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Pricing and Market Strategies in the National Branded Cheese Industry

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Pricing and Market Strategies in the National Branded Cheese Industry

1. Introduction

Supermarket sales of branded and private label cheese were \$5.4 billion consisting of nearly 1.8 billion pounds of cheese during 1992.¹ In-store sales of cheese account for 20 percent of the dairy product category and 1.6 percent of all product sales.² In 1991 following a sharp decline in the price of manufacturers milk, some retail cheese prices began to fall. In a *Milwaukee Sentinel* article,³ several retail food chain executives blamed Kraft General Foods for not cutting prices stating "... Land O'Lakes [and] Borden's had made cuts with the exception of Kraft." This led to many farm organizations and other groups to ask for a congressional investigation of cheese pricing; on April 10, 1991, testimony was presented to the Subcommittee on Livestock, Dairy, and Poultry of the U.S. House Committee on Agriculture. A similar request was made of the Wisconsin attorney general by several Wisconsin legislators stating milk prices had dropped to a 13 year low, more than 30 percent over the previous year but that Kraft cheese prices didn't reflect that decrease.⁴

This report identifies the leading national brands of cheese sold in 1992. We will discuss the following six different types of cheese: american, natural, natural shredded, cream cheese, spreads & balls, and imitation. For each cheese type we will report the market share, price, and merchandising trends over the twenty quarter period of 1988 through 1992. We will use price index trends to show how cheese manufacturers have used fluctuations in the price of manufacturing milk to increase price-cost margins over time. We will also discuss relevant product markets and point out where one brand may have different characteristics than other brands in that type.

¹ I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut. Figures cited exclude cottage cheese, for a detailed examination of cottage cheese, see Cotterill and Haller (1994) and Haller (1994).

² *Progressive Grocer*, 1993 Supermarket Sales Manual, July 1993, p. 114.

³ Stanley, G. 1991. 'Overpriced' Cheese is Blamed on Kraft. *Milwaukee Sentinel*. March 27.

⁴ Legislators Question Cheese Prices Charged by Philip Morris Unit, *Wall Street Journal*, April 1, 1991, C8.

The data cited in this report is from the Information Resources, Inc. Infoscan database. The data is national level data for the twenty quarters from 1st quarter 1988 through 4th quarter 1992. The price data are the national average price per pound of cheese net of merchandising. Merchandising may include both the push type, a dealers discount to retailers, and pull, coupons to be used by consumers. From the price per pound data we calculate a price index trend for each brand. The indices are calculated so that 1st quarter 1988 equals 100 except where noted. Illustrations of price, share, and index trends will contain an aggregate of private label brands as well as the leading brands for each type so that one can compare branded product performance to effectively undifferentiated and competitive private label products.

Section 2 of this paper will give an overview of the supermarket cheese sales in the U.S. from 1988 through 1992. Section 3 will analyze the American, natural, shredded, cream cheese, cheese spreads and balls, and imitation cheese markets. Finally, section 4 will contain a summary and conclusions.

2. Overview of Supermarket Cheese Sales

2.1 Cheese Types

Table 1 gives the market share of each type of cheese sold in the U.S. in 1992. American cheese was the largest selling type in both dollar and volume share with over \$1.5 billion in sales and a 29.1 percent dollar share. American leads all cheeses in volume share with a 31.7 percent share. American cheese is primarily sold presliced in packages or in individually wrapped slice packages. American cheese can be found in white or yellow, and low fat and low cholesterol varieties are now available.

Natural cheese, or natural chunk, is the second largest type of cheese sold with nearly \$1.5 billion in sales or 27.9 percent share and 24.1 percent of cheese volume. This type of cheese is usually sold as pieces of a large wheel, individually wrapped and weighed. There are several varieties of natural cheese, *e.g.* cheddar, mozzarella, monterey jack and others.

Natural shredded cheese is the third largest selling type of cheese by dollar sales with \$829 million in 1992 sales and a 15.5 percent dollar share. Shredded cheese is marketed in small packages which offers the convenience of not having to purchase larger quantities. Shredded cheese also by nature of being preshredded gives consumers the

convenience of not having to spend time preparing chunk cheese. Small packages and value added convenience tend to increase the price paid by consumers an average of 17.6 cents per pound over chunk in 1992.

The fourth largest type of cheese by dollar sales is cream cheese with 1992 sales of \$598 million, 11.1 percent dollar share of all cheese. Cream cheese is a more homogeneous type as compared to natural cheese. Product differentiation is offered with flavor additives and low fat or fat free and cholesterol free varieties. As we will show, this type of cheese does not follow the same traditional pricing trends as the other types. We will discuss and evaluate hypotheses for the different price behavior.

The fifth type of cheese we will discuss is cheese spreads and balls. Sales topped \$415 million in 1992. This group of cheese is the most heterogeneous. A proliferation of flavorings and holiday packages make it difficult to develop simple explanations of pricing and merchandising strategies. One would expect the December holiday period would show frequent merchandising, market share and price changes; however, this is only the case with respect to some types of merchandising.

Finally, we have included imitation cheese in this study, a small category as compared to the other types with \$27 million in 1992 sales. We include imitation to test the hypothesis that additional processes, ingredients, and possibly packaging will differentiate these cheese from others. We will show that the data does not support this hypothesis.

2.2 Manufacturer Sales and Volume

In the following section we will discuss the total dollar and volume sales of each cheese type. This section also looks at the quarterly dollar and volume share of manufacturers of the leading cheese brands of 1992 by type.

Table 2 gives the total dollar and volume of American cheese sold by quarter from 1988 through 1992. American cheese had over \$308 million in sales in the 1st quarter 1988, sales peaked at \$435.9 million in 1990 but dropped to \$384 million at the end of 1992. The volume of American cheese sold in U.S. supermarkets rose from 143 million pounds in the beginning of the period to over 154 million pounds in 1990 and ended at 141 million pounds at the end of the period, nearly three million pounds less than at the start of the period. Philip Morris' dollar share of American cheese remained above 60 percent throughout the period until 4th quarter 1991 when it had dropped to 59.56 percent. Philip Morris dollar share ended the period at 61 percent. Borden's share dropped from 11.33 percent share of dollar sales to 9.3 percent

at the end of the period. Land O'Lakes and Crystal Foods share of the dollar sales rose substantially over the period. Land O'Lakes dollar share rose nearly 70 percent from 1.04 percent in 1st quarter 1988 to 1.70 percent in 4th quarter 1992. Crystal Farms dollar share rose nearly 150 percent from 0.24 percent to 0.62 percent. Schreiber Foods share nearly doubled from its 1st quarter 1988 dollar share of 0.37 percent to 0.68 percent in 1st quarter 1992; by 4th quarter 1992, share had slipped to 0.47 percent.

Natural cheese sales rose from \$308 million to \$396 million over the twenty quarter period (Table 3). Philip Morris' share of dollar sales dropped nearly 25 percent from 1st quarter 1988 dollar share of 41.5 percent to 31.7 percent in 4th quarter 1992. Land O'Lakes also lost dollar share during the twenty quarter period. Land O'Lakes started the period with 4.6 percent share and ended under 4.2 percent. Sorrento, Tillamook, and Unigate's dollar share rose marginally over the entire period. Beatrice/ConAgra⁵ share remained steady throughout.

The shredded cheese industry doubled in terms of dollar sales over the twenty quarter period (Table 4). First quarter 1988 sales were \$110 million, 4th quarter 1992 sales had reached over \$224 million. Volume nearly doubled to 61 million pounds from 36 million pounds. The two largest shredded cheese manufacturers were Philip Morris and Sargento. Philip Morris lost more than 5 share points dropping from 31.7 percent to almost 26.6 percent at the end of the period. Sargento gained several share points reaching over 25 percent at the end of the period having started at 21.6 percent. ConAgra's share rose sharply after 3rd quarter 1990 reaching 3.5 percent in 1st quarter 1991. ConAgra's share then slipping back to finish the period at 2.8 percent, nearly double the share at the start of the period. Land O'Lakes started the period with only 0.15 percent of the shredded cheese dollar sales, sales increased dramatically in the 3rd quarter 1990 and finished the period with 1 percent dollar share.

Table 5 reports the dollar and volume sales of cream cheese for the twenty quarter period 1988 through 1992. Sales increased 27 percent from 1st quarter 1988 sales of \$107 million to 1st quarter 1992 sales of \$136 million. Philip Morris maintained a large share throughout the period beginning with 72 percent dollar share and ending slightly lower at 68 percent. Bongrain and Crystal Foods experienced gains in dollar share; Bongrain gained 43 percent and Crystal Foods gained nearly 73

⁵ ConAgra completed the purchase of Beatrice August 15, 1990. For a greater overview of the Beatrice/ConAgra merger, see Haller, 1994.

percent. Anco Foods and Raskas Foods both lost major portions of their dollar share. Unilever introduced Shedd's Country Crock during the 4th quarter 1990. Immediate popularity was high gaining dollar share of 3.47 percent by 3rd quarter 1991. Share declined, however, and by 4th quarter 1992 was 1.19 percent.

Table 6 reports the dollar and volume sales of cheese spreads and balls. First quarter sales increased 24 percent from 1988 to 1992 reaching \$97 million for 1st quarter 1992. Fourth quarter sales are higher do to Christmas and other holiday spending. Fourth quarter sales averaged 32 percent higher than previous quarter sales.

Philip Morris began the period with dollar share of 47 percent. Share slipped to a low of 34 percent for 3rd quarter 1991. Most of the share was regained by 4th quarter 1992. RJR Nabisco dollar share rose from 9.1 percent to 12.5 percent. Fromageries Bel's dollar share shrank from 13.9 percent to 10.4 percent over the twenty quarter period.

Finally, Table 7 reports the sales and volume of imitation cheese.⁶ There were \$4.7 million in sales in the 1st quarter 1988. Sales reached \$9.4 million in the st quarter 1990 but had slipped to \$6 million by the end of 1992. Sargento's dollar share began the period at 44.6 percent dropping to 22.8 percent by 4th quarter 1992. Borden and Galaxy Cheese also lost significant share over the twenty quarters. Borden's share dropped from 10.5 percent to 7.6 percent and Galaxy Cheese share dropped from 9.3 percent to 2.6 percent. Schreiber Foods' dollar share rose dramatically during 1992 ending the period with 14.7 percent dollar share having begun the year at 4.1 percent.

Philip Morris, N. Dorman and A&J Foods all introduced imitation cheese brands during the twenty quarter period. By the end of the period, Philip Morris had gained 2.9 percent of the dollar sales, N. Dorman 4.1 percent, and A&J Foods only 0.8 percent.

3. Brand Market Share, Pricing and Merchandising

3.1 American Cheese

Table 8 reports the 10 leading american cheese brands and all private label⁷ sold in U.S. supermarkets in 1992, their average prices

⁶ Imitation food is required to be labeled as imitation ... if it is a substitute for and resembles another food but is nutritionally inferior to that food. CFR 21 101.3.

⁷ The IRI Infoscan data is constructed such that all private label brands observations are grouped into one observation. Therefore, there are no distinct private label brand observations.

and market shares. All private labels had a volume share of 29 percent. Philip Morris—Kraft General Foods' Kraft and Velveeta were the two leading American cheese brands with 25 percent and 15 percent volume share respectively. Borden was the third largest with 7.9 percent share. The top three brands and private label combined accounted for over 78 percent of all American cheese sales.

Figure 1 illustrates the volume share trend over the twenty quarter period. Kraft and Velveeta had declining volume shares while private label share increased, particularly during 1990 and 1991. The shares of Kraft and Velveeta were 32.49 percent and 25.49 percent for a total of 57.92 percent in 1st quarter 1988 (see table 9). Private label share in the 1st quarter 1988 was 23.23 percent. By the 1st quarter of 1991, Kraft responded to the continued declining shares of its two leading brands, now at 51.41 percent, by introducing lower fat varieties and lowering price about 8 percent (Deveny 1992). In addition, considerable expenditure was made on merchandising. Figure 4 illustrates an increase in the amount of volume sold with merchandising beginning 2nd quarter 1991. Nonetheless, by the end of 1992, the combined share of the two Kraft brand was 42.89 percent, a 15.03 point decline. This decline was partially offset by the introduction of Kraft Free and Velveeta Light in 1990 and 1991. By 4th quarter 1992, the shares of these products had climbed to 6.8 percent combined making them the 4th and 5th largest selling brands of American cheese.⁸ At the end of 1992, the total share of the four Kraft brands was 49.71 percent, an 8.21 point decline over the entire period. Private label share rose 4.18 points to 27.41 percent.

Switching consumer preferences to private label may have been partly driven by Kraft's higher price. As Hwang 1992 points out, Kraft cheese operations in particular had been hurt by sluggish demand and preferences toward less expensive alternatives.⁹ The average price

⁸ In Figure A1 we illustrate the average distribution of the leading American cheese brands over the twenty quarter period. Kraft Free was introduced during the 1st quarter 1990 and was not widely distributed, probably only to test the consumer acceptance. Velveeta Light was introduced in the 1st quarter 1991 and was widely distributed very quickly. By 1992, both brands were marketed in over 80% of the supermarkets. The ability of Kraft to widely distribute new brands accounts in part for the amount of market share the new brands acquire. Brand loyalty may also play an important role in consumer choice of these new products.

⁹ Hwang, Suein L. 1992. Philip Morris's Kraft to Make 1,000 Job Cuts; Early Retirement Package is Sweetened, Offered to White-Collar Staff. *Wall Street Journal*. May 6: A4.

for Kraft and Velveeta in 1992 was \$3.241/lb and \$2.818/lb an average of \$1.047/lb and \$0.624/lb, respectively, over the private label average price of \$2.194/lb. Figure 2 illustrates the average price trends of the top 5 brands and private label for the twenty quarter period; private label price remains below the other 5 brands for the entire period. It appears that the price difference increased over time, especially in the period following 1st quarter 1990.

Figure 3 is a graph of the price index trends of the top 3 American cheese brands, private label, and the index of the Minnesota-Wisconsin based manufacturing milk, the input used in cheese manufacturing. Here we see the price index of private label begins to decline after the 1st quarter 1990 whereas the indices of the top 3 brands does not. Note the significant decline in the index of the price of manufacturing milk after the 4th quarter 1989. Until that time the leading brands' price indices moved similarly to the input price. However, after the decline of the input price index, branded cheese and initially the private label cheese indices remained high. This created a large price-cost margin with respect to the price of manufacturing milk. Even though Kraft had highly publicized price decreases during 1991 and 1992 (Deveny 1992; Liesse and Dagnoli 1992), the index remained high keeping the margin large.

3.2 Natural Cheese

Natural or natural chunk cheese was the second largest selling cheese in 1992. Although natural cheese sales had 24 percent less volume than American cheese, dollar sales were nearly equal, only 4.3 percent less making the natural cheese market nearly as economically important. The average price per pound of natural cheese was \$3.469/lb in 1992, 71.9 cents per pound higher than American cheese.

Table 11 gives the top 10 leading brands and all private label natural cheese sold in 1992. Philip Morris marketed the top two leading brands, Kraft and Cracker Barrel, with volume shares of 11.5 percent and 6.3 percent, respectively. All private label had the largest share with 35.4 percent. The Tillamook brand held a third place share of nearly 5 percent. Polly O, another Philip Morris brand, was the fourth largest with 3.9 percent and County Line, a ConAgra product, was fifth with 2.4 percent.

Figure 5 illustrates the volume trend of the top 5 brands and all private label natural cheese for the twenty quarter period. It is plain to see that private label share tends to rise while Kraft's share declines. Private label share rose 6.4 points from 27.85 percent to 34.31 percent over the entire period (Table 12). Kraft lost 8.7 points, its share declining from 20.02 percent to 11.3 percent. All of the remaining

branded natural cheeses maintained constant shares over the twenty quarter period. As in american cheese, consumer preference for more inexpensive alternatives may have contributed to the decrease in Kraft's share. The average price of private label in 1992 was \$2.886/lb, \$1.102/lb less than the average Kraft price, and \$1.331/lb less than the average Cracker Barrel price.

