Sales data and market shares

Retail ketchup market

TABLE 1 **Retail ketchup market concentration by volume**

	4 w/e 15 June 2002 to 4 w/e 17 May 2003		*4 w/e 14 June 2003 to 4 w/e 15 May 2004*		*4 w/e 12 June 2004 to 4 w/e 14 May 2005*	
	Volume ’000kg	*Market share %*	*Volume ’000kg*	*Market share %*	*Volume ’000kg*	*Market share %*
Heinz	39,210	65.7	39,223	64.9	40,766	65.6
HP (Daddies)	1,982	3.3	2,022	3.3	2,272	3.7
Heinz/HP combined	41,192	69.0	41,245	68.3	43,037	69.2
Other branded	1,198	2.0	233	0.4	689	1.1
Own label	17,269	28.9	18,940	31.3	18,445	29.7
Total	59,659	100	60,418	100	62,171	100
HHI pre-merger		5,172		5,209		5,194
HHI post-merger		5,609		5,643		5,673
Increase in HHI		437		435		479

Source: CC analysis of IRI data provided by Heinz.

Notes:
1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

TABLE 2 **Retail ketchup market concentration by value**

	4 w/e 15 June 2002 to 4 w/e 17 May 2003		*4 w/e 14 June 2003 to 4 w/e 15 May 2004*		*4 w/e 12 June 2004 to 4 w/e 14 May 2005*	
	Value £’000	*Market share %*	*Value £’000*	*Market share %*	*Value £’000*	*Market share %*
Heinz	64,842	74.6	72,192	76.3	77,937	77.6
HP (Daddies)	2,890	3.3	2,839	3.0	2,952	2.9
Heinz/HP combined	67,731	77.9	75,030	79.3	80,888	80.5
Other branded	1,076	1.2	229	0.2	827	0.8
Own label	18,126	20.9	19,337	20.4	18,761	18.7
Total	86,934	100	94,596	100	100,477	100
HHI pre-merger		6,011		6,251		6,375
HHI post-merger		6,506		6,709		6,830
Increase in HHI		496		458		456

Source: CC analysis of IRI data provided by Heinz.

Notes:
1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

Retail brown sauce market

TABLE 3 **Retail brown sauce market concentration by volume**

	4 w/e 15 June 2002 to 4 w/e 17 May 2003		4 w/e 14 June 2003 to 4 w/e 15 May 2004		4 w/e 12 June 2004 to 4 w/e 14 May 2005	
	Volume ’000kg	*Market share %*	*Volume ’000kg*	*Market share %*	*Volume ’000kg*	*Market share %*
Heinz*	0	0.0	0	0.0	1	0.0
HP (HP and Daddies)	11,831	69.4	12,152	70.6	12,702	73.8
Heinz/HP combined	11,831	69.4	12,152	70.6	12,703	73.8
Other branded	935	5.5	587	3.4	725	4.2
Own label	4,290	25.2	4,465	26.0	3,794	22.0
Total	17,056	100	17,204	100	17,221	100
HHI pre-merger		5,474		5,675		5,943
HHI post-merger		5,474		5,675		5,943
Increase in HHI		0		0		0

Source: CC analysis of IRI data provided by Heinz.

*One large Heinz Brown Sauce SKU (2.5kg) appeared in the data over the period concerned. This is because IRI data covers some retailers that sell to the food service sector. The quantities are negligible and do not change our conclusion that Heinz was not active in the retail brown sauce market.

Notes:

1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

TABLE 4 **Retail brown sauce market concentration by value**

	4 w/e 15 June 2002 to 4 w/e 17 May 2003		4 w/e 14 June 2003 to 4 w/e 15 May 2004		4 w/e 12 June 2004 to 4 w/e 14 May 2005	
	Value £’000	*Market share %*	*Value £’000*	*Market share %*	*Value £’000*	*Market share %*
Heinz*	0	0.0	0	0.0	1	0.0
HP (HP and Daddies)	30,007	80.7	30,993	82.7	31,623	84.3
Heinz/HP combined	30,007	80.7	30,993	82.7	31,624	84.3
Other branded	1,715	4.6	1,275	3.4	1,368	3.6
Own label	5,459	14.7	5,193	13.9	4,504	12.0
Total	37,181	100.00	37,462	100.0	37,496	100.0
HHI pre-merger		6,750		7,048		7,271
HHI post-merger		6,750		7,049		7,271
Increase in HHI		0		0		0

Source: CC analysis of IRI data provided by Heinz.

*One large Heinz Brown Sauce SKU (2.5kg) appeared in the data over the period concerned. This is because IRI data covers some retailers that sell to the food service sector. We do not think that this materially affects our analysis.

