING ON PRICE PROMOTIONS, NEW MARKETING STRATEGIES AND NPD TO ATTRACT CONSUMERS. GRÁINNE BURNS REPORTS.



Irish consumers have a strong affinity with grocery brands, whether through impulse purchases or shopping for main household goods.

However, necessity has influenced purchasing habits of late, and hence the prevalence of switching to PL lines. After another financially strained year, and almost every pocket hit, the PL market has widened somewhat, moving from non-food core lines to KVI products, such as milk, packaged bakery and mineral waters.

Price promotions have become commonplace across all grocery categories with shoppers travelling from one retail group to another in search of special offers. As such, it is not surprising that the combined value of the top five within each category continues to be squeezed. Outside forces, such as rising commodity prices, not to mention our indifferent climate, has also had a negative impact on certain categories.

Within the Top 10 categories, it was only carbonated soft drinks (which lost value share in 2010) that enjoyed a marginal reversal in this respect. While some of the Ireland's leading categories are proving recession-resistant, such as Biscuits and Crisps, it is the sheer volume and level of competition that is generating the price war amongst brands.

Once again, it is Confectionery that leads the field. Whether it's price, innovation, or our penchant for sweet things (or a combination of all three factors), Confectionery is the definitive recession-proof category.

On the other side of the coin, other so called comfort items, such as Fruit Juice (down 1 place), Sport / Energy drinks (down 2), Chewing Gum (down 4) and Granola Bars (down 3) all dropped in position, reflecting the manner in which consumers are also withholding discretionary spend.

New Shopping Habits

The main upward movers in the Top 100 also mirror the shopping trends of late with consumers reverting to basic but convenient lines in areas such as cereals, canned fish, rice and frozen fish products. Similarly, the trend towards at-home dining may be long exhausted, but as witnessed by the trends in the Top 100, and the recent success of programmes such as *Come Dine With Me* consumers have far from tired of it.

To illustrate this, categories such as Prepacked Continental Sausages, including Chorizo, have entered the fray for the first time, while Meal Kits (up 2), Prepared Savoury Dips (up 2), Herbs (up

4) and Cooking Foil (up 2) are all enjoying higher rankings.

Fearful of job security, more consumers are working longer hours, hence the stability of convenience categories, including Prepacked Meats, Sauces and Frozen Veg / Fish / Meat.

In terms of household and personal care products, it is clear that consumers are increasingly reverting to PL lines or choosing to shop for such items in alternative outlets, including Euro shops. Some of the most downwardly-mobile categories were Hair Styling Aids (down 3), Toothpaste (down 3), Razors (down 7) and Hair Conditioners (down 3).

Milk is another area in which PL penetration is having a major impact. Back in 2009, the top 5 milk varieties accounted for 52% of market share. Last year, it was 44%. Now, despite milk still being the second most important category, Top 5 brand market share has slipped to 37.5%.

As evidenced by its jump of four places, Irish consumers refuse to trade down when it comes to Pet Food. However, that being said, it is interesting to note that Pet Impulse Snacks & Treats, completely dropped out of the Top 100, having placed at No.68 last year. This was the biggest negative mover seen for some time, and surely reflects the real manner in which consumers are choosing to spend their discretionary cash.

Overall, however, it's worth noting that few categories have remained static this year, mirroring the turbulent year it has been for the grocery category as a whole. This is, above all, one definite trend that will continue next year. ■

As with the Top 100 Brands, please note that while the overall method of compiling the Top 100 Category data has not changed, some category classifications have changed year-on-year as the market evolves. For example, some broader categories have produced 'offshoot' sub-categories, which are now treated as categories in their own right. In this context, the comparative data from previous years refers to the information as it was printed at the time, and does not reference any category revisions which may have occurred in subsequent years.

2011 Ranking	2010	2009
1 Confectionery	1	1
2 Milk	2	2
3 Bakery	3	4
4 Carbonated Soft Drinks	4	3
5 Biscuits	5	8
6 Crisps/Snacks/Tubes	6	5
7 Yoghurt & Fromage Frais	7	7
8 Prepacked Sliced Meat	8	10
9 Cheese	10	12
10 Fruit Juice	9	6
11 Breakfast Cereals	12	14
12 Pet Food	16	16
13 Sport/Energy	11	9
14 Mineral Waters	14	11
15 Ice Cream	13	13
16 Cakes	15	15
17 Toilet Tissues	17	17
18 Butter/Spreadable Butter	19	18
19 Prepacked Bacon	18	19
20 Sauces	20	20
21 Detergents	21	21
22 Frz. Prep. Fish Products	24	27
23 Prepacked Sausages	22	22
24 Frozen Pizzas	25	26
25 Packaged Tea/Tea Bags	23	23
26 Canned/Packet/Fresh Soup	27	24
27 Babymilks/Meals/Rusks	28	25
28 Instant/Ground Coffee	29	31
29 Disposable Nappies	30	28
30 Packed Salads	31	67
31 Chilled Prepared Poultry	26	29
32 Frz. Prep. Poultry Products	34	37
33 Dried/Fresh Pasta Noodles	35	34
34 Ignition Products	33	33
35 Nuts	37	35
36 Chewing Gum	32	30
37 Creams/Lotions/Oils	36	32
38 Kitchen Towels	40	47
39 Canned Fish	43	48
40 Cream	39	43
41 Frozen Chips	38	40
42 Canned Vegetables	42	45
43 Squashes & Cordials	45	46
44 Granola Bars	41	36
45 Deodorants	44	39
46 Rice	46	52

CHECKOUT TOP100 CATEGORIES 2011

in association with



47 Frozen Vegetables	48	49	74 Facial Tissues	74	74
48 Canned Baked Beans	54	55	75 Fresh Pre-Packed Veg	75	-
49 Margarine	49	42	76 Jam	79	80
50 Toothpaste	47	41	77 Frz. Prep Meat Products	71	77
51 Chilled Desserts	52	51	78 Honey	85	89
52 Hard Surface Cleaners	57	57	79 Washing Up Liquids	77	78
53 Dishwasher Products	51	56	80 Cooking Foil	82	87
54 Condiments	58	53	81 Pickles	83	94
55 Shampoo	53	44	82 Toothbrushes	81	75
56 Ambient Desserts	56	58	83 Hair Conditioners	80	73
57 Razors	50	38	84 Vitamins & Minerals	84	83
58 Air Fresheners	55	54	85 Canned Fruit	86	95
59 Refuse Sacks	60	69	86 Herbs	90	82
60 Sanitary Protection	59	50	87 Mouthwashes	89	84
61 Fabric Softeners	61	60	88 Liquid Soap	87	93
62 Cooking Oils - Non olive	69	70	89 Marmalade	91	86
63 Popcorn	66	65	90 Cough & Cold Remedies	88	90
64 Frozen Potato Products	64	64	91 Bleach & Laundry Adds	94	92
65 Batteries	62	59	92 Total Lav Care	93	91
66 Black/White Pudding	63	71	93 Hair Colourants	92	88
67 Shower Gels	65	62	94 Liq. Household Bleaches	98	-
68 Baby Wipes	67	63	95 Prepared/Savoury Dips	97	99
69 Bouillon Cubes/Gravy Mixes	70	68	96 Frz. Prep Veg Products	-	-
70 Olive Oil	72	76	97 Meal Kits	99	-
71 Oral Analgesics	73	66	98 Hair Styling Aids	95	85
72 Frozen Ready Meat Meals	76	79	99 Instant Snacks	100	96
73 Tomato Ketchup	78	81	100 Prepacked Cont.Sausages	-	-

01 Confectionery

Top 5 brands share of the total category: **21%**

Top 5 Brands in Category:

- Cadbury Dairy Milk
- Mf Galaxy
- Nestle Kit Kat
- Cadbury Roses
- Kinder

Confectionery remains the leading category, with Cadbury's Dairy Milk remaining in pole position. MF Galaxy, which stormed into second place last year, retains that position. In fact, four of the top five brands are the same as last year, with Kinder returning after tipping Cadbury Snack for fifth place. Given the level of complexity and range in this category, it's no surprise that the top five players account for just 21% of the total market, a share that continues to dwindle year on year.



02 Milk

Top 5 brands share of the total category: **37.5%**

- Avonmore
- Premier
- Connacht Gold
- Golden Vale
- GMP

After knocking carbonated drinks off its No.2 spot in 2009, Milk has since maintained its high-ranking position, with the value of the category heavily affected by fluctuating dairy prices. Avonmore is the top brand, with Golden Vale moving up the ranks from last year. The main issue in milk is the strong growth of PL – in the last three years the top five branded share has gone from 54% to 37.5%.



03 Packaged Bakery

Top 5 brands share of the total category: **49.9%**

- Brennans
- Irish Pride
- Pat The Baker
- J M O'Brien
- Mc Cambridges

Holding on to its No.3 position from last year, Packaged Bakery's top five brands have also maintained the same ranking since 2008. However, with PL also claiming an increasing chunk of this market share, the category dynamics follow the same trends as across the grocery sector.



04 Carbonated Soft Drinks

Top 5 brands share of the total category: **85.6%**

- Coca Cola
- 7 Up
- Club
- Pepsi
- Fanta



Having slipped from third to fourth place in 2010, Carbonated Soft Drinks remains in the same position this year. This category was once the second largest by value, however price promotions have knocked it down the rankings. The top five is the same year-on-year, and continues to be spearheaded by leading brand Coke.

05 Biscuits

Top 5 brands share of the total category: **37.2%**

- Jacob's
- Mc Vitie's
- Nestlé Kit Kat
- Cadbury Snack
- Tuc



Biscuits are a good low-cost treat, and this, along with commodity price increases – pushes the value of the category back up. Last year, it was the eighth biggest category, whereas this year, it's fifth. Jacob's is a strong leader, while Tuc displaces Ryvita in this year's rankings.

06 Crisps/Snacks/Tubes

Top 5 brands share of the total category: **79.9%**

Tayto
Walkers
Kp
Hunky Dorys
Pringles

Like biscuits, crisps is a category that does well in a recession, and it remains the sixth largest by value. There's a clear top two here, in Largo's Tayto and PepsiCo's Walkers. Indeed, this is quite a PL-resistant category, with the main branded players holding a share of almost 80%.



07 Yoghurt/Fromage Frais/Yoghurt Drinks

Top 5 brands share of the total category: **71.8%**

Danone
Yoplait
Müller
Glenisk
Benecol

Danone tops the yoghurt category again this year, with the top five brands holding the bulk of market share. There's been a lot of promotional activity in yoghurts, with this resulting in a 5% value decline in the 2010 calendar year, however PL is not particularly influential. As with milk, cheese and the other dairy categories, fluctuations in milk pricing is a significant factor in overall category performance.



08 Prepacked Sliced Meat

Top 5 brands share of the total category: **38.9%**

Denny
Shaws
Carroll Meats
Galtee
Green Farm

Led by the powerhouse Denny brand, the sliced meats category is mainly the Kerry Foods show, with three of the top five coming from the Kerry stable. Carroll's, however, is the third biggest brand, with a significant investment in leveraging strong brand equity in deli into the pre-pack sector. In 2008, the top five brands had 80% of the market – now it's just 38.9%



09 Cheese

Top 5 brands share of the total category: **28.8%**

Charleville
Kilmeaden
Kerry LowLow
Dubliner
Cheesestrings

The value of the cheese category (relative to other super categories) increases year-on-year; moving up one position in 2011. Increased volumes are helping here, with grated cheese having a good year. Charleville has seen some pretty heavy investment by Kerry in the last 12 months, and this has paid off, keeping it on top of the category rankings.



10 Fruit Juice

Top 5 brands share of the total category: **32.3%**

Tropicana
Innocent
Squeez
Capri Sun
Ribena



The value of the fruit juice category is dropping, with the category having been as high as No. 6 in our rankings as recently as 2008. Why is this? Price promotions and price cuts are a major contributor – mega brands like Tropicana and Squeez are both significantly cheaper now than they were a few years back. Pepsi's Tropicana holds the top spot again, with Innocent in No 2 position.

11 Breakfast Cereals

Top 5 brands share of the total category: **41%**

Weetabix
Kellogg's Special K
Flahavan's
Kellogg's Cornflakes
Kellogg's Rice Krispies



Breakfast cereals climbs one place up the rankings this year, due to high consumption rates amongst Irish consumers. While Weetabix is in pole position, Kellogg's is the biggest combined manufacturer, as the Weetabix listing includes its many sub-brands, while Kellogg's is ranked by brands like Special K or Cornflakes. One new entry this year – Rice Krispies overtakes Coco Pops to enter the top 5.



12 Pet Food

Top 5 brands share of the total category: **41.9%**

Pedigree
Whiskas
Bakers
Felix
Go Cat

Powered forward by Pedigree and Whiskas, the pet food sector jumps four places this year. This shows that the Irish consumer is less likely to cut back on spending on their pet, even if they are happy to trade down on groceries for themselves. One change within the category rankings – the Felix cat food brand moves in, and Brandy drops out.



13 Sports/Energy

Top 5 brands share of the total category: **83.9%**

Lucozade
Red Bull
Powerade
Energise Sport
Boost

This is not a category short of investment, but like carbonated soft drinks or indeed mineral water, it suffers from the value decline that has hit the entire beverages sector. It's still the big brand show, with Lucozade and Red Bull dominating, with Boost (Gleeson's) the only brand in the Top 5 which doesn't hail from one of the massive international players (GSK, CCHBC, Britvic and Red Bull). Overall, the category drops two places on last year's position.



14 Mineral Waters

Top 5 brands share of the total category: **50.5%**

Ballygowan
Volvic
Deep River Rock
Tipperary
Evian

Water has been hit by significant promotional pressure, with PL impacting on brands both in a take-home and impulse setting. This category was as high as No. 11 in the rankings in 2009. That being said, there's not a lot of change within the top brands – indeed four of the top five have remained unchanged for many years. There is one newcomer though – Kerry Spring (sold by Kerry Group last year) drops out and Tipperary joins the top five.

15 Ice Cream

Top 5 brands share of the total category: **33.6%**

HB Cornetto
HB Magnum
Ben & Jerry
HB Vanilla
HB Iceberger



Ireland's ice cream consumption is huge by global standards but a bad summer is a bad summer, and the category falls two places year-on-year. The share of the market held by the top five is also down. That being said, it's still the Unilever show, albeit with some significant changes. Cornetto soars into top spot, knocking Magnum down a place. Cornetto, in fact, is one of the biggest movers in the overall Top 100 – a significant achievement for the brand.



16 Cakes

Top 5 brands share of the total category: **24.2%**

Reilly's
Cadbury
Gateaux
O'Haras
Mr Kipling

Cakes remains in the same position as last year – a good stable performance. That said, there's not a lot of stability at the top, where Premier Foods' Gateaux brand drops back to third, and Reilly's takes the top spot. From an overall perspective, having dropped as low as No. 23 in 2008, the cakes category is a good example of the success of low-cost treats in a recessionary climate.



17 Toilet Tissue

Top 5 brands share of the total category: **37.3%**

Andrex
Kittensoft
Cushelle
Nicky
Velvet

Since 2010, this household essential has remained in 17th place, albeit with the top five brands' share dropping from 44% in 2010 to 37.3%. And while Andrex and Kittensoft maintain their respective No.1 and No.2 positions, there's been something of a reshuffle in the remaining three places, with Cushelle rising to third place and Velvet falling to fifth.



18 Spreadable Butter

Top 5 brands share of the total category: **66%**

Dairygold
Kerrygold
Kerry LowLow
Champion
Connacht Gold



Inevitably affected by fluctuating dairy prices, this category rose one place to a No.18 spot over the past year, albeit with the share of the top five brands dropping by four points. Firm favourite Dairygold holds onto its established No.1 spot for another year, while only fifth place has witnessed a switchover, where Connacht Gold moves into the top five.

19 Prepacked Bacon

Top 5 brands share of the total category: **38.4%**

Denny
Galtee
Roscrea
Clonakilty
Cookstown

Rising one place on 2010's chart position of 18, the value of the Prepacked Bacon category has increased slightly, with many consumers still favouring trusted, big-name brands. Denny is once again top of the pile, with the only rank change involved being a simple switch in places, with Clonakilty claiming the No. 4 slot over Cookstown.



20 Sauces

Top 5 brands share of the total category: **54.9%**

Dolmio
Knorr
Uncle Ben's
Lloyd Grossman
McDonnells



A consistent chart position of 20th for the past three years proves there is still ample demand for these convenient meal solutions. Since 2010, there's been a minor drop in the top five market share from 57% to a 54.9%. The ranking of the top five within this category has also remained largely unaltered since 2008, with Dolmio, Knorr, Uncle Ben's and Lloyd Grossman all staples of the category. However, curry sauce kings McDonnells make their debut this year, knocking Erin out of the picture.

21 Detergents

Top 5 brands share of the total category: **70%**

Persil
Ariel
Bold
Daz
Fairy

Having long been led by big-name brands, this category's 70% market share (for the top five brands) is testament to the simple fact that tried and trusted products remain hugely important for most Irish consumers. Persil retains top spot, with Bold leapfrogging Ariel, and Fairy dropping back at the expense of Daz.

22 Frozen prepared fish products

Top 5 brands share of the total category: **51.4%**

Donegal Catch
Birds Eye
Young's
Ocean Harvest
Ross

Cheap? Check. Nutritious? Check. Popular with kids? Check. With all these factors, why wouldn't frozen fish be popular? Indeed, the category has risen seven places since 2008. Donegal Catch is a strong top dog, with Birds Eye in No 2. It's interesting to observe the shift in market share held by the top five, which is now just over 51%. In 2009, this figure was 88%.q

23 Prepacked sausages

Top 5 brands share of the total category: **46.6%**

Denny
Clonakilty
Mallons
Olhausen
Kearns

The value of the prepacked sausages category falls back a bit, albeit with the same top five brands from last year (and in the same order too). The market share of the top five also drops back slightly – from 49% to 47%. All in all, it's a pretty stable category.

24 Frozen Pizzas

Top 5 brands share of the total category: **71.1%**

Frozen pizza is up year-on-year, with Goodfella's leading the way and (relatively) new challenger Chicago Town storming up the charts. Indeed, Chicago Town is a new entrant to the overall Top 100 brands, which is a huge achievement for parent company Dr. Oetker. Dr. Oetker's eponymous Ristorante brand is the third biggest frozen pizza brand in the market.



Goodfella's
Chicago Town
Dr. Oetker
Green Isle
McCain

25 Packaged Tea/Tea Bags

Top 5 brands share of the total category: **82.5%**

Lyons
Barry's
Twinings
Bewley's
Robert Roberts



Can Irish people drink any more (or any less) tea? It's a moot point – particularly when you consider the slight value decline of the category – which is much more due to a slightly higher promotional uptake than any fall-off in tea consumption. Lyons has had an excellent year, and along with Barry's is an exceptionally strong brand. One new entrant this year – Robert Roberts trumps Tetleys to take fifth spot.

26 Canned/Packet/Fresh Soup

Top 5 brands share of the total category: **80.6%**

Knorr
Erin
Avonmore
Cully & Sully
Heinz

Soup is the anti ice-cream – so when Unilever's brand managers are railing against the gods for the rain and snow, on the other side of the building, another group is jumping up and down with joy. We had more bad weather than good over the last 12 months, resulting in a value hike for the category, with Knorr remaining in pole position. Erin, however, is a strong mover, overtaking Avonmore.



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27

Babymilks/Meals and Rusks

Top 5 brands share of the total category: **86.9%**

Milupa (Aptimel)
Cow & Gate
SMA
Heinz
Hipp

A decline in cross-border shopping has helped this category, and it moves up one place on last year. That being said, it has been higher in the past. The share of the Top 5 brands drops back eight percentage points, although this is a still a category where brand equity and the trust of parents is hugely important. Aside from Hipp overtaking Liga into fifth place, the top five show signs of strong stability. Milupa (Aptimel) remains the No.1 choice.