Table 13 gives the price trends of the leading branded and private label natural cheese. The average price of Kraft was \$3.364 in 1st quarter 1988; by 1st quarter 1991 the price had risen \$1.064/lb to \$4.428/lb. During the same period the private label price per pound rose 20.4 cents per pound. Figure 6 illustrates the price trends of natural cheese. When manufacturing milk price rose during the 3rd and 4th quarters of 1989, all the brands of natural cheese experienced increases in price. However, beginning in 1990 when milk prices declined, the price of Kraft, Cracker Barrel and County Line continued to rise while private label price leveled off. As was the case with american cheese, the top brands did not begin to lower price until 2nd quarter 1991 after private label price had been declining during the two previous quarters.

Figure 7 illustrates the price index trends of the top 3 brands and private label natural cheese. The index trends are characterized by a general increase from 1st quarter 1988 to 4th quarter 1989. When the price index of manufacturing milk declined in 1990, private label and Tillamook showed declines in their price indices while Kraft and Cracker Barrel price indices continued to climb. During the period 4th quarter 1990 through 4th quarter 1991, the price-cost margin was larger for Kraft and Cracker Barrel than for private label and Tillamook.

Possibly to stem declining shares, the Kraft-General Foods division of Philip Morris began lowering prices in the 2nd quarter 1991. This price decrease was at least partially achieved by an increase in the amount of merchandising (Figure 8). One can see the volume sold with merchandising was up in late 1990 and 1991 as compared to levels in 1989. As Deveny (1992) and others reported, Kraft's attempts to combat its declining share was marked by lower prices and increased merchandising. Although Kraft made highly publicized announcements of price cutting, most of the reductions were probably achieved by merchandising and not purely by shelf price cutting.

3.3 Natural Shredded Cheese

Shredded cheese has the highest volume sold by private label of all cheese types in this report. Forty one percent of the shredded cheese

market is sold as private label. The highest branded shredded cheese share was Sargento with 19.2 percent (Table 14). Kraft was second with a 17.8 percent share. Sorrento was the third most popular brand with a share of 3.6 percent.

Figure 9 illustrates the volume share trends of the top 5 shredded cheese brands for 1988 through 1992. The private label and Sargento shares remained relatively stable over the entire period. Kraft steadily lost share falling below Sargento in the 1st quarter 1991. Kraft started the period as the leading brand with 27.6 percent share (Table 15). Its share continued to decline, losing nearly 9 points to end the period at 18.6 percent.

Figure 10 illustrates the price trends of the leading shredded cheese brands and private label. The price of private label remained the lowest in all but one quarter. The difference between the price of private label and the leading brands increased over time beginning with the 1st quarter 1990. As we have seen with other cheese types, the price of branded shredded cheese and private label increased sharply from 2nd quarter 1989 to 4th quarter 1990. During 1990, private label price was flat and began to decline in 1991 while branded cheese price continued to climb in 1990. The difference between private label price and Sargento in 1st quarter 1990 was \$1.082/lb; the difference had risen to \$1.347/lb by 2nd quarter 1991 (Table 16). Over the entire twenty quarter period, the difference between private label and the leading brand of shredded cheese increased from 79 cents per pound to \$1.324/lb, a 53.4 cent increase. Kraft increased its premium over private label only 15.5 cents over the entire period. This is primarily due to steep price declines in 1992 that gave back much of the previous increases.

Figure 11 shows the price index trends of the leading shredded cheese brands and private label. The private label price index declines beginning in 4th quarter 1990 and drops faster than branded cheeses. The manufacturing milk price index is graphed also. Here we see the milk price index falling while cheese prices remain high. Consequently the price-cost margin increases. Also evident is the price reduction of Kraft brands to stem the decline of their share. Kraft volume share of shredded cheese does increase beginning 2nd quarter 1992 until it is above that of Sargento making Kraft the leading shredded cheese brand in 3rd and 4th quarter 1992.

Figure 12 illustrates the merchandising trends of the leading brands of shredded cheese. As expected and consistent with american and natural cheese, the Kraft brand had a greater percentage of volume sold with merchandising beginning 4th quarter 1990. Sargento also showed an increase in the volume sold with any merchandising. However,

Sargento's price did not decline with Kraft's and subsequently share was lost.

3.4 Cream Cheese

The top 10 leading brands of cream cheese for 1992 are reported in Table 17. Philip Morris markets all of the top 5 brands with a combined market share of 63.5 percent. All private label share equaled 30.3 percent. Figure 13 illustrates the volume share trends over the twenty quarter period. The Philadelphia brand experienced a continuous decline in share over the entire period. The market share for Philadelphia in 1st quarter 1988 was 54.5 percent, and it drops to 41.3 percent at the end of the period (Table 18), a 13.2 point drop. Part of the decrease may be attributed to a shift in consumer preference toward health conscious brands. Phili Lite, marketed as having less fat than Philadelphia rose in overall share from 10.7 percent to 14.3 percent, a 33 percent increase in share. Philadelphia Free was introduced in 1991 and sharply gained market share in 1992 to capture 4.3 percent share in 4th quarter 1992 becoming the third leading brand in 1992. Overall, Philip Morris products share declined from 68.3 percent to 62.8 percent, 5.5 points.

Consumer preference toward inexpensive alternatives may have induced consumers to switch to private label. Private label's market share rose from 26.1 percent to 31.3 percent, a 5.2 point gain or nearly a 20 percent increase. The 1992 average price of Philadelphia was \$2.461/lb, 73 cents over private label. Philadelphia remained the lowest priced of the Philip Morris brands over nearly the entire period with an increase in average price of 15.2 cents per pound. Private label, average price, however, rose fractionally, only half a cent from 1988 to 1992.¹⁰ Figure 14 illustrates the price trends of the leading brands and private label cream cheese. The most striking feature of the price trends is its cyclical nature. Each 4th quarter is characterized by a dip in price. This pricing strategy must be an attempt to promote additional consumption for baking holiday desserts.

So far, all the cheese types we have discussed have had a large increase in the price-cost margin after the milk price drop in 1990. Interestingly, the cream cheese price index trend does not follow this pattern. Figure 15 illustrates the price index trends of several Kraft

¹⁰ We are discussing average yearly price changes due to the cyclical nature of cream cheese. Philadelphia brand average price for 1988 was \$2.312/lb., private label average price was \$1.725/lb. Source, I.R.I. Infoscan database, Food Marketing Policy Center, University of Connecticut.

brands and private label cream cheese. One will immediately notice the price index of manufacturing milk peaks well above the indices of the cream cheese brands. All the branded and private label cream cheeses move in close proximity during the twenty quarter period and do not have the same increase in price during the 1989 period as the other cheese types do. The post 1990 price-cost margin that occurs for american, natural and shredded does not occur here.

The merchandising strategy for cream cheese also differs from that of the other cheese types. Figure 16 shows sharp spikes in the percent of volume sold with merchandising for all 5 of the leading cream cheese brands as well as private label. Private label brands generally used merchandising to sell over 50 percent of their volume during the 4th quarter period when normally only 20 to 30 percent of the volume was sold with merchandising (Table 19). Philadelphia and Phili Lite also used approximately twice the amount of merchandising during the 4th period.

The merchandising and price strategies of Kraft and private label is used to attract a large holiday market for cream cheese. Figure A2 illustrates the volume sales of cream cheese during the twenty quarter period. Each fourth quarter period is characterized by large increases in volume sales for both Philadelphia and private label cream cheese.

Aside from the seasonality of the cream cheese market, there may be another reason why the price trends of this industry are so distinct from that of the previous types we have discussed. Although there exists a premium on Philip Morris products, the price of the Philadelphia brand is probably maintained at a constant level to offset the higher price of the newly introduced brands and Philip Morris's other brands. Kraft Spreadery's price was \$3.208/lb when introduced in the first quarter 1990, 72 cents per pound higher than Philadelphia; Philadelphia Free was introduced at \$3.339/lb, 81 cents above Philadelphia in the third quarter 1991. Temp Tee's price stays 30 to 50 cents higher than Philadelphia over the entire period. Philadelphia Lite begins the period 15 cents higher but the difference shrinks to nearly the same price in 1992.

3.5 Cheese Spreads and Balls

Table 20 shows the top 10 leading cheese spreads and balls (S&B) of 1992. All private label share was 22.8 percent; Philip Morris manufactured two of the top selling branded S&B with Cheez Whiz at 17.6 percent share and Kraft with 13.9 percent share. RJR Nabisco produced the third most popular brand, Easy Cheese at 7.5 percent share. Velveeta, another Philip Morris brand, was 4th with 5.4 percent and Price, manufactured by Fromageries Bel, was the 5th leading S&B

with just under 4 percent. Beginning late in 1989, Cheez Whiz share began to drop sharply (Figure 17) and appeared to be slowly losing share through 1992. Cheez Whiz had lost 14.9 share points, over 50 percent of its initial share during the twenty quarter period dropping from 30.8 percent to 15.9 percent (Table 21). After gaining nearly 10 share points, private label share slipped in 1991 and 1992 ending with a 21.2 percent share. Kraft's share jumped significantly beginning in the 2nd quarter 1992 to capture over 19 percent share.

Figure 18 shows the price trends of the top 5 leading branded and private label S&B. Easy Cheese's price remained well above the other brands over the entire period. Even after a significant drop in price in late 1988 and a flat price trend over the remainder of the period, the average price of Easy Cheese was \$5.721/lb in 1992, \$3.798/lb above the private label price. Cheez Whiz price averaged \$ 3.607/lb, \$1.68/lb higher than private label. Note that Kraft's price drops below the other branded S&B in 1992. This pricing strategy may explain the increase in Kraft's share in 1992.

Figure 19 illustrates the price index trends. Once again we have the familiar increase in the index of manufacturing milk price which drops in the 4th quarter 1990. We also see the indices of the leading brands and private label increase during the period prior to the drop in manufacturing milk. When the milk price drops, the Kraft products price indices continue to climb while private label's price begins to drop. This creates the increased price-cost margin that we have seen before. The index for Kraft drops considerably in the 3rd quarter 1991 only to rise again in early 1992. The index drops again in mid 1992 and stays down through the end of the period ending below that of manufacturing milk. The Cheez Whiz price index remains high to the end of the period, a strategy we have seen in other cheese types.

Figure 20 illustrates merchandising trends for the two Philip Morris brands and private label S&B. Cheez Whiz merchandising increases dramatically in the fourth quarter 1990 and remains at a higher level over the remainder of the period. This strategy is consistent with strategies for previous cheese types that Philip Morris employed to stem share declines. Price (net of merchandising) however, does not decline. Figure 20 also shows a significant seasonal merchandising trend for the Kraft brand. Fourth quarter merchandising is high for Kraft compared to other quarters except for 1992. This may be an indication of overall increased merchandising to *increase* volume (see Figure A3) and share rather than stem declining share. As we discussed in this section, the Kraft brand share increased dramatically in 1992 (Figure 17).

Seasonality in the S&B cheeses seem to be mixed with (Kraft)

seasonal and (Cheez Whiz) nonseasonal. Although we can identify certain strategies from the data for individual brands, in summary, an attempt to draw general conclusions for the type as a whole may be futile.

3.6 Imitation Cheese

The final type of cheese we will discuss is imitation cheese. Table 22 lists the 10 leading brands of imitation cheese in the U.S. for 1992. Sargento was the leading branded imitation cheese with 19.3 percent share. Schreiber was second with 11.1 percent; Reale was third with 8.5 percent. Fisher and County Legend were the fourth and fifth most popular imitation brands with 6.9 percent and 3.2 percent respectively.

Figure 21 gives an illustration of the volume share trends of the top 5 brands and private label imitation cheese. Private label had an overall increase in share during the period equalling 13.8 points from 20.8 percent to 34.6 percent. Sargento lost significant share, 24.7 points dropping from 42.1 percent to 17.4 percent (Table 24). A significant portion of the switch from Sargento to private label occurs after 4th quarter 1989. In the year following that, shares are marked by sharp declines in Sargento share and increases in private label share. Schreiber's second place rank in 1992 can be attributed to increases in share in 1992 as compared to the previous years. Schreiber's share in 4th quarter 1991 was 3.7 percent. By 4th quarter 1992 share had increased to nearly 19.3 percent. Schreiber's increase in share (and volume, see Figure A4), coincides with decreases in price. The 1992 price for private label was \$2.099/lb, Sargento's average price was \$3.113/lb, \$1.012/lb greater. Schreiber's average price was 50 cents per pound cheaper and Reale was 60 cents per pound cheaper than Sargento. After 4th quarter 1989, Schreiber's price declined until 4th quarter 1990 then leveled off (Figure 22). Sargento's declining share can be attributed to its steady increase in price coupled with decrease in competitors' prices. Figure 22 illustrates the steady increase from \$2.193/lb to \$3.12/lb over the entire period, a 43 percent increase in price. Private label price remained constant with only a slight overall increase. Fishers' price trend was marked with a sharp increase in 3rd quarter 1991 after a period of low pricing during 1990 and the first half of 1991.

Unlike the other cheese types we have illustrated, the top 5 imitation cheese brands are characterized by different price and price index trends. Figure 23 shows the price index trends of the leading brands of imitation cheese. The imitation cheeses seem to follow independent trends. There is little index followship among brands and there is only

one instance of a large increase in the price-cost margin during 4th quarter 1990 and 1st quarter 1991, when manufacturing milk dropped precipitously. The Sargento index seems to follow the same trend as other types of cheese; Sargento follows the manufacturing milk index until manufacturing milk declines in the 4th quarter 1990 creating the large price-cost margin. The price indices of Fisher and Schreiber are distinguished by sudden steep changes, uncharacteristic of other cheese types we have seen.

Figure 24 illustrates the two leading brands and private label imitation cheese merchandising trends. There does not seem to be any seasonal trend. It does seem that the high amount of merchandising of Schreiber late in 1990 and early 1991 coincides with a slight increase in volume and share.

There may be two reasons for the different pricing and merchandising strategies of imitation cheese brands. First, the primary input price may not be based upon the manufacturing milk price. Manufacturing processes and other inputs may be a larger factor in the production of imitation cheese. Binding agents such as potato flour, artificial or substitute flavorings and sugar substitutes may be among these. This would account for the different price and price index trends. The second is the small distribution of imitation cheese brands. Figure A5 illustrates the distribution of the top 5 brands and private label imitation cheese. None of the brands are distributed widely as compared to American or natural cheese. Sargento was distributed to 48 percent of the supermarkets in the 1st quarter 1988 and over the next nineteen quarters distribution declined to 37 percent (Table A4). Private label distribution rose early in 1990 from 20 percent to over 30 percent which probably accounts for some of the increase in private label share in that same period. Overall, with smaller distribution, imitation cheese may have less competition from other brands on the local level.

4. Summary and Conclusions

The detailed brand level analysis of cheese marketing over the 1988-1992 period suggest that there was a general tendency to maintain retail prices when manufacturing milk prices decreased. In fact for several brands, retail prices actually increased when milk prices dramatically declined in 4th quarter 1990. Table 26 lists the brands we have examined that had a positive change in price from the 3rd quarter 1990 to the 4th quarter 1990, the period in which the price of manufacturers milk plummeted 20.75 percent. Tables 10, 13, 16, 19, 22, 25 indicate

that price-cost margins increase in the 4th quarter 1990 for 31 of 60 branded and private label cheeses we have examined.

From Table 26 we see that 7 of 10 American cheese brands had a positive change in price during the 3rd quarter to 4th quarter 1990 period. All four brands marketed by Philip Morris showed an increase in price as well as Borden, Land O'Lakes and Schreiber. In contrast, the private label and the Crystal Farms brand average price fell 0.13 percent and 0.14 percent respectively.