Notes:

1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

Retail barbecue sauce market

TABLE 5 **Retail barbecue sauce market concentration by value (based on sales values for the 52 weeks ended 5 November 2005)**

	Market definition					
	A		*B*		*C*	
	Value £'000	*Market share %*	*Value £'000*	*Market share %*	*Value £'000*	*Market share %*
HP	4,218	40.6	6,128	24.6	9,493	21.1
Heinz	1,821	17.5	2,809	11.3	4,623	10.3
Heinz/HP combined	6,039	58.1	8,938	35.9	14,116	31.3
Other branded	2,828	27.3	12,940	52	23,551	52.2
Own label	1,527	14.7	3,013	12.1	7,385	16.4
Total	10,394	100	24,891	100	45,052	100
HHI pre-merger		2,916		3,583		3,545
HHI post-merger		4,337		4,139		3,973
Increase in HHI		1,421		556		428

Source: CC analysis of IRI data provided by Heinz.

Notes:
1. Market definition: A—BBQ only; B—BBQ, chilli and hot and spicy; C—BBQ, chilli, hot and spicy, relish and other thick sauces.
2. Columns may not sum to totals due to rounding.
3. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

TABLE 6 **Retail barbecue sauce market concentration by value (based on sales values for the 52 weeks ended 6 November 2004)**

	Market definition					
	A		*B*		*C*	
	Value £'000	*Market share %*	*Value £'000*	*Market share %*	*Value £*	*Market share %*
HP	4,737	41.5	7,048	27.9	12,509	26.9
Heinz	2,338	20.5	3,135	12.4	5,848	12.6
Heinz/HP combined	7,075	62.0	10,183	40.3	18,357	39.5
Other branded	2,551	22.4	12,280	48.6	20,754	44.6
Own label	1,527	14.7	3,013	12.1	7,385	16.4
Total	11,153	100	25,475	100	46,496	100
HHI pre-merger		2,889		3,413		3,127
HHI post-merger		4,592		4,104		3,803
Increase in HHI		1,703		691		677

Source: CC analysis of IRI data provided by Heinz.

Notes:
1. Market definition: A—BBQ only; B—BBQ, chilli and hot and spicy; C—BBQ, chilli, hot and spicy, relish and other thick sauces.
2. Columns may not sum to totals due to rounding.
3. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

TABLE 7 **Retail barbecue sauce market concentration by volume (based on sales volumes for the 52 weeks ended 5 November 2005)**

	Market definition					
	A		*B*		*C*	
	Volume ’000kg	*Market share %*	*Volume ’000kg*	*Market share %*	*Volume ’000kg*	*Market share %*
HP	1,575	49.5	2,105	35.8	2,778	27.1
Heinz	768	24.1	1,122	19.1	1,534	15.0
Heinz/HP combined	2,344	73.6	3,227	54.9	4,312	42.1
Other branded	491	15.4	1,981	33.7	4,252	41.5
Own label	351	11.0	671	11.4	1,688	16.5
Total	3,186	100	5,879	100	10,251	100
HHI pre-merger		3,389		2,912		2,954
HHI post-merger		5,775		4,280		3,767
Increase in HHI		2,386		1,368		813

Source: CC analysis of IRI data provided by Heinz.

Notes:
1. Market definition: A—BBQ only; B—BBQ, chilli and hot and spicy; C—BBQ, chilli, hot and spicy, relish and other thick sauces.
2. Columns may not sum to totals due to rounding.
3. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

TABLE 8 **Retail barbecue sauce market concentration by volume (based on sales volumes for the 52 weeks ended 6 November 2004)**

	Market definition					
	A		*B*		*C*	
	Volume kg	*Market share %*	*Volume kg*	*Market share %*	*Volume kg*	*Market share %*
HP	1,735	51.2	2,375	40.1	3,458	32.5
Heinz	921	27.2	1,205	20.3	1,829	17.2
Heinz/HP combined	2,657	78.4	3,580	60.4	5,287	49.7
Other branded	318	9.4	1,766	29.8	3,700	34.8
Own label	413	12.2	577	9.7	1,650	15.5
Total	3,388	100	5,923	100	10,637	100
HHI pre-merger		3,600		3,006		2,803
HHI post-merger		6,385		4,638		3,921
Increase in HHI		2,786		1,632		1,118

Source: CC analysis of IRI data provided by Heinz.

Notes:
1. Market definition: A—BBQ only; B—BBQ, chilli and hot and spicy; C—BBQ, chilli, hot and spicy, relish and other thick sauces.
2. Columns may not sum to totals due to rounding.
3. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is an upper-bound as it assumes other branded products are produced by one manufacturer.