28

Instant/Ground Coffee

Top 5 brands share of the total category: **67.9%**

Nescafé
Maxwell House
Kenco
Lavazza
Bewley's



2011 marks the recovery of this category to the rank it held back in 2008. How much of this is due to price increases or are we now drinking more coffee? In truth, it's probably a factor both of the commodity price hike, and a shift away from out-of-home coffee consumption. With a significant marketing budget and some clever advertising, Nescafé holds the top spot, while Kenco and Maxwell House are also trusted brands here. Carte Noire, however, disappears from the Top 5, with Bewley's joining the ranks.

29

Disposable Nappies

Top 5 brands share of the total category: **82.1%**

Pampers
Huggies
Moltex
Comfies
Honeybee



Rising one place to 29th, the nappies category looks to be recovering slightly from the heavy price cuts and cross-border shopping that hit the sector hard between 2009 and 2010, resulting in a value decline of two points. The top five brands' market share of 82.1% continues to fall steadily, albeit this is still very much the Pampers show.

30

Packed Salads

Top 5 brands share of the total category: **26.3%**

Florette
Willowbrook
Country Kitchen
Inishowen
Delphi

After leaping a tremendous 36 places to 31st in 2010, salad's surge of popularity appears to have slowed, with the category moving up just one place in 2011. Still, this upward trend is very significant. Florette is the top dog again, but this is a category where PL is hugely influential, with the top five brands only holding about a quarter of the total value share of the category.

31

Chilled Prepared Poultry

Top 5 brands share of the total category: **16.6%**

Moy Park
O'Kanes
Shannonvale
Hogan's
Silver Hill

As with packed salads, chilled poultry is far more PL-focused than most of the other mega-categories in the Top 40 or 50 categories, and indeed, the top five brands total share is lower than last year. The main brands here are more or less unchanged year on year, where Moy Park and O'Kanes remain the biggest players.

32

Frozen Prepared Poultry Products

Top 5 brands share of the total category: **55.1%**

Birds Eye
Big Al's
Glenhaven
1st Choice
Innisfree

While chilled poultry drops back, frozen poultry moves up. Frozen food is clearly back in vogue. That being said, the value share of the top five is down 30 percentage points in the last two years. Birds Eye is the top brand in this category, with Big Al's second.



33

Dried Pasta and Noodles

Top 5 brands share of the total category: **38.2%**

Roma
Koka Multipack
Knorr Pasteria
McDonnells
Koka

Pasta and noodles are cheap and easy to prepare, and these two factors are certainly helping the category, however price increases are probably the most likely driver of total value growth. Irish megabrand Roma is the top player, with Boyne Valley having done good work with the Koka brand. The big trend, as with many other categories, is the increasing presence of PL – the top five brands here had 58% of the market in 2008, compared to 20 points lower now.



34 Ignition Products

Top 5 brands share of the total category: **34.9%**



Zip
Bord Na Mona
Drummer
Staffords
Crackerjack

Cold winters help the ignition category, and there weren't many colder than last year. Hence, this category jumps up one place. Zip and Bord na Mona are a strong one and two, with both investing heavily in NPD and advertising too. Certainly, retailer own-brands are more prevalent here than before, particularly in firelighters, but these two brands are not short of experience on how to stay ahead of the market.

35 Nuts

Top 5 brands share of the total category: **26.7%**

Kp
Manhattan
Shamrock
Natural Food
Forest Feast

From recessionista shoppers sitting at home chomping on peanuts instead of heading for the pub, to health-conscious consumers grazing at their desks, nuts tick a lot of boxes for today's society. The category soared in value between 2009 and 2010, and the two-place increase this year is less dramatic, but it's still on a steady upward curve. KP, the 19th largest overall brand in the Top 100, is a strong category leader here.

36 Chewing Gum

Top 5 brands share of the total category: **85.7%**

Extra
Airwaves
Orbit
Five
Juicy Fruit



Shoppers are spending less time in c-stores, and that's a big problem for what is probably the most impulse-driven category in the entire Top 100. Of course, it's still a mega-category, but it's down six places in the last two years. Chewing gum is very much the Wrigley show, where Extra is the top brand and other Wrigley megabrands like Airwaves and Orbit continue to hold the main spots.

37 Creams/Lotions/Oils

Top 5 brands share of the total category: **45.6%**

Nivea
Olay
Simple
Johnson's
Sudocreme

As with all health and beauty brands, this category is promotion crazy – both for new product launches (to encourage trial) and simple money-off deals. It's not quite shampoo or conditioner on that front, but it's still quite deal-centric. Brands are king here – Nivea in particular – while Olay moves into second place. Simple moves up a spot, which knocks Johnson's back to fourth.



38 Kitchen Towels

Top 5 brands share of the total category: **48.4%**

Plenty
Cien
Thirstpockets
Regina
Nicky



Kitchen towels rise two positions year-on-year, having jumped seven places between 2009 and 2010. What's this about then? Price increases for paper products or sloppy shoppers spilling food all over their kitchens? A bit of both is probably the real truth, but this category, in fairness to the big manufacturers, is quite focused on NPD and brand investment. On this front, the migration from Bounty to Plenty hasn't hurt the brand at all.

39 Canned Fish

Top 5 brands share of the total category: **60.5%**

John West
Picnic
Prince's
Sunny South
Epicure



A definite box-ticker for a number of consumer demands that include healthy eating, low-cost and convenience qualities, it's unsurprising that Canned Fish continues to skyrocket up Checkout's Top 100 categories, having only entered in 2008. The top four is unchanged year-on-year, with John West accounting for the bulk of canned fish sales.

40 Cream

Top 5 brands share of the total category: **53.3%**

Avonmore
Strathroy
Elmlea
Dawn
Yoplait

The Irish consumer is now far more focused on cooking than in the past, and cream is a beneficiary of this trend. That said, the category does drop back one place on last year, however it's still experienced a huge value growth (relative to other categories) in the last few years. Avonmore is the biggest brand here by some distance, however the Strathroy brand storms into the top five, and knocks Elmlea back to No 3.



41 Frozen Chips

Top 5 brands share of the total category: **60.7%**

McCain
Green Isle
Mr Food
Aunt Bessies
1st Choice

Frozen chips follows the strong value growth trajectory set by other frozen categories, up three points year-on-year. In 2009, this category was No. 64 in the rankings. PL is pushing into the category that bit more, however, with the top five share having been as high as 90% in 2008. Now, its almost 30 points lower.



42 Canned Vegetables

Top 5 brands share of the total category: **50.6%**

Batchelors
Green Giant
Roma
Napolina
Sunny South



As with canned fish, canned vegetables are doing well. Of course, fluctuations in commodity prices impact here, but by and large, the overall trend towards cooking at home is helping sales of pulses, corn and tomatoes. Fuelled by a strong presence in Tesco, Napolina moves one place up the charts, but it's still the Batchelors show at the top.

43 Squashes and Cordials

Top 5 brands share of the total category: **65.3%**

Miwadi
Robinsons
Ribena
Heinz
Kia Ora

Considerably cheaper, a bit healthier and definitely longer-lasting than bottles of carbonated drinks, this category fulfils the consumer needs of children and adults alike. So in today's health and money-conscious times, it's unsurprising that the category has risen in value by a total of two places. However, this year also saw the top five brands lose almost ten percentage points, resulting in a considerably lower figure of 65.3%. Irish favourite Mi Wadi triumphs again this year, with Robinsons and Ribena following close behind. Heinz moves up one place on last year, thanks to its attention on baby-focused products.

44 Granola Bars

Top 5 brands share of the total category: **63%**

Kellogg's Nutri Grain
Kellogg's Rice Krispies
Nature Valley
Kellogg's Special K
Kellogg's Spl K M/Breaks



Granola and snack bars are important both in the take-home and convenience channels, with multi-pack sales to parents and impulse sales to hungry shoppers both contributing to the overall category performance. Nature Valley has been a strong market entrant, with the General Mills brand rolling out a number of new SKUs. However this is still a Kellogg's-dominated category.



45 Deodorants

Top 5 brands share of the total category: **73.1%**

Lynx
Sure
Dove
Nivea
Soft & Gentle

Due to heavy price promotions, this category witnessed a sharp decline in value, dropping five places between 2009 and 2010. Though still feeling the aftermath of this effect, Deodorants fell a comparatively minor one place this year. The top five's market share has remained relatively stable over the last few years, fluctuating from a 2008 value of 74% to 76% in 2009 and down again to 73%. There's also been a minor reshuffle within the top five brands which sees Dove, 4th in 2010, exchange positions with Nivea, which rises to third place. Top brand Lynx is once again followed closely by Sure, and in fifth place, Palmolive Soft & Gentle also stays put.

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46 Rice

Top 5 brands share of the total category: **57.3%**

Uncle Ben's
Roma
Erin
Tilda
Ainsley Harriot

It's been another successful year for the Rice sector, which, following exponential growth during the years 2008-10 has maintained 46th place in the value charts. Successful NPD, informed by health and convenience trends has played a major part in reviving the category which rose whopping nine places to No.52 in 2009. That being said, with pretty much all the big retailers pushing their own micro-rice PL ranges, Uncle Ben's has had to work hard on the innovation side of things.



48 Canned Baked Beans

Top 5 brands share of the total category: **87.6%**

Batchelors
Heinz
Heinz Weight Watchers
Crosse & Blackwell
Epicure

Baked beans are a genuine staple of the Irish grocery sector, and the category enjoys year-on-year value growth. Batchelors, now part of Valeo Foods, is the lead player, with Heinz a strong No. 2. This battle between the two top players is the key characteristic of the category, with this level of brand equity and loyalty only really seen in tea and tomato ketchup. Luckily for Heinz, they are in two of these categories, and now that Valeo has bought Jacob Fruitfield, they'll be locking horns in ketchup too.



47 Frozen Vegetables

Top 5 brands share of the total category: **51.9%**

Green Isle
Birds Eye
Green Giant
1st Choice
Blue Plate Supersaver

After a decline in 2009, this category is enjoying steady growth, moving up another position this year in the value stakes to No. 47. This is due to a number of factors, ranging from health trends to more home cooking, with pretty much all the frozen categories doing well. Green Isle is the market leader here again, with the only changes in ranks seeing Green Giant move up into third.

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Refresh your soles

49 Margarine

Top 5 brands share of the total category: **88%**

Flora
Benecol
Stork
Mathews
Kerry LowLow

After plummeting seven places to 49th in 2010, Margarine maintains its position this year. Back in 2009, the top five weighed in at a mighty market share of 98%, and while that's since dwindled to 88%, this still-high percentage is testament to the enduring strength of these brands. As witnessed in 2010, Flora is once again top of the pile, with Benecol and Stork in second and third place respectively.



50 Toothpaste

Top 5 brands share of the total category: **91.2%**

Colgate
Sensodyne
Aquafresh
Euthymol
Arm & Hammer

Devalued by heavy price promotions, this category saw a decline in 2010, falling six places in value to 47th. 2011, however, heralds signs of recovery as the Toothpaste category climbs three places alongside an additional, albeit minor, rise in top five market share from 90% to 91.2%. Showing tremendous brand strength, the top five show little signs of change in rank, with Colgate in at No.1 and only Pearl Drops losing its former fifth place to chart newcomer Arm & Hammer.

51 Chilled Desserts

Top 5 brands share of the total category: **26.6%**

Kinder
Cadbury
Galberts
Glenilen
Nestlé Rolo

Chilled desserts saw an improvement of one place from last year, equalling their 2009 showing, although still somewhat shy of the 44th position they occupied in 2008. The top 5 hold 26.6% of the total market share for the category, a decline from last year's 28% (itself a fall from 2009's 30%), and also features two substitutions with Yoplait and Butlers replacing Galberts and Nestlé Rolo. Most significantly, Kinder has leapfrogged Cadbury at the top, with brands like Pingui proving popular with children.

52 Hard Surface Cleaners

Top 5 brands share of the total category: **65.8%**

Cif
Dettol
Flash
Mr Muscle
Cillit Bang

A five-place rise sees hard surface cleaners peak at No. 52 in 2011. The top five brands within the category remain the same however, although their value share has dropped to 65.8% (from 71% in 2010). Cif and Dettol swapped places at the top of the brands list, with Cif emerging as top dog in the category for the first time since 2008. With PL carving a greater share of the market, it will be interesting to see what lies ahead for this category.



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53 Dishwasher Products

Top 5 brands share of the total category: **75.1%**

Finish
Fairy
Sun
Finish Phall Quantumatic
Ecover

A two-spot fall for Dishwasher products sees them drop back at the same point the category occupied in 2008. The top five brands in the category remain identical (with Finish still ruling the roost) although, once again, value share drops significantly due to price promotions and PL growth. The only main mover in this category is Finish PowerBall overtaking Ecover at the foot of the table.

54 Condiments

Top 5 brands share of the total category: **75%**

Hellmanns
Heinz
Lakeshore
Chef
Fiorette



Condiments improved four places on last year's positioning of 58th, while also regaining marginal value share. Why is this? Simply put, Irish consumers love their sauces, and especially brands such as Hellmann's and Heinz. While Lakeshore overtakes Chef for the third spot, it is clear that NPD, and predominately innovative family pack sizes, continue to attract consumers to the category.

55 Shampoo

Top 5 brands share of the total category: **64.5%**

Head & Shoulders
Pantene
L'Oreal Elvive
Tresemme
Timotei

It's not that people are washing their hair any less frequently, but promotions and volumes sold on special offer means that the average price paid for a bottle of shampoo is lower year-on-year. Hence, the overall category drops in value, having been as high as 41st in 2008. Head & Shoulders is the top brand here, with the only change in the rankings seeing Herbal Essences fall out to be replaced by Timotei.

56 Ambient Desserts

Top 5 brands share of the total category: **63.8%**

Ambrosia
Birds
Chivers
Hartleys
Tate & Lyle

Ireland is a nation of sweet lovers and hence the stagnation of the Ambient Dessert category in 56th. Price promotions have had a knock on effect on value, but traditional favourites, such as the leading Ambrosia and Birds, continue to appeal to both old and new customers. Indeed, the top five players remain unchanged, indicating that consumers are relatively loyal for this evidential recession proof category.



57 Razors

Top 5 brands share of the total category: **67.1%**

Gillette Mach 3
Gillette Fusion
Gillette Venus
Gillette Blue 11 Fixed
Wilkinson Quattro

With probably the highest per-SKU value in the Top 100, razors still fall back a bit this year, with promotions taking their toll. Also, are consumers trying to make their blades last that little bit longer in a bid to save money? Gillette is the category king, holding four of the top five places, with only Wilkinson Sword preventing this from being a total clean sweep.

58 Air Fresheners

Top 5 brands share of the total category: **71.8%**

Airwick
Glade
Febreze
Magic Tree
Ambi Pur

While not as severe as some other categories, the decline of air fresheners will still create some concern. As far as brands go, the make up of the top five remains constant, with Febreze's move above Magic Tree into third place providing the sole change on last year's listings.



59 Refuse Sacks

Top 5 brands share of the total category: **31.3%**

Killeen
Greensax
Red Cross
Shamrock
Amigo

A rise of a single place saw refuse sacks build (albeit slightly) on the nine place jump experienced between 2009 and 10. This category is quite PL heavy in some retail channels, however from a branded perspective, it's all about Killeen, which has put a lot of money into NPD (including the new potato-based bag).



64 Frozen Potato Products

Top 5 brands share of the total category: **68.7%**

Birds Eye
McCain
Green Isle
Aunt Bessies
Lamb Weston

Remarkably consistent, frozen potato products have managed to maintain its 64th position now for the fourth year in a row. This must be the most stable performance in any FMCG sector. Indeed, it's also stable when it comes to the big brands. Birds Eye is top dog.



65 Batteries

Top 5 brands share of the total category: **80.6%**

Duracell
Energizer
Panasonic
Philips
Eveready

Batteries experienced a drop of three places for the last three years, and underwent a similar slide this year, perhaps indicating a shift towards alternative sources of portable power. For example, most portable music players (like the iPod) are now fuelled by plug-in power sources, whereas in the past the humble walkman or discman would eat up a few packs of Duracell every week. That said, it's still all about the big brands here.

66 Black/White Pudding

Top 5 brands share of the total category: **59.9%**

Clonakilty
Denny
Shaws
Galtee
Rudds

Pudding had a storming year between 2009 and 2010, but it drops back a bit in 2011. Are shoppers turning away from the full Irish? We doubt it. Anyway, we've seen some more PL coming into this category – particularly at a high-end level – which is taking away some share from the big branded players. For the brands, however, there's no change in the rankings.

67 Shower Gels

Top 5 brands share of the total category: **56.3%**

Radox
Lynx
Dove
Imperial Leather
Palmolive

Increased price promotions (rather than a decline in personal hygiene) result in this category dropping back year-on-year. Radox and Lynx are the big two here, and both are significant advertisers. Lynx, in particular, is very active from a marketing perspective at the moment. The only change in the listings sees Nivea pushed out by Imperial Leather.

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60 Sanitary Protection

Top 5 brands share of the total category: **80.7%**

Always
Tampax
Carefree
Lil-Lets
Kotex



This category drops back one place year-on-year, however this decline is slowing compared to a nine point slide last year. Always remains the top brand, with the top five accounting for almost 81% of the market.

61 Fabric Softeners

Top 5 brands share of the total category: **78.5%**

Comfort
Lenor
Fairy
Punch
Clean&Fresh

Fabric Softeners has managed to maintain 61st place in the rankings, it's position last year. The top three brands remain Comfort, Lenor and Fairy respectively, although newcomers Punch and Clean & Fresh advanced into the final two positions, usurping Bounce and Ecover in the process. The top 5's share of their market fell by one and a half points from 2010, itself a nine point dip from the year before.

62 Cooking Oils (Non-olive)

Top 5 brands share of the total category: **30.5%**

Crisp 'n Dry
Flora
Lakeshore
Fry Light
Chalice

Non-olive cooking oils have continued to grow from strength to strength over the last four years, evidenced in 2011 by a jump of seven places in this year's ranking. Are cost-focused shoppers trading down from more expensive olive oils or is this a reflection of the at-home cooking phenomenon?

63 Popcorn

Top 5 brands share of the total category: **70%**

Manhattan
Kelkin
Tayto
Popz
Perri

2011 sees Popcorn ascend three places in the category rankings, with the top five brands remaining identical to those last year. Tayto improved on 2010's listings, replacing Popz in third place in the only ranking change, while Manhattan is still the most popular popcorn option among Irish consumers. It may be a tired cliché by now, but popcorn manufacturers will certainly hope that staying in remains the new going out.

68 Baby Wipes

Top 5 brands share of the total category: **79.8%**

Johnsons
Pampers
Cien
Huggies
Simple

The cross-border shopping spree that ate into this category from 2009-10 seems to have eased off slightly, as the value of the category stabilises. From a brand perspective, Johnson's have overtaken Pampers at the pinnacle of the pecking order, however the overall composition remains unchanged on last year.



69 Bouillon Cubes/Gravy Mixes

Top 5 brands share of the total category: **89.2%**

Bisto
Knorr
Oxo
Erin
Schwartz

People may be cooking at home far more than before, but the value of the stock cube and gravy category drops back slightly. That said, it's still all about the big name brands like Bisto and Knorr. The only change in the top five sees Schwartz enter at the expense of Kallo.