In the natural cheese category, 5 brands had a positive change in price. Philip Morris increased the price of two brands, Kraft and Cracker Barrel, by 3.44 percent and 0.21 percent while dropping the price of Polly O 19.6 percent. The Sorrento Cheese Company marketed two brands, increasing the price of one while decreasing the other. The price of private label natural cheese dropped 3.43 percent.

In the natural shredded category, 5 brands showed an increase in price. Again, Philip Morris increased the price of two brands Kraft and Light Naturals by 2.45 percent and 3.21 percent. At the same time Philip Morris dropped the price of Polly O by 8.36 percent. The Sargento Cheese Company also increased the price of one cheese, Preferred Light, by 1.52 percent and decreased the price of Sargento by 0.84 percent. The private label price dropped 0.31 percent.

In the cream cheese category, there was only one brand with a positive change in price from the 3rd to the 4th quarter 1990. Alouette, produced by Bongrain rose in price 1.95 percent. This was in direct contrast to the rest of the brands we examined. The four Philip Morris brands marketed in 1990 showed a decrease in price. Private label cream cheese price dropped 9.73 percent. As we examined earlier, the fourth quarter is marked by decreases in price for cream cheese products in order to capture the huge holiday cheese market, this may account for the fact that all but one brand had a decrease in price during this time.

In the S&B category, Philip Morris increased the price of two brands, Cheez Whiz and Velveeta while decreasing the price of the Kraft brand. Fromageries Bel decreased the price of Price and Laughing Cow brand while increasing WisPride. The private label price of S&B was the only private label category cheese to show an increase in price raising 0.65 percent.

Finally, in the imitation category, 5 brands showed a positive change in price. Schreiber Foods Incorporated decreased its price of Schreiber by 10.95 percent while increasing the price of American Heritage 0.65 percent. Borden also increased the price of one brand, Fisher, while decreasing the price of another, Pizzamate. The private label price decreased 0.51 percent.

For some brands, maintaining a higher price lead to changes in consumer preferences, that is, switching to competitors brands or to private label brands in search of less expensive alternatives. Faced with declining share, some manufacturers used more merchandising and highly publicized price reductions to stem the exodus. In some cases this has been at least partially effective (natural and shredded) and in others it has not (american).

The cream cheese market is quite different than other cheese types. Pricing and merchandising strategies are governed not just by the seasonal nature and the amount at stake during one quarter of the year but possibly by the introduction of substitutes by the same manufacturer. Only one brand showed a positive change in price in the later part of 1990.

Finally, for S&B and imitation cheese, it is hard to draw any consistent conclusions. Individual brands sometimes follow familiar characteristics we have seen in other cheese types. Six S&B brands and 5 imitation brands had a positive change in price at the end of 1990. For other brands, pricing strategies suggest other inputs and manufacturing processes are the major price determinants. This is most evident in the fact that the price of private label S&B showed a slight increase from the 3rd to the 4th quarter 1990 (0.65 percent).

We have shown that some manufacturers price index trends stay closer to input price trends than others. We have presented evidence that supports the notion that retail price strategy may not follow the price trends of inputs in some cases. In those cases, declining volume and share forced a change in price and merchandising strategy.

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Table 1 Sales, Share, and Average Price of Cheese by Type Sold, Total U.S., 1992

Type	Dollar Sales	Dollar Share	Volume Share	Avg. Price/lb
American	\$1,563.1	29.142	31.734	\$2.750
Natural	1,496.0	27.892	24.076	3.469
Natural Shredded	829.1	15.458	12.697	3.645
Cream Cheese	598.0	11.148	14.191	2.352
Spreads & Balls	415.2	7.742	6.998	3.312
Imitation	27.8	0.517	0.646	2.396
All Others ¹	434.2	8.094	9.650	
total	\$5,363.4	100.00	100.00	\$2.994

¹ Includes Grated Cheese, Processed Shredded Cheese, Ricotta, and All Other Processed Cheeses. Sales figures in millions, shares do not total 100 due to rounding.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 2 American Cheese Sales and Volume¹, Manufacturers Dollar and Volume Share², Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Total Sales and Volume												
Dollar Sales	308.52	309.70	323.91	333.83	348.27	353.49	362.35	382.27	410.10	416.60	435.90	433.94
Volume Sales	143.96	144.45	148.10	146.67	149.87	151.50	150.40	144.86	149.70	152.40	154.73	151.66
Borden Inc.												
Dollar Share	11.33	10.82	10.03	10.70	10.55	10.47	11.04	10.68	10.73	10.87	10.27	10.21
Volume Share	11.12	10.43	9.68	10.51	10.19	9.84	10.62	10.32	10.08	10.32	9.80	9.77
Crystal Foods Inc.												
Dollar Share	0.24	0.26	0.26	0.25	0.29	0.29	0.33	0.28	0.39	0.45	0.48	0.54
Volume Share	0.30	0.33	0.33	0.30	0.35	0.38	0.42	0.34	0.49	0.61	0.63	0.73
Land O' Lakes, Inc.												
Dollar Share	1.04	1.33	1.56	1.21	1.28	1.43	1.49	1.29	1.44	1.34	1.31	1.22
Volume Share	1.00	1.49	1.55	1.16	1.32	1.46	1.60	1.34	1.52	1.41	1.36	1.26
Philip Morris												
Dollar Share	62.56	62.55	62.55	64.03	63.76	62.82	62.10	63.80	62.27	61.62	62.00	63.14
Volume Share	59.11	58.85	58.42	60.65	60.44	59.31	58.39	60.32	58.42	57.11	56.89	57.63
Schreiber Foods Inc.												
Dollar Share	0.37	0.38	0.42	0.38	0.35	0.42	0.43	0.32	0.32	0.29	0.30	0.31
Volume Share	0.56	0.55	0.59	0.53	0.49	0.53	0.56	0.44	0.47	0.43	0.46	0.47
Philip Morris												
Dollar Share	9.91	9.82	9.45	9.97	8.82	8.95	9.24	9.30				
Volume Share	9.29	9.39	8.97	9.35	8.06	8.23	8.84	9.34				
Crystal Foods Inc.												
Dollar Share	0.54	0.60	0.64	0.59	0.53	0.58	0.66	0.62				
Volume Share	0.75	0.85	0.88	0.80	0.72	0.82	0.96	0.87				
Land O' Lakes, Inc.												
Dollar Share	1.21	1.45	1.51	1.70	1.59	1.84	1.56	1.70				
Volume Share	1.26	1.52	1.62	1.93	1.78	2.10	1.66	1.79				
Philip Morris												
Dollar Share	62.29	61.36	60.02	59.56	58.61	59.14	58.98	61.04				
Volume Share	55.27	53.84	52.88	52.82	51.75	52.09	52.48	54.93				
Schreiber Foods Inc.												
Dollar Share	0.31	0.35	0.53	0.55	0.68	0.61	0.67	0.47				
Volume Share	0.47	0.55	0.84	0.86	1.04	0.90	0.96	0.67				

¹ Sales expressed in million dollars, volume expressed in million pounds.² Share expressed as a percent.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 3 Natural Cheese Sales and Volume¹, Manufacturers Dollar and Volume Share², Total U.S., 1988-1992 Quarterly

Quarter	IQ 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Total Sales and Volume												
Dollar Sales	308.85	294.95	303.10	340.31	326.82	311.31	315.41	374.04	405.63	388.02	395.31	430.06
Volume Sales	101.29	97.11	98.63	107.66	102.58	96.91	95.79	107.18	113.83	110.84	108.93	120.18
Beatrice/ConAgra³												
Dollar Share	3.925	4.038	3.931	4.161	4.133	4.08	4.168	4.428	3.861	3.969	3.839	4.296
Volume Share	3.68	3.815	3.679	3.886	3.901	3.842	3.909	4.344	3.58	3.5	3.42	3.715
Land O' Lakes												
Dollar Share	4.644	4.811	4.651	3.462	2.974	3.288	3.448	3.549	3.287	3.416	3.283	3.458
Volume Share	4.414	4.519	4.361	3.294	2.788	3.146	3.341	3.706	3.307	3.412	3.309	3.432
Sorrento Cheese Co												
Dollar Share	4.012	3.75	3.818	4.044	3.98	3.27	3.379	3.455	3.598	4.043	4.001	3.398
Volume Share	4.443	4.056	4.12	4.72	4.523	3.515	3.724	4.129	4.077	4.696	4.436	3.684
Tillamook Country Creamery												
Dollar Share	3.459	3.345	3.356	3.069	2.892	2.879	3.074	3.138	3.687	3.484	3.751	3.424
Volume Share	4.215	3.981	4.021	3.82	3.59	3.522	3.894	4.101	4.756	4.381	4.896	4.399
Unigate PLC												
Dollar Share	2.348	2.485	2.642	2.444	2.811	2.876	2.812	2.648	2.903	3.174	3.131	2.923
Volume Share	2.131	2.303	2.427	2.257	2.629	2.72	2.588	2.532	2.611	2.816	2.742	2.572
Philip Morris												
Dollar Share	41.465	40.941	40.452	41.904	40.425	38.957	38.3	40.109	36.774	34.636	33.757	34.083
Volume Share	37.677	36.984	36.232	37.656	36.261	34.562	34.106	35.277	31.943	29.622	28.437	28.731
Quarter	IQ 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Total Sales and Volume												
Dollar Sales	410.91	371.94	368.33	398.94	373.16	361.22	365.40	396.27				
Volume Sales	117.03	107.07	104.91	113.77	106.50	105.50	103.89	115.35				
Beatrice/ConAgra³												
Dollar Share	4.522	4.512	4.208	3.803	3.562	3.631	3.576	4.111				
Volume Share	4.039	4.039	3.888	3.243	3.099	3.143	3.105	3.383				
Land O' Lakes												
Dollar Share	3.406	3.393	3.54	3.834	3.864	3.773	3.827	4.181				
Volume Share	3.359	3.355	3.503	3.929	3.862	3.73	3.834	4.265				
Sorrento Cheese Co												
Dollar Share	3.977	3.552	3.656	3.893	4.24	4.411	3.946	4.29				
Volume Share	4.335	3.729	3.709	4.263	4.362	4.669	3.991	4.686				
Tillamook Country Creamery												
Dollar Share	3.29	3.262	3.614	3.421	2.846	4.055	4.487	4.209				
Volume Share	4.252	4.09	4.665	4.411	3.52	5.273	6.145	5.521				
Unigate PLC												
Dollar Share	3.092	2.973	3.096	2.858	3.054	2.999	3.211	2.844				
Volume Share	2.71	2.496	2.669	2.505	2.601	2.436	2.679	2.315				
Philip Morris												
Dollar Share	32.357	33.626	31.952	32.895	30.432	30.887	29.541	31.747				
Volume Share	26.058	27.549	26.377	27.865	25.549	26.221	25.005	28.124				

¹ Sales expressed in million dollars, volume expressed in million pounds.² Share expressed as a percent.³ Beatrice was purchased by ConAgra on August 15, 1990.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 4 Natural Shredded Cheese Sales and Volume¹, Manufacturers Dollar and Volume Share², Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Total Sales and Volume												
Dollar Sales	110.08	99.15	103.33	124.91	130.63	117.76	121.93	151.67	165.08	152.97	162.43	187.74
Volume Sales	36.66	33.28	34.11	39.29	40.73	37.15	37.24	42.61	44.69	41.46	42.86	49.14
Beatrice/ConAgra³												
Dollar Share	1.462	1.403	1.449	1.732	1.549	1.765	1.818	1.667	1.332	1.533	1.902	3.168
Volume Share	1.564	1.522	1.586	2.003	1.65	1.961	1.989	1.863	1.473	1.713	1.982	3.083
Crytal Foods Inc.												
Dollar Share	1.237	1.226	1.153	1.222	1.268	1.34	1.381	1.323	1.458	1.533	1.282	1.269
Volume Share	1.728	1.739	1.605	1.636	1.74	1.888	1.868	1.717	1.927	1.982	1.642	1.668
Land O' Lakes, Inc.												
Dollar Share	0.15	0.421	0.35	0.218	0.131	0.2	0.125	0.229	0.157	0.294	1.05	1.157
Volume Share	0.164	0.494	0.424	0.241	0.132	0.248	0.132	0.309	0.188	0.296	1.075	1.143
Sargento Cheese Co.												
Dollar Share	21.625	21.872	21.686	22.801	22.586	22.264	22.116	23.929	24.412	25.024	22.743	24.111
Volume Share	18.71	18.67	18.53	19.698	19.474	18.777	18.589	20.574	21.138	21.702	19.473	20.955
Sorrento Cheese Co.												
Dollar Share	3.425	3.387	3.318	3.543	3.32	3.104	3.309	3.393	3.411	3.377	3.156	2.957
Volume Share	3.225	3.146	3.078	3.428	3.145	2.848	3.17	3.29	3.289	3.278	3.1	2.883
Philip Morris												
Dollar Share	31.671	30.275	31.401	31.071	30.34	30.08	29.571	29.265	29.033	29.145	29.521	28.644
Volume Share	28.537	27.142	28.044	27.782	27.175	27.089	26.157	25.57	25.755	25.677	25.523	24.436

Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92
Total Sales and Volume								
Dollar Sales	191.71	169.39	178.70	205.26	214.60	192.29	197.66	224.57
Volume Sales	51.82	46.40	48.44	54.98	58.40	53.25	54.15	61.61
Beatrice/ConAgra³								
Dollar Share	3.599	3.259	2.973	2.88	2.605	2.443	2.366	2.885
Volume Share	3.477	3.173	2.989	2.936	2.68	2.563	2.525	2.735
Crytal Foods Inc.								
Dollar Share	1.245	1.145	1.144	1.202	1.176	1.276	1.351	1.354
Volume Share	1.635	1.501	1.473	1.518	1.495	1.716	1.818	1.857
Land O' Lakes, Inc.								
Dollar Share	1.09	1.318	1.489	1.578	1.233	1.632	1.18	1.00
Volume Share	1.049	1.291	1.454	1.624	1.18	1.674	1.169	0.981
Sargento Cheese Co.								
Dollar Share	25.305	24.283	23.218	26.38	28.436	26.925	23.687	25.088
Volume Share	21.538	20.5	19.435	22.408	23.712	22.007	19.27	20.562
Sorrento Cheese Co.								
Dollar Share	3.047	2.953	3.575	3.783	4.609	4.168	3.612	3.978
Volume Share	2.938	2.85	3.553	3.795	4.612	4.051	3.463	3.784
Philip Morris								
Dollar Share	26.232	28.483	28.977	26.176	23.605	24.174	27.015	26.577
Volume Share	21.568	23.743	24.235	22.032	20.536	21.364	24.352	24.128

¹ Sales expressed in million dollars, volume expressed in million pounds.² Share expressed as a percent.³ Beatrice was purchased by ConAgra on August 15, 1990.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 5 Cream Cheese Sales and Volume¹, Manufacturers Dollar and Volume Share², Total U.S., 1988-1992 Quarterly

Quarter	IQ 88	2Q 88	3Q 88	4Q 88	IQ 89	2Q 89	3Q 89	4Q 89	IQ 90	2Q 90	3Q 90	4Q 90
Total Sales and Volume												
Dollar Sales	107.00	104.66	102.43	147.54	111.70	108.40	106.94	158.74	124.93	129.77	128.41	182.08
Volume Sales	48.23	46.04	44.02	68.52	48.86	46.43	45.02	71.31	51.51	54.57	52.73	81.27
Anco Foods Corp.												
Dollar Share	1.97	1.89	2.03	2.01	1.96	1.93	2.03	1.80	1.90	1.58	1.54	1.51
Volume Share	0.68	0.59	0.66	0.64	0.65	0.65	0.66	0.58	0.63	0.49	0.47	0.44
Bongrain												
Dollar Share	2.23	2.69	3.19	3.10	3.50	3.69	4.01	3.50	3.58	3.57	3.87	3.59
Volume Share	1.16	1.33	1.52	1.46	1.67	1.68	1.81	1.49	1.54	1.51	1.61	1.33
Crystal Foods Inc.												
Dollar Share	0.33	0.33	0.28	0.38	0.40	0.41	0.35	0.41	0.35	0.49	0.44	0.54
Volume Share	0.48	0.46	0.39	0.54	0.59	0.56	0.48	0.55	0.47	0.66	0.63	0.80
Raskas Foods Inc.												
Dollar Share	0.45	0.47	0.47	0.41	0.42	0.38	0.39	0.34	0.38	0.36	0.40	0.36
Volume Share	0.45	0.48	0.50	0.42	0.46	0.41	0.44	0.36	0.46	0.44	0.50	0.44
Philip Morris												
Dollar Share	72.02	71.00	70.62	68.60	70.40	69.83	69.41	68.75	70.85	71.07	70.07	66.52
Volume Share	68.56	67.72	67.35	64.60	66.99	66.79	66.33	64.90	67.78	67.88	67.50	63.17
Unilever												
Dollar Share	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91	2.51
Volume Share	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	1.69

