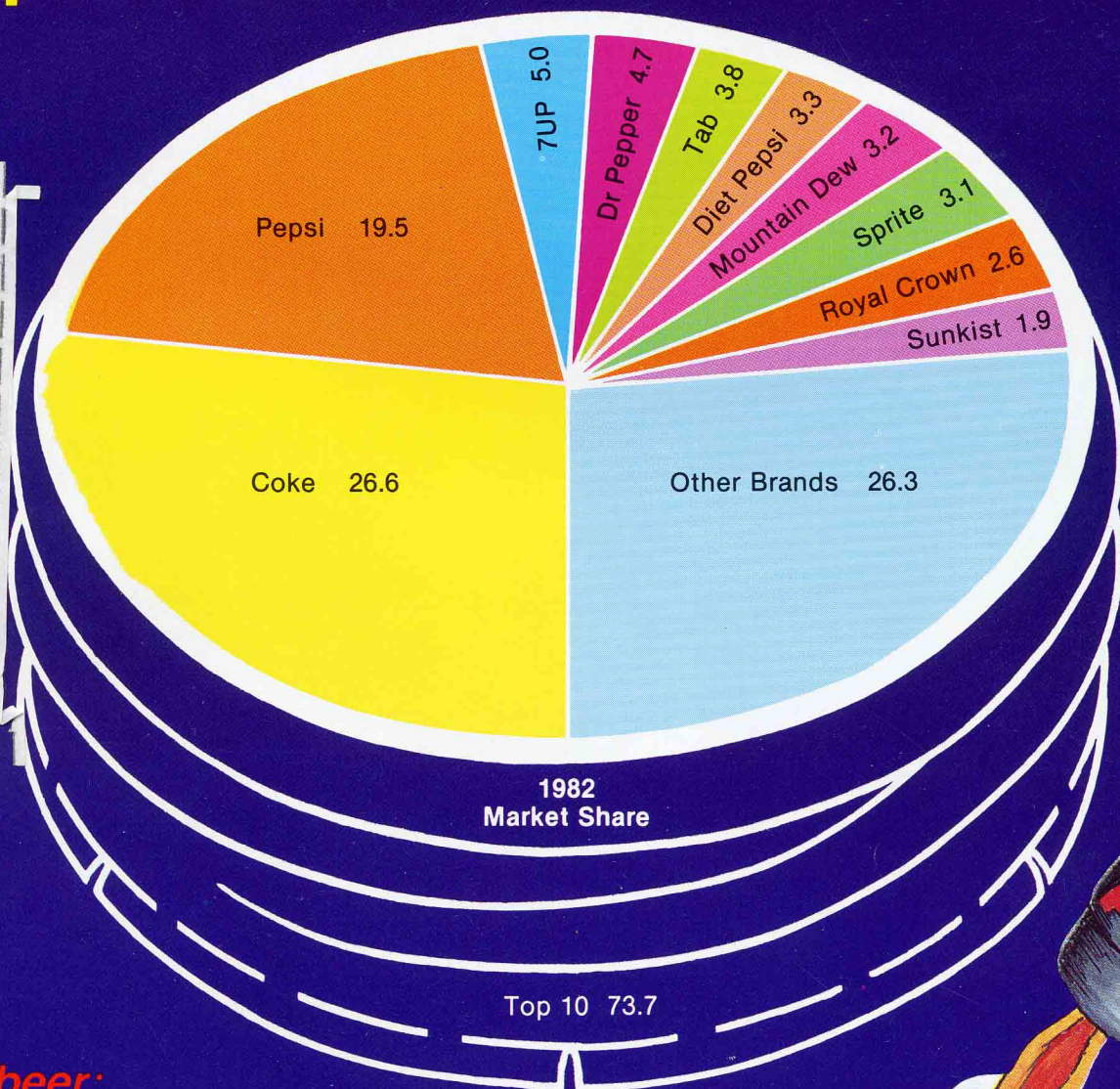


THE AMERICAN WINE PANORAMA

BEVERAGE WORLD

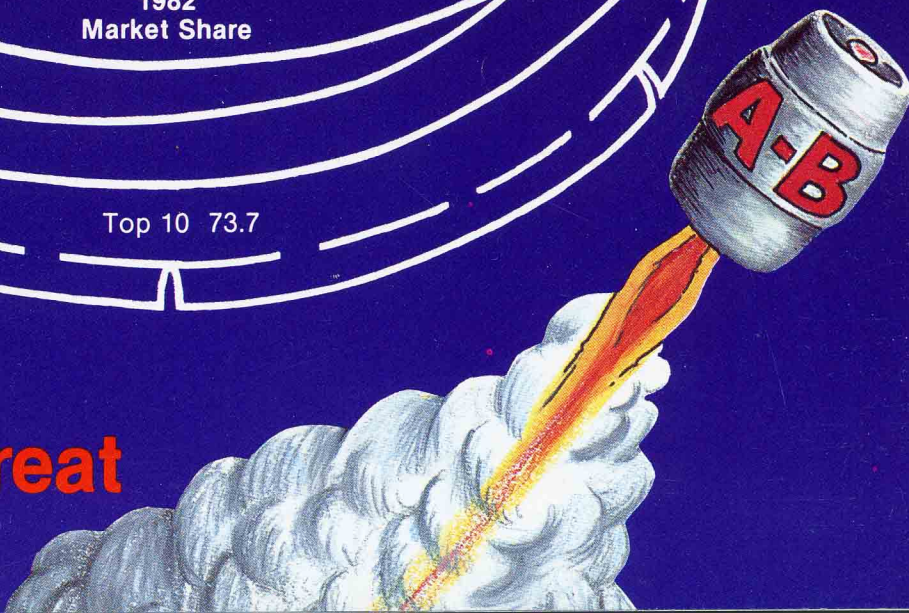
SOFT DRINKS • JUICES • BOTTLED WATERS • BEERS • WINES • POWDERS • MARCH 1983

Top Ten Soft Drink Brands For 1982



and in beer:

**A-B Rockets;
Many Retreat**



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'82 Scoreboard: Who Gained? Who Lost? Why?

Diet Drinks Outpace Field; No-Caf Segment "For Real"

As marketing missiles continued to fly north and south between Atlanta and Purchase, *Coke* and *Pepsi* heightened the battle for soft drink industry dominance—which spelled increased discounting in 1982.

Other major franchisors followed suit, scrapping for remaining market share. The high levels of discounting, according to Manny Goldman, beverage analyst for Montgomery Securities (San Francisco, Calif.), caused secondary brands to fall off significantly for the year. "Such activity," he says, "comes out of the hides of the smaller brands." (See *BEVERAGE WORLD PeriScope*, January 31, 1983, "Discounting: Everyone Gets Hurt.")

Interestingly, the *Pepsi Challenge* and, if you will, the *Coke Rebuttal*—that has given way to widespread price promotion—did not noticeably benefit either of the two giants for the year. Based on 1981 figures, *Pepsi* maintained an identical 19.5 percent of market share for 1982 while *Coke* was up one-tenth of one percent from 26.5 to 26.6.

Indicating the effectiveness of its "no-caffeine" campaign, meaningful gains were made by *7UP* as the brand returned to the number three spot

behind *Coke* and *Pepsi* for the first time since being "nosed out" by *Dr Pepper* several years ago. Also significant was the fact that *Sprite* achieved modest gains, riding on the heels of the *7UP* campaign that seems to have awakened consumer awareness to the caffeine issue. More importantly, the introductions of *Like*, *Pepsi Free*, *Pepper Free*, and the ongoing marketing of decaffeinated *RC100* indicate the presence of a viable new market segment.

THINKING THIN

