

## Glossary

<b>Act</b>	The Enterprise Act 2002.
<b>AG Barr</b>	AG Barr plc.
<b>Aldi</b>	Aldi Stores Ltd.
<b>ASDA</b>	ASDA plc.
<b>Aseptic still drink</b>	A form of still drink that contains no preservatives. The product is flash heat-treated and cooled rapidly.
<b>Bargain Booze</b>	Bargain Booze Ltd.
<b>Batley</b>	Batleys Ltd.
<b>BMRB</b>	British Market Research Bureau.
<b>Booker</b>	Booker Ltd.
<b>Bottler</b>	A manufacturer that makes and bottles beverages.
<b>Brand owner</b>	A company which owns a <b>soft drink</b> brand, including product name, logo, and recipe.
<b>Branded soft drinks</b>	<b>Soft drinks</b> manufactured under a known brand.
<b>Britvic</b>	Britvic Soft Drinks Ltd.
<b>Brooks</b>	Brooks Soft Drinks Ltd.
<b>Buyer power</b>	Buyer power refers to the ability of a large purchaser to negotiate lower prices from its suppliers. Where this involves offsetting the market power of large suppliers, it is often referred to as 'countervailing' buyer power.
<b>Cadbury Schweppes</b>	Cadbury Schweppes plc.
<b>Category captain or category manager</b>	A supplier invited by a retailer to provide advice, research and make recommendations to optimize how that retailer stocks and sells all products (including competing products) within a particular grocery category.
<b>Category management</b>	Where retailers invite a supplier or suppliers to take responsibility for analysing data on consumer preferences; identifying the best means of meeting these; determining the most effective ways in which suppliers can provide the relevant products, in terms of range and allocation of space; and advising the retailer accordingly.
<b>CC</b>	Competition Commission.
<b>CCE</b>	Coca-Cola Enterprises Ltd, <b>bottler</b> for Coca-Cola in Great Britain.

<b>COD</b>	Cheapest on display.
<b>Concentrate</b>	Material manufactured from company-defined ingredients and sold to <b>bottlers</b> for use in the preparation of <b>syrops</b> through the addition of sweetener and/or water.
<b>Contract packing, co-packing or contract filling</b>	The process whereby <b>brand owners</b> focus on brand and product development and promotion, but outsource <b>soft drink</b> production.
<b>Co-op</b>	Co-operative Group (CWS) Ltd.
<b>Costco</b>	Costco UK Ltd.
<b>Cott</b>	Cott Beverages Ltd, a subsidiary of Cott Corporation.
<b>Crystal</b>	Crystal Drinks (UK) Ltd.
<b>CSDs</b>	Carbonated <b>soft drinks</b> . Manufactured drinks, optionally sweetened, acidulated, carbonated and which may contain fruit or other flavours.
<b>Danone</b>	Danone Holdings (UK) Ltd.
<b>Deep discount promotions</b>	Promotional offers by retailers which have the effect of cutting prices to near or below cost.
<b>Dolly pallets</b>	Pallets with wheels, able to be wheeled directly into retail space for display purposes.
<b>DTT</b>	Dilute-to-taste soft drink. Squash and other cordials, sold in <b>concentrate</b> form for dilution with water.
<b>Dunnes</b>	Dunnes Stores (Bangor) Ltd.
<b>E-auction or e-tender</b>	A method of sourcing supply of goods through an electronic auction process where competing bidders remain anonymous but can usually see competing bid prices.
<b>EBIT</b>	Earnings before interest and tax.
<b>Elopak</b>	Carton packaging system for fresh milk, premium fresh and <b>aseptic</b> juice produced by Elopak A/S.
<b>Energy drinks</b>	<b>Soft drinks</b> which are marketed as being able to help improve concentration, reaction time and endurance.
<b>EPOS</b>	Electronic point of sale, ie the scanning system at the checkout.
<b>Ex-works</b>	Distribution agreement where the seller has goods ready for collection at its premises and the buyer pays all transportation costs and also bears the risks for bringing the goods to their final destination.
<b>Farmfoods</b>	Farmfoods Ltd.

<b>Flavour houses</b>	Companies which develop flavourings for the food and beverage industry.
<b>Flavoured water</b>	A form of colourless <b>soft drink</b> consisting of flavours and sugar or sweetener, usually using <b>mineral</b> or <b>spring water</b> .
<b>Fruit juice or pure juice</b>	<b>Soft drink</b> consisting of 100 per cent pure juice and generally with no added ingredients.
<b>Gerber</b>	Gerber Foods Soft Drinks Limited.
<b>Glenpatrick</b>	Glenpatrick Spring Water Co Ltd.
<b>Greencore</b>	Greencore Maltings Group Ltd.
<b>Gross margin</b>	Gross margin is gross contribution divided by <b>NSV</b> , where gross contribution equates to NSV less material costs, direct and indirect variable costs and fixed overheads.
<b>GSK</b>	Glaxo Smithkline plc (Consumer Healthcare International).
<b>Hall &amp; Woodhouse</b>	Hall and Woodhouse Ltd.
<b>Hansa</b>	Hansa Borg Bryggerier ASA.
<b>HHI</b>	Herfindahl-Hirschman index, a measure of the degree of concentration in a market and defined as the sum of the squares of all the market shares in the market.
<b>Highland Spring</b>	Highland Spring Ltd.
<b>Iceland</b>	Iceland Foods Ltd.
<b>Juice drinks and nectars</b>	<b>Soft drinks</b> made with varying quantities of different types of <b>fruit juice</b> .
<b>KVI</b>	Key or known value item, a grocery item for which there is a high level of consumer awareness of the normal retail price, and which is therefore a particular focus of comparisons and competition between retailers.
<b>Lidl</b>	Lidl Ltd.
<b>Loblaw's</b>	Loblaw Companies Ltd.
<b>Loyalty cards</b>	Cards issued to store customers, which accumulate points on purchases, which are redeemable for value in a variety of ways.
<b>Makro</b>	Makro Self Service Wholesalers Ltd.
<b>Marks &amp; Spencer</b>	Marks and Spencer plc.
<b>Macaw</b>	Macaw (Holdings) Ltd.