Quarter	IQ 91	2Q 91	3Q 91	4Q 91	IQ 92	2Q 92	3Q 92	4Q 92
Total Sales and Volume								
Dollar Sales	140.62	130.91	132.62	180.59	136.07	137.24	135.49	189.17
Volume Sales	59.03	53.89	54.22	80.89	55.98	57.68	55.26	85.25
Anco Foods Corp.								
Dollar Share	1.52	1.18	1.16	1.18	1.12	1.07	0.94	0.88
Volume Share	0.46	0.36	0.36	0.36	0.35	0.33	0.28	0.24
Bongrain								
Dollar Share	3.67	3.97	3.83	3.62	3.58	3.66	3.89	3.20
Volume Share	1.38	1.51	1.42	1.23	1.27	1.26	1.33	1.01
Crystal Foods Inc.								
Dollar Share	0.44	0.48	0.45	0.55	0.40	0.52	0.48	0.57
Volume Share	0.68	0.72	0.65	0.82	0.60	0.82	0.75	0.86
Raskas Foods Inc.								
Dollar Share	0.39	0.38	0.36	0.40	0.47	0.30	0.28	0.24
Volume Share	0.52	0.50	0.49	0.50	0.67	0.44	0.42	0.32
Philip Morris								
Dollar Share	68.41	68.29	67.89	66.08	68.01	68.11	67.67	68.13
Volume Share	65.15	64.84	64.75	61.82	63.89	64.20	63.52	63.24
Unilever								
Dollar Share	3.09	2.51	3.47	2.75	2.79	1.88	1.66	1.19
Volume Share	2.23	1.87	2.63	2.02	2.20	1.49	1.38	0.92

¹ Sales expressed in million dollars, volume expressed in million pounds.² Share expressed as a percent.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 6 Cheese Spreads & Balls Sales and Volume¹, Manufacturers Dollar and Volume Share², Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Total Sales and Volume												
Dollar Sales	78.58	73.47	76.00	108.85	88.26	90.70	90.55	131.92	100.15	96.37	95.86	128.02
Volume Sales	28.47	26.76	26.73	36.70	30.70	31.61	30.18	41.02	30.93	29.65	28.72	37.54
Fromageries Bel Inc.												
Dollar Share	13.98	13.81	13.55	11.88	11.81	11.08	11.47	10.54	11.54	12.06	11.74	10.75
Volume Share	9.23	9.14	9.41	8.34	7.94	7.49	8.00	7.86	8.66	9.17	8.99	8.47
Kaukauna Cheese												
Dollar Share	2.99	2.68	2.70	4.40	2.77	2.60	2.78	4.52	3.15	3.03	2.99	5.39
Volume Share	2.60	2.28	2.33	3.71	2.28	2.18	2.41	3.99	2.75	2.64	2.60	4.69
RJR Nabisco, Inc.												
Dollar Share	9.11	10.05	11.81	10.96	9.76	11.03	14.04	12.94	12.40	13.89	16.45	14.50
Volume Share	3.97	4.31	5.37	5.47	4.43	5.35	7.54	7.36	7.15	8.20	9.91	8.67
Unilever												
Dollar Share	0.00	0.00	0.16	1.46	1.25	0.91	0.96	7.21	9.83	7.59	5.10	4.13
Volume Share	0.00	0.00	0.14	1.34	1.07	0.77	0.85	6.97	9.57	7.46	5.18	4.24
Philip Morris												
Dollar Share	47.03	44.61	43.99	45.27	46.50	46.76	43.42	40.83	37.56	36.13	34.77	38.10
Volume Share	49.20	46.28	46.13	47.15	46.73	46.74	44.01	40.65	37.07	35.72	33.85	37.17
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Total Sales and Volume												
Dollar Sales	107.72	91.42	98.72	121.18	97.67	93.00	100.97	123.57				
Volume Sales	33.35	28.61	30.31	37.06	29.41	28.18	30.56	37.20				
Fromageries Bel Inc.												
Dollar Share	10.39	11.15	10.09	10.57	10.42	11.49	11.22	10.43				
Volume Share	7.63	8.29	7.56	8.16	7.97	8.89	8.76	8.01				
Kaukauna Cheese												
Dollar Share	3.33	3.00	2.08	4.26	2.75	2.34	2.04	5.12				
Volume Share	2.89	2.52	1.84	3.77	2.51	2.15	1.83	4.65				
RJR Nabisco, Inc.												
Dollar Share	13.47	13.65	14.74	12.88	12.60	13.24	13.56	12.50				
Volume Share	7.58	7.58	8.27	7.20	7.26	7.73	7.82	7.23				
Unilever												
Dollar Share	4.34	3.12	4.13	3.33	3.08	1.82	1.44	1.28				
Volume Share	4.24	3.06	4.15	3.62	3.33	2.00	1.62	1.47				
Philip Morris												
Dollar Share	38.41	36.88	40.35	41.16	43.63	44.59	46.62	45.83				
Volume Share	35.65	34.00	38.88	40.04	40.55	43.42	46.83	45.68				

¹ Sales expressed in million dollars, volume expressed in million pounds.² Share expressed as a percent.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 7 Imitation Cheese Sales and Volume¹, Manufacturers Dollar and Volume Share², Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Total Sales and Volume												
Dollar Sales	4.72	4.10	4.26	4.88	5.85	5.55	5.75	6.51	9.41	8.47	8.58	8.80
Volume Sales	2.28	1.95	1.95	2.11	2.43	2.31	2.32	2.46	3.50	3.10	3.16	3.30
A&J Foods Inc.												
Dollar Share	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	2.00	1.98	1.55	0.12
Volume Share	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	3.00	3.02	2.35	0.18
Borden Inc.												
Dollar Share	10.51	11.49	10.80	11.14	9.86	10.96	10.93	11.46	15.04	14.75	14.28	13.57
Volume Share	10.00	11.09	10.65	11.42	9.79	10.76	10.60	11.91	18.21	17.93	17.46	16.10
Galaxy Cheese Co.												
Dollar Share	9.33	10.20	9.67	11.22	14.70	15.42	14.02	11.94	9.95	8.72	7.53	6.36
Volume Share	7.36	7.64	6.75	6.72	8.50	8.73	8.08	7.19	6.12	5.40	4.61	3.78
Milkhouse Cheese Co.												
Dollar Share	1.15	1.30	1.03	1.05	1.12	1.95	1.90	2.65	2.23	2.24	2.44	2.28
Volume Share	1.24	1.51	1.20	1.32	1.46	2.50	2.43	3.57	2.97	3.05	3.24	2.95
Sargento Cheese Co.												
Dollar Share	44.64	44.16	45.80	45.79	44.23	38.05	37.02	40.26	29.74	28.23	28.37	28.03
Volume Share	42.09	41.92	43.81	44.41	43.72	36.77	35.72	38.44	28.13	26.57	25.59	24.54
Schreiber Foods Inc.												
Dollar Share	1.46	1.03	0.73	0.32	2.23	6.67	8.03	4.21	0.81	0.96	1.20	2.92
Volume Share	1.60	1.19	0.83	0.44	3.64	10.26	12.56	6.80	0.98	1.22	1.57	4.61
N. Dorman & Co.												
Dollar Share	0.00	0.00	0.00	0.00	0.02	0.84	4.22	6.11	13.39	14.93	13.38	12.68
Volume Share	0.00	0.00	0.00	0.00	0.01	0.46	2.21	3.18	7.35	8.21	7.15	6.76
Philip Morris												
Dollar Share	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Volume Share	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92
Total Sales and Volume								
Dollar Sales	9.27	7.34	7.31	7.45	8.27	6.69	6.69	6.15
Volume Sales	3.69	2.95	2.99	3.02	3.41	2.75	2.86	2.58
A&J Foods Inc.								
Dollar Share	4.18	7.41	9.22	7.30	9.49	4.71	4.99	0.80
Volume Share	7.01	12.24	15.01	12.00	15.42	7.60	7.79	1.21
Borden Inc.								
Dollar Share	12.58	11.44	10.61	10.18	8.08	7.89	7.50	7.56
Volume Share	14.05	12.49	10.27	9.78	7.48	7.24	6.65	6.91
Galaxy Cheese Co.								
Dollar Share	5.69	5.00	3.88	2.52	3.20	3.28	2.82	2.57
Volume Share	3.14	2.74	2.05	1.33	1.66	1.69	1.36	1.24
Milkhouse Cheese Co.								
Dollar Share	2.29	2.04	2.36	2.45	2.96	2.43	2.76	3.17
Volume Share	2.75	2.49	2.78	2.85	3.46	2.84	3.11	3.61
Sargento Cheese Co.								
Dollar Share	26.82	26.10	26.08	28.78	28.02	25.92	22.61	22.79
Volume Share	21.95	21.59	20.88	22.84	21.83	20.32	17.00	17.37
Schreiber Foods Inc.								
Dollar Share	5.00	1.86	2.29	3.62	4.13	7.04	10.46	14.76
Volume Share	7.92	2.39	3.01	5.27	5.93	10.54	15.07	20.58
N. Dorman & Co.								
Dollar Share	10.48	10.37	7.74	7.74	7.65	7.29	5.34	4.10
Volume Share	5.13	5.16	3.69	3.76	3.68	3.37	2.37	1.80
Philip Morris								
Dollar Share	0.00	0.00	0.01	0.50	1.54	2.72	2.98	2.93
Volume Share	0.00	0.00	0.01	0.52	1.76	3.23	3.24	3.23

¹ Sales expressed in million dollars, volume expressed in million pounds.² Share expressed as a percent.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 8 Leading American Cheese Brands, Total U.S. 1992, Ranked by Volume Share

Manufacturer Brand	Rank	Volume Share	Dollar Share	Average Price/lb
Private Label		29.385	23.446	2.194
Philip Morris				
Kraft	1	25.506	30.060	3.241
Velveeta	2	15.691	16.043	2.818
Kraft Free	4	3.646	4.982	3.757
Velveeta Light	5	3.187	2.916	2.516
Kraft Light	6	1.697	2.089	3.384
Kraft Singles	8	.954	.787	2.268
Borden Inc.				
Borden	3	7.906	8.036	2.795
Land O' Lakes Inc.				
Land O' Lakes	7	1.275	1.123	2.421
Crystal Foods Inc.				
Crystal Farms	9	.843	.595	1.941
Schreiber Foods Inc.				
American Heritage	10	.655	.441	1.851

Source: I.R.I Infoscane data, Food Marketing Policy Center, University of Connecticut.