The diet category grew extensively for the year. *Tab* and *Diet Pepsi* were the only "Top 10" brands to achieve double-digit brand growth. *Diet Pepsi* jumped two notches on the list—from number eight last year to number six for 1982—as it experienced brand growth of 11.3 percent. Although the impact *diet Coke* has had on *Tab* has not yet been fully realized, *Tab* grew 10.2 percent and may have enjoyed even greater sales had not such an effort been put behind the introduction of *diet Coke*.

If *Coke USA* meets its sales and distribution projections for *diet Coke*, the brand may well crack the "Top 10" for 1983. Analysts caution,

however, that such an accomplishment may occur at *Tab's* expense.










Dr Pepper and *Royal Crown Cola* continued to represent troubled "Top 10" brands. Negative sales for the second straight year caused *Dr Pepper* to drop into fourth place. While *Royal Crown Cola* also lost for the year, the RC Company can take heart that its *RC100* and *Diet Rite* brands experienced very favorable sales gains. Overall volume increases for RC brands approached six percent for 1982 (see *BEVERAGE WORLD PeriScope*, November 30, 1982).

Sunkist experienced continuing tremendous growth, topping the one hundred million case mark for the first time in its brief history.

Results of the *BEVERAGE WORLD* "Top 10 Soft Drinks" survey represent a consensus of several major analysts including Manny Goldman and Allan Kaplan of Merrill Lynch (New York, N.Y.), and Joe Doyle of Smith Barney Harris Upham & Co., Inc. (New York, N.Y.). Also participating in the study as "unofficial consultants" were several franchise company executives and market researchers. Special input also was supplied by BW's executive publisher Jerry E. Stevens. **BW**

BEVERAGE WORLD

Top 10 Soft Drink Brands for 1982

Brand	1982 Market Share	1982 Cases (000) ¹	1981 Cases (000) ¹	1982 Brand Growth
	26.6	1,526,395	1,495,000	2.1
	19.5	1,123,100	1,100,000	2.1
	5.0	291,775	275,000	6.1
	4.7	267,859	277,000	-3.3
	3.8	215,992	196,000	10.2
	3.3	186,984	168,000	11.3
	3.2	185,413	178,970	3.6
	3.1	178,779	168,500	6.1
	2.6	149,720	152,000	-1.5
	1.9	106,330	98,000	8.5
Top 10	73.7	4,232,347	4,108,470	2.9
Other Brands	26.3	1,513,093.7	1,524,315.1	-0.7
Total Industry	100.0	5,745,440.7	5,632,785.1	2.0

¹Eight-Ounce Equivalent Cases

SOURCE: BEVERAGE WORLD Estimates Based on Industry Contacts