70 Olive Oil

Top 5 brands share of the total category: **34.7%**

Don Carlos
Roma
Berio
Monini
Napolina

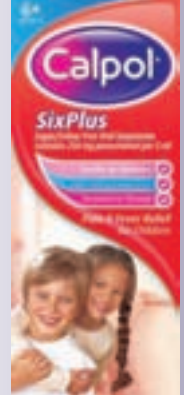
Olive oil is in growth, and has transformed itself from niche to mainstream in the eyes of even the most conservative or traditional Irish shopper. Ireland's favourite branded olive oils all retained their ranking, but found their market share reduced by eight points from 2010, following a colossal dip of 26 points the year before. Perhaps some more brand investment is required to show Irish consumers that PL is a less desirable option.

71 Oral Analgesics

Top 5 brands share of the total category: **97.6%**

Panadol
Anadin
Disprin
Calpol
Tramil

More money problems mean more headaches for Irish consumers, which should be a good thing for this category. However, restrictions on sale can't be helping. The category rises two places on last year, and the share accounted for by the top five brands is an enormous 98%.



72 Frozen Ready Meat Meals

Top 5 brands share of the total category: **38.9%**

Heinz Weight Watchers
Birds Eye
Findus
Country Cooking
Sharwood's



The increasing success of this category (vouched for by its rise in rank year-on-year) has coincided with a proliferation of brands on the market. While this may offer variety and choice to consumers, it is bad news for some senior brands within the sector, with the overall top five market share dropping 10 points on last year. Heinz Weight Watchers is the biggest brand here, with the only change in the listings seeing Sharwood's join the top five.

73 Tomato Ketchup

Top 5 brands share of the total category: **82%**

Heinz
Chef
Kandee
Hellmann's
Levi Roots

Dragon's Den success story Levi Roots' Reggae Reggae Sauce took some time to establish itself among the heavyweights of the Irish market, but 2011 was the year when it finally solidified itself in a category still dominated by Heinz, Chef, Kandee and Hellmann's. Lakeshore suffered as a consequence of this sole change, dropping out of the top five to make way.



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74 Facial Tissues

Top 5 brands share of the total category: **54.4%**

- Kleenex
- Cien
- Tempo
- Posies
- Lotus

In the same position for the last three years, the facial tissues category is Mr (or Mrs) Consistent. Kleenex cleans up here, with Cien holding the second place it grabbed last year.



75 Fresh Pre – Packed Vegetables

Top 5 brands share of the total category: **1.9%**

- Willowbrook
- Inishowen
- Lundy's
- Stafford's
- Oasis

This newcomer to the list last year managed to hold its position in 2011, which is good news. When it comes to brands, however, this is the opposite of oral analgesics for example – because the top five only hold 1.2% of the total market share. It's all about the own-brand here.

76 Jam

Top 5 brands share of the total category: **43.2%**

- Bonne Maman
- Chivers
- St Dalfour
- Follain
- Hartley's

Jam continues to leapfrog its way up the *Checkout* chart, finishing three places clear of its 2010 position. Bonne Maman performed excellently in 2010 to overtake Chivers as top dog in the jam market, and continued to hold its own this year at the helm of a top five that went unaltered over the last 12 months.



77 Frozen Prepared Meat Products

Top 5 brands share of the total category: **43.8%**

- Big Al's
- Birds Eye
- Drover
- Doherty
- Honey Leaf

With category value down slightly year on year, Frozen Prepared Meat Products drops back six places in the rankings. The market share of the top five, however, actually increases year on year, which bucks the trend of the 2011 Top 100. Big Al's and Birds Eye are the biggest players here.

78 Honey

Top 5 brands share of the total category: **50.9%**

- Boyne Valley
- Manuka Choice
- Capilano
- Healy's
- Gales

The Honey revolution continued in 2011, completing a phenomenal 12-place rise over the last four years. Irish shoppers now see honey as an alternative to jam, a cooking ingredient and also a healthy option, which in turn continues to push the category value forward. Boyne Valley is the top player by a clear distance here.

79 Washing Up Liquids

Top 5 brands share of the total category: **66.6%**

- Fairy
- Morning Fresh
- Ecover
- Clean & Fresh
- Freud

Washing up liquids hit a four-year low in 2011, with promotions and price cuts pushing down the category value. And there was us thinking that the rise in home cooking would also result in increased washing up? Fairy is far and away the biggest brand here, but a new entrant comes in at No 2 – the Working Fresh brand.

80 Cooking Foil

Top 5 brands share of the total category: **20.4%**

- Raytex
- Glad
- Shannon
- Baco
- Shabra

Testament to the growing popularity of home cooking is the growing demand for cooking foil, accounting for its rise of 15 places since 2008. Over the course of that time, brands such as Raytex have continued to rule the roost, although, as with virtually every other category, the market share of the top five has dropped due to the prevalence of PL.



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81 Pickles

Top 5 brands share of the total category: **29.1%**

Chef
Don Carlos
Kuhne
Giovanni
Crosse & Blackwell

The growth of the pickles category may suggest that Irish consumers are returning to 1940s eating habits, but when this sector includes such a wide variety of products (including olives), this isn't just about the return of the humble pickled onion. Chef is the biggest brand here, with Don Carlos moving from fourth to second in the rankings.

82 Toothbrushes

Top 5 brands share of the total category: **81.1%**

Colgate
Oral B
Aquafresh
Reach
Sensodyne

Toothbrushes, like toothpaste, is a category which encourages shoppers to stock up when they see a good deal, and the proliferation of such good deals is hitting sales at the full RSP. Hence, category value drops again this year. Colgate trumps Oral B to top spot, with Aquafresh, Reach and Sensodyne filling up the remaining positions. These brands suffered a 2.9% drop-off in combined market share during the year.

83 Hair Conditioners

Top 5 brands share of the total category: **63.4%**

L'Oreal Elvive
Pantene
Aussie
Tresemme
John Frieda

As with shampoo, this category sees a continued value decline. Again, as with shampoo, this is not about poor personal hygiene, but promotions. This category is the true BOGOF king. The good news for its leading brands is that their market share (at 63.4%) has not fallen as steeply as those in other categories. Of these, Aussie had a good year, moving up to third, while John Frieda also managed to perform well, entering the quintet as its fifth member. L'Oreal Elvive remains the brand to beat, though.

84 Vitamins & Minerals

Top 5 brands share of the total category: **64.5%**

Seven Seas
Berocca
Beeline
Haliborange
Centrum

The vitamins and minerals market has stayed relatively stable in recent times, indicated by the category's identical placement last year. Haliborange exchanged places with Centrum in the only modification to the top 5 brands. We are seeing more PL here, particularly from the likes of Tesco, but it's still a sector where consumers trust the big-name brands.

85 Canned Fruit

Top 5 brands share of the total category: **44.3%**

Lustre
Sunny South
Del Monte
Chivers
John West

The canned fruit category attains a four-year high in 2011, evidenced by a strong 85th place finish. Do Irish shoppers now see this as a cheaper dessert alternative, or are they using canned fruit to make smoothies at home? Either way, the news is good for the category. The four top brands are the same as those in 2010.



86 Herbs

Top 5 brands share of the total category: **56.7%**

Schwartz
Goodalls
Knorr
Old El Paso
GDF

Herbs rose for the first time in three years, ascending from 90th to 86th. Schwartz, Goodalls and Knorr retained the trio of most prized spots, with Old El Paso (through its Mexican spice kits) squeezing in to replace Saxa.

87 Mouthwashes

Top 5 brands share of the total category: **86.4%**

Listerine
Plax
Corsodyl
Aquafresh
Sensodyne

While toothbrushes and toothpaste have dropped in value, mouthwashes buck the overall oral care trend, and move up the rankings. Listerine is the top branded player, with positions two and three also unchanged year on year, while Sensodyne is a new entrant.



88 Liquid Soap

Top 5 brands share of the total category: **63%**

Palmolive
Carex
Dettol
Radox
Dove

Liquid soap is a promo-heavy category, and encourages multi-buying when there are good deals on offer. The category is static year on year, but the top five brands actually increase their level of market share – albeit with a sharp decline occurring on this front between 2009 and 2010.

89 Marmalade

Top 5 brands share of the total category: **58.7%**

Little Chip
Old Time Irish
Follain
Fruitfield
Bonne Maman

Like jam, the marmalade sector moves up on last year's position. Of course, rising sugar prices have played their part here, but consumers may be eating breakfast at home now instead of picking up a scone or muffin on the go. The top five brands are the same, with Jacob Fruitfield, now Valeo Foods, far and away the most influential company in the overall category.



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90 Cough & Cold Remedies

Top 5 brands share of the total category: **97.3%**

Lemsip
Panadol
Benylin
Venus
Vicks

Winter 2010 was pretty awful, so why the decline in the cold and cough category? Are Irish consumers harder than before, or are they just grinning and bearing the pain instead of turning to the medicine cabinet? In fairness, it's only a fall of two positions, but it's still probably unexpected. Brand loyalty is king here – the top five brands control a huge bulk of the overall category value.

91 Bleach & Laundry Additives

Top 5 brands share of the total category: **91.7%**

Vanish
Punch
Ariel
Killeen
Ace

This category enjoyed a bumper year, registering its highest place on the list for five years. Ariel made the greatest gains of any brand, coming in third having failed to make the cut last year, ending Wizz's short stint in the top 5. The primacy of these brands, with nearly 92% of the market between them, remains strong, although it still represents a fall from last year's 96% stake. This shouldn't be of too much concern to Vanish or Punch in a market dominated by brand names, while Killeen's expansion into the colour-run segment is clearly paying off too.



92 Total Lavatory Care

Top 5 brands share of the total category: **66.1%**

Harpic
Toilet Duck
Jeyes Bloo
Parozone
Cillit Bang

This category improves in position by one point, with the top five brands holding the same positions. We've seen the total share of the top five brands decline by around seven points, however, which will be of concern for some of the branded players.

93 Hair Colourants

Top 5 brands share of the total category: **63.5%**

Nice N Easy
L'Oreal Excellence
Nutrisse
Casting Cr+Me Gloss
Preference

2011 proved a somewhat mixed bag for hair colourants, with the category dropping in value again. However, the top 5 brands within the category managed to grow their market share from 57% to 63.5%, a significant improvement on recent years, implying that the likes of Nice and Easy, L'Oreal and Nutrisse are moving closer and closer towards dominance. On an overall level, however, one would think that this category has more growth potential, with shoppers turning to DIY haircare in a bid to save cash.

94 Liquid Household Bleaches

Top 5 brands share of the total category: **49.4%**

Domestos
Parozone
Clean&Fresh
Dispel
Jeyes

Having debuted at 98th last year, this category improved on that showing by advancing four places in the space of a year. Domestos and Parozone retained the one and two slots respectively, with debutants Clean & Fresh and Dispel following closely and Jeyes rising from fifth to third. The market share for this rearranged top 5 fell by close to six points over the course of the year, and it is likely that plenty more change will be in store as the category continues to develop.

95 Prepared Savoury Dips

Top 5 brands share of the total category: **37.3%**

Walkers Doritos
Primula
Old MacDonnell
Old El Paso
Galberts

Another relative newcomer, prepared savoury dips continues to improve year in year out, rising two places per annum since debuting in 2009. Again, staying in being the new going out (groan) is clearly helping here. Phileas Fogg dropped out of the big 5 for the first time in 2011, allowing Galberts to debut in fifth place. Doritos remains the brand to beat in this category.

96 Frozen Prepared Vegetable Products

Top 5 brands share of the total category: **65.7%**

Quorn
Green Isle
Birds Eye
Linda McCartney
Aunt Bessie's

Recently sold off by Premier Foods, Quorn is the top brand in a category that should have lots of potential. Indeed, the vegetarian target market is one which no one brand has cracked completely, but we would expect to see more growth.

97 Meal Kits

Top 5 brands share of the total category: **81.7%**

Old El Paso
Dolmio
Roma
Knorr
Discovery

Meal Kits debuted in the Top 100 categories last year, and driven by the Mexican subcategory, it is a segment that continues to resonate well with families. It's all about ease of preparation here, particularly when the ingredients may seem a bit obscure if bought on their own. Aside from Mexican, Italian is the other key sub-category here.

98 Hair Styling Aids

Top 5 brands share of the total category: **72.2%**

Brylcreem
Wella Shock Waves
V05
Pantene
John Frieda

Like shampoos, conditioners and pretty much every other hair-related category, styling aids like gels, mousses and hairsprays have seen a decline in overall category value. Hence, this category drops three places year on year. Brylcreem is top of the pile, as per last year, but V05 jumps into third place.

99 Instant Snacks

Top 5 brands share of the total category: **89.5%**

Koka
Pot Noodle
Knorr Quick Lunch
King Pot Noodle
Golden Wonder

Up one place, the instant snack category is still brand-centric, with Koka retaining its top position for the second consecutive year at the cost of the traditionally strong Pot Noodle brand. With many shoppers trading down to cheaper lunchtime snacks, this category is ideally positioned for future growth.

100 Pre-packed Continental Sausages

Top 5 brands share of the total category: **30.2%**

Herta
Denny
Meisterhof
Bradley's
Epicure

The final place in the Top 100 is a new entrant, with hotdogs, frankfurters and salamis having a good year. Some of this may be due to the increased popularity of meats like chorizo, while it may also indicate an increased level of cooking with continental-style meats. Hot dog brand Herta is the biggest brand in the category.

**ITS EASY TO BE WISE
BEFORE THE EVENT.**



Celebrating 25 years of proverbial excellence.

TOP OF THE CHARTS

DESPITE THE THREAT FROM PRIVATE LABEL, AND CONSUMER DEMAND FOR BETTER VALUE OFFERINGS, SEVERAL BRANDS HAVE BEEN ABLE TO CEMENT THEIR PLACE IN THE TOP 100 THROUGH CONSISTENCY, QUALITY AND CONTINUOUS NEW PRODUCT DEVELOPMENT, AS *CHECKOUT* DISCOVERS.

The Kings of Kerry

Kerry Group are no strangers to the Top 100 Brands list, with this year's chart boasting some impressive movers – its highest placed product, Denny Sliced Meats, rose one place to ninth to cement its big brand status, while there were also impressive gains for Dairygold (up 3 places to 23rd), Charleville (up 14 places to 40th), Denny Bacon (up three places to 41st), and Low Low (up 10 places to 87th).

As April Redmond, marketing director, Kerry Group, explains, one of the key challenges facing brands in the current environment is how to maintain relevance; while a brand like Denny has benefited from today's trend towards 'bringing sandwiches to work', it is also versatile enough to adapt to different environments. "Consumer behaviour has clearly changed over the past few years," she explains. "The brands that remain strong today are those that have adapted to consumer's changing needs. The overriding success of the Denny brand through the years has been its ability to empathise and relate to the consumer in a variety of situations. Though times are tough, consumers are not willing to compromise on quality and now more than ever, consumers will turn to brands they can trust and rely on.

"It is extremely edifying that in these difficult times Denny sliced cooked meats remains in the top ten as it has done over the last five years."

Kerry Group maintains a close relationship with its customers, engaging with them on both the breadth and depth of its ranges, as well as on new product development. It is this level of feedback that has enabled the group to develop new offerings, such as chicken and turkey products under the Denny brand. "Consumers were of the view that the category was overly focused on ham



April Redmond, Marketing Director, Kerry Group

and the sandwich occasion," says Redmond. "Based on this, we have introduced chicken and turkey alternatives to sliced ham as well as chicken pieces for use as an ingredient in other meal occasions, which are delivering strong growth gains for the brand."

Kerry's dairy ranges are also making their presence felt in the Top 100, with Dairygold, Charleville and LowLow all making successful gains – Charleville in particular benefited from a successful advertising campaign earlier this year. Redmond believes that the growth shown by these brands is testament to Kerry Group's close relationship with the customer. "LowLow has been

one of the great success stories of the Irish grocery business over the last ten years," she explains. "Consumers are clearly embracing healthy eating concepts but are doing so on their terms i.e. embracing health but not sacrificing taste. By reconciling taste and health, we're giving the LowLow consumer the freedom to enjoy dairy without compromise."

In the case of Charleville, which has enjoyed significant volume and value share gains, the focus has been on appealing to the family, or in particular, the female parent. "Over time the brand has consistently empathised with Mum through understanding her needs and those of the family, resulting in Charleville's clear position as Ireland's favourite cheese brand. Charleville is up considerably both in terms of 'brand consideration' and 'brand love' according to the latest Millward Brown Brand Equity Tracker."

Of course, such is the changing nature of the marketplace, that Kerry Group has introduced a number of new innovations, particularly in terms of packaging, in order to broaden the appeal of its products. "We're very proud of the packaging innovations we've introduced across categories, ranging from being the first to introduce zip lock in cheese and resealable ham, through to our most recent flow wrap packaging innovations in sausage," says Redmond. "Our new closable sausage packaging is a first for the chilled cabinet and is a development we're hugely excited about as it starts to positively impact our bottom line and that of our retail partners."

Kerry Group also boasts a rich innovation pipeline, with plenty of scope for 'game-changing' new products, such as the Charleville and LowLow Cheese spreads and triangles. "Our packaging innovations are invariably borne out from consumer insight, and are grounded in the



Greta Hammel, Marketing Manager Chocolate, Kraft Ireland.

consumer need to maintain freshness and avoid waste wherever possible. This in turn has a positive impact on the environment both in terms of production as well as in the home."

Sweet Success For Cadbury

Cadbury's recent advertisement campaigns have become almost as iconic as the brand itself, with everything from 'Eyebrows' to the recent 'Charity Shop' ads generating unrivalled brand awareness and sales. Having retained the No. 6 position for its flagship Cadbury Dairy Milk brand, it's clear that a little bit of creativity can make a huge difference.

"Glass and a Half Full' productions continues to do a terrific job for us in reminding consumers of the joy that they receive from each square of Cadbury Dairy Milk," says Greta Hammel, Marketing Manager Chocolate, Kraft Ireland. "The iconic productions, which have included 'Gorilla', 'Airport Trucks', 'Eyebrows', and most recently 'Charity Shop', illustrate Cadbury Dairy Milk's unique personality and have resonated extremely well with our consumers. Combining these with other executions through sponsorship and in-store activation has ensured Cadbury Dairy Milk remains the country's favourite chocolate bar."

Hammel also says that the next Cadbury advertisement will be created exclusively for the Irish market using state of the art technology to bring the viewer closer to the brand. She adds that it will be supported by a high impact above and below the line media campaign.

Last year, Cadbury made one of its biggest marketing investments with a 15 million 'Spots v Stripes' campaign to coincide with its sponsorship of next year's Olympics and Paralympics. Social media has accelerated interest in this novel campaign, which has also seen the launch of new product lines, including the Big Race bar, which hit the market in April.

While Cadbury leads the confectionery market when it comes to NPD and marketing, the company is not immune to changing consumer habits and brand switching. However, Hammel believes that it is best placed to respond to the nouveau shopper. "Our main motivation is to always ensure that we continue to deliver products of exceptional quality at excellent value. We have built up an extremely loyal consumer base over the years, and are absolutely focused on ensuring that we continue to exceed their expectations in terms of quality, innovation, value and communications."

Without doubt, one of the most successful new selling lines for Kraft has been The National Confectionery Company (TNCC). A new entrant last year on the Top 100, and up four places this year, the brand continues to carve a greater share of the market.

Hammel says the cornerstone of the brand's success has been its ability to tap into the needs of the health-conscious family. "TNCC is very much the sugar confectionery solution for young families, the single biggest sugar-consuming segment, because it delivers on their need to provide a treat for their families that is more natural," she says. "Variety, playability and fun are key drivers of sugar confectionery consumption and through our breadth of range we can offer something that ticks all the boxes."

A new offshoot of the brand, Guzzle Puzzle, is also proving another successful line, she adds. "Guzzle Puzzle represents innovation which has not been seen before and as a result the response has been phenomenal. Our customers know and trust the brand; they have seen us deliver exceptional growth over the last number of years and are excited by this never before seen innovation."