Table 9 American Cheese Brand Volume Share and Percent Sold with Any Merchandising, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label												
Volume Share	23.23	23.13	24.02	21.98	22.12	23.54	23.54	22.57	23.90	25.19	26.01	25.29
% Merch.	34.646	34.642	35.447	29.968	33.24	39.992	35.896	27.056	34.111	44.101	36.464	42.171
Philip Morris												
Kraft	32.43	34.05	33.89	32.50	33.07	34.79	34.16	32.52	31.70	32.09	32.47	30.14
Kraft	31.369	34.605	34.044	28.937	31.462	35.037	31.187	27.648	29.792	33.583	32.603	37.552
Velveeta	25.49	23.57	23.47	27.09	26.11	23.10	22.73	26.45	25.24	23.30	22.77	25.03
Kraft Free	35.06	31.322	30.574	32.96	30.222	30.666	26.763	27.433	27.662	26.714	26.644	33.273
					0.01	0.19	0.23	0.20	0	34.22	19.113	21.708
Kraft Light	0.07	0.06	0.07	0.06	0.08	0.08	0.09	0.08	0.09	0.09	0.15	1.23
	7.962	10.087	30.242	26.076	25.427	26.466	29.689	22.55	23.291	55.361	35.712	26.173
Borden Inc.												
Borden	8.78	8.18	7.64	8.67	8.55	8.36	9.17	9.02	8.58	8.76	8.15	8.32
	53.582	50.249	47.033	51.833	48.835	49.679	49.437	49.437	45.585	53.916	51.882	59.001
Land O' Lakes Inc.												
Land O' Lakes	0.84	1.31	0.96	0.74	0.94	0.93	1.11	0.86	1.03	0.99	0.97	0.73
	46.91	69.828	49.193	41.06	50.974	53.847	58.261	37.47	55.902	55.089	54.191	46.189
Crystal Foods Inc.												
Crystal Farms	0.30	0.33	0.33	0.30	0.35	0.38	0.42	0.34	0.49	0.61	0.63	0.73
	18.124	38.47	27.839	14.505	27.648	34.332	28.152	5.72	22.9	42.587	38.417	45.132
Schreiber Foods Inc.												
American Heritage	0.26	0.31	0.34	0.33	0.32	0.41	0.43	0.31	0.35	0.32	0.33	0.33
	49.453	48.121	46.539	39.736	44.824	46.085	47.685	36.666	32.98	28.214	30.912	32.943
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label												
Volume Share	27.71	28.60	29.42	29.26	30.22	30.06	29.84	27.41				
% Merch.	48.523	48.191	43.523	38.271	47.574	49.748	44.542	39.48				
Philip Morris												
Kraft	28.55	29.11	28.20	26.24	27.36	25.64	25.48	23.49				
Kraft	36.964	45.742	37.693	36.671	44.787	41.404	40.009	37.119				
Velveeta	22.86	18.58	16.60	18.69	14.55	14.73	14.14	19.40				
Velveeta	31.98	39.824	37.218	29.601	28.449	28.291	28.792	29.696				
Kraft Free	0.25	0.70	1.68	1.93	3.30	3.94	3.89	3.44				
Kraft Free	17.173	39.367	30.408	22.582	24.369	21.671	19.427	17.398				
Velveeta Light	0.05	2.28	3.21	3.46	3.46	3.11	2.82	3.38				
Velveeta Light	18.013	34.925	34.433	27.568	26.705	27.175	25.818	23.677				
Kraft Light	2.46	2.25	2.08	1.45	2.02	2.14	1.81	1.63				
Kraft Light	40.052	48.951	35.193	30.185	36.501	34.917	30.986	28.579				
Kraft Singles					0.74	1.88	1.17					
					56.042	49.433	35.236					
Borden Inc.												
Borden	7.88	8.06	7.74	8.25	7.12	7.48	8.25	8.75				
Borden	59.699	63.732	55.587	52.626	53.609	63.07	61.48	64.937				
Land O' Lakes Inc.												
Land O' Lakes	0.82	1.01	1.00	1.25	1.31	1.47	1.14	1.18				
Land O' Lakes	60.058	63.998	64.898	66.822	66.894	67.703	59.193	64.435				
Crystal Foods Inc.												
Crystal Farms	0.75	0.85	0.88	0.80	0.72	0.82	0.96	0.87				
Crystal Farms	38.855	52.689	43.031	29.021	37.738	56.895	50.923	42.384				
Schreiber Foods Inc.												
American Heritage	0.36	0.44	0.68	0.72	0.85	0.68	0.68	0.42				
American Heritage	43.31	56.615	70.953	61.4	64.511	47.396	44.027	18.589				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table 10 American Cheese and Manufacturing Milk Price per Pound and Price Indices¹, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	1.859 100	1.844 99.2	1.85 99.5	1.961 105.5	1.992 107.2	1.965 105.7	2.041 109.8	2.261 121.6	2.318 124.7	2.273 122.3	2.317 124.6	2.314 124.5
Philip Morris Kraft	2.488 100.0	2.461 98.9	2.535 101.9	2.659 106.9	2.687 108.0	2.641 106.1	2.745 110.3	3.049 122.5	3.205 128.8	3.188 128.1	3.304 132.8	3.395 136.5
Velveeta	1.967 100.0	1.992 101.3	2.041 103.8	2.081 105.8	2.133 108.4	2.189 111.3	2.259 114.8	2.442 124.1	2.526 128.4	2.578 131.1	2.69 136.8	2.765 140.6
Kraft Free 1Q 90 = 100	3.051 100.0	3.027 99.2	2.906 95.2	2.998 98.3	3.039 99.6	3.039 99.6	3.083 101.0	3.56 116.7	3.603 118.1	3.414 111.9	3.49 114.4	3.532 115.8
Borden Inc. Borden	2.198 100.0	2.261 102.9	2.294 104.4	2.333 106.1	2.387 108.6	2.426 110.4	2.446 111.3	2.686 122.2	2.852 129.8	2.815 128.1	2.909 132.3	2.956 134.5
Land O' Lakes Inc. Land O' Lakes	2.203 100.0	1.863 84.6	2.104 95.5	2.321 105.4	2.176 98.8	2.213 100.5	2.158 98.0	2.542 115.4	2.528 114.8	2.555 116.0	2.631 119.4	2.813 127.7
Crystal Foods Inc. Crystal Farms	1.707 100.0	1.675 98.1	1.735 101.6	1.876 109.9	1.872 109.7	1.791 104.9	1.899 111.2	2.171 127.2	2.158 126.4	2.027 118.7	2.121 124.3	2.118 124.1
Schreiber Foods Inc. American Heritage	1.425 100.0	1.422 99.8	1.543 108.3	1.675 117.5	1.682 118.0	1.839 129.1	1.814 127.3	1.869 131.2	1.792 125.8	1.8 126.3	1.793 125.8	1.823 127.9
Manufacturing Milk ²	10.65 100	10.34 97.1	10.99 103.3	12.13 113.9	11.38 106.9	11.18 105.0	12.41 116.6	14.50 136.2	12.73 119.5	12.79 120.2	13.01 122.2	10.31 96.8
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label	2.153 115.8	2.08 111.9	2.139 115.1	2.228 119.8	2.221 119.5	2.146 115.4	2.201 118.4	2.21 118.9				
Philip Morris Kraft	3.407 136.9	3.308 133.0	3.328 133.8	3.411 137.1	3.29 132.2	3.225 129.6	3.211 129.1	3.238 130.1				
Velveeta	2.786 141.6	2.774 141.0	2.667 135.6	2.806 142.7	2.895 147.2	2.839 144.3	2.823 143.5	2.720 138.3				
Kraft Free	3.913 105.6	3.797 102.5	3.728 100.6	3.888 104.9	3.776 101.9	3.735 100.8	3.768 101.7	3.749 101.2				
Velveeta Light	2.785 100.0	2.699 96.9	2.56 91.9	2.617 94.0	2.526 90.7	2.493 89.5	2.473 88.8	2.564 92.1				
Kraft Light	3.457 113.3	3.335 109.3	3.33 109.1	3.475 113.9	3.429 112.4	3.367 110.4	3.391 111.2	3.412 111.8				
Kraft Singles					2.246	2.237	2.335					
Borden Inc. Borden	2.935 133.6	2.779 126.4	2.794 127.1	2.925 133.1	2.961 134.7	2.852 129.8	2.76 125.6	2.646 120.4				
Land O' Lakes Inc. Land O' Lakes	2.647 120.2	2.58 117.1	2.485 112.8	2.403 109.1	2.372 107.7	2.319 105.3	2.479 112.5	2.544 115.5				
Crystal Foods Inc. Crystal Farms	2.051 120.2	1.932 113.2	1.968 115.3	2.087 122.3	2.045 119.8	1.91897 112.4	1.892 110.8	1.933 113.2				
Schreiber Foods Inc. American Heritage	1.784 125.2	1.689 118.5	1.672 117.3	1.794 125.9	1.836 128.8	1.836 128.8	1.898 133.2	1.823 127.9				
Manufacturing Milk ²	10.07 94.6	10.28 96.6	11.50 108.1	12.36 116.1	11.30 106.1	11.99 112.7	12.47 117.1	11.74 110.3				

Source: I.R.I. Infoscant data, Food Marketing Policy Center, University of Connecticut. *Federal Milk Order Market Statistics, Annual Summary, 1988-1992.*

¹ Prices indexed at 1st quarter 1988 = 100 unless indicated.

² Minnesota based manufacturing milk priced in dollars per 100 pounds.

Table 11 Leading Natural Cheese Brands (not shredded), Total U.S. 1992, Ranked by Volume Share

Manufacturer Brand	Rank	Volume Share	Dollar Share	Average Price/lb
Private Label		35.412	29.465	2.886
Philip Morris				
Kraft	1	11.484	13.178	3.988
Cracker Barrel	2	6.281	7.652	4.217
Polly O	4	3.880	3.916	3.495
Kraft Light Naturals	7	2.158	2.609	4.193
Tillamook Country Creamery				
Tillamook	3	4.976	3.812	2.657
ConAgra				
County Line	5	2.443	2.523	3.583
Sorrento Cheese Co.				
Precious	6	2.362	2.391	3.511
Sorrento	10	2.010	1.783	3.076
Land O' Lakes, Inc.				
Lake to Lake	8	2.115	2.020	3.314
Unigate PLC				
Frigo	9	2.114	2.632	4.318

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut.

Table 12 Natural Cheese (not shredded) Brand Volume Share and Percent Sold with Any Merchandising, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label												
Volume Share	27.851	27.418	28.240	28.037	29.133	29.241	29.149	28.499	29.837	30.806	31.159	33.146
% Merch.	26.232	28.923	28.447	30.126	32.644	33.281	28.804	26.751	35.703	41.787	31.181	44.054
Philip Morris												
Kraft	20.019	20.325	20.440	18.607	18.000	16.948	17.082	15.507	14.391	14.211	13.715	11.864
Cracker Barrel	17.72	19.335	18.087	17.966	17.072	17.076	16.056	14.257	16.117	20.332	17.958	20.224
Polly O	6.379	5.867	5.710	7.533	6.331	5.782	5.869	9.063	7.908	6.724	6.155	6.640
K. Light Naturals	25.322	23.576	22.33	38.279	24.617	24.929	19.246	29.101	17.949	26.228	20.205	36.582
Tillamook Country Creamery	3.400	3.332	3.224	3.654	3.799	3.623	3.444	3.432	3.418	3.042	2.764	4.581
Tillamook	25.999	23.566	24.609	39.767	36.414	25.779	23.554	34.402	29.818	36.724	23.4	60.665
ConAgra	0.861	0.938	0.948	1.925	2.615	2.703	2.49	2.603	3.482	2.793	2.809	2.311
County Line	14.669	13.14	6.728	11.439	11.341	14.667	8.876	10.318	11.83	9.986	10.07	11.763
Sorrento Cheese Co.												
Precious	4.152	3.915	3.939	3.750	3.526	3.467	3.814	4.007	4.652	4.287	4.785	4.313
Sorrento	54.15	50.708	49.441	51.408	44.232	42.041	47.927	48.462	38.144	35.808	41.841	39.861
Land O' Lakes, Inc.												
Lake to Lake	3.257	3.363	3.243	3.409	3.478	3.401	3.480	3.879	3.142	3.055	2.993	3.240
Unigate PLC	35.746	37.548	32.539	30.941	32.425	27.476	29.982	36.06	35.681	31.318	25.511	33.902
Friso	2.351	2.287	2.279	2.230	2.141	1.730	1.906	1.940	2.259	2.266	2.523	2.083
Land O' Lakes, Inc.	25.222	22.261	16.708	28.082	23.662	27.302	27.054	38.529	38.806	43.023	43.607	35.458
Unigate PLC	2.091	1.769	1.842	2.490	2.382	1.785	1.817	2.189	1.804	2.415	1.898	1.587
Friso	49.322	43.068	41.785	58.519	50.964	39.9	39.921	54.968	45.185	63.296	38.218	42.423
Land O' Lakes, Inc.												
Lake to Lake	3.258	3.217	3.142	1.991	1.584	1.909	1.923	2.111	1.977	1.880	1.815	1.903
Unigate PLC	34.855	29.349	28.912	40.837	32.208	40.806	37.964	47.781	39.818	45.486	36.673	59.06
Friso	2.131	2.303	2.427	2.257	2.629	2.720	2.588	2.532	2.275	2.322	2.357	2.147
Unigate PLC	28.08	33.175	27.369	28.843	30.792	30.121	22.22	32.919	24.628	28.148	24.017	33.644

Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92
Private Label								
Volume Share	34.420	34.437	34.761	34.580	36.108	35.535	35.792	34.313
% Merch.	47.462	46.531	37.728	40.535	43.232	44.849	35.617	38.189
Philip Morris								
Kraft	11.270	12.661	12.230	11.226	11.524	11.645	11.486	11.299
Cracker Barrel	22.126	37.24	25.611	23.873	32.32	28.433	24.202	26.969
Polly O	5.962	5.808	5.336	7.328	6.463	6.008	5.603	6.972
K. Light Naturals	29.601	33.177	26.57	39.74	26.776	27.566	21.606	39.899
Tillamook Country Creamery	3.417	3.276	3.277	4.410	3.231	3.956	3.281	4.947
Tillamook	42.32	49.669	38.638	61.04	40.173	56.355	34.093	69.039
ConAgra	2.379	2.534	2.666	2.189	2.182	2.315	2.372	1.801
County Line	19.724	31.865	17.962	16.914	20.66	21.769	15.634	17.753
Sorrento Cheese Co.								
Precious	3.606	3.999	4.556	4.301	3.386	5.139	5.980	5.390
Sorrento	46.671	54.164	49.179	38.792	54.082	58.29	54.986	54.695
Land O' Lakes, Inc.								
Lake to Lake	3.606	3.599	3.430	2.744	2.582	2.610	2.465	2.140
Unigate PLC	2.384	2.187	2.194	2.199	2.622	2.526	2.193	2.125
Friso	37.134	35.015	28.062	36.085	40.261	38.812	28.318	41.205
Land O' Lakes, Inc.								
Lake to Lake	1.941	1.538	1.515	2.038	1.694	2.085	1.746	2.472
Unigate PLC	56.374	43.878	37.234	61.087	40.458	61.199	44.191	64.453
Friso	1.967	1.882	1.924	2.159	2.060	1.993	2.015	2.367
Unigate PLC	50.861	49.562	48.808	61.527	50.812	52.605	49.246	63.513
Friso	2.189	2.041	2.148	1.958	2.193	2.080	2.262	1.940
Friso	36.882	28.751	29.089	36.447	34.785	33.451	31.992	32.791

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table 13 Natural Cheese (not shredded) Price per Pound and Price Indices¹, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	2.573 100.0	2.541 98.8	2.542 98.8	2.639 102.6	2.664 103.5	2.652 103.1	2.741 106.5	2.932 114.0	2.976 115.7	2.884 112.1	3.005 116.8	2.902 112.8
Philip Morris Kraft	3.364 100.0	3.33 99.0	3.393 100.9	3.516 104.5	3.551 105.6	3.622 107.7	3.694 109.8	4.023 119.6	4.105 122.0	4.064 120.8	4.273 127.0	4.42 131.4
Cracker Barrel	3.536 100.0	3.486 98.6	3.52 99.5	3.534 99.9	3.644 103.1	3.666 103.7	3.749 106.0	3.97 112.3	4.169 117.9	4.191 118.5	4.345 122.9	4.354 123.1
Polly O	3.506 100.0	3.592 102.5	3.591 102.4	3.51 100.1	3.407 97.2	3.619 103.2	3.689 105.2	3.828 109.2	3.738 106.6	3.672 104.7	4.09 116.7	3.287 93.8
Light Naturals	3.492 100.0	3.492 100.0	3.562 102.0	3.611 103.4	3.648 104.4	3.657 104.7	3.720 106.5	3.845 110.1	4.002 114.6	4.155 118.9	4.314 123.5	4.465 127.8
Tillamook Country Creamery Tillamook	2.508 100.0	2.558 102.0	2.572 102.6	2.546 101.5	2.572 102.6	2.631 104.9	2.606 103.9	2.678 106.8	2.769 110.4	2.792 111.3	2.788 111.2	2.792 111.3
ConAgra County Line	3.034 100.0	2.973 98.0	3.047 100.4	3.138 103.4	3.15 103.8	3.172 104.5	3.283 108.2	3.332 109.8	3.617 119.2	3.734 123.1	3.83 126.2	3.888 128.1
Sorrento Cheese Co. Precious	2.855 100.0	2.885 101.1	2.893 101.3	2.799 98.0	2.887 101.1	2.938 102.9	2.972 104.1	2.929 102.6	3.081 107.9	3.137 109.9	3.163 110.8	3.254 114.0
Sorrento	2.639 100.0	2.708 102.6	2.791 105.8	2.626 99.5	2.727 103.3	3.036 115.0	3.003 113.8	2.912 110.3	3.22 122.0	2.892 109.6	3.415 129.4	3.358 127.2
Land O' Lakes, Inc. Lake to Lake	3.164 100.0	3.215 101.6	3.262 103.1	3.279 103.6	3.37 106.5	3.3 104.3	3.352 105.9	3.138 99.2	3.43 108.4	3.393 107.2	3.456 109.2	3.421 108.1
Unigate PLC Frigo	3.358 100.0	3.277 97.6	3.345 99.6	3.423 101.9	3.406 101.4	3.396 101.1	3.577 106.5	3.65 108.7	4.063 121.0	4.098 122.0	4.222 125.7	4.194 124.9
Private Label	2.777 107.9	2.722 105.8	2.812 109.3	2.87 111.5	2.867 111.4	2.821 109.6	2.94 114.3	2.916 113.3				
Philip Morris Kraft	4.428 131.6	4.171 124.0	4.186 124.4	4.237 126.0	4.085 121.4	3.989 118.6	3.986 118.5	3.869 115.0				
Cracker Barrel	4.422 125.1	4.399 124.4	4.372 123.6	4.282 121.1	4.303 121.7	4.265 120.6	4.288 121.3	4.086 115.6				
Polly O	3.727 106.3	3.874 110.5	3.859 110.1	3.743 92.5	3.832 109.3	3.391 96.7	4.003 114.2	3.084 88.0				
Light Naturals	4.442 127.2	4.343 124.3	4.378 125.3	4.364 124.9	4.252 121.7	4.132 118.3	4.189 119.9	4.205 120.4				
Tillamook Country Creamery Tillamook	2.728 108.8	2.779 110.8	2.729 108.8	2.73 108.9	2.859 114.0	2.643 105.4	2.581 102.9	2.629 104.8				
ConAgra County Line	3.694 121.8	3.625 119.5	3.503 115.5	3.743 123.4	3.615 119.1	3.523 116.1	3.572 117.7	3.628 119.6				
Sorrento Cheese Co. Precious	3.279 114.9	3.341 117.0	3.494 122.4	3.396 118.9	3.419 119.8	3.444 120.6	3.661 128.2	3.548 124.3				
Sorrento	3.148 119.3	3.259 123.5	3.41 129.2	2.996 113.5	3.395 128.6	2.997 113.6	3.26 123.5	2.817 106.7				
Land O' Lakes, Inc. Lake to Lake	3.371 106.5	3.382 106.9	3.434 108.5	3.274 103.5	3.363 106.3	3.317 104.8	3.425 108.2	3.187 100.7				
Unigate PLC Frigo	4.175 124.3	4.306 128.2	4.244 126.4	4.193 124.9	4.199 125.0	4.324 128.8	4.349 129.5	4.406 131.2				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut
¹ Prices indexed at 1st quarter 1988 = 100.