<b>Mineral water</b>	Natural mineral water. Water which must be officially recognized through a local authority after a qualifying period of two years, during which time it is repeatedly analysed. It must also be registered with the Food Standards Agency. It must come from a specified ground water source which is protected from all kinds of pollution. The water may not be treated in any way to alter its original chemical and microbiological composition. In addition natural mineral waters must provide certain information on their labels, such as the typical mineral analysis.
<b>Montgomery Spring</b>	Montgomery Spring Water Company.
<b>Morrisons</b>	Wm Morrison Supermarkets plc.
<b>Multiple, multiple grocery retailer</b>	Operator of a chain of supermarkets.
<b>NAB</b>	Non-alcoholic beverage.
<b>Netto</b>	Netto Foodstores Ltd.
<b>Nichols</b>	Nichols plc.
<b>Nisa</b>	Nisa-Today's Holdings Ltd.
<b>Norbev</b>	Northern Beverages Ltd.
<b>NSV</b>	Net sales value.
<b>OFT</b>	Office of Fair Trading.
<b>Operating margin</b>	Operating margin is gross contribution less sales, general and administrative overheads, divided by <b>NSV</b>
<b>Own-label</b>	Range of products carrying the retailer's brand and produced to retailer's specification, typically sold at a lower price than main brand competition.
<b>PepsiCo</b>	PepsiCo Inc.
<b>PET</b>	Polyethylene Terephthalate. Plastic used to make soft drink bottles.
<b>Premium products</b>	Products of superior quality sold at a premium price.
<b>Pre-form</b>	Compact form of pre-prepared <b>PET</b> bottles that are blow moulded into the final shape and size of the bottle.
<b>Primary brand</b>	Prominent brand well recognized by consumers. Production and brand ownership of primary brands is usually integrated in a single company.
<b>Princes</b>	Princes Soft Drinks, a subsidiary of Princes Ltd and ultimately of Mitsubishi Corporation.

<b>Product category</b>	A group of similar product lines, eg <b>soft drinks</b> .
<b>Radnor Hills</b>	Radnor Hills Mineral Water Company Ltd.
<b>Red Bull</b>	Red Bull Company Ltd.
<b>Refresco</b>	Refresco Holdings BV.
<b>Rothschild</b>	NM Rothschild & Sons Ltd.
<b>Roxane</b>	Societe d'Exploitation des Sources Roxane.
<b>Sainsbury's</b>	Sainsburys plc.
<b>Shannon</b>	Shannon Minerals Ltd.
<b>Shepley Spring</b>	Shepley Spring Ltd.
<b>Silver Spring</b>	Silver Spring Mineral Water Co Ltd.
<b>SKU</b>	Stock-keeping unit; a term used to refer to a specific version of a product (often differentiated by size and type of packaging).
<b>SLC</b>	Substantial lessening of competition.
<b>Soft drink</b>	Beverage which does not contain alcohol.
<b>Somerfield</b>	Somerfield Stores Ltd.
<b>Spar</b>	Spar (UK) Ltd.
<b>Sports drinks</b>	<b>Soft drinks</b> which are marketed as providing energy for physical or mental activity, and particularly to improve performance and assist with physical recovery during sporting activities.
<b>SSNIP</b>	Small but significant non-transitory increase in price.
<b>Still soft drinks</b>	<b>Soft drinks</b> produced without carbonation.
<b>Strathmore</b>	Strathmore Mineral Water Co Ltd.
<b>Spring water</b>	Water which comes from a single non-polluted ground water source. Unlike <b>mineral water</b> there is no formal recognition process required although it must still be registered with the local authority. Many mineral waters begin their lives as spring waters trading as such during the two-year testing period. Unlike mineral waters, spring waters may undergo permitted treatments but like NMWs must meet microbiological criteria. All spring waters must comply with the Drinking Water Regulations.
<b>Syrup</b>	<b>Concentrate</b> mixed with sweetener and water, mixed with water or carbonated water to produce finished <b>soft drinks</b> .
<b>Table water</b>	Water which may come from more than one source and may

include the public water supply. Treatment is permitted which results in the water achieving the compositional/microbiological requirements of the regulations.

<b>Tertiary brands</b>	Brands which are relatively low profile and may be sold by smaller retailers or wholesalers that do not have an <b>own-label</b> offering.
<b>Tesco</b>	Tesco plc.
<b>Tetra Pak</b>	Packaging system primarily for liquid food products produced by Tetra Pak, a subsidiary of Tetra Laval SA.
<b>TNS</b>	Taylor Nelson Sofres plc.
<b>Value products</b>	Products which are cheapest on display.
<b>Villa</b>	Villa Soft Drinks Ltd.
<b>Virgin</b>	Virgin Drinks Group Limited, owners of the Virgin Cola brand, a subsidiary of Virgin Cola USA Inc.
<b>Waitrose</b>	Waitrose Ltd.
<b>Wal-Mart</b>	Wal-Mart Stores, Inc.