Birds Eye Capitalises On Frozen Success

Birds Eye has had another strong year, with its frozen poultry range rising 14 places to 70th in the Top 100, and its frozen fish range a consistent performer at 82nd. It's also had a busy year, with the success of the Bake to Perfection range, driven by a heavyweight TV advertising campaign and in-store activity. This, in turn, is one of the reasons why both the Frozen Prepared Poultry and Frozen Prepared Fish categories have each risen two places this year.

As Paul Kelly, Birds Eye marketing manager explains, the company has been able to achieve its position as the biggest brand in the Frozen food market (18% value market share, source: AC Nielsen value sales MAT 10th July 11) through heavy marketing investment. "Birds Eye has grown its share of the frozen Poultry and Fish categories due to heavy investment in a consistent marketing campaign, strong NPD such as 'Bake to Perfection Fish' and up-weighted in-store activation to encourage consumers to buy more frozen food," he explains.

"Typically, in tougher times such as today, consumers tend to trade back into frozen food, and Birds Eye is driving this by ensuring that we are offering great tasting products combined with fantastic value for money. Almost eight out of ten of all households in Ireland buy Birds Eye, which is the highest penetration for any frozen food brand (Kantar MAT 15th May 2011)."

Bake to Perfection has been one of the category's biggest launches, and is now worth in excess of ?2.5 million on MAT. "The insight for this range came from consumers' concerns regarding natural fish," says Kelly. "Birds Eye Bake to Perfection is a range of deliciously tasty fish fillets and seafood complemented with the perfect sauce. Each variant comes with two individually wrapped portions, and Birds Eye's innovative packing technology, the 'Bake Perfect bag' prevents the fish from drying out during the cooking process while preventing unwanted aromas.

"In order to drive penetration and trial, Birds Eye continuously advertised the range throughout 2011 and as a result, we have seen sales increase +46% YOY (Source: AC Nielsen value sales MAT 10th July 11). We plan to continue to build this business through continued innovation and advertising communicating the benefits of the range."

In Frozen Poultry too, the company has delivered a positive uplift in sales, with its share of the category growing to 61% (Source: (AC Nielsen value sales MAT 10th July 11). Much of this success has derived from its ranges aimed at children, such as Birds Eye Crispy Chicken Dippers. "The focus of our message is that our Dippers are made from 100% chicken breast, and taste fantastic – perfect for children," says Kelly.



Paul Kelly, Marketing Manager, Birds Eye

Next on the agenda is the promotion of Birds Eye's new Rice Fusion range, which is to be the subject of a massive TV campaign in Q3 and Q4 of 2011. "There is plenty of opportunity to grow the size of the frozen food basket spend," says Kelly, "and we at Birds Eye are looking to deliver this through innovation with the launch of our new Rice Fusion range which moves the frozen category into new occasion opportunities.

"We are planning to run a huge marketing calendar for the remainder of the year. In addition we will be running significant campaigns across our vegetable and fish categories." ■

WAKE UP AND SMELL THE COLA

PEPSI - THIS YEAR'S BIGGEST MOVER!

Why should you stock Pepsi?

- Pepsi Max is this year's biggest mover, **up 27 places to 49th place** in the Checkout Top 100 brands 2011
- Pepsi is the fastest growing cola in Ireland
- Pepsi has grown **+21%** volume and **+23%** value in 2011
- Pepsi now has a market share of **9%** in value and **11%** in volume of the cola category
- Pepsi's growth has been fuelled by an increase in household penetration which has grown from **17%** to **22%**

Sources:
AC Nielsen 52 WK Max April 17#1
Kantar Worldpanel Online April 2011

How has Pepsi boosted sales?

- Great global collateral and strong in-store support
- By delivering value for money
 - 440ml €1.00 Can
 - 500ml Pepsi Max iconic bottle



**GET YOUR
KICKS
WITHOUT
SUGAR**

MOVERS & SHAKERS

IT HAS BEEN A BRAND BATTLEFIELD IN THE LAST 12 MONTHS, WITH ALL PLAYERS VYING FOR A SLICE OF THE SMALL, YET COMPETITIVE MARKETPLACE. BUT IN TIMES OF ADVERSITY, THERE ARE ALWAYS OPPORTUNITIES AND SOME BRANDS ARE CAUSING MORE THAN JUST A MARKET SHARE STIR. *CHECKOUT* LOOKS AT WHAT SOME OF IRELAND'S TOP COMPANIES ARE DOING TO MAXIMISE GROWTH.

Healthy Growth With Flahavan's



John Noonan, Sales and Marketing Director, Flahavan's

The country may have come to a standstill last winter, but Flahavan's was one company that benefited from the unusual cold snap.

It was this factor, amongst others, that has contributed to the brand's 14-position jump in the Top 100 charts, according to John Noonan, sales and marketing director with Flahavan's. "We shared insights and worked closely with our retail partners, as some of them reorganised and extended their hot oat

categories," he explains. "Our most recent new products continued to grow and we believe that we benefited from being part of the Love Irish Food initiative over the past 12 months."

While it is already accustomed to seasonal spikes, Flahavan's enforced its brand proposition during the last winter period with a TV advertising campaign. NPD is a central focus for Flahavan's with the new Multi Seed variety (part of its Quick Oats range) launched earlier this year in a variety of pack formats. This pack range, says Noonan, is instrumental in today's retail environment. "During the height of the recession, more consumers were moving back to larger pack sizes and away from convenience options. But more recently that trend has eased. We recognise that the Irish consumer is different in their preferences to the UK or USA consumer, where more convenient formats dominate."

Despite this launch, Noonan says the focus is not on investing in new products but on putting more emphasis on insightful research and identifying what the consumer really wants. While breakfast consumption is relatively high in Ireland, market share is affected by the growth of PL in the category. Noonan says brand awareness and communication is essential to combat this threat, with the Love Irish Food initiative a central part of this.

"Flahavan's has a very loyal Irish customer base and while we have retained our focus around health and quality, we have also increased our communications around Irishness," he says. "We feel it is important to remind consumers about the Irish nature of the product, from the harvesting of Irish oats

sown on Irish farms through to the product on-shelf in store. We used PR and advertising to deliver these messages."

Big Steps From John West

Having shot into the Top 100 in 2008 in 59th place, and jumped another six places in 2011, John West has proven to be one of the more recession-friendly brands. However, fish consumption in Ireland remains relatively low compared to our EU neighbours,



Brendan Murphy, Managing Director, John West

so what is it about John West that is triggering brand awareness and sales?

“Consumers buying into the category previously consumed fresh or frozen and so opting for canned fish is a more cost effective solution,” says Brendan Murphy, MD of John West. “This, combined with renewed focus and a strong marketing and PR campaign by John West, led by the ‘BrainFood’ message, has consolidated an already strong market share position and grown it by 10 share points.” The award winning ‘BrainFood’ campaign, which was launched this year and contributed to a 11% hike in sales, was rolled out again in 2011, with additional focus on its interactive website.

While the health benefits of fish is a key USP for such brands, Murphy says that the company’s traceability message has become paramount. “This year will see a major pack rejuvenation in the autumn with a very strong focus on sustainable fishing practises,” he says. “John West is the only brand that is able to demonstrate full traceability right down to the vessel that was used in catching the fish and on what date and time. This has always been a very strong focus area for John West and will continue to be so in the future.”

Murphy adds that such campaigns and ongoing product innovation will distinguish John West from both its Private Label and branded competitors, adding that price and other trade promotion strategies is not a route that John West wants to follow. “The growth strategy for John West is not trade promotional driven. Trade promotions do play an important part as consumers need to see value offerings, but it is not the cornerstone, and ensuring continued growth in retail value will be a high focus area for John West.”

As for the future, Murphy says John West will achieve greater market share as it rejuvenates the brand image to make it more relevant to new and younger consumers.

“Product innovation will intensify,” he explains, “and John West will invest in the brand in the Irish marketplace with a fully integrated and sustained media campaign to support the brand rejuvenation in 2011 and into 2012 and 2013.”

Nothing Cheesy from Kilmeaden

With fluctuating dairy prices and the growth of PL, it has not been an easy 12 months for the cheese category. Kilmeaden, however, has overcome all of those challenges, recording its highest position since entering the Top 100 in 2007 following a jump of eight places. Holding on to its No.2 position in the overall Cheese category, senior brand manager Eithne O’Hara says that this performance can be attributed to product quality alone.

“Kilmeaden is an iconic Irish brand, much loved by Irish consumers and renowned as



Eithne O’Hara, Senior Brand Manager, Kilmeaden

‘The Fillet of Cheddar,’ says O’Hara. “We have consistently focused on quality, taste, craft and tradition as the cornerstones of our brand and this has been one of the main reasons for our strong growth.”

Referring to the brand’s iconic status in Ireland, O’Hara adds that consumers are actively seeking out brands like Kilmeaden, which in turn leads to positive sales figures.

“In difficult times, consumers are more conscious of their weekly grocery spend and are making more selective decisions as to what brands go into their shopping basket. The brands they tend to return to are those iconic brands that have been around for years and have stood the test of time.”

The renowned ‘Fillet of Cheddar’ tagline has been used for some years, which is an interesting tactic given the changing nature of the marketplace. Kilmeaden, to date, has resisted the temptation of changing its brand proposition. If it ain’t broken and all of that.

“Whilst it’s crucial to keep brands fresh and relevant for consumers today, it is also important to retain key brand propositions which still resonate with consumers. ‘The Fillet of Cheddar’ still plays an important role in communicating the quality, care and expertise that Kilmeaden is renowned for and we will continue to use this brand

proposition for as long as we feel it resonates with our consumers,” explains O’Hara.

Irish consumers recognise and appreciate quality Irish brands, says O’Hara, however communicating the value message is just as important. “In the current climate, we appreciate the need for all brands to provide value for money to consumers and we have a very strong in-store promotional programme to ensure that we provide consumers with a premium quality brand at a competitive offering.”

Kilmeaden recently launched two new block variants - Kilmeaden Lighter Mature and Kilmeaden Smooth & Mature.

Kilmeaden is a member of the Love Irish Campaign, an initiative that O’Hara feels has propelled the brand further. “The Love Irish Campaign has been excellent in terms of driving awareness of the collective benefits for us all of buying Irish. Whilst the campaign can drive awareness of the overall benefits of buying Irish, it’s important that each brand does as much as possible to activate and re-enforce the message on the ground as well.”

The Right Focus from McCambridge

The bakery sector may be at its most competitive yet, but McCambridge bread has long carved itself a niche to withstand any such challenges. Having shot into the Top 100 brands in 2008 at 91, jumping one position last year, it has made considerable ground in 2011, moving up seven places.

Given the current market conditions, this is a remarkable achievement. However, for Michael McCambridge, director of the bakery, there is a few simple reasons for this upward shift - quality of product, a focus by consumers on healthy eating and value for money.

McCambridge has long traded under the healthy eating banner, and while that market has become saturated of late, its company



director says the brand is differentiating itself through its focus on genuine quality and authenticity. “We are positioning McCambridge as we always have, as the brand leader in its niche. We are emphasising integrity, honesty, originality and quality,” he says.

McCambridge points to the stunted growth of PL in this niche bakery sub-category to demonstrate the strength of his brand.

Regarding the future of the sector, McCambridge says that, as is the case today, the focus will be on health, quality and functioning. With consumers now more demanding of the bakery category, McCambridge says that they are responding to this with ‘value for money and quality’. “We are responding by listening to the customer and acting on the messages we receive.”

McCambridge is planning on rolling out new marketing programmes within the next 12 months, which will no doubt have a positive impact on its rankings in 2012.

Profit in Petfood

Much has been said about the way in which Irish consumers are trading down in their own grocery brand choices, but are reluctant to do so when it comes to their pets.

The sharp growth of Pedigree illustrates this trend, jumping 15 places to No. 20 this year. Also under the Mars umbrella, Whiskas enjoyed an uplift of three positions. Both brands also maintained their No 1 and No 2 placings respectively in the pet food category.

Jennifer Power, marketing manager at Mars Ireland, says brand extension, such as new pack formats, is the cornerstone of success: “Both

Pedigree and Whiskas are brands with a strong heritage of successful innovation and are trusted by Irish consumers. Therefore, they are the best positioned brands to bring new and exciting products to the market place. A key driver for this growth is expansion of the Pedigree and Whiskas Care and Treats ranges which sales are incremental to core main meal purchases.”

Power points to the media investment in the Care and Treats range for this aforementioned growth, with particular reference to Pedigree’s ‘Doggie Dentures’ campaign, which highlighted the importance of oral care.

“Feature level is also key. Retailers who have opened up space on their petcare fixture for Care and Treats, and who are also utilising secondary display solutions from Pedigree to capitalise on the impulse nature of the category, are benefiting from increased sales and margins in this highly profitable sector,” say Power. Pedigree, she adds, is outperforming market growth at 12%.

New pack formats have been instrumental in driving growth in the Pet Food category, with health as important as convenience, says Power. “All of our product innovations are based on strong consumer insights. One of these is the constant need for providing variety within a pets diet balanced with the reassurance that what you are feeding your pet is good for them.”

Whiskas Simply was launched last year and, according to Power, is now worth over €1 million to the overall brand, while Pedigree Meaty Mixers is also growing at a strong rate.

Despite this level of innovation, PL continues to carve a greater share of the overall market year-on-year. This growth does not deter Power in her belief that strong brands can still

dominate the overall market.

“By putting the pet first and using our wealth of expertise and scientific research from the Waltham Centre for Pet Nutrition, we’re continually pushing our brands into the level once considered only for premium specialty foods. Because one of our core beliefs is that professional level nutrition should be available to all pets, our pricing is still very affordable.”

Mirroring the trend in general grocery lines, and as demonstrated by the growth of single serve formats, pet food producers are now more willing to invest in new innovations. As such, Power envisages more new products in the pipeline.

“We expect products that not only taste great but also have added benefits. I think consumers will become more conscious of the foods they choose for their pets, and will prefer to purchase products with no artificial colours or flavours, or those with ingredients that deliver a specific health benefit or addresses a specific problem.” ■



CHECKOUT

TOP10 TOBACCO 2011

in association with 



01 Silk Cut

As Ireland's No.1 brand, Silk Cut has enjoyed over 25% market share since 1994 and is admired as a premium brand that provides a consistently high quality product to consumers.

Over the last four decades the brand has illustrated its ability to remain a modern classic with subtle improvements to the pack, while remaining true to its origins.

Innovation is at the forefront of its brand strategy with unique pack formats, such as SuperSlims, illustrating the company's dedication to the further development of the Silk Cut brand.

Silk Cut recognises the need to continually evolve in order to accommodate the ever-changing needs of today's existing adult smokers





NO COMPROMISE



IRELAND'S NUMBER 1 SELLING CIGARETTE*

* B&H Gold Kingsize 17.5% EOM (2010, AC Nielsen). This advertisement is for tobacco retailers only and should not be made available to the public nor should it be displayed in any area where it is visible to the public.

02 Benson & Hedges

Benson & Hedges Gold continues to hold its strong position as Ireland's leading selling cigarette*, and research shows that Benson & Hedges Gold is the first brand of choice for almost one in four smokers in Ireland**.

Benson & Hedges has a rich history and heritage and is committed to delivering consistent and high quality smoking experience without compromise to its adult consumers.

Keep an eye out for our exciting upcoming Limited Edition pack designs, coming soon.

*B&H Gold 17.3% SOM (Jul 2010, AC Nielsen).

**Smoking Monitor Survey 2010, Millward-Brown Landsdowne.



06 Carrolls

CARROLLS

The longest-established tobacco company in Ireland, PJ Carroll & Company Ltd has been producing tobacco products since 1824. It's Number One selling brand, Carrolls was first launched in 1958 and retains its sixth place position in this year's Top 10 Tobacco chart.

05 Superkings

Launched in Ireland in 1984, Superkings was the original brand to offer adult smokers the 100s format and continues to dominate the longer length sector. Superkings is over twice as big as its next competitor (Source: Nielsen, Extended Scantrack, June 12/11), and the brand family includes Superkings Black, Superkings Blue and Superkings Menthol.

Over the past few years, Superkings has launched several 'Limited Edition' ranges, including an 'Animal Skin' series in 2009 and a set of 11 striking designs in 2010, which have served to add interest for the consumer, and continues to position Superkings as the premium 100s brand at a value RSP.

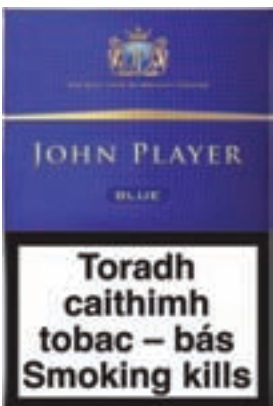


03 John Player

John Player, the company's flagship brand, includes John Player Blue, John Player Blue 100s, John Player Bright Blue, and a new smooth option, John Player Gold.

In April, the brand launched a new, fresh and modernised packaging. Among the many packaging updates, a tactile element helps the brand exude a more contemporary 'look and feel'.

The striking new look enhances the premium positioning of John Player, while remaining true to the brand heritage. 'Blue' has consistently shown its strength as a brand favourite since launching 35 years ago, becoming one of those rare brands that have become an Irish icon.



04 Marlboro

Marlboro

Marlboro is one of the most iconic tobacco brands available on the Irish market, and with its range extension now including Marlboro Menthol, as well as its ever-popular Marlboro Gold, it has retained its Number 4 position since last year. In 2010, Marlboro unveiled new packaging for 'Gold' and 'Menthol', supported by an in-store 'Mystery Shopper' campaign.



THIS SEASON'S COLLECTION



■ THE ORIGINAL STYLE

SILK
CUT

This advertisement is for tobacco retailers only and should not be made available to the public nor should it be displayed in any area where it is visible to the public

07 Mayfair

Throughout September Mayfair will launch its latest range of limited edition packs. The limited edition 'Peep Hole' design reinforces the modern and fresh look synonymous with the current Mayfair pack. Since its launch in March 2000, Mayfair has been growing from strength to strength, becoming widely identified as one of the best 'value for money' brands in Ireland.

Available in King Size and Superkings, Mayfair is competitively priced offering real value for money while also delivering the retailer a very favourable cash margin.

Mayfair limited edition packs will run for a limited time throughout September 2011



08 Major

MAJOR
extra size

Major was launched on the Irish market 45 years ago and has retained a loyal following for over four decades. While it has slipped a place in the Top 10 since last year, one wouldn't rule out a comeback in the years ahead.

09 Rothmans

Rothmans
KING SIZE

Rothmans is another brand with a loyal consumer base, and it has now retained its position of 9th for three years running.

10 Pall Mall

Pall Mall is the biggest cigarette brand share winner in Ireland, currently holding a market share of 3.13% in the latest period. As the lowest priced cigarette brand available on the tobacco market at €7.35*, P J Carroll's Pall Mall has fast become a must stock product for retailers since its launch in 2008.

A pioneer in the market, Pall Mall offers adult smokers a quality product at an affordable price. To minimise the risk of lost sales and out of stocks, now is the perfect time to increase order quantities to allow for the increased demand for Pall Mall.