Table 14 Leading Natural Shredded Cheese Brands, Total U.S. 1992, Ranked by Volume Share

Manufacturer Brand	Rank	Volume Share	Dollar Share	Average Price/lb
Private Label		41.406	34.872	3.070
Sargento Cheese Co.				
Sargento	1	19.158	23.128	4.401
Sargento Preferred Light	5	2.185	2.858	4.768
Philip Morris				
Kraft	2	17.773	19.409	3.981
Kraft Light Naturals	6	1.957	2.205	4.109
Cracker Barrel	8	.876	1.047	4.356
Polly O	10	.629	.752	4.357
Sorrento Cheese Co				
Sorrento	3	3.587	3.641	3.701
ConAgra				
County Line	4	2.288	2.180	3.472
Crystal Foods Inc.				
Crystal Farms	7	1.558	1.169	2.735
Land O' Lakes Inc.				
Land O' Lakes	9	.858	.869	3.692

Source: I.R.I Infoscans data, Food Marketing Policy Center, University of Connecticut.

Table 15 Natural Shredded Cheese Brand Volume Share and Percent Sold with Any Merchandising, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label Volume Share % Merch.	38.462	40.111	39.904	38.917	40.474	41.104	41.94	41.153	41.894	41.298	42.991	41.807
Sargento Cheese Co Sargento	19.507	23.539	21.755	18.146	21.527	25.156	22.806	17.503	27.591	29.888	23.41	31.816
Preferred light	18.657	18.501	18.363	19.589	19.311	18.626	18.419	20.446	20.986	21.529	19.319	20.429
	17.451	14.999	12.535	17.333	15.107	15.365	9.818	13.396	12.771	20.113	10.966	25.945
											0.004	0.382
											0	14.482
Philip Morris Kraft	27.55	26.201	27.049	25.968	25.193	25.029	24.088	23.343	23.276	23.062	23.235	21.882
Light Naturals	20.337	17.884	15.697	15.552	17.308	16.474	15.777	12.326	15.546	17.226	16.205	21.634
Cracker Barrel	0.248	0.235	0.323	0.908	1.078	1.137	1.202	1.221	1.42	1.379	1.327	1.115
	10.929	14.212	9.199	7.236	8.701	19.083	10.421	8.181	10.234	9.226	8.513	11.757
	0.002	0.004	0.003									
	0	0	0									
Polly O	0.737	0.703	0.664	0.851	0.79	0.758	0.688	0.805	0.601	0.718	0.454	0.597
	14.574	15.624	14.705	23.458	12.458	10.447	9.515	22.177	6.031	36.449	9.744	31.966
Sorrento Cheese Co Sorrento	2.976	2.854	2.769	3.182	2.948	2.644	2.92	3.041	3.052	3.015	2.859	2.702
	27.466	27.412	21.986	27.474	23.068	20.148	22.394	18.386	20.917	28.9	16.492	14.175
ConAgra County Line	1.559	1.516	1.583	1.996	1.645	1.956	1.986	1.863	1.47	1.71	1.981	3.081
	24.308	37.175	35.066	41.558	24.423	44.718	36.722	29.302	31.492	38.214	29.46	31.337
Crystal Food Co Crystal Farms	1.728	1.739	1.605	1.636	1.74	1.888	1.868	1.717	1.927	1.982	1.642	1.668
	26.414	24.242	20.499	12.46	22.46	31.294	12.097	3.517	12.441	16.152	14.177	23.718
Land O' Lakes Inc. Land O' Lakes												
											0.127	0.49
											29.107	23.81
												33.636

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table 17 Leading Cream Cheese Brands, Total U.S. 1992, Ranked by Volume Share

Manufacturer Brand	Rank	Volume Share	Dollar Share	Average Price/lb
Private Label		30.298	22.281	1.730
Phillip Morris				
Philadelphia	1	41.873	43.859	2.464
Philadelphia Lite	2	16.098	17.063	2.494
Philadelphia Free	3	2.103	2.874	3.215
Temp Tec	4	1.774	2.148	2.847
Kraft Spreadery	5	1.656	1.866	2.651
Unilever				
Shedds Country Crock	6	1.429	1.819	2.995
Bongrain				
Alouette	7	.922	3.058	7.802
Crystal Foods Inc.				
Crystal Farms	8	.748	.487	1.515
Raskas Foods Inc.				
Brittany Lane	9	.378	.233	1.452
Anco Foods Corp.				
Rondele	10	.290	.990	8.027

Source: I.R.I Infoscian data, Food Marketing Policy Center, University of Connecticut.

Table 18 Cream Cheese Brand Volume Shares and Percent Sold with Any Merchandising, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label Volume Share % Merch.	26.107	26.676	26.903	30.044	27.555	27.689	28.062	30.573	27.15	27.205	26.786	30.687
	30.998	23.99	20.785	52.351	35.464	25.089	22.146	50.029	30.041	33.865	24.652	55.359
Philip Morris Philadelphia	54.529	52.742	52.395	52.706	51.701	50.454	49.676	49.219	47.406	47.793	47.448	46.326
	28.769	20.943	17.511	42.289	27.873	22.007	19.298	43.548	23.07	28.91	21.697	45.431
Philadelphia Lite	10.72	11.656	11.877	9.739	12.771	13.469	13.818	11.49	14.556	15.056	15.504	12.851
	23.732	21.931	17.515	34.232	24.841	24.068	22.023	39.269	29.234	29.462	22.789	41.861
Temp Tee	3.07	3.159	2.966	2.095	2.474	2.847	2.697	1.91	2.538	2.482	2.272	1.642
	32.07	31.275	28.845	32.332	27.414	29.041	35.201	41.587	30.873	33.769	29.101	37.689
Kraft Spreadery									3.272	2.539	2.274	2.353
									41.22	36.962	37.31	52.359
Unilever Shedd's Country Crock											0.623	1.686
											26.416	40.744
Bongrain Alouette	0.55	0.731	0.903	0.81	0.951	1.069	1.181	0.978	1.047	0.992	1.106	0.938
	15.718	21.49	13.849	29.132	19.697	17.749	15.429	29.22	20.789	22.453	20.488	29.587
Crystal Foods Co. Crystal Farms	0.479	0.464	0.394	0.542	0.588	0.557	0.479	0.546	0.469	0.663	0.628	0.79
	47.216	16.96	4.421	59.337	47.892	23.164	10.185	56.96	31.242	54.503	41.031	67.707
Raskas Foods Inc. Brittany Lane	0.279	0.266	0.272	0.227	0.263	0.219	0.221	0.176	0.305	0.266	0.301	0.3
	22.941	18.505	18.937	32.294	15.027	14.662	7.097	12.296	5.099	17.093	43.55	6.974
Anco Foods Corp. Rondelle	0.675	0.591	0.659	0.637	0.649	0.626	0.635	0.564	0.592	0.465	0.446	0.43
	36.347	15.281	14.789	35.949	31.23	22.332	16.496	41.822	26.943	19.962	9.226	37.021
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label Volume Share % Merch.	27.826	28.548	28.163	32.101	29.531	29.703	30.108	31.328				
	41.917	33.865	28.083	59.341	37.812	38.48	34.929	58.437				
Philip Morris Philadelphia	43.801	43.702	43.67	44.476	42.551	42.418	41.508	41.297				
	30.189	23.919	25.824	48.158	23.135	29.974	20.289	48.457				
Philadelphia Lite	16.283	16.942	16.898	14.036	17.065	17.296	16.628	14.308				
	33.415	24.71	26.808	44.115	23.502	28.415	19.138	42.515				
Philadelphia Free			0.0004	0.205	0.459	0.602	1.909	4.323				
			12.367	31.779	22.878	24.052	18.357	20.666				
Temp Tee	2.186	2.14	2.018	1.478	2.023	2.175	1.874	1.275				
	33.201	29.57	28.152	32.574	32.677	33.476	33.482	36.314				
Kraft Spreadery	2.88	2.049	2.163	1.623	1.795	1.705	1.574	1.584				
	42.41	37.859	32.523	42.382	34.994	53.999	35.577	54.152				
Unilever Shedd's Country Crock	2.234	1.871	2.634	2.02	2.198	1.487	1.375	0.919				
	38.708	41.833	37.261	48.396	40.117	41.613	36.328	30.697				
Bongrain Alouette	1.021	1.082	1.011	0.898	0.924	0.92	1.065	0.83				
	26.226	25.675	19.464	30.382	23.755	26.96	27.025	31.066				
Crystal Foods Co. Crystal Farms	0.671	0.708	0.635	0.805	0.58	0.799	0.724	0.84				
	52.669	41.781	14.98	63.128	40.005	61.582	26.138	68.601				
Raskas Foods Inc. Brittany Lane	0.404	0.379	0.382	0.412	0.577	0.367	0.355	0.268				
	13.896	11.648	13.466	13.753	19.195	1.337	3.408	10.39				
Anco Foods Corp. Rondelle	0.45	0.35	0.357	0.355	0.353	0.33	0.274	0.233				
	31.451	26.634	31.867	48.535	32.81	39.373	20.589	31.607				

Source: I.R.I. Infoscant data, Food Marketing Policy Center, University of Connecticut

Table 19 Branded Cream Cheese Price per Pound and Price Indices¹, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	1.73 100.0	1.763 101.9	1.795 103.8	1.658 95.8	1.75 101.2	1.803 104.2	1.819 105.1	1.705 98.6	1.845 106.6	1.816 105.0	1.87 108.1	1.688 97.6
Philip Morris Philadelphia	2.286 100.0	2.346 102.6	2.405 105.2	2.248 98.3	2.368 103.6	2.411 105.5	2.461 107.7	2.297 100.5	2.486 108.7	2.437 106.6	2.48 108.5	2.305 100.8
Philadelphia Lite	2.438 100.0	2.471 101.4	2.532 103.9	2.41 98.9	2.48 101.7	2.496 102.4	2.533 103.9	2.386 97.9	2.504 102.7	2.485 101.9	2.542 104.3	2.385 97.8
Temp Tee	2.598 100.0	2.601 100.1	2.625 101.0	2.639 101.6	2.702 104.0	2.7 103.9	2.684 103.3	2.68 103.2	2.749 3.208	2.738 105.8	2.775 106.8	2.736 105.3
Kraft Spreadery Q1 90 = 100	6.703 100.0	6.64 99.1	6.742 100.6	6.464 96.4	6.621 98.8	6.625 98.8	6.712 100.1	6.616 98.7	6.993 104.3	7.022 104.8	7.017 104.7	7.154 106.7
Unilever Shedds Country Crock Q3 90 = 100	1.514 100.0	1.597 105.5	1.644 108.6	1.491 98.5	1.563 103.2	1.695 112.0	1.753 115.8	1.68 111.0	1.801 119.0	1.748 115.5	1.708 112.8	1.513 99.9
Bongrain Alouette	1.712 100.0	1.72 100.5	1.689 98.7	1.611 94.1	1.639 95.7	1.64 95.8	1.657 96.8	1.658 96.8	1.676 97.9	1.664 97.2	1.607 93.9	1.507 88.0
Crystal Foods Inc. Crystal Farms	6.466 100.0	7.278 112.6	7.156 110.7	6.792 105.0	6.88 106.4	7.107 109.9	7.516 116.2	7.025 108.6	7.6 117.5	7.927 122.6	8.252 127.6	7.814 120.8
Raskas Foods Inc. Brittany Lane												
Anco Foods Corp. Rondelle												
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label	1.751 101.2	1.804 104.3	1.819 105.1	1.649 95.3	1.788 103.4	1.776 102.7	1.805 104.3	1.617 93.5				
Philip Morris Philadelphia	2.459 107.6	2.522 110.3	2.526 110.5	2.338 102.3	2.560 112.0	2.501 109.4	2.574 112.6	2.302 100.7				
Philadelphia Lite	2.485 101.9	2.557 104.9	2.554 104.8	2.415 99.1	2.574 105.6	2.517 103.3	2.574 105.6	2.351 96.4				
Philadelphia Free Q3 91 = 100	2.78 107.0	2.823 108.7	2.872 110.5	2.849 109.7	3.412 111.1	3.425 108.0	3.316 111.1	3.153 108.5				
Temp Tee	3.003 93.6	3.077 95.9	3.113 97.0	2.909 90.7	2.823 88.0	2.497 77.8	2.845 88.7	2.511 78.3				
Kraft Spreadery Q1 90 = 100	3.292 93.0	3.255 92.0	3.224 91.1	3.042 86.0	3.085 87.2	3.009 85.0	2.953 83.5	2.879 81.4				
Unilever Shedds Country Crock Q3 90 = 100	7.225 107.8	7.414 110.6	7.628 113.8	7.433 110.9	7.774 116.0	7.819 116.6	7.897 117.8	7.731 115.3				
Bongrain Alouette	1.549 102.3	1.603 105.9	1.692 111.8	1.49 98.4	1.618 106.9	1.499 99.0	1.554 102.6	1.457 96.2				
Crystal Foods Inc. Crystal Farms	1.553 90.7	1.544 90.2	1.512 88.3	1.558 91.0	1.5 87.6	1.447 84.5	1.432 83.6	1.407 82.2				
Raskas Foods Inc. Brittany Lane	7.969 123.2	8.157 126.2	7.94 122.8	7.397 114.4	7.726 119.5	7.713 119.3	8.366 129.4	8.37 129.4				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

¹ Prices indexed at 1st quarter 1988 = 100 except where noted.

Table 20 Leading Brands of Cheese Spreads and Balls, Total U.S. 1992, Ranked by Volume Share

Manufacturer Brand	Rank	Volume Share	Dollar Share	Average Price/lb
Private Label		22.786	13.267	1.928
Philip Morris				
Cheez Whiz	1	17.600	19.163	3.607
Kraft	2	13.855	12.681	3.031
Velveeta	4	5.413	5.211	3.189
Cheez Whiz Zap a Pack	6	3.930	4.431	3.734
RJR Nabisco, Inc.				
Easy Cheese	3	7.495	12.945	5.720
Fromageries Bel Inc.				
Price	5	3.990	3.930	3.262
Wis Pride	7	2.617	3.152	3.988
Laughing Cow	10	1.725	3.714	7.131
Kaukauna Cheese				
Kaukauna	8	2.278	2.514	3.655
Unilever				
Shedd's Country Crock	9	2.062	1.863	2.993

Source: I.R.I Infoscans data, Food Marketing Policy Center, University of Connecticut.

