

Glossary

Act	The Enterprise Act 2002.
AG Barr	AG Barr plc.
Aldi	Aldi Stores Ltd.
Asda	ASDA plc.
Aseptic still drink	A form of still drink that contains no preservatives. The product is flash heat treated and cooled rapidly.
Bargain Booze	Bargain Booze Ltd.
Batley	Batleys Ltd.
BOGOF	Buy one, get one free: a form of promotional offer by retailers.
Booker	Booker Ltd.
Bottler	A manufacturer that makes and bottles beverages.
Brand owner	A company which owns a soft drink brand, including product name, logo, and recipe.
Branded soft drinks	Soft drinks manufactured under a known brand.
Britvic	Britvic Soft Drinks Ltd.
Brooks	Brooks Soft Drinks Ltd.
Buyer power	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.
Cadbury Schweppes	Cadbury Schweppes plc.
Category captain or category manager	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.
Category management	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.
CC	Competition Commission.
CCE	Coca-Cola Enterprises Ltd, bottler for Coca-Cola in Great Britain.

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

Flavour houses	Companies which develop flavourings for the food and beverage industry.
Flavoured water	A form of colourless soft drink consisting of flavours and sugar or sweetener, usually using mineral or spring water.
Fruit juice or pure juice	Soft drink consisting of 100 per cent pure juice and generally with no added ingredients.
Gerber	Gerber Foods Soft Drinks Limited.
Glenpatrick	Glenpatrick Spring Water Co Ltd.
Greencore	Greencore Maltings Group Ltd.
Gross margin	Gross margin is Gross Contribution divided by Net Sales Value, where Gross Contribution equates to Net Sales Value less material costs, direct and indirect variable costs and fixed overheads.
GSK	Glaxo Smithkline plc (Consumer Healthcare International).
Hall & Woodhouse	Hall and Woodhouse Ltd.
Hansa	Hansa Borg Bryggerier ASA.
HHI	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.
Highland Spring	Highland Spring Ltd.
Iceland	Iceland Foods Ltd.
Juice drinks and nectars	Soft drinks made with varying quantities of different types of fruit juice .
KVI	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.
Lidl	Lidl Ltd.
Loblaw's	Loblaw Companies Ltd.
Loyalty cards	Cards issued to store customers, which accumulate points on purchases, which are redeemable for value in a variety of ways.
Makro	Makro Self Service Wholesalers Ltd.
M&S	Marks and Spencer plc.
Macaw	Macaw (Holdings) Ltd.
Mineral water or NMW	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 NMWs must provide certain information on their labels such as the typical mineral analysis.

Montgomery Spring	Montgomery Spring Water Company.
Morrisons	Wm Morrison Supermarkets plc.
Multiple, multiple grocery retailer	Operator of a chain of supermarkets.
NAB	Non-alcoholic beverage.
Netto	Netto Foodstores Ltd.
Nichols	Nichols plc.
Nisa	Nisa-Today's Holdings Ltd.
Norbev	Northern Beverages Ltd.
NSV	Net sales value.
OFT	Office of Fair Trading.
Operating margin	Operating margin is Gross Contribution less sales, general and administrative overheads divided by Net Sales Value.
Own-label	Range of products carrying the retailer's brand and produced to retailer's specification, typically sold at a lower price than main brand competition.
PepsiCo	PepsiCo Inc.
PET	Polyethylene Terephthalate. Plastic used to make soft drink bottles.
Premium products	Products of superior quality sold at a premium price.
Pre-form	Compact form of pre-prepared PET bottles that are blow moulded into the final shape and size of the bottle.
Primary brand	Prominent brand well recognized by consumers. Production and brand ownership of primary brands is usually integrated in a single company.
Princes	Princes Soft Drinks, a subsidiary of Princes Ltd and ultimately of Mitsubishi Corporation.
Product category	A group of similar product lines, eg soft drinks .

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

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