The Pall Mall family includes: Red Kingsize & 100's (10mg Full Flavour), Blue Kingsize & 100's (7mg Smooth) and Pink Kingsize (4mg Extra Smooth), providing a wide choice to meet the individual demands of today's adult smokers. For more information or to purchase Pall Mall, please call P J Carroll on 01-205 2345. (* Recommended Retail Price)

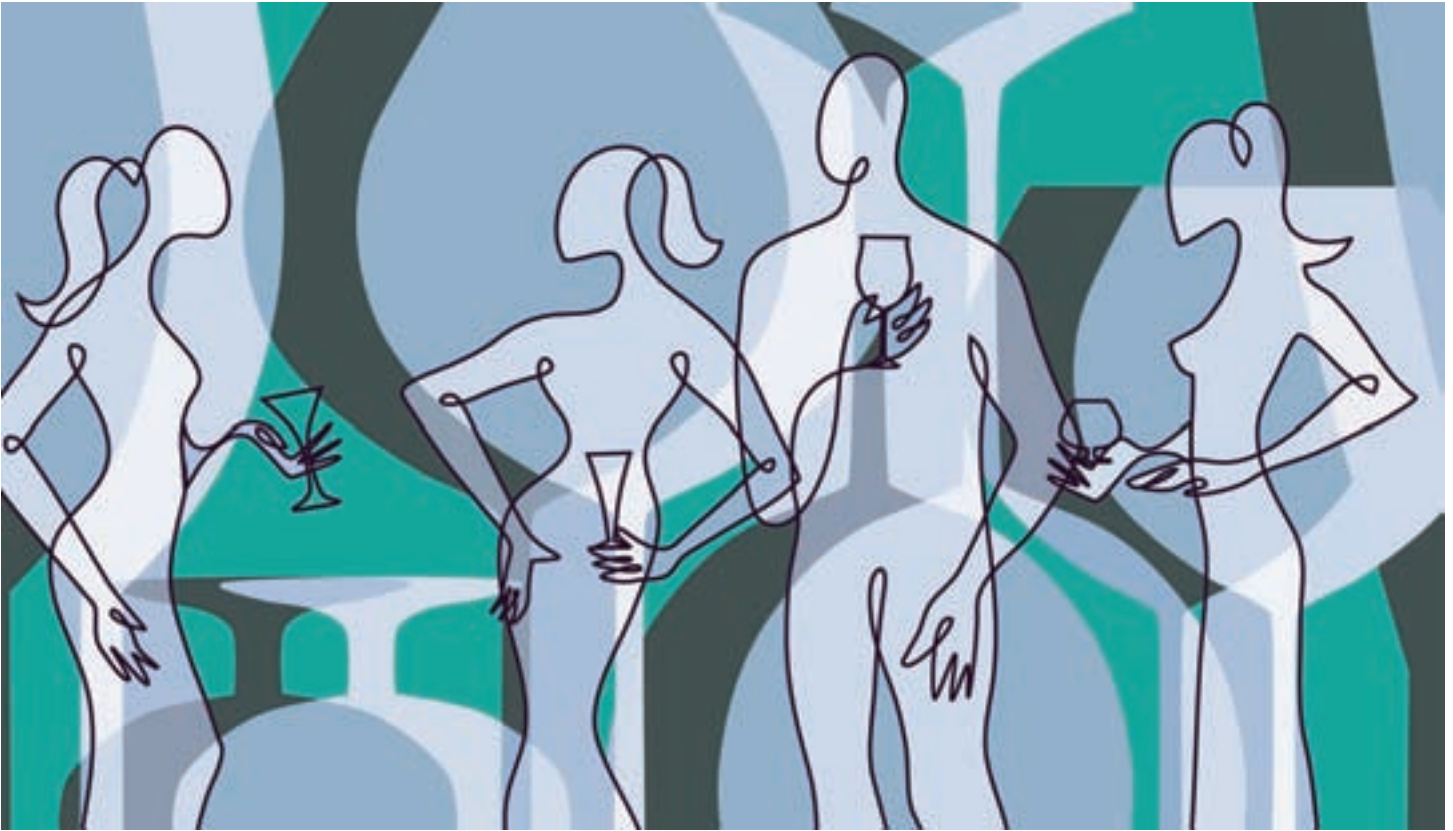




look out for limited editions

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MAYFAIR |



A PRICING DIFFERENCE

THE CROSS BORDER SITUATION MAY HAVE ABATED, BUT THE VALUE OF THE ALCOHOL MARKET IS NOW DECIMATED BY HEAVY PRICE PROMOTIONS. GRÁINNE BURNS ASSESSES THE IMPACT OF PRICE POLICIES ON THE CATEGORY AND WHAT BRANDS ARE DOING TO INVIGORATE THE MARKET.

Once the primary reason for making regular trips across the border, and the main influential factor on the Top 50 listing in recent years, cheap alcohol is no longer attracting the masses to the North.

The increased VAT rate, higher fuel prices and litany of promotions across the wider alcohol category in the South has effectively stopped that shopping pattern, with the latter factor now influencing the listing.

On average, Irish people spend €2,000 per annum on alcohol, primarily in the off-trade (or more so supermarkets) and as retailers would testify, with most of that product purchased on promotion. Volume may be up, but value and retailer margins are being hammered. Now accustomed to the low cost offering and blinded by promotional deals, it is hard to envisage any real recovery in this respect within the immediate future.

Despite this, and as indicated by the trends in the Top 50 list, it is apparent that clever marketing and innovation are attracting new customers to various brands.

For example, new entrant Captain Morgan is enjoying success on the back of a successful integrated media campaign following its re-launch in 2008. Its target market – predominately younger males – is resonating with this youthful marketing approach, such as its presence at the Oxygen music festival.

Another new entrant, Absolut, is demonstrating how association with 'on trend' events, such as Dublin's Fringe Festival, can generate viable brand awareness and sales. New, innovative products, such as the Absolut miniature flavoured varieties, have also proven instrumental in attracting new consumers to the brand.

This energetic and creative approach is something the more traditional players are trying to re-create but, to date, are failing to translate into sales. Jameson, Hennessy, Huzzar, Powers, Jack Daniels have all dropped positions in this year's listings, while Finlandia has lost its Top 50 placing.

The Big Influence

The off-trade, or, more so, the multiples, account for almost 35% of all alcohol sales, with wine

remaining a significant contributor to this share.

As such, the key selling brands in the multiples, as well as symbol groups, generally influence the overall positions of brands, with four new entrants this year. JP Chenet, Villa Maria, Yellow Tail and Casillero del Diablo all enter the Top 20 wines list for the first time; notably all have been on price promotion at various stages throughout the year.

On average, according to Mintel figures, Irish consumers predominately spend between €6 and €10.50 on a bottle of wine, with prices decreasing between 10 to 14% in 2010.

While not brand loyal, Irish consumers are reverting to labels they are accustomed and aware of, such as Blossom Hill, which retained its No. 1 position it took from Wolf Blass last year. A new entrant last year, New Zealand powerhouse Oyster Bay continues to carve a greater share of the market with 156,000 cases sold last year and perhaps is one of the reasons why its producer, Deleat's Wine Estate, will distribute the brand directly from October this year.

As well as in the wine category, the LAD market has been primarily affected by heavy price promotions, with plenty of fluctuations in the Top 20 listings. Such pricing has facilitated volume growth for players such as Heineken, Coors and Corona, while Bulmers and MGD slip positions in the Top 50. Nonetheless, there's still plenty of room for exciting new additions, as Kopparberg, in 49th this year, has proven.

Mainstream brands are dominating the overall beer market with such deals as 20 bottles for €20, with the market share of artisan and other select beers being gradually squeezed out. ■

2011 Ranking

2009 2008

1	Budweiser	1	1
2	Heineken	4	3
3	Bulmers	2	4
4	Smirnoff	3	2
5	Guinness	5	5
6	Jameson	6	7
7	Carlsberg	12	13
8	Blossom Hill	7	11
9	M.G.D.	8	6
10	Hennessy	9	9
11	Wolf Blass	11	8
12	Coors	15	15
13	Huzzar	10	10
14	Powers	14	12
15	McGuigan	22	
16	Santa Rita	16	17
17	Bavaria	13	14
18	Dutch Gold	17	16
19	Jacobs Creek	18	18
20	Karpackie	28	
21	Stella Artois	19	22
22	Bacardi	21	20
23	Carling	36	38
24	Paddy	20	19

CHECKOUT TOP50 ALCOHOL 2011

in association with



25	Druids	30	32	38	Devils Bit	39	46
26	Tyskie	27	34	39	Jack Daniels	42	35
27	Corona	23	30	40	Faustino	50	44
28	WKD	26	25	41	Absolut	-	-
29	Baileys	34	33	42	Cork Dry	40	37
30	Tuborg	35	23	43	Bushmills	-	-
31	Torres	24	27	44	Cono Sur	38	40
32	Hardy's	29	26	45	Oyster Bay	48	-
33	Fosters	31	29	46	Carmen	41	28
34	Captain Morgan	-	-	47	JP Chenet	-	-
35	Lindemans	37	47	48	Yellow Tail	-	-
36	Rosemount	25	21	49	Kopparberg	-	-
37	West Coast Cooler	33	-	50	Sol	-	-



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EPOS data provided by our retail partners has shown that, when measuring test and control stores, sales of advertised products have been 11 - 54% higher in stores which ran a POPad Trolley campaign.

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UP TO
54%
SALES UPLIFT



01 Budweiser



Since Budweiser was first launched in 1876, it has been renowned for its authenticity, quality and brewing heritage. Budweiser remains Ireland's Number One beer brand in the off-trade, proof that Budweiser truly is the King of Beers. Budweiser is a heroic brand with an iconic heritage that goes hand-in-hand with the pursuit and anticipation of great times. Budweiser today has a wide range of packaging formats and sizes that makes it suitable for all occasions. Budweiser is supported throughout the year with great above the line advertising and in-store promotional activity.

02 Heineken

As the leading draught lager in the Irish market with 41.5% share, Heineken is at the forefront of innovation in Ireland, developing programmes to secure future growth of the entire lager category in the on and off-trade channels.

Heineken has now given the consumer the perfect tools to serve a beer that looks as good as it tastes at home, with the launch of the 5L Draughtkeg Collection. This comes complete with two 250ml glasses, skimmer and ten coasters.

The Draughtkeg Collection is the ultimate companion for any event; barbeques, nights-in or parties with friends. The Draughtkeg itself pours approximately 20 x 250ml glasses of smooth draught beer and its intelligent patented pressure system ensures fresh beer for 30 days after tapping, guaranteeing perfectly fresh pours even after guests have left. The Draughtkeg Collection is available from supermarkets nationwide. For more information visit www.heineken.ie/draughtkeg.



05 Guinness



Guinness, like Budweiser, has remained stationary in fifth place for six years now, although the lack of growth in the off-trade will probably frustrate Diageo, particularly given the brand's iconic association with Ireland, the widespread popularity of 'Arthur's Day', and, of course, the image of President Obama sinking a pint on his recent visit to Moneygall. Guinness is behind some of the most innovative and iconic advertising on the alcohol scene, but this has not managed to increase its rating with Irish consumers. Comfort can be salvaged from the fact that it remains far and away the most popular stout on the market.

06 Jameson



Jameson managed to rise a sole place over the course of the year, further cementing its claims to the title of Ireland's favourite whiskey. The brand experienced a 16% sales increase at the start of the year as part of a six month growth period. This, coupled with growing adoration for the brand overseas, ensures that good times lie ahead if its current rates of popularity can be maintained.

03 Bulmers



Bulmers slipped one spot in the rankings this year, although the brand remains not only Ireland's favourite cider but also its highest-ranking indigenous alcohol brand, a particular bragging right that may unsettle a certain brewery at St. James' Gate. This success was derived entirely from the strength of its existing varieties; no new recipes were released in 2011, although sponsorship of such events as 'Live at Leopardstown' may have helped, as well as the expansion of its traditionalist advertising campaign, now featuring economist David McWilliams.

04 Smirnoff



Smirnoff was another victim of Heineken's ascent in 2011, hitting a five year low in the Top 50 rankings as a result (it hit the lofty heights of 2nd back in 2009), although 4th place is hardly anything to be sniffed at. Smirnoff's dominance of the spirits market is assured, as it sits nine places above the next vodka, Huzzar. No cause for concern just yet for parent company Diageo.

07 Carlsberg



If Diageo's Guinness hasn't displayed the anticipated level of growth in 2011, then the same can't be said for Carlsberg, which has cracked into the top ten for the first time in six years with a solid 7th place finish, five better than its showing last year. Such a rapid jump is testament to the shine Irish lager-lovers are increasingly taking to the brand; plus its presence on the on-trade 'Pour Your Own Pint' tables in bars nationwide can't have harmed its chances. Budweiser and Heineken would do well to look over their shoulders should this growth persist.

08 Blossom Hill



Although unable to improve on its all-time highest position last year, Blossom Hill still enjoyed a successful 2011, with the discrepancy between its current position of eighth and its 31st placing only four years before, nothing short of gargantuan, and commendable. Still the highest ranked wine on the list by a comfortable margin.



GRAB SOME BUDS



BUDWEISER, THE NO.1 BEER IN THE OFF-TRADE

Once again, Budweiser is the best selling beer in the off-trade. We're anticipating great times ahead for Budweiser, so grab some extra sales by stocking up your shelves with the King of Beers.

09 Miller



2011 marks a relatively disappointing year for Miller, which slipped a single place to attain its lowest finish since 2006, partly due to the rise of Heineken and sustained primacy of Budweiser. It has been active on the marketing front, most notably with its 'Tonight' billboard campaign, meaning it has the potential to bounce back from this relatively minor low-point.

10 Hennessy



Hennessy's reputation worldwide as a quality cognac ensured it retained its position as Ireland's favourite, even though the drink itself fell a place from 2010's showing to record a six year low. Having said that, its wintertime appeal, not to mention its association with the world of sport - most notably via the Hennessy Gold Cup - ensures it maintains a broad appeal.

11 Wolf Blass



Wolf Blass kept its position on the list this year, and with Blossom Hill's rapid growth stalling somewhat, it may well now have the Californian brand in its sights. However, it may also have to rethink its pricing strategy; the premium prices demanded by its portfolio continue to be undermined by special offers and promotions.

12 Coors Light



Coors Light managed to grow three places this term, in what has proven to be a bumper year for lager. It remains a popular beer with female drinkers, although as its position indicates, it still has considerable ground to make up on the likes of Heineken (its parent company in Ireland) and the ever-dominant Budweiser. A well-recognised and varied advertising campaign drawing on its 'Rocky Mountain' appeal may help the brand in this regard.

13 Huzzar



Ireland's second favourite vodka also declined on its performance this year, in what was a relatively poor year for the fiercely-competitive vodka sub category. Huzzar has done well in the face of such adversity, and although its share may have fallen, the gulf between it and its next highest competitor, Absolut, is still massive. As such, making up ground on Smirnoff should remain the primary objective.

14 Powers



Powers held on to its tag of Ireland's No.2 Whiskey this year, having failed to gain any ground on market leader Jameson, which also stayed stationary. This was not all bad news however, given that it's nearest pursuer, Paddy's, lost four places on its 2010 finish to wind up ten places behind it. Like a number of brands in the Irish Distillers Pernod Ricard portfolio, it witnessed positive sales in the off-trade earlier this year.

15 McGuigan



McGuigan wines continue to outperform the market. The Black Label range comprises of a Cabernet/ Merlot, Shiraz, Merlot, Chardonnay, Sauvignon Blanc, Pinot Grigio, Rose as well as McGuigan Black Label Sparkling Chardonnay and Sparkling Rose. The range will continue to have strong above the line marketing support, particularly in the national press, with a major emphasis on Neil McGuigan's award at the 2009 IWSC awards for "The Best White Winemaker in the world", as well as the title of "Winemaker of the year."

16 Santa Rita



Santa Rita's surge in recent years appears to have stalled in 2011, following on from a mixed performance in recent years (in 2008, it stood at 36th, a year later it was 17th). This suggests the brand may be stagnating somewhat on these shores, although it does remain the dominant Chilean brand on the Irish market.

17 Bavaria



Despite the low-cost advantage it wields over other lagers on the market, it may come as a surprise that this year, Bavaria achieved its lowest finish for five years, while its more premium priced rivals continue to perform strongly. The brand proved unable to build upon a successful 2010, with its 18- and 12- pack offerings (introduced over the last 12 months) adding little to its overall stake in the market.

18 Dutch Gold



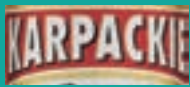
Worryingly for Comans, its Dutch Gold brand (initially a shrewd investment) continues to gradually lose market share in the Irish lager market, falling eight places on the Top 50 since 2006. Should this gradual slide continue, the company might consider increasing its marketing spend, to see off the advances of its rivals.

19 Jacob's Creek



It would appear that Jacob's Creek's place near the pinnacle of Ireland's wine trade (it achieved 11th on this list in 2006, before slipping back) has been usurped in more recent times by the likes of McGuigan, not to mention Wolf Blass and Blossom Hill, which continue to put in strong performances. This is not good news for one of the world's leading wine brands and a product of world-renowned quality.

20 Karpackie



The setbacks suffered by the likes of Dutch Gold and Bavaria would appear to have benefited Karpackie, which improved on last year's impressive debut in the Top 50 by growing eight places in 2011. Clearly, there are still places for new entrants on the lager market if they are savvy enough, with its low cost offerings (typically 5 for four cans) proving a hit with Irish consumers in the off-trade.

21 Stella Artois



Stella Artois regressed somewhat in Ireland this year. Having reached a respectable number 19 in last year's list, one would have anticipated it to possibly push forward with building a dominant position in the Irish alcohol market within a few years, a feat which it has achieved over in Britain. However, its performance this year indicates that it has some way to go yet to establish here the esteem with which it is held in other countries.

22 Bacardi



Bacardi's gradual descent of the alcohol chart continues this year, with the brand slipping into 22nd place. The sustained growth of Captain Morgan's could shoulder most of the blame for this drop, not to mention the proliferation of other brands of rum. However, brand extensions, such as its Mojito pre-mix bottle, should help Bacardi attract new consumers in the long term.

23 Carling



Upon becoming part of its already prestigious portfolio, Molson Coors Ireland foresaw huge potential for the brand here. It would appear that Carling is beginning to fulfill that potential now in a market where it has lacked the popularity it enjoys in the UK, leaping 13 places in the space of just a year. The recent Carling Nations Cup at the Aviva Stadium, while poorly attended, certainly gave the brand a boost. Ireland's more established lagers would be right to be worried.

24 Paddy



Although it persists in being Ireland's third largest whiskey brand, Paddy's lack of growth in three years (including a drop of four places this term alone) is likely to be noted by the marketing boffins at Irish Distillers. This could be due to several reasons, such as Jameson's continued strength and the gradual growth of other spirit categories. In short, there should be no room for complacency in the future.

25 Druids Cider



Bulmers may be top dog on the cider scene for now, but the accelerating appetite among Irish consumers for rival brand Druids, particularly in the off-trade, may yet put that status in jeopardy. Druids has climbed a phenomenal 25 places on the list in only five years; brand marketers will be eager to see whether it continues that ascent.

26 Tyskie



Tyskie's rise was maintained in 2011, even if it only entailed an increase of one place on the list from 2010. Originally a champion of the Polish ex-pat market, this commendable position seems to suggest its acceptance among indigenous consumers as well, and should this position it for further growth, you can expect another heavyweight in-store campaign, despite the already saturated lager market.

27 Corona



Barry & Fitzwilliam, distributors of Corona Extra in Ireland, has launched a new bigger bottle size for the Irish market. Customers get 7% extra free with the bottle increasing in size from 330ml to 355ml. This bottle size has been the result of increasing customer demand for more value for money. As a result, there has been no increase in price to either trade, allowing consumers to experience more of the extraordinary. Following years of persistent brand building, marketing activity and nationwide sampling campaigns in the on-trade, Corona Extra has proved a phenomenal success in Ireland, and the country is now the 4th most important market for Corona Extra per capita.

28 WKD



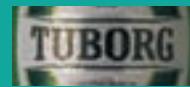
WKD continues its gradual decline in 2011, having now regressed six places in four years. While this would hold with the general notion that alcopops could be in steady decline, for now WKD remains the dominant brand within this niche and, in this context, has managed to hold up reasonably well.