Table 21 Cheese Balls & Spreads Brand Volume Share and Percent Sold with Any Merchandising, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label												
Volume Share	18.984	20.429	19.085	18.036	22.501	22.79	21.694	18.64	20.633	21.387	22.923	20.838
% Merch.	42.628	37.052	33.749	42.548	43.363	47.685	38.695	38.886	40.843	43.244	41.177	49.933
Philip Morris												
Cheez Whiz	30.844	29.854	29.732	28.981	31.095	33.089	31.226	24.369	21.076	20.699	19.11	19.337
	27.281	27.421	23.22	27.437	26.427	33.751	27.494	31.761	25.078	29.859	21.064	40.882
Kraft	5.385	5.097	4.827	6.929	4.69	3.866	3.657	5.42	4.126	3.856	3.6	5.551
	11.564	10.591	3.224	34.898	12.929	8.056	5.386	36.154	12.865	6.476	3.521	42.818
Velveeta	9.07	8.078	8.487	6.86	7.805	7.067	6.678	5.458	6.51	6.583	6.943	5.845
	18.835	17.162	15.705	16.21	13.55	17.335	15.248	12.537	12.394	15.972	15.005	21.746
RJR Nabisco, Inc.												
Easy Cheese	0.355	0.403	0.695	1.673	1.295	3.155	6.253	7.205	7.152	8.197	9.905	8.671
	29.095	21.421	29.812	62.029	30.49	34.816	38.458	36.425	30.283	40.71	34.945	36.984
Fromageries Bel Inc.												
Price	3.423	3.671	3.96	2.922	3.26	3.424	3.605	2.814	3.474	4.3	4.37	3.702
	11.361	8.966	20.316	15.019	13.443	19.13	18.898	24.546	19.865	26.154	23.318	28.138
WisPride	2.696	2.641	2.805	3.226	2.464	2.064	2.253	3.05	3.115	2.805	2.572	2.917
	17.169	15.232	9.169	24.109	15.841	16.195	13.058	32.082	18.999	21.697	8.789	22.443
Laughing Cow	3.109	2.826	2.649	2.188	2.218	2.005	2.143	1.99	2.063	2.06	2.05	1.816
	15.062	15.732	13.849	24.865	16.597	14.556	13.484	23.767	19.021	17.097	15.056	27.773
Kaukauna Cheese												
Kaukauna	2.517	2.191	2.227	3.579	2.162	1.887	2.026	3.628	2.643	2.536	2.487	4.562
	27.89	20.042	13.425	33.431	14.435	19.636	17.953	37.742	20.228	28.41	23.218	41.314
Unilever												
Shedd's Country Crock			0.143	1.335	1.065	0.774	0.846	6.969	9.569	7.463	5.175	4.239
			31.736	30.802	19.085	27.052	16.74	31.048	32.031	29.417	38.345	40.671
Private Label												
Volume Share	27.06	28.871	24.693	22.777	25.567	23.704	21.215	21.181				
% Merch.	57.402	57.017	47.945	47.248	52.222	45.898	44.417	46.83				
Philip Morris												
Cheez Whiz	20.411	19.58	16.195	19.631	19.921	18.553	16.515	15.932				
	39.009	37.478	27.429	38.087	29.308	31.219	28.937	32.232				
Kraft	3.396	3.234	7.805	6.414	4.937	11.553	19.43	18.07				
	11.589	10.474	28.396	41.111	21.369	44.123	48.285	46.945				
Velveeta	5.986	7.048	5.692	5.154	6.34	5.598	5.069	4.821				
	16.207	30.88	19.789	9.078	8.558	7.851	8.144	7.421				
Cheez Whiz Zap a Pack												
Q3 1991 = 100	0.014	4.967	3.157		4.734	4.383	3.991	2.901				
	11.83	24.24	12.931		16.177	11.892	11.402	12.986				
RJR Nabisco, Inc.												
Easy Cheese	7.577	7.577	8.273	7.198	7.263	7.726	7.822	7.234				
	43.361	37.648	35.076	39.275	42.32	45.283	36.691	46.818				
Fromageries Bel Inc.												
Price	3.497	4.025	3.642	3.274	3.624	4.452	4.711	3.335				
	24.224	28.529	21.109	29.248	28.535	28.021	23.037	28.523				
WisPride	2.334	2.264	2.142	3.126	2.415	2.572	2.407	2.983				
	16.388	29.08	18.324	31.144	22.464	20.914	19.4	37.425				
Laughing Cow	1.786	1.999	1.777	1.683	1.885	1.847	1.633	1.582				
	23.599	24.929	17.947	34.853	22.158	19.849	17.195	29.82				
Kaukauna Cheese												
Kaukauna	2.782	2.398	1.712	3.75	1.973	1.502	1.266	3.938				
	35.169	29.837	23.859	45.835	34.361	31.273	17.617	45.74				
Unilever												
Shedd's Country Crock	4.239	3.06	4.153	3.621	3.329	2.004	1.618	1.469				
	39.404	45.837	39.611	53.687	44.939	44.499	39.841	34.638				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table 22 Branded Cheese Spreads & Balls Price per Pound and Price Indices¹, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	1.58 100.0	1.538 97.3	1.636 103.5	1.763 111.6	1.705 107.9	1.668 105.6	1.782 112.8	1.868 118.2	1.982 125.4	1.969 124.6	1.993 126.1	2.006 127.0
Philip Morris Cheez Whiz	2.605 100.0	2.608 100.1	2.681 102.9	2.794 107.3	2.841 109.1	2.869 110.1	2.945 113.1	3.211 123.3	3.302 126.8	3.302 126.8	3.472 133.3	3.527 135.4
Kraft	2.995 100.0	3.009 100.5	3.129 104.5	3.086 103.0	3.175 106.0	3.27 109.2	3.437 114.8	3.414 114.0	3.523 117.6	3.584 119.7	3.838 128.1	3.794 126.7
Velveeta	2.319 100.0	2.355 101.6	2.396 103.3	2.515 108.5	2.571 110.9	2.549 109.9	2.63 113.4	2.895 124.8	2.998 129.3	3.017 130.1	3.123 134.7	3.24 139.7
RJR Nabisco, Inc. Easy Cheese	7.492 100.0	7.548 100.7	6.558 87.5	5.521 73.7	5.841 78.0	5.483 73.2	5.439 72.6	5.636 75.2	5.613 74.9	5.509 73.5	5.544 74.0	5.701 76.1
Fromageries Bel Inc. Price	2.924 100.0	2.98 101.9	2.935 100.4	2.96 101.2	3.038 103.9	3.111 106.4	3.14 107.4	3.119 106.7	3.244 110.9	3.209 109.7	3.271 111.9	3.172 108.5
WisPride	3.45 100.0	3.45 100.0	3.521 102.1	3.838 111.2	3.834 111.1	3.641 105.5	3.706 107.4	3.763 109.1	3.888 112.7	3.899 113.0	4.03 116.8	4.147 120.2
Laughing Cow	6.194 100.0	6.32 102.0	6.43 103.8	6.481 104.6	6.573 106.1	6.793 109.7	6.885 111.2	6.837 110.4	6.766 109.2	7.024 113.4	7.08 114.3	6.977 112.6
Kaukauna Cheese Kaukauna	3.172 100.0	3.226 101.7	3.295 103.9	3.523 111.1	3.486 109.9	3.487 109.9	3.565 112.4	3.72 117.3	3.713 117.1	3.721 117.3	3.848 121.3	3.922 123.6
Unilever Shedd's Country Crock 3Q 1988 = 100			3.167 100.0	3.241 102.3	3.373 106.5	3.378 106.7	3.403 107.5	3.325 105.0	3.325 105.0	3.304 104.3	3.292 103.9	3.322 104.9
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label	1.873 118.5	1.839 116.4	1.866 118.1	1.924 121.8	1.894 119.9	1.947 123.2	1.955 123.7	1.922 121.6				
Philip Morris Cheez Whiz	3.535 135.7	3.521 135.2	3.54 135.9	3.156 121.2	3.625 139.2	3.604 138.4	3.632 139.4	3.568 137.0				
Kraft	3.987 133.1	4.029 134.5	3.132 104.6	3.893 130.0	3.966 132.4	3.055 102.0	2.834 94.6	2.993 99.9				
Velveeta	3.285 141.7	3.161 136.3	3.211 138.5	3.227 139.2	3.208 138.3	3.163 136.4	3.179 137.1	3.199 137.9				
CW Zap a Pack 2Q 91 = 100		3.911 100.0	3.516 89.9	3.707 94.8	3.707 94.8	3.738 95.6	3.756 96.0	3.74 95.6				
RJR Nabisco, Inc. Easy Cheese	5.742 76.6	5.758 76.9	5.803 77.5	5.851 78.1	5.757 76.8	5.654 75.5	5.726 76.4	5.739 76.6				
Fromageries Bel Inc. Price	3.284 112.3	3.205 109.6	3.235 110.6	3.153 107.8	3.224 110.3	3.268 111.8	3.271 111.9	3.278 112.1				
WisPride	4.113 119.2	3.92 113.6	3.995 115.8	4.008 116.2	3.996 115.8	3.962 114.8	4.041 117.1	3.965 114.9				
Laughing Cow	6.95 112.2	6.918 111.7	7.045 113.7	6.78 109.5	6.937 112.0	7.061 114.0	7.284 117.6	7.244 117.0				
Kaukauna Cheese Kaukauna	3.719 117.2	3.81 120.1	3.684 116.1	3.693 116.4	3.628 114.4	3.567 112.5	3.678 116.0	3.686 116.2				
Unilever Shedd's Country Crock	3.307 104.4	3.255 102.8	3.241 102.3	3.01 95.0	3.068 96.9	3.004 94.9	2.936 92.7	2.897 91.5				

Source: I.R.I. Infocan data, Food Marketing Policy Center, University of Connecticut
¹ Prices indexed at 1st quarter 1988 = 100 except where noted.

Table 23 Leading Imitation Cheese Brands, Total U.S. 1992, Ranked by Volume Share

Manufacturer Brand	Rank	Volume Share	Dollar Share	Average Price/lb
Private Label		32.698	28.634	2.099
Sargento Cheese Co. Sargento	1	19.288	25.055	3.113
Schreiber Foods Inc. Schreiber	2	11.149	7.427	1.596
American Heritage	9	.995	.995	2.395
A & J Foods Inc. Reale	3	8.520	5.328	1.498
Borden Inc. Fisher	4	6.933	5.091	2.050
Pizzamate	10	.928	1.011	2.610
Milkhouse Cheese Corp. County Legend	5	3.206	2.741	2.049
N. Dorman & Co. Dorman	6	2.866	6.222	5.202
Philip Morris Harvest Moon	7	2.800	2.478	2.121
Galaxy Cheese Co. Formagg	8	1.496	2.983	4.780

Source: I.R.I Infoscian data, Food Marketing Policy Center, University of Connecticut.

Table 24 Imitation Cheese Brand Volume Shares and Percent Sold with Any Merchandising, Total U.S., 1988-1992 Quarterly

Quarter	IQ 88	2Q 88	3Q 88	4Q 88	IQ 89	2Q 89	3Q 89	4Q 89	IQ 90	2Q 90	3Q 90	4Q 90
Private Label	20.839	19.637	19.444	19.662	19.321	17.162	15.439	16.336	23.548	25.89	28.888	29.8
	3.453	3.224	5.189	4.912	4.341	11.144	3.927	2.494	10.177	10.749	11.761	13.917
Sargento Cheese Co.	42.091	41.923	43.814	44.407	43.721	36.772	35.718	38.438	28.126	26.566	25.588	24.544
Sargento	11.32	7.4	8.63	7.876	10.396	9.236	6.132	5.722	8.724	9.103	7.503	16.874
Schreiber Foods Inc.	1.409	0.914	0.62	0.183	0.912	0.038	0.011	0	0.246	0.348	0.615	3.709
Schreiber	17.582	56.664	17.695	45.449	69.345	0	0	0	28.312	32.505	11.205	78.714
American Heritage	0.056	0.109	0.192	0.253	2.727	10.221	12.55	6.796	0.731	0.856	0.93	0.885
A & J Foods Inc.	0	15.464	20.169	15.976	73.794	69.519	62.238	38.205	43.074	37.652	22.363	25.158
Reale								0.573	2.999	3.017	2.353	0.178
								0.941	33.294	18.789	15.562	11.199
Borden Inc.	1.078	1.674	1.854	1.589	0.849	0.243	0.179	0.149	7.427	6.007	6.062	5.18
Fisher	18.822	9.566	20.08	5.468	1.123	18.748	0	0	10.675	12.818	11.302	8.15
Pizzamate	0.444	0.359	0.259	0.124	0.366	0.703	0.824	1.649	4.28	4.489	4.754	5.041
	15.201	14.8	24.341	31.74	13.746	17.662	20.346	9.908	22.425	24.804	21.929	17.271
Milkhouse Cheese Corp.	1.24	1.508	1.195	1.322	1.456	2.501	2.434	3.574	2.973	3.046	3.236	2.953
County Legend	33.398	35.371	20.896	18.781	15.853	26.964	13.396	17.605	21.728	22.199	9.039	10.066
N. Dorman & Co.					0.01	0.459	2.213	3.182	7.354	8.208	7.154	6.758
Dorman					0	30.738	18.425	18.781	17.673	19.675	15.679	33.525
Galaxy Cheese Co.	7.031	7.485	6.619	6.621	8.417	8.639	7.993	7.109	6.063	5.337	4.557	3.73
Formagg	6.136	17.087	9.539	4.205	5.121	5.097	2.429	2.402	4.902	5.566	9.728	8.583
Quarter	IQ 91	2Q 91	3Q 91	4Q 91	IQ 92	2Q 92	3Q 92	4Q 92				
Private Label	28.114	30.475	32.146	32.343	29.989	33.419	33.518	34.605				
	16.667	17.042	16.119	14.732	21.4	19.318	21.08	19.855				
Sargento Cheese Co.	21.948	21.585	20.884	22.835	21.828	20.316	16.995	17.371				
Sargento	12.529	24.679	10.939	7.302	11.439	12.13	8.966	8.482				
Schreiber Foods Inc.	7.13	1.524	1.566	3.726	4.512	9.07	13.738	19.276				
Schreiber	79.431	0.289	3.853	38.009	20.052	22.427	21.332	18.394				
American Heritage	0.781	0.857	1.062	1.142	1.029	1.109	0.96	0.871				
	20.103	24.749	26.474	21.736	10.966	2.845	11.064	9.216				
A & J Foods Inc.	7.014	12.244	15.007	11.929	15.401	7.599	7.794	1.205				
Reale	95.246	91.07	89.357	82.806	91.734	76.216	75.539	13.248				
Borden Inc.	4.398	3.257	1.999	2.498	4.563	5.068	4.933	4.533				
Fisher	9.666	9.439	7.982	3.558	16.806	11.441	6.146	13.144				
Pizzamate	4.428	3.905	4.045	3.59	1.447	0.744	0.516	0.895				
	9.255	9.511	12.001	10.371	10.003	2.048	0	6.326				
Milkhouse Cheese Corp.	2.746	2.487	2.78	2.788	3.393	2.763	3.059	3.591				
County Legend	10.113	18.083	5.187	9.085	22.195	14.228	11.228	15.007				
N. Dorman & Co.	5.127	5.159	3.687	3.755	3.678	3.374	2.372	1.8				
Dorman	30.156	21.994	14.027	28.007	29.492	22.679	13.115	11.441				
Philip Morris				0.518	1.764	3.23	3.237	3.228				
Harvest Moon				7.05	32.515	9.892	3.724	3.957				
Galaxy Cheese Co.	3.112	2.718	2.035	1.328	1.654	1.691	1.362	1.227				
Formagg	1.707	3.589	2.246	0.88	1.714	2.386	6.054	4.103				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table 25 Branded Imitation Cheese Price per Pound and Price Indices¹, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	1.855 100.0	1.86 100.3	1.92 103.5	1.999 107.8	2.023 109.1	2.02 108.9	2.068 111.5	2.128 114.7	2.116 114.1	2.162 116.5	2.175 117.3	2.164 116.7
Sargento Cheese Co. Sargento	2.193 100.0	2.214 101.0	2.281 104.0	2.39 109.0	2.433 110.9	2.48 113.1	2.567 117.1	2.774 126.5	2.842 129.6	2.9 132.2	3.011 137.3	3.041 138.7
Schreiber Foods Inc. Schreiber	1.891 100.0	1.837 97.1	1.906 100.8	1.356 71.7	1.265 66.9	2.069 109.4	2.671 141.2	3.379 178.7	2.161 114.3	1.872 99.0	1.717 90.8	1.529 80.9
American Heritage	2.123 100.0	2.003 94.3	1.951 91.9	1.892 89.1	1.542 72.6	1.557 73.3	1.582 74.5	1.641 77.3	2.253 106.1	2.267 106.8	2.313 108.9	2.328 109.7
A & J Foods Inc. Reale 4Q 89 = 100	1.909 100.0	1.81 94.8	1.885 98.7	1.848 96.8	1.844 96.6	1.865 97.7	1.93 101.1	1.964 102.9	1.794 100.1	1.792 100.0	1.793 100.1	1.761 98.3
Borden Inc. Fisher	2.183 100.0	2.149 98.4	2.076 95.1	2.176 99.7	2.292 105.0	2.609 119.5	2.653 121.5	2.727 124.9	1.818 83.3	1.805 82.7	1.816 83.2	1.839 84.2
Pizzamate	2.115 100.0	2.127 100.6	2.158 102.0	2.317 109.6	2.344 110.8	2.329 110.1	2.35 111.1	2.377 112.4	2.442 115.5	2.427 114.8	2.41 113.9	2.382 112.6
Milkhouse Cheese Corp. County Legend	1.909 100.0	1.81 94.8	1.885 98.7	1.848 96.8	1.844 96.6	1.865 97.7	1.93 101.1	1.964 102.9	2.014 105.5	2.003 104.9	2.047 107.2	2.057 107.8
N. Dorman & Co. Dorman 1Q 89 = 100	3.725 100.0	4.393 117.9	4.718 126.7	5.085 136.5	4.157 100.0	4.236 117.9	4.295 126.7	4.398 136.5	4.893 131.4	4.964 133.3	5.08 136.4	4.998 134.2
Galaxy Cheese Co. Formagg	2.634 100.0	2.804 106.5	3.121 118.5	3.875 147.1	4.157 157.8	4.236 160.8	4.295 163.1	4.398 167.0	4.367 165.8	4.404 167.2	4.429 168.1	4.471 169.7
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label	2.115 114.0	2.099 113.2	2.102 113.3	2.11 113.7	2.097 113.0	2.088 112.6	2.09 112.7	2.121 114.3				
Sargento Cheese Co. Sargento	3.069 139.9	3.007 137.1	3.053 139.2	3.116 142.1	3.11 141.8	3.104 141.5	3.116 142.1	3.127 142.6				
Schreiber Foods Inc. Schreiber	1.501 79.4	1.731 91.5	1.653 87.4	1.517 80.2	1.522 80.5	1.529 80.9	1.569 83.0	1.674 88.5				
American Heritage	2.362 111.3	2.304 108.5	2.203 103.8	2.28 107.4	2.378 112.0	2.381 112.2	2.4 113.0	2.437 114.8				
A & J Foods Inc. Reale 4Q 89 = 100	1.495 83.4	1.504 83.9	1.502 83.8	1.504 83.9	1.491 83.2	1.507 84.1	1.498 83.6	1.578 88.1				
Borden Inc. Fisher	1.845 84.5	1.848 84.7	2.789 127.8	2.76 126.4	2.572 117.8	2.578 118.1	2.556 117.1	2.523 115.6				
Pizzamate	2.401 113.5	2.403 113.6	2.405 113.7	2.445 115.6	2.561 121.1	2.643 125.0	2.664 126.0	2.65 125.3				
Milkhouse Cheese Corp. County Legend	2.09 109.5	2.041 106.9	2.075 108.7	2.082 109.1	2.04 106.9	2.034 106.5	2.042 107.0	2.08 109.0				
N. Dorman & Co. Dorman 1Q 89 = 100	5.136 137.9	4.996 134.1	5.129 137.7	5.094 0.0	5.039 0.0	5.259 0.0	5.273 0.0	5.428 0.0				
Philip Morris Harvest Moon 4Q 91 = 100	2.381 100.0	2.381 100.0	2.381 100.0	2.381 100.0	2.11 88.6	2.046 85.9	2.16 90.7	2.166 91.0				
Galaxy Cheese Co. Formagg	4.54 172.4	4.531 172.0	4.631 175.8	4.685 177.9	4.683 177.8	4.725 179.4	4.836 183.6	4.962 188.4				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut
¹ Prices indexed at 1st quarter 1988 = 100 except where noted.