Retail baked beans market

TABLE 9 **Retail baked beans market concentration by value (plain baked beans only, without additional food items)**

	Market share %		
	*2003**	*2004†*	*2005‡*
Heinz	68.9	68.9	67.7
Premier	6.4	6.6	6.7
HP	6.3	5.7	5.1
Crosse & Blackwell	0.0	0.9	0.9
Branston	0.0	0.0	0.7
Own label	24.5	24.2	25.3
Other branded	0.3	0.3	0.4
HP/Heinz combined	75.2	74.6	72.8
HHI pre-merger	5,387	5,366	5,251
HHI post-merger	6,255	6,152	5,941
Increase in HHI	868	785	691

Source: Heinz (IRI) and CC analysis.

*52 weeks ended 3 January 2004.
†52 weeks ended 1 January 2005.
‡52 weeks ended 31 December 2005.
Notes:
1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is calculated by treating the different Premier brands as if they were produced by separate manufacturers and other branded products as if they were produced by one manufacturer.

TABLE 10 **Retail baked beans market concentration by volume (plain baked beans only, without additional food items)**

	*2005 annualized**		*2005 pre-Branston†*	
	Volume '000kg	*Share %*	*Volume '000kg*	*Share %*
Heinz	139,955	51.1	101,616	50.9
Premier	20,626	7.5	14,885	7.5
HP	15,935	5.8	12,521	6.3
Crosse & Blackwell	3,666	1.3	2,364	1.2
Branston	1,025	0.4	0	0.0
Own label	112,869	41.2	82,772	41.5
Other branded	233	0.1	175	0.1
HP/Heinz combined	155,890	57.0	114,137	57.2
Total	273,684		199,448	
HHI pre-merger		4,352		4,359
HHI post-merger		4,947		4,999
Increase in HHI		596		640

Source: CC analysis of IRI sales volume data provided by Heinz.

*Grossed up data for the week ended 8 January 2005 to the week ended 3 December 2005.
†Week ended 8 January 2005 to the week ended 24 September 2005.
Notes:
1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is calculated by treating the different Premier brands as if they were produced by separate manufacturers and other branded products as if they were produced by one manufacturer.

Retail tinned pasta products market

TABLE 11 **Retail tinned pasta products market concentration by value (plain pasta only, without additional food items)**

	Market share %		
	*2003**	*2004†*	*2005‡*
Heinz	69.9	69.6	68.6
Premier	11.3	11.7	11.6
HP	11.1	10.4	9.6
Crosse & Blackwell	0.1	1.3	1.8
Branston	0.0	0.0	0.2
Own label	18.2	18.1	19.1
Other manufacturers	0.7	0.7	0.7
HP/Heinz combined	81	80	78.2
HHI pre-merger	5,341	5,282	5,167
HHI post-merger	6,893	6,730	6,484
Increase in HHI	1,552	1,448	1,317

Source: Heinz (IRI) and CC analysis.

*52 weeks ended 3 January 2004.
†52 weeks ended 1 January 2005.
‡52 weeks ended 31 December 2005.
Notes:
1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is calculated by treating the different Premier brands as if they were produced by separate manufacturers and other branded products as if they were produced by one manufacturer.

TABLE 12 **Retail tinned pasta products market concentration by volume (plain pasta only, without additional food items)**

	*2005 annualized**		*2005 pre-Branston†*	
	Volume '000 kg	*Share %*	*Volume '000 kg*	*Share %*
Heinz	29,056	54.8	20,389	53.6
Premier	5,298	10.0	3,956	10.4
HP	3,657	6.9	2,655	7.0
Crosse & Blackwell	1,585	3.0	1,301	3.4
Branston	57	0.1	0	0.0
Own label	18,523	34.9	13,622	35.8
Other branded	159	0.3	39	0.1
HP/Heinz combined	32,713	61.7	23,044	60.6
Total	53,037		38,006	
HHI pre-merger		4,278		4,223
HHI post-merger		5,033		4,973
Increase in HHI		755		750

Source: CC analysis of IRI sales volume data provided by Heinz.

*Grossed up data for the week ended 8 January 2005 to the week ended 3 December 2005.
†The week ended 8 January 2005 to the week ended 24 September 2005.
Notes:
1. Columns may not sum to totals due to rounding.
2. HHI values are calculated from the underlying raw data, not the rounded market share figures shown in the table. The HHI indicated is calculated by treating the different Premier brands as if they were produced by separate manufacturers and other branded products as if they were produced by one manufacturer.