29 Baileys



The ever-resilient Baileys recovered from a brief lapse last year to further solidify its rank as the dominant cream liqueur in Ireland. As if that weren't enough, the brand also attained the lofty honour of being the top selling duty free liqueur brand in the world. Expect it to remain somewhere on this list for a long time to come.

30 Tuborg



Although Tuborg's recovery this year still sees it fall somewhat short of its 23rd place finish in 2009, it still makes a significant improvement on last year's 35th position. Although this would appear positive for now, the past regressions of the brand confirm that it has yet to assure itself of a place in the hearts of Irish lager-lovers and rub shoulders with the more established beers in the country.

31 Torres



The Torres family has been linked with wine for more than three centuries, during which time it has produced the finest of wines to the highest quality. Torres Wines, distributed by Findlater Wine and Spirit Group, continues to be the No. 1 Spanish wine brand in Ireland. The Torres portfolio is extensive and has an offering for every wine taste, from the hugely popular Torres Vina Sol and Torres Sangre de Toro wines of Catalunya, to the premium and super-premium wines of Torres Celeste from Ribera del Duero, Torres Salmos from Priorat, and most recently Torres Ibericos from Rioja.

Proof of the importance of the Torres brand is the awards that it receives. Miguel A. Torres recently collected a Lifetime Achievement Award for his contribution to the world of wine. Torres was also recently awarded the distinction of 'Green' Company of the Year. The winery was also rewarded for its commitment to the environment: improving its systems and procedures to reduce carbon footprint, minimising the impact on its surroundings and promoting ecological awareness, among its workers, clients and consumers.

32 Hardy's



Hardy's' three place per annum fall persisted in 2011, suggesting that action must be taken to address its lower-priced products diluting the overall value of its sales. Until this is remedied, the brand will be unlikely to make significant headway amidst strengthening competition in the wine market.

33 Fosters



Fosters, a titan of the lager scene in its native Australia, has so far failed to truly establish itself in Ireland, slipping a brace of places now for two years in a row, and well behind its 20th place finish of 2008. The sustained strength of the likes of Budweiser and Heineken married to the apparent proliferation of newer lagers in the off-trade, such as Karpackie, have made things difficult for Foster's, with an extensive ad campaign paying homage to the brand's antipodean routes being employed to boost its profile here.

34 Captain Morgan



A not-all-that-surprising newcomer, Captain Morgan debuts on the list at a respectable No. 34, thanks to a plethora of promo events and ad campaigns that has seen it grow to become one of the signature rums on the Irish alcohol market, worrying Bacardi in the process.

35 Lindeman's



Lindeman's continues to gain momentum this year, advancing 12 places in only three years (having been absent from the list altogether in 2008). This growth is testament to the popularity of Australian wines on the Irish market, and if it can be sustained we should see Lindeman's become a more dominant player in years to come.

36 Rosemount



Despite the success of wines such as Lindeman's, things were a little bit tougher for rival Australian brand Rosemount, which fared pretty poorly in 2011, dropping 11 places on the list. Combined with the poor showing of its lager as of late, this would suggest that the Fosters Group has some work to do to increase the profile of its brands on the Irish alcohol market.

37 West Coast Cooler



After a promising debut last year, West Coast Cooler fell by four places in 2011. This might suggest that the novelty factor of this brand (frequently assigned to a category unto itself) has begun to wear off on the Irish consumer, and/or that its target demographic, the female market, are gravitating towards newer alternatives or has rediscovered more orthodox beverages. Nonetheless, it continues to invest in NPD and strong marketing campaigns to promote its message to consumers.

38 Devils Bit



Devils Bit's low-price penetration of the Irish cider market continued to pay dividends in 2011, with the brand continuing its upward rise by hitting a new high of 38th on the list. A brand that's garnering an ever-improving reputation with Irish consumers, its off-trade performance since 2007 has been impressive, having risen ten places since that time. Whether it proves to be a home-grown contender capable of rattling Bulmers' cage in times to come remains to be seen.

39 Jack Daniels



A brand synonymous with whiskey the world over, Jack Daniels' mixed fortunes on the Irish market were relatively underwhelming in 2011. Granted, it did manage to climb three places in rank, but its recent history shows that this could be a short-term gain, with the brand having forfeited seven spots on the list between 2009 and 2010. However, its status as the top-selling imported whiskey in a market presided over by native brands remains intact.

40 Faustino



Faustino recovered spectacularly from a poor showing in 2010 to reach an all-time high of 40th on the list, ten places clear of last year's standing. As Irish drinkers gradually discover the merits of Spanish wine, it's certain to have Torres in its sights next.

41 Absolut




Absolut was one of the big success stories of the Irish vodka scene over the last 12 months, rewarded accordingly by its deserved debut on the 2011 list, a move that caused Huzzar (also part of the Irish Distillers Pernod Ricard stable) and Smirnoff to fall in rank in the process. Nonetheless, the dominance of its rivals remains substantial, and the Swedish brand will be endeavouring to nip at their heels in the coming year.

42 Cork Dry Gin



Being the sole gin to make the list, Cork Dry's dominance of that sub category would appear to remain absolute. However, its ever-declining position on the list suggests that complacency would be foolish at present, particularly with rival brands such as Gordon's breathing down its neck.

43 Bushmills



One of Ireland's oldest whiskeys, Bushmills marked its introduction to the list this year, upping the competition levels in the challenging whiskey market. The growth of Jack Daniels, as well as the strength of indigenous arch rivals such as Jameson's, could ensure a combative future for this traditional, history-rich brand.

44 Cono Sur



Having experienced growth since first entering the list in 2009, Cono Sur will be disappointed to have surrendered five places this year. Its much-touted value for money offerings appear to be losing out in a fiercely competitive wine market.

45 Oyster Bay



Oyster Bay managed to build upon last years' entrance to the list by rising a further three places in 2011. And although its antipodean neighbour continues to command the lion's share of the Irish wine market, Oyster Bay has struck a chord with Irish consumers, whose penchant for New Zealand Sauvignons (in the on-trade, more so than the off-trade) continues unabated.

46 Carmen



Carmen's premium priced approach persisted in proving its undoing in 2011, which saw its slide down the list continue; at 46th, it now ranks 18 places behind its 2009 finish. Action may be needed soon to prevent a slip into absentia.

47 J.P. Chenet



In stark contrast to Carmen, J.P. Chenet's drive to make its fine offerings more affordable paid dividends in 2011 with a debut on the list. It proved a bumper year here for the top selling French wine.



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FRUIT CIDER GROWING SHARE OF TOTAL CIDER MARKET***

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The Kopparberg range consists of:

- 500ml bottle: Pear, Mixed Fruit, Strawberry & Lime, Raspberry, Pear Non Alcoholic
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- 4 Pack 500ml can: Pear, Mixed Fruit, Strawberry & Lime
- 6 Pack 330ml bottle: Pear



Contact Richmond Marketing: 01 631 6100

*Feb-Apr 2011 by value, Nielsen total off trade, excludes apple ciders
 ** Nielsen total off trade MAT April, top 50 alcohol brands by value
 *** MAT Apr'11 by value, Nielsen total off trade

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48 Yellow Tail



While not the most prestigious of Australian brands, Yellow Tail still managed to capitalise on the popularity of its homeland's vintages with Irish consumers, becoming yet another debutant wine on the 2011 list. Further investment may be required to ensure that this is not a mere blip.

49 Kopparberg



Kopparberg has enjoyed a fruitful year, with off-trade sales up a bumper 41%*. Stock up on the full Kopparberg range for refreshing sales growth. According to Kopparberg, when the brand isn't available in the off-trade, almost half of consumers switch out of the high margin cider category**. Kopparberg Strawberry & Lime, Pear & Mixed Fruit are performing neck & neck***; and so carrying the full range is important to minimise lost sales as only one in four Kopparberg consumers drink all three variants**. Kopparberg is supported by the high impact 'First Drink Refreshment' TV, radio, and on-line campaign, plus colourful PoS materials. The Kopparberg range comprises Pear, Strawberry & Lime, Mixed Fruit and new Raspberry. Kopparberg Pear, Mixed Fruit and Strawberry & Lime are available in 500ml bottle, 500ml can and 4-pack can formats. Kopparberg Pear is also available in a 6 x 330ml bottle 'carry-pack', while Kopparberg Raspberry & Pear Non Alcoholic are both available in 500ml bottle.

*Nielsen MAT Apr 2011 by value, Nielsen total off trade
 ** i-reach market research Feb 2011
 *** Richmond Marketing internal sales data Jan - July 2011

50 Sol



Sol's exotic, sun-drenched image was well received by the Irish market in 2011, while the brand may also have stolen a few drinkers from its not-all-that-dissimilar rival Corona. As such, the beer made its first appearance on the Top 50 list this year, and will be confident of making further strides in the future with the backing of market giant Heineken.



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CHECKOUT

TOP20 WINES 2011

in association with



01 Blossom Hill



A second year at the top spot for Blossom Hill, with the brand benefiting from consumers sticking to trusted, and more importantly, competitive brands. Under the guidance of Gleeson's, the Californian brand is tapping well into its target market (i.e female) through its association with glamorous Ladies Day events, such as at the recent Dublin Horse Show. Still the highest ranked wine on the Top 50 Alcohol list by a comfortable margin.

02 Wolf Blass



Having lost the top position last year, Wolf Blass has had to settle for second best again. However given the current market conditions and consumers switching to lower-priced brands, the premium Australian brand has done well to secure this position.

03 McGuigan



McGuigan is demonstrating how a marketing and pricing push by retailers can positively affect the fortunes of a brand. A new entrant to the Top 20 last year, it has jumped two places again this year, as well as seven positions in the Top 50 Alcohol Brands list. It is hard to know whether it has reached its saturation point or if there is still more room for growth. Only time will tell.

04 Santa Rita



Despite rolling out an integrated marketing campaign with limited edition ranges last October, Santa Rita dropped one place in the rankings, primarily because of the aforementioned rise in McGuigan. While remaining the dominant Chilean variety, some more work may be required to retain its favour amongst Irish consumers.

05 Jacob's Creek



Jacob's Creek has done well to reinvent itself amongst Irish consumers with its new Sparkling Rosé variety enticing shoppers back to the brand. While it may have dropped one place on the wine list, the Irish Distillers brand is doing enough to hold market share.

06 Torres



Torres holds on to its No.6 spot this year and continues to make strides among Irish consumers looking for an alternative to New World varieties. The Spanish wine, distributed by Findlater Wine & Spirit Group, is competing well against its rivals, but may require an additional marketing boost in such a tough competitive market.

07 Hardy's



Distributors Barry & Fitzwilliam will be relatively happy with this one place jump from last year, considering the brand has fallen in the overall Top 50. Its lower priced products are serving the mass market well, but such growth may be coming at the cost of its premium end brands.

08 Lindeman's



Australian wine remains in favour in Ireland, with brand recognition for Lindeman's accelerating through its sponsorship of popular series *Desperate Housewives*. Capitalising on this current interest will be the brand's next challenge.

09 Rosemount



Dropping two places this year, Rosemount lost some ground to fellow Australian brand Lindeman's, as well as other more 'on-trend' brands. While still a well-received brand amongst Irish consumers, it has failed to ignite the masses this year.

15 Yellow Tail



Another new entrant this year, Yellow Tail is benefiting from Irish consumers choosing recognisable and inexpensive brands. The brand is expected to capitalise on this trend – and its memorable logo – by investing further in marketing in the coming years.

10 Faustino



Faustino climbs five places this year, an indication of the inherent potential in Spanish wines. It may have been around for some time, but with subtle associations and promotional pricing, it has attracted a new breed of shopper on the hunt for recognisable brands.

16 Villa Maria



The popular New Zealand brand has shot into the Top 20 with special offers throughout the year attracting new customers, particularly for its Private Bin range. Nobilo and White Cloud are also under this umbrella and adding to the brand's kudos.

11 Cono Sur



Another Chilean favourite, Cono Sur retains its No. 11 position. Once the leader of the best priced wine brands, the Chilean wine has found the new market conditions tougher in recent times, but is clearly finding its feet again.

17 E&J Gallo



Adversely affected by the new players in the Top 20, E&J Gallo slips four places this year. Despite this, the Californian brand continues to invest heavily in NPD and recently launched the Gallo Family Vineyards Summer Red and Gallo Family Vineyards Merlot Rosé.

12 Oyster Bay



It was the on-trend wine brand last year and that interest does not seem to be abating as the New Zealand variety climbs a further two spots. With its producer taking direct representation of the brand this year, it will be interesting to see how it performs in 2012.

18 Long Mountain



Having dropped four places last year, Long Mountain slips another two this year, despite it being a strong price-positioned brand. Or, could it be that Irish consumers are gradually turning away from South African wines?

13 Carmen



Carmen has dropped one place since last year, and three places since 2009, a sign perhaps that its premium price positioning may be doing more damage than good for the brand over the last two years. Still retains a loyal following, however.

19 Casillero del Diablo



From the Concha-Y-Toro stable, and a new entrant (it last appeared in 2008, placed 17th), Casillero del Diablo earned its popularity via the hospitality trade and gathered momentum through strategic pricing in the retail sector. The Chilean wine is one to watch for further growth.

14 J.P. Chenet



J.P. Chenet has shot into the Top 20 list in 14th place for one primary reason – affordable price. The French favourite has repositioned itself as an accessible, good quality wine and as such, has seen sales soar.

20 Nederberg



Rooted at the bottom of the list for a second consecutive year, the South African brand has done little to stand out from this region or reinvigorate its positioning. With rival Long Mountain continuing to slide down the chart, this could be the right time to do so.

CHECKOUT

TOP20 LADS 2011

in association with 

01 Budweiser

Since Budweiser was first launched in 1876, it has been renowned for its authenticity, quality and brewing heritage. Budweiser today remains Ireland's number one beer brand in the off trade, proof that Budweiser truly is the King of Beers.

Budweiser is a heroic brand with an iconic heritage that goes hand-in-hand with the pursuit and anticipation of great times. Budweiser today has a wide range of packaging formats and sizes that makes it suitable for all occasions.

Budweiser is supported throughout the year with great above the line advertising and in store promotional activity.



03 Bulmers



With no new varieties to add to its portfolio, Bulmers focused on its marketing and branding in 2011. Now affiliated with some of the new and on trend festival and events, Bulmers also earned brand recognition with the appointment of David McWilliams to front its ad campaign.

04 Guinness



Guinness consumers are clearly loyal, particularly in the off trade as the iconic brand remains in the Top 5 despite the competition and targeted marketing by other brands.

02 Heineken

Driving innovation in Ireland and around the world, Heineken presents the perfect tools to serve the perfect pour at home.

Entertaining friends at home is growing in popularity and to meet the demands of savvy party hosts, Heineken has launched the 5L Draughtkeg Collection complete with two pint glasses, skimmer and ten coasters.

The Draughtkeg pours approximately 20 250ml glasses of smooth draught and its intelligent patented pressure system ensures fresh beer for 30 days after tapping, guaranteeing perfectly fresh pours even after guests have left. To support the arrival of the Draughtkeg, Heineken promotional teams will be creating an interactive experience in supermarkets nationwide. This will showcase the collection and challenge the public to pour the perfect pint.

The Draughtkeg follows the roll out of Heineken Served Extra Cold, the Pint-remastered and the launch of Heineken's new engineered glass and counter mounts in the on trade, reinforcing Heineken's commitment to the best experience for trade and consumers.

Heineken is Ireland's number one draught lager and has been enjoyed around the world since 1873.

The Draughtkeg Collection is available from supermarkets nationwide.

For more information visit www.heineken.ie/draughtkeg.



05 Carlsberg



Premium European lager, Carlsberg, was founded in 1847, by J. C. Jacobsen and developed in a brewing tradition steeped in uncompromising quality.

Known to be the original modern lager, Carlsberg crafted modern brewing - a technique that all others subsequently followed.

Carlsberg's tag line 'That Calls for a Carlsberg' redefines the brand's proposition - celebrating its heritage and values, while connecting with today's adventurous generation of beer drinkers.

It's encouraging consumers to step up and do the right thing - rewarding themselves with a Carlsberg for their efforts.

The past year has seen a new look and feel of packaging for Carlsberg which further affirms the brand's distinctiveness, consistency and superior credentials.

Carlsberg today has a wide range of packaging formats and sizes that makes it suitable for all occasions.

Carlsberg is supported throughout the year with great above the line advertising and in store promotional activity.

09 Dutch Gold



Dutch Gold was first introduced to the Irish market in 1994 and is now the 4th best selling lager. Liked for its crisp and clean taste at an affordable price, it has a large target market.

To coincide with Dutch Gold's SummerFestival Campaign, a special 4 for €4 offer pack with new visuals has been launched. Comans, distributors of the brand, state this has proven highly successful in the off trade.

Comans have invested a great deal of time and effort into building Dutch Gold's social media campaigns with a recently updated website and restructured Facebook page where

fans are informed of events and competitions.

To date the response and interaction from fans has been very encouraging which, in time, Comans predict will further strengthen brand loyalty and continue to build brand awareness.

06 M.G.D.



Down one place from last year, Miller suffered from the overall value decline in the market. Backed by an enigmatic media campaign, Miller will be confident of returning to the Top 5 next year.

07 Coors



Heineken and Molson Coors extended their partnership at the end of 2010, and it is clear that the former's control of the brand is working. Up one place, Coors is achieving its aim of moving from a perceived female drink to the mass market.

08 Bavaria



Bavaria know how to do timely marketing campaigns, such as last year's ambush tactics at the World Cup and using Mickey Rourke to front its own election campaign this year. The Gleeson brand may have dropped one position, but its come a long way and will continue to do so.

10 Karpackie



Only introduced in 2007, Karpackie is one of the recent success stories in the lager off trade market.

Karpackie, a premium Polish Lager, is one of the fastest growing beers on the Irish market. This growth is exemplified by the brand moving up four places from last year to No. 10 on the Top 20 Alcohol LADs.

Available in single cans, 4 Pack, 8 Pack and 20 x 330ml single bottles, Karpackie is catered to meet consumer needs.

Comans, distributors of the brand, believes the reason for this success is because it is a top quality Polish lager at an affordable price. Given the success of the brand to date Comans are expecting growth to accelerate further over the coming year.

11 Stella Artois



A popular UK brand, Stella Artois is up one place, with promotions and spill over of cross channel ad campaigns resonating with consumers.

12 Carling



Carling jumps a massive seven places this year, primarily thanks to the huge advertising push by Molson Coors Ireland. The Carling Nations soccer tournament in February may not have attracted the masses, but it did enough to accelerate interest and demand for the brand.

13 Druids

The Druids brand, established in 1998, is now the 2nd best selling cider on the Irish market. This is clear to be seen with the brand moving up two places from last year's No 15 position to No13 on the Top 20 LADs list. Distributor Comans has seen growth of 70% in Druids brand YTD. They accredit this success to the standard to which Druids is produced. It has an ABV of 6% and is packed with 100% apples. It is available in single cans, 4 and 8 pack, as well as a Mixed Berry flavour available in Bottle.

The Druids 4 Pack for €5 is exceptional value in the market at this time. Due to the standard to which Druids is produced and value for money, Comans are confident that the brand will continue to grow in the off-trade sector over the coming years and is a strong competitor for the other well known ciders in the Irish market.



14 Tyskie



A third consecutive jump, and another Polish brand, Tyskie is further proof of the popularity of Polish brands in Ireland, long after a majority of Eastern Europeans and natives have left these shores.

15 Corona



Corona drops four places this year, which will naturally disappoint distributors Barry & Fitzwilliam. With intense competition from other Mexican brands, Corona is still leading and with a bigger bottle size introduced recently, and this can only strengthen the brand.

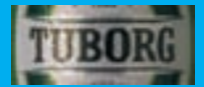
16 Wkd



Despite new variants added to the portfolio, Wkd drops four places. Earlier this year, it launched a new Purple limited edition format that will be available till year-end. This may have a positive impact on positioning next year.



17 Tuborg



Tuborg's clear value proposition is resonating with shoppers as it moves up one place. With so much value now offered in the market, it will be interesting to see if the Carlsberg owned product holds this position over the next 12 months.

18 Fosters



While Foster's future structure still up in the air with a possible takeover, its flagship brand, distributed by Heineken, endures another drop in 2011, from 16 to 18. A brand that could possibly do with a new impetus.

19 West Coast Cooler



Distributors Irish Distillers will be disappointed with the brand's position, down two places from last year. Having invested significantly in its target market, and with new variants, such as Citra, they have done all they can – so what next for the brand?

20 Devils Bit



A new entrant last year, the Gleeson Group will be happy that the brand retained its No. 20 position and is now the third biggest cider in the country.



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CHECKOUT

TOP20 SPIRITS 2011

in association with



01 Smirnoff



For the fourth consecutive year, Smirnoff retains its title as the top spirit, despite falling a spot on the alcohol rankings. With new flavoured varieties and price promotions, the Diageo brand is holding its own in the highly competitive vodka market.

05 Powers



Powers completes a top five that has remained unchanged since 2009, but has slipped two places in the Top 50 alcohol rankings. Similar to Hennessy, Powers has a stable customer base and a clear target audience.

02 Jameson



While unable to prise the top spot from Smirnoff yet again, Jameson sales continue to grow, both domestically and internationally. The integrated marketing campaign launched last year has proved successful in attracting new customers to the brand.

06 Bacardi



Bacardi ascended above the seventh spot it has held for the last three years, which is a remarkable achievement considering the rapid growth of Captain Morgan and other rum variants. New variations, including the Bacardi Mojito, are resonating with consumers.

03 Hennessy



Despite current trading conditions, Hennessy is one of the few brands to reap the benefits of customer loyalty without too much investment in marketing. With strong brand recognition, the brand remains Ireland's favourite cognac.

07 Paddy



Paddy will be disappointed to have exchanged places with Bacardi in 2011. The brand appears to have stagnated somewhat, even though it remains Ireland's third largest whiskey, and may need reinvigoration to fuel growth in the future.

04 Huzzar



The second biggest vodka in the country has yet again been unable to shift Smirnoff from its lofty perch. Having also slipped three places in the Top 50 alcohol rankings, it's been a mixed year for Huzzar.

08 Baileys



Although Baileys has held fast on this chart, its rise on the Top 50 alcohol rankings implies a recovery from the lapse it underwent in 2009. It is now the world's top-selling duty-free liquor brand to boot – a deserved member of Ireland's stellar assembly of alcohol brands.

09 Captain Morgan



Captain Morgan has not only shot up 11 places this year, but has also been one of the most recognisable brands in terms of marketing. With a targeted consumer approach, the Diageo brand is one to watch over the next 12 months.

15 Gordon's



Gordon's remain Ireland's second most popular gin, rising one place this year. With Hendrick's also having been launched in Ireland in the past year, could this be the start of a renaissance in the gin category?

10 Jack Daniel's



With the cross border equation abated, Jack Daniel's one position drop will disappoint distributor Edward Dillon. The brand enjoyed a boost via the 'JD Set' gigs held earlier this year, but more may be needed to spur growth in the future.

16 Finlandia



Having boomed through the good years, Finlandia's popularity has dwindled in the face of lower pricing by other vodka brands. Dropping five places this year and with consumer trading down expected to continue, the Edward Dillon brand may need to rethink its strategy.

11 Absolut



Up four places from 2010, Absolut is benefiting from the vast brand awareness through sponsorship of the Fringe festival in Dublin and Arts festival in Galway. With new flavours and mini multipacks, Absolut is clearly servicing its target market.

17 Dunphy's



Primarily viewed as an inexpensive core ingredient for Irish Coffee, Dunphy's has failed to capitalise on the new savvy consumer base and has dropped three places this year as a result.

12 Cork Dry Gin



The foremost gin brand on the Irish market, Cork Dry Gin endured somewhat of a lean year this outing, dropping three places into 12th as a result. The growth of Gordon's may be a direct cause of this.

18 Southern Comfort



A slight regression for Southern Comfort sees it finish a place shy of its 2010 spot. Pre-mix cans have been unable to boost its popularity here, although it persists as a popular cocktail ingredient.

13 Bushmills



Bushmills stays cemented to the 13th spot – a position it has held for the third consecutive year. Despite the vast marketing investment from Diageo, the brand has yet to reach the dizzy heights of its competitors. Unlucky for some?

19 Grant's



In a vodka market presided over by bigger name players, Grant's have been unable to make its presence sufficiently felt, compounding two years of stagnation with a one place fall this term.

14 Teachers



Despite dropping two places, the only Scotch whiskey on the list reaffirms its popularity amongst Irish consumers. Exceptionally popular during the festive period, Teachers is distributed by Barry & Fitzwilliam.

20 Jägermeister



Jägermeister's ever-expanding profile on the Irish market sees it finally crack into the top 20. Popular among younger consumers, it is another brand that will continue to rise.

BRAND NEWS

NEW LINES FROM COUNTRY CREST

Country Crest has added new lines to its successful 'From the Orient' and 'From the Farm' ranges. The Dublin based company launched 'From the Orient' earlier this year and following that success, it decided to add two new lines to that range.

The two new noodle lines include Chicken Chow and Szechuan Chicken, which have specifically been designed for 'on the go' consumers. The other lines in the range include Cantonese Chicken; Sweet & Sour Chicken; Lamb Rogan Josh and Chicken Makhani. The six varieties don't contain added colours, preservatives and hydrogenated fats and come complete with a fork for added convenience.

In the 'From the Farm' range, Country Crest has launched a new range of Baker Melts - Irish Rooster baked potatoes, loaded with cream cheese, peppers and chorizo or the alternative option of cream cheese and spinach.

Twin Pack vegetables have also been added to the range, comprising Baton Carrots and Baby Potatoes, Potato Croquettes and Breaded Mushrooms.

Also included in the 'From the Farm' range are Baby Garlic Potatoes, Potato Croquettes and Creamy Mash.

"At Country Crest, continuous innovation and new product development are instrumental to growing our business," says Michael Hoey, managing director of Country Crest. "We have been looking at ways in which to increase our product offering to the consumer as the response to the quality and taste has been superb. We're confident that these new additions will provide customers with more choices that are exciting, healthy and wholesome." "The response from consumers has been excellent, with people confirming the superior taste of the meals," adds Sinead O'Hanlon, group sales and marketing manager. "This has been instrumental in the company's decision to further expand the range and offer our 'From the Orient' customers another oriental-inspired meal option."

The new lines are available across Ireland in multiples and symbol stores nationwide.



DR. OETKER TEAMS UP WITH LEADING CHEF

Award-winning Italian chef, Marco Roccasalvo of Campo de' Fiori has paired up with Ristorante Pizza by Dr. Oetker to deliver the true Italian pizzeria experience in the comfort of home.

Chef Marco has created seven easy-to-make, mouth-watering salad and side dishes to complement the delicious Ristorante Pizza range, which includes the traditional favourite, Mozzarella, as well as the new exciting tastes of Vegetale and Pepperoni Salame. With its delightfully thin and crispy base and luxurious toppings, Ristorante Pizza delivers a restaurant-quality taste at home and is ready to eat in just 12 minutes.

Speaking about the new venture, Caroline Burton, marketing manager at Dr. Oetker Ireland, said; "Being true to authentic Italian food is Marco's business and passion, so joining together with Ristorante, which is the pizza of choice for those looking for a real pizzeria experience at home, is the perfect pairing. We are looking forward to bringing this new relationship to life through our pizzeria taste campaign over the coming months."

Chef Marco is pictured with his dish, Pisellini con pancetta and Caroline Burton, marketing manager at Dr. Oetker Ireland with Ristorante Mozzarella. Chef Marco will be preparing his dishes at events throughout the country over the coming months. For more information and recipes check out www.oetker.ie



INNOVATION AND MARKETING BOOST SHLOER SALES

Innovation in new flavours and successful marketing investment are the key drivers that are making Shloer sales sparkle.

Over the past year, Shloer - which is distributed by SHS Sales & Marketing - has seen sales volume and value in the Republic of Ireland (ROI) rocket by over a third, with one in five households now purchasing Ireland's No. 1 adult soft drink brand (ASD).

This growth looks set to accelerate during 2011 with high profile marketing support that will ensure consumers keep placing Shloer into their shopping baskets.

During 2011, Shloer is investing STG£16 million behind its 'Best Served Shared' marketing campaign, which has seen the screening of the

brand's first ever TV campaign in ROI, new press ads running in *OK!* and *Hello!*, a raft of digital and consumer sampling activity, and tailor-made support for trade customers.

Following the success of Shloer Rosé, which was launched in 2009, another innovative new line made its debut this summer - Limited Edition Shloer Summer Fruit Punch. Shloer has also been making regular appearances at a number of trade shows, where retailers have benefited from special promotional offers.

Free point of sale materials are also available to retailers all year round from the Shloer POS Hotline (Tel: + 44 800 917 3450).



NEW CAMPAIGN FROM CALPOL

Calpol is launching a new website in September to coincide with its huge marketing drive in time for the busy winter period. Calpol is Ireland's leading brand for pain and fever with a 46% share of the children's analgesics market.*

The Calpol brand has been helping children feel better for over 40 years and yet is still showing strong growth of +18%*. This growth can be seen across both the infant range, which is specifically formulated to be used by children as young as two months, and the Calpol 'SixPlus' range, which is designed to be even tougher on pain for the older child.



Above all, Calpol is a tried and trusted brand proven not only to be tough on pain but also gentle on tummies.

The winter months mark a key time for this market and Calpol will be investing heavily across the period.

The new Calpol website launches in September, followed by heavyweight TV, press and online activity which will be sure to maximise the season. Contains paracetamol. Always read the label.

(*Combined grocery and pharmacy market – IMS MAT May 2011 and AC Nielsen MAT May 2011. CK4/105/00)

NEW LISTERINE ZERO



A new Listerine Zero mouthwash has been launched onto the Irish market.

Listerine, the best-selling mouthwash brand in Ireland, has added the new variety to its portfolio of products.

Used twice daily, Listerine Zero is proven to freshen breath, kill bacteria between teeth and prevent and reduce plaque. It still kills millions of bad breath germs for a whole clean mouth. Now people everywhere can get a deep clean and fresh mouth without the intensity that kept them away. New Listerine Zero - Deep Clean, Less Intense Taste.

A CAREFREE CHOICE

Leading Panty Liner brand, Carefree, believes that women who feel fresh are able to live in the moment and enjoy life more.

Carefree has recently launched Carefree Plus Ultra, a specific liner for light incontinence, which protects like a pad but feels like a liner.

Discover the secret to everyday freshness with the Carefree range.



Mc Kernan Training Solutions has delivered training support to over 3500 FMCG suppliers across Europe, Asia, Africa and the Middle East since 2002. Working with companies who supply over 70% of top 100 checkout brands in this issue.



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Conferences / Sales Meetings

- Engaging and highly interactive selection of FMCG related topics to liven up your conference

BRAND NEWS



CRAFT BUTCHERS TO HOST PAVILION AT SHOP 2011

Craft Butchers have signed up for the forthcoming SHOP 2011 event, which takes place in the RDS Simmonscourt, Dublin, from September 27-29.

The association will hold a number of visitor attractions, including learnShop seminars; sessions on customer care with Jane Newbigging (Shop of the Year judge); and social networking seminars with social media specialist, Justine Negri.

There are also competitions such as

the Sausage and Pudding final and the Speciality Food final, along with numerous meat cutting events over the course of the three days.

The partnership offers an exclusive opportunity for the trade to discover the very best of Irish meat and the butchery craft.

"SHOP is an excellent forum for Craft Butchers to build both business relationships and commercial partnerships and we understand the importance of attending a show such

as this," Dave Long, Development Manager at Craft Butchers, explains. "We anticipate SHOP 2011 to be bigger and better than ever."

Throughout the duration of SHOP, free 15-minute consultations will be available for all visitors with interior business designer Maria O'Neill (mariaoneill@eircom.net) on commercial store design, at the Craft Butchers Pavilion. Pre-booking is required, and visitors seeking consultation are requested to bring along an image of their shop, to enable Maria to offer some free advice on possible business designs. Why not pop along and sample a 'slice' of the action?

WIPE OUT WASTE WITH JOHNSON'S BABY WIPES

Johnson's baby wipes are formulated to protect and respect baby's delicate skin, and with 100 years of experience they are leaders in the field.

Johnson's are the only wipes with the 'No More Tears' stamp of approval, signifying that they are as mild to the eyes as pure water, so customers can trust that they can be used safely all over the body. Log onto www.wipeoutwaste.ie for information about the Johnson's baby 'Wipe out Waste' initiative, an exciting new upcycling scheme in association with partners Terracycle.



VISUAL COMMS SPECIALISTS CUSPAL EXHIBITING AT SHOP

For the first time ever, Cuspal, one of the leading companies in visual communications, is exhibiting at SHOP 2011.

Established in 1978, Cuspal has recently changed the company's strategic direction and invested considerably in technology in order to be able to deliver an end-to-end solution for all consumers.

From an exterior fascia board to an in-store display, or from product labels to flyers through your door, Cuspal has the ability to deliver communication solutions to accommodate any business requirement.

Kevin Williams, Managing Director, Cuspal comments; "As we strive to increase awareness of Cuspal's product range, SHOP 2011 is the perfect platform upon which to reach our customers and make valuable leads. We aim to become a

visual communications brand name that is highly recognised within the retail industry - an area within which we aim to grow."

Cuspal will be located at stand B23. SHOP 2011 is being held from 27 - 29 September at the RDS Simmonscourt Dublin. Register for free fast track entry at www.easyfairs.com/SHOP

SPECIALISTS IN

- SIGNAGE
- SMALL FORMAT PRINT
- LABELS
- LARGE FORMAT PRINT

LEARNSHOP SEMINARS AT SHOP

Interest and excitement is mounting in advance of Ireland's definitive food and drink, retail and hospitality event, SHOP 2011, being held from 27 - 29 September at the RDS Simmonscourt, Dublin.

Not only do visitors get to meet with suppliers and key contacts, but there are also free content-rich 'learnShop' seminars which address hot industry trends and issues. These learnShops have been developed to provide visitors with detailed in-depth knowledge and innovative, practical advice.

There are industry speakers from a broad spectrum of backgrounds such as Jane Newbigging from Context Business Solutions who will be covering the topic of 'Customer Care and how it can affect your bottom line.'

Conor Hyde, the managing director from Bullseye Food Marketing, will discuss the 'Top 10 Effective Food Packaging Design Tips', while Tom Collins, Head of Strategic Information Services, Bord Bia, will be presenting on 'Consumer Lifestyle Trends'. As Conor Hyde, comments; "At my learnShop seminar, I'll be outlining the means, methods and tips that can help

small and medium food producers choose effective packaging that will significantly boost their chances of securing new listings in a competitive retail environment"

The learnShops schedule, beginning at 11am and running through to 4pm daily, is sure to generate plenty of interest. For the full schedule of learnShops and their speakers, log on to www.easyfairs.com/SHOP Register for FREE fast track entry at

www.easyfairs.com/SHOP



PERFECT POUR FROM HEINEKEN

Heineken has created the perfect pour at home with Draughtkeg Collection.

As the leading draught lager in the Irish market with 41.5% share, Heineken is at the forefront of innovation in Ireland, developing programmes to secure future growth of the entire lager category in the on and off trade channels.

Heineken has now given the consumer the perfect tools to serve a beer that looks as good as it tastes at home. Heineken has unveiled the 5L Draughtkeg Collection complete with two 250ml glasses, skimmer and ten coasters. The Draughtkeg Collection is the ultimate companion for any event; barbeques, nights-in or just get together parties with friends. The Draughtkeg itself pours approximately 20 250ml glasses of smooth draught beer and its intelligent patented pressure system ensures fresh beer for 30 days after tapping,

guaranteeing perfectly fresh pours even after guests have left. The Draughtkeg Collection is available from supermarkets nationwide. For more information visit www.heineken.ie/draughtkeg



New Varieties From Fruice

Fruice, the premium fruit juice range by Coca-Cola Hellenic Ireland, has extended its range. The new range includes two 1ltr Fruice Special Edition juice drinks in Tropical and Apple, Red Grape and Mixed Berry. First launched in Northern Ireland in 2001, Fruice has gone from strength to strength in the past number of years. The Fruice core range comprises 100% Orange, Apple and Cranberry juice drinks, available in a variety of take home and on-the-go packs. The 330ml pack has recently undergone a makeover with new 'healthy heart' graphics to reinforce the five a day message.

Despite the juice market continuing to decline in volume and value, the latest YTD Nielsen figures show that Fruice continues to perform ahead of the market. It is experiencing volume and value growth at +32% (+1.6 share points) and +4.3% (+0.3 share points) respectively on an IOI basis.*

As consumer tastes have changed over the years, so too has the Fruice range, keeping the brand at the forefront of innovation. A dilutable juice range, Fruice Dilute, was launched last year. The range was the first branded double strength dilutable juice in a 750ml PET bottle in three great tasting flavours with no added sugar variants (Orange, Blackcurrant, Orange & Pineapple). 2011 sees the Fruice Dilute range going from strength to strength, and indeed the range has now extended to a 1.5ltr pack. Fruice is regularly supported by promotional activity which makes it an extremely competitive choice. All its products contain 100% fruit juice, which also helps customers to maintain a healthy and balanced diet.

Above and below the line activity will run throughout the summer months reminding consumers Fruice is the healthy and convenient drink and Fruice is so smooth, it goes with everything. (Source: *Nielsen AM 2011).



KIT KAT POP CHOC IMPULSE BAGS LAUNCHED

Following the successful launch of Kit Kat Pop Choc sharing bag in March – bitesize Kit Kat is now available in a 40g impulse bag. Kit Kat Pop Chocs are delicious bitesize pieces of famous Kit Kat wafer coated in milk chocolate. Containing no artificial colours, flavours or preservatives, the new impulse bag is proving to be a huge hit among Irish consumers. Maria McKenna, Nestlé Ireland's Confectionery Manager, says; "The impulse bag is a natural move for the brand enabling consumers to enjoy Kit Kat Pop Choc in a convenient impulse pack. Supported by a strong marketing campaign, the new Kit Kat variant is enjoying solid launch sales and is proving to be very popular among consumers"



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BRAND NEWS

TOP 10 REASONS TO ATTEND SHOP 2011 THIS SEPTEMBER

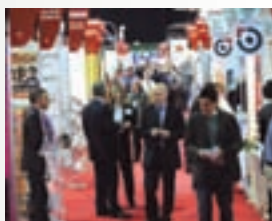
With SHOP just around the corner, here are the Top 10 reasons why you should attend this event.

Over 60% of exhibitors are there for the first time, showcasing an array of new products and solutions.



This year is set to be the biggest one yet, spanning 1,500 sq m and featuring over 140 exhibitors.

Over 4,000 focused buyers and decision makers are expected to attend, including those from multiples, forecourt and retail operations, as well as wholesalers.



Exhibitors will be offering 'show only' discounts, offers and vouchers.

There are free, content-rich learnShop seminars addressing hot industry trends and issues.

New to the show is the Knowledge Sharing Village - a rolling programme of 10-15 minute interactive workshop sessions focused on specific areas.

Craft Butchers' Pavilion - The Associated Craft Butchers (ACBI) of Ireland will be staging the National Sausage and Puddings Final and Speciality Food Final at the show, and meat cutting demonstrations events over the course of the exhibition. The ACBI will also be hosting free seminars.

The French Trade Commission will be present, encouraging trade partnerships between France and Ireland.

The Irish Cheese and Product of the Show Awards take place - an annual show that has proved the perfect platform for previous winners.



The Retail Doctor - respected retail consultant James Burke will be offering advice to exhibitors, while a 'Doctor's Clinic' will also be open for free consultations.

A SECOND WIND FOR LOVE IRISH FOOD

As it approaches its second birthday, Love Irish Food (LIF) has a new marketing campaign, a new Executive Director, and a second wind carrying it into its next phase of growth. Having started in 2009 with 28 members, the Irish brand movement has enjoyed undeniable success, growing to a membership today of almost 80 brands across 58 companies.

Its new leader, Kieran Rumley, a former marketing director at Batchelors, got started with the launch of a €350,000 communications campaign earlier this month, as well as a new wave of activity to drive the



logo's call to action among Irish shoppers and grow its membership even further. The campaign, which runs from August to January 2012, was designed to target the emotional space around Irish food brands and the thousands of livelihoods that depend on them. Following research from Ideaction, commissioned by LIF in February, jobs were identified as the current 'hot button' for Irish consumers. With the tag line 'works for all of us', the tone of the message is positive, promoting the purchase of Irish manufactured food and drink brands as a constructive action, and empowering consumers to do something good for themselves and the Irish economy.

The campaign's ATL component comprises a TV ad running on all major national stations from August 15, with 1850 TVRs, supported by radio on all major national and local stations. In addition, LIF member brands will be working together during the period to offer joint promotions to consumers. The campaign will be further supported by a comprehensive PR plan, specifically targeting national and trade press.

As the organisation embarks on its next phase of activity, it has attracted considerable interest from member companies in new categories of the food and beverage industry. According to LIF, brands are keen to join for two key reasons: firstly, because carrying the logo on-pack gives members a genuine competitive advantage over imported brands and, secondly, because there is a real demand by consumers for the LIF identification on-pack.

SOPHISTICATION FROM SILK CUT

Introducing the latest line of limited edition packs, 'Seasons', brought to you by Silk Cut. The bespoke themed designs will run across Purple, Blue and Silver King Size variants for a four to a six week period. Each custom pack design encapsulates an individual representation of each of the four seasons. The limited edition line will be arriving at the end of August, so look out for the design in your store.



PEDIGREE: TREATING IRELAND'S PETS

Pedigree, Ireland's number one selling dog care brand, is investing significantly in a TV, press and online campaign to tackle the serious issue of gum disease in dogs. The campaign, 'Doggie Dentures', highlights the importance of oral health care in dogs. With 80% of dogs over the age of three in Ireland showing signs of gum disease, Pedigree Dentastix is the only oral care treat endorsed by vets, and can reduce tartar by up to 80% when fed daily.

Pedigree Dentastix are available in trial packs of three, weekly packs of seven or monthly packs of 28 - and with a 'Vets Recommend' flash on pack, retailers should ensure they stock up and site this great product alongside their existing Dog Care range.

The Dog Care and Treats category is growing by over 7%* and represents a massive opportunity to recruit new buyers into the category, particularly if retailers ensure they have a range of Pedigree Care and Treats available on their pet care fixture. Pedigree continues to outperform the market and is growing by 12%* (*Source: AC Nielsen Scantrack- July 2011)



TULLAMORE DEW SPONSORS PRO AM

Tullamore Dew recently sponsored the annual Pro Am at Tullamore Golf Club. The Pro Am is one of the premier events in the Irish region PGA Pro Am calendar.

This year's event attracted entries from all over the country, with 42 professionals and amateur teams competing.

Speaking prior to the event, Ann Marie Finucane of Findlater Wine and Spirit Group, distributors of Tullamore Dew, said the sponsorship was a natural tie in for the brand.

"We are delighted to come to Tullamore, the natural home of Tullamore Dew whiskey, to sponsor this event. We are looking forward to the professionals and their teams coming to compete here at Tullamore Golf Club. We couldn't imagine anywhere better to stage our first Pro Am than the beautiful surroundings of Tullamore."

Tullamore Dew, the world's number two Irish whiskey, continues to grow in its home market where the brand is +16%* in the last three months. (*Source: AC Nielsen Volume May '11).



NEW B&H IN TOWN - THE START OF A NEW MOVEMENT

The iconic Benson & Hedges house offers a new smoking experience for existing adult smokers with its latest launch - B&H Silver Slide, a unique slide pack retailing at €8. Look out for the new Music Edition Packs that capture an array of different music genres. B&H Silver Slides has shown impressive growth month on month*, with SOS in the King Size Value sector now at 2.4% nationally, 1.8% in Dublin, 3.6% in Cork and 3.6% in Connaught/Ulster.



To ensure adequate stocking, talk to your local JTI Trade Marketer, visit your local Cash & Carry or place an order on 01 4040200.

(*Source: Nielsen, Extended Scantrack, Cigarette Volume Share, WE 17/4/11)

MOUNTAIN DEW ENERGY BUILDS ON STRONG START

Launched onto the Irish market in April of this year, Mountain Dew Energy offers consumers the perfect 'on-the-go' energy boost. The product also appeals to young male adults with its youthful personality and vibrant design. The iconic global brand arrived in Ireland in a 500ml PET citrus flavoured variant and was supported by a heavyweight sampling campaign, targeting universities and urban sports events.

This summer, Mountain Dew Energy, which has strong associations with extreme and urban sports, was the major sponsor of Kings of Concrete, the largest and most comprehensive urban sports and culture festivals in Ireland. Mountain Dew Energy has had an incredible reception in Ireland. It is the best-selling everyday energy SKU in convenience and continues to add growth to the everyday energy category. 2012 will see an exciting new Mountain Dew Energy campaign unveiled in Ireland to build on the brands success since its launch.

*Source: Nielsen Scantrack Sales growth period July10th 2011.



KEELINGS JOINS LOVE IRISH FOOD

Keelings, the 100% Irish owned family company and experts in growing, sourcing, sales, marketing and distributing fresh produce, has just signed up to the Love Irish Food campaign. Keelings is delighted with its participation in the Love Irish Food initiative, which aims to promote Irish food and drink brands. Keelings are passionate about quality, taste and growing Irish fruit.

Keelings has been growing berries for three generations, initially supplying their produce to the local Dublin markets before expanding nationwide. The Keelings Group currently employs over 1,400 people in Ireland. The new Keelings labels, featuring the Love Irish Food logo, will appear in shops over the coming weeks. In addition to this, there will be lots of exciting in-store activity to highlight Keelings involvement in the campaign occurring in retail units nationwide. Keelings are proud to be part of Love Irish Food.



BAGPACKER



Say Cathedral Cheese

Top selling UK brand Cathedral City Cheese was launched onto the Irish market last month with listings already secured in Tesco and Superquinn. Mary Scott (pictured), recent runner up in TV3's *Head Chef* programme, has been appointed as brand ambassador for the cheese.

Kraft Makes TV History

Kraft Foods Ireland was first off the mark to become a TV product placement advertiser following a six-figure deal with TV3. Kenco will feature heavily on TV3's popular chat shows, *The Morning Show with Sybil & Martin and Middy*. The 12-month deal combines the product placement with sponsorship of both programmes and will commence in September. Pictured are Martin King, presenter of *The Morning Show* with Sandra Gahan, Head of Marketing at Kraft Foods Ireland.



Top of the Class for Glanbia

Congratulations to Glanbia Consumer Foods Ireland (GCFI), Bewleys and Bachelors who were all recently certified with the Energy Management System I.SEN 16001. All three companies were commended for pursuing high standards in order to open trading doors to overseas markets and improving strategies for their business and customers. Pictured are (l-r) Ann Riordan, Chairman, NSAI and President of the Institute of Directors, Tony Nash, manager, Richard Hogan, Environmental Manager, Glanbia and John Perry, T.D, Minister of State with responsibility for small business.

BLUE HAVEN CELEBRATE EXPANSION

It has been a big year for the Blue Haven Food Company, having completed its €1 million expansion programme and securing further listings in Tesco for its product range. The new 8,000 sq ft production facility at Little Island in Cork will continue production of its award winning Kinsale Fish Pie, Seafood Chowder, Orange Marmalade and Jam ranges. The company is also investing in a nationwide advertising and marketing campaign to raise the profile of the brand. Pictured at the Tesco listing announcement were Michael Gallagher, Blue Haven Food Company Manager and Rachel Lawless and Carmel-Anne Brennan of Tesco Ireland.



Cavan Egg Producer Pretty In Pink

A Cavan free-range egg farm has been selected for display by a world design body for its unique product packaging. Clonam Clover launched its new O'Egg free-range white eggs earlier this year, with its eye catching pink packaging and branding attracting all the right attention. Clonam Clover was established in 1988 by Margaret Farrelly (pictured) and is one of the leading suppliers of free-range eggs to the retail sector. With its striking pink packaging similar to Action Breast Cancer, Clonam donated a percentage of sales to the charity. Pictured are Margaret and her son Killian.

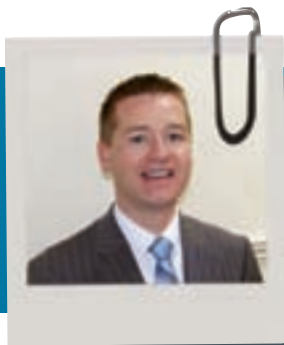
RACE IS ON FOR MUSGRAVE

Irish Olympian John Treacy (pictured) recently launched the 10th Musgrave Annual Triathlon which takes place on Saturday, September 3 in Farran Woods, Cork. Almost €3 million has been raised to date for various charities, including the Irish Cancer Society. The public can also donate funds for the causes by purchasing lucky bags in SuperValu and Centra stores nationwide.



Who is...

SEAMUS MC HUGH



SEAMUS MC HUGH COULD HAVE BEEN THE NEXT MARK ZUCKERBERG, BUT AS THE MARKETING MANAGER AT EPOS SPECIALISTS CBE EXPLAINS, HE CRAVED THE FMCG AND NOT THE FACEBOOK WORLD.

What was your first ever FMCG job and what did you learn from it?

I got a summer job in Boyce's Supermarket in Carrigart, Co Donegal when I was 13. This gave me an insight into dealing with customers on a daily basis. It taught me that exceptional service is rewarded with customer loyalty.

Who was the biggest influence on your career in FMCG?

The CBE sales team has been my biggest influence. Being part of a 14-strong sales team for eight years meant that you had to be on top of your game every day, just to remain on a par with your colleagues. Events such as SHOP 2011 highlight the importance of face-to-face dealings with customers/potential customers.

Who do you admire most in FMCG today?

I admire all independent retailers that are facing up to the challenge

from the multiples and continue to offer greater customer service and better support to their local areas.

If you didn't work in FMCG, what would you do?

I studied Computer Science in college and worked for a number of years as a programmer, so I would probably be still involved in that sector if I hadn't moved into the FMCG industry.

What would be your advice to people starting out in the industry?

I would advise people to embrace both challenges and opportunities head on - as the rewards can greatly outweigh any challenges presented.

Where do you see yourself in five years time?

At present, CBE are gaining significant market share in the UK. In five years time, I would imagine that I would be overseeing CBE's

marketing operations in Ireland, the UK and possibly mainland Europe.

Which is your favourite store and why?

Scally's Supermarket in Tullamore was my local store for six years and I always found their service to be first class. Ben (owner) and Fiona (manager) run a fantastic operation there.

If your company was a bar of chocolate what would it be and why?

The Mars bar - like CBE, it has been around for years and has plenty of experience, always stays ahead of its competitors and always guarantees satisfaction.

If you could bring back one (grocery) product that is no longer available in Ireland, what would it be?

It would have to be the Wispa Mint chocolate bar.

Name your top five grocery brands

Denny Sliced Meats, Fyffe's bananas, Lucozade Sport, Hunky Dory's and Dairygold

If you could work for any other retailer, brand or supplier (aside from your current employer), who would it be and why?

With the strength of the CBE brand and loyal customer base I couldn't see myself working for another company.

What do you like to do in your spare time?

I enjoy socialising most weekends but balance that by exercising regularly, and enjoy football, running and cycling.

Twitter / Facebook: Friend or foe?

Friend. As a means of communication, social media is a fantastic medium.

X Factor or Strictly?

I'm not a big fan of either but I'll opt for Strictly as they seem to have more fun.

Work to play or play to work?

Work to play.

iPhone or BlackBerry?

Recently converted to the iPhone

Most likely to say?

Comprehensive EPOS systems are a must have for all retailers.

Least likely to say?

Sorry, we don't want your business.

CBE will be at stand B1 at this September's SHOP event.



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FINAL WORD

SPIN OF THE MONTH

Spin Of The Month for August has to go to embattled Minister for Jobs, Enterprise and Innovation, Richard Bruton, whose announcement in late July that he was planning to overhaul the outdated JLC system, rather than abolish the system altogether, drew collective groans from those in the trade. Following the High Court ruling on the unconstitutionality of the system, the stage was set for Minister Bruton - who also has an announcement on the Retail Code of Practice looming, lest we forget - to announce the end of the JLC process.

The press release that accompanied the announcement of 'JLCII: The Revenge' (our description) was packed with the usual guff; that the new measures "will radically overhaul the system so as to make it fairer, more competitive and more flexible so as to increase job-creation in these sectors."

However, the plans were roundly slated by spokespeople on all sides, with Retail Ireland's Torlach Denihan describing them as "totally unnecessary", his IBEC colleague Brendan McGinty labelling them "arbitrary and unnecessary", and Mandate describing them as "opportunist" and "cowardly". Who'd want to be a Minister?



WHAT THEY SAID

Choice quotes from the FMCG Sector

“ *Having built the Superquinn business and watch it grow throughout the years, I was delighted to see that the Musgrave Group, a strong, Irish family owned business is to take over the Superquinn chain.* ”

Feargal Quinn finally broke his silence over the Superquinn/Musgrave drama.

“ *Investing in the food sector looks like a smart thing to do in the current environment.* ”

With some spare cash left after the sale of Jacob Fruitfield, Michael Carey is eyeing up new ventures.

RUMOUR MILL

Of course, the Musgrave takeover of Superquinn has dominated the past month, with the rumour mill spinning into action as to which, if any, SQ stores Musgrave may seek to offload, due to competition with existing SuperValu outlets or underperformance. Portlaoise and Carlow have been mooted as first for the chop, while Ballinkeer, Knocklyon and even Blackrock have also been mentioned. One rumour that doesn't look like coming true, however, is that SQ founder Feargal Quinn is planning a run for the Áras - at the time of going to press, he confirmed to Final Word that he's "too busy with his new book [...] also, my wife tells me that if I don't learn to say no to anything else, she'll be very cross."

GOOD MONTH, BAD MONTH

COCA-COLA

No sign of the giant relinquishing its No. 1 spot any time soon

BEST IN FRESH WINNERS

With new categories, entrants and winners, the competition is really hotting up.

CENTRA

First off the mark to accept contactless payments in the retail sector.

BARRY GROUP

The Cork based company recorded a 16% increase in turnover in 2010.

SUPERQUINN/MUSGRAVE DEAL

Will it, won't it? The late night deal turned into a lesson of how not to conduct a sale deal. All ended well, eventually.

BAG-GATE

Dunnes Stores clearly has a thing about bags given their ongoing legal battle over levy charges and now their Rathmines store is up in arms over customers using fruit and veg bags for general groceries. Right or wrong, it's not exactly good PR.

NEW CARD FEES

The roll out of the Visa Debit card is causing a stir with massive transactional charges imposed on retailers. Time to talk to your merchant provider.

PRODUCT(s) of the MONTH

Chutney was one of those quintessential Celtic Tiger products that enjoyed a new lease of life thanks to the multitude of Farmers' Markets dotted around the country. 'Homemade' was the USP, and with cheeseboards almost a commonplace during the post-dinner offering, chutney sales naturally rocketed. Such sweet days, such memories. The story of the newly established Rocker Foods is a familiar one that could be applied to dozens of recent startups. Faced with unemployment, Dublin native Kevin Redmond turned to food production as a new career move. With the proceeds of a car boot sale, he invested €800 in equipment and tried his hand at everything from pasta and pesto to chutney. Farmers' Markets, of course, were his selling ground and after relatively successful sales, he discovered that his chutney was the jewel in the crown. And so Rocker Foods was established.

Rocker chutney, Redmond says, is 'different' to the many others on the market, aiming at a customer base that's not that dissimilar from what David McWilliams once referred to as

the Pope's Children - profile age of 25-35 years, well educated and travelled, accustomed to the finer things in life and while faced with new challenges, know their food and drink.

So what is Rocker Foods doing to entice this would-be upmarket, cash-poor demographic? A 'funky' brand with eye-catching packaging, suitable for all diets and the big push on being Irish owned. It's vibrant, young and all very Rock and Roll - just the way some consumers like it, as is the case with the successful Reggae Reggae brand.

Rocker Foods is currently listed in 15 shops around Dublin and Redmond is hopeful of a full national presence by year-end.



Introduction of Lower Ignition Propensity Cigarettes

What?

Lower Ignition Propensity (LIP) is a new tobacco regulation requiring cigarettes to comply with standards that increase the chances of a cigarette self-extinguishing when left at rest.

Why?

The new regulation has been introduced by the European Union and aims to reduce accidental fires occurring as a result of burning cigarettes being left unattended.

When?


The new standard will apply to all cigarettes across the European Union from 17th November 2011.

LIP cigarettes have already been introduced in the USA, Canada, Australia and Finland.

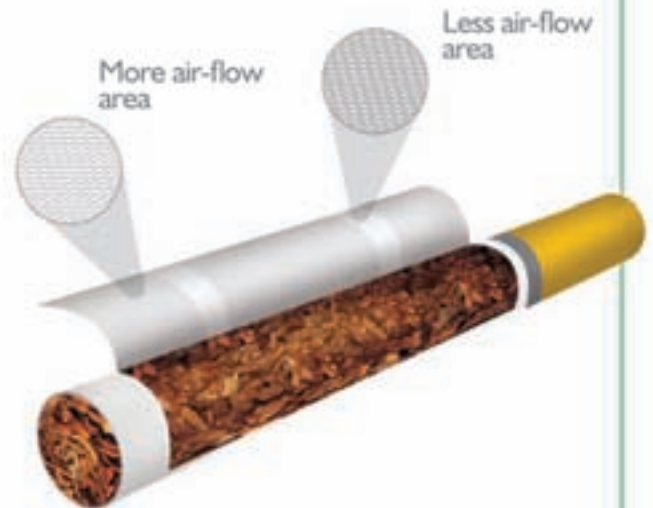
How do LIP cigarettes work?

The new cigarettes contain a specifically designed cigarette paper that includes narrow bands which in effect act as speed bumps.

When smoked normally, the cigarettes should not self-extinguish, however they may self-extinguish if they are left at rest.

 The taste and flavour of cigarettes will not be affected by the change. Adult smokers should find the same taste and flavour they have always enjoyed.

The regulation only applies to cigarettes and does not extend to roll your own or other smoking products.



What do tobacco retailers need to do?

- Tobacco companies are committed to managing the change as smoothly as possible and the companies will be in contact with customers in the coming months to provide specific details of how they are managing the transition to LIP cigarettes for their products.
- Tobacco retailers will need to give special attention to stock management and rotation of tobacco products in the weeks leading up to the 17th November. Your tobacco company representatives will be on hand to assist you. This is to ensure packets of non-LIP cigarettes are sold out before restocking the point of sale with the new LIP cigarettes.

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