Table 26 Top 10 Cheese Brands of 1992 by Type and Manufacturer, Percent Change in Price, 3rd quarter 1990 to 4th Quarter 1990

Manufacturer Brand	Retail Price Change Q3-Q4 1990 (%)	Manufacturer Brand	Retail Price Change Q3-Q4 1990 (%)	Manufacturer Brand	Retail Price Change Q3-Q4 1990 (%)
American					
Private Label	-0.13	Private Label	-3.43	Private Label	-0.31
Philip Morris		Philip Morris		Sargento Cheese Co.	
Kraft	2.75	Kraft	3.44	Sargento	-0.84
Velveeta	2.79	Cracker Barrel	0.21	Preferred Light	1.52
Kraft Free	2.27	Polly O	-19.63	Philip Morris	
Velveeta Light	*	Tillamook Country Creamery	0.14	Kraft	2.45
Kraft Light	1.20	Tillamook		Light Naturals	3.21
Kraft Singles	*	ConAgra		Cracker Barrel	*
Borden Inc.		County Line	1.51	Polly O	-8.36
Borden	1.62	Sorrento Cheese Co		Sorrento Cheese Co.	
Land O' Lakes Inc.		Precious	2.88	Sorrento	1.67
Land O' Lakes	6.92	Sorrento	-1.67	ConAgra	
Crystal Foods Inc.		Land O' Lakes Inc.		County Line	7.92
Crystal Farms	-0.14	Lake to Lake	-1.01	Crystal Foods Inc.	
Schreiber Foods Inc.		Unigate		Crystal Farms	-1.72
American Heritage	1.67	Frigo	-0.66	Land O' Lakes, Inc.	
				Land O' Lakes	2.21
Natural Shredded					
Cream Cheese					
Private Label	-9.73	Private Label	0.65	Private label	-0.51
Philip Morris		Philip Morris		Sargento Cheese Co.	
Philadelphia	-7.06	Cheez Whiz	1.58	Sargento	1.00
Philadelphia Lite	-6.18	Kraft	-1.15	Schreiber Foods Inc.	
Philadelphia Free	*	Velveeta	3.75	Schreiber	-10.95
Temp Tee	-1.41	CW Zap a Pack	*	American Heritage	0.65
Kraft Spreadery	-5.55	RJR Nabisco, Inc.		A & J Foods Inc.	
Unilever		Easy Cheese	2.83	Reale	-1.78
Shedd's Country Crock	-5.71	Fromageries Bel Inc.		Borden Inc.	
Bongrain		Price	-3.03	Fisher	1.27
Alouette	1.95	WisPride	2.90	Pizzamate	-1.16
Crystal Foods Inc.		Laughing Cow	-1.45	Milkhouse Cheese Corp.	
Crystal Farms	-11.42	Kaukauna Cheese		County Legend	0.49
Raskas Foods Inc.		Kaukauna	1.92	N. Dorman & Co.	
Brittany Lane	-6.22	Unilever		Dorman	-1.61
Anco Foods Corp.		Shedd's Country Crock	0.91	Philip Morris	
Rondelle	-5.31			Harvest Moon	*
				Galaxy Cheese Co.	
				Formagg	0.95
Spreads & Balls					
Imitation					

Note: * indicates product was not marketed during the 3rd and 4th quarter 1990.

Source: Table 10, 13, 16, 19, 22, 25

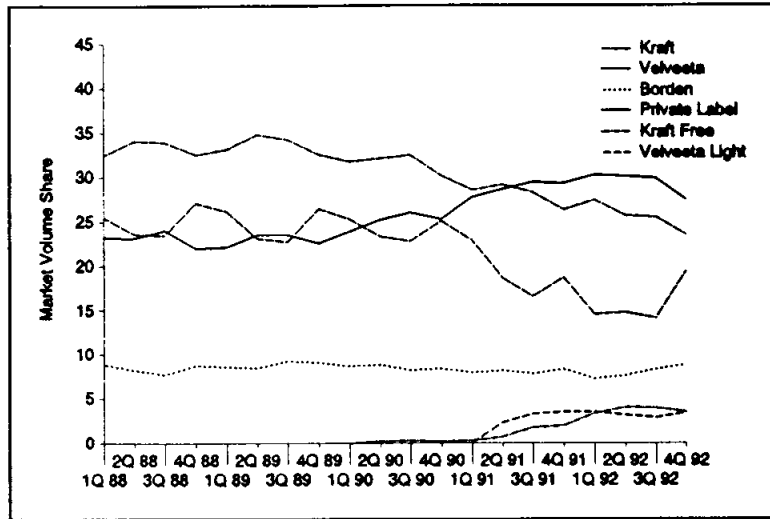


Figure 1 Volume Shares, American Cheese, 1Q 1988 - 4Q 1992
 Source: Table 9

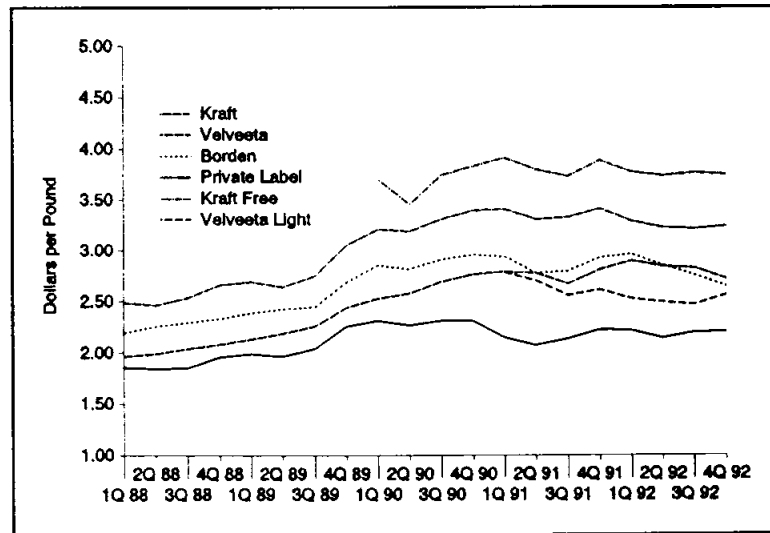


Figure 2 Price Trends, American Cheese, 1Q 1988 - 4Q 1992
 Source: Table 10

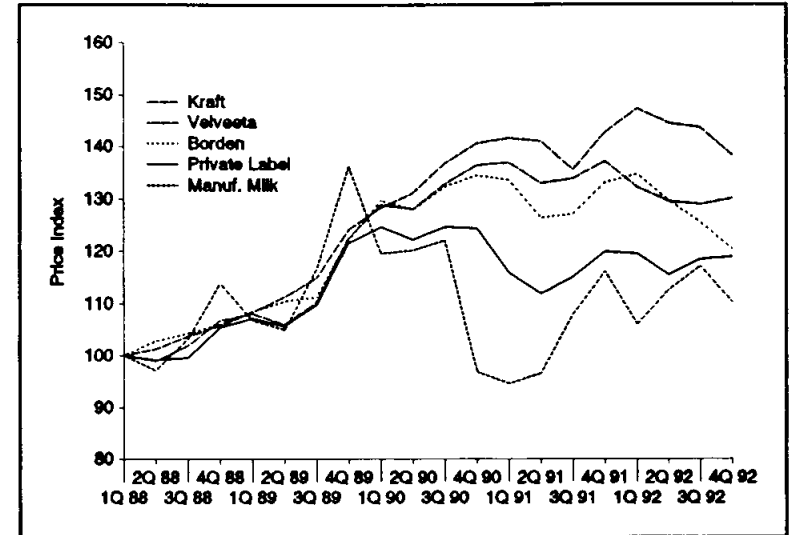


Figure 3 Price Index Trends, American Cheese, 1Q 1988 - 4Q 1992
 Source: Table 10

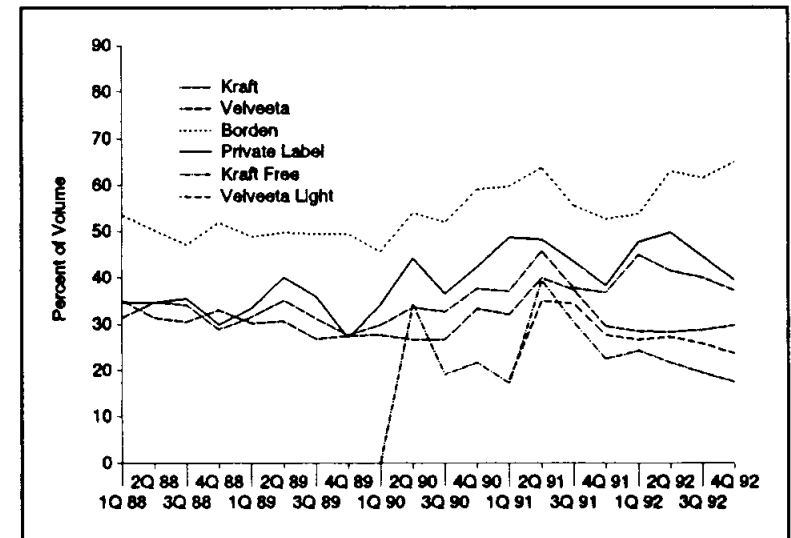


Figure 4 Percent Sold with Merchandising, American Cheese, 1Q 1988 - 4Q 1992
 Source: Table 9

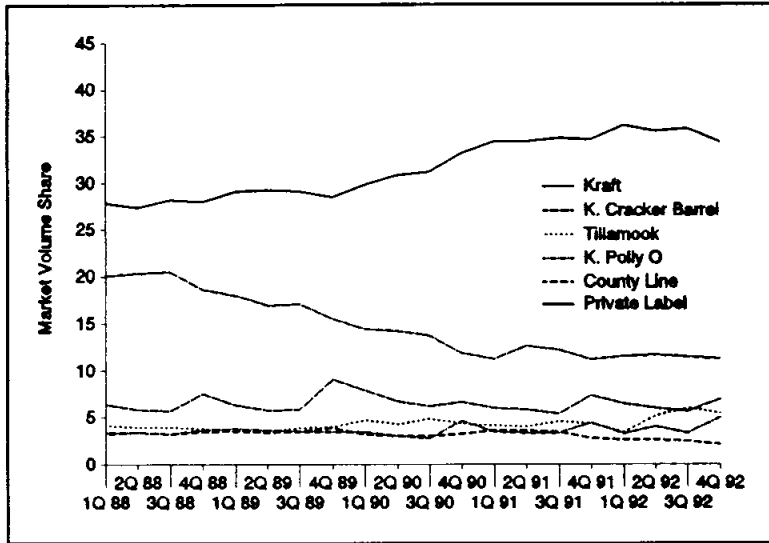


Figure 5 Volume Shares, Natural Cheese, 1Q 1988 - 4Q 1992
Source: Table 12

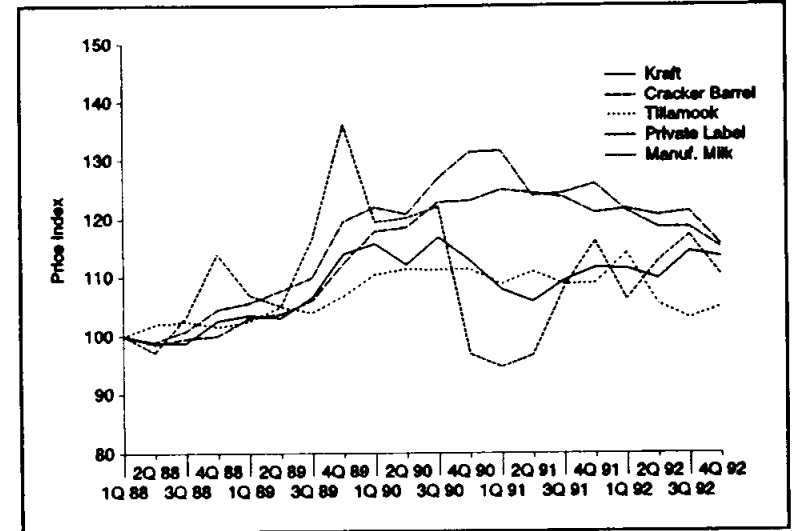


Figure 7 Price Index Trends, Natural Cheese, 1Q 1988 - 4Q 1992
Source: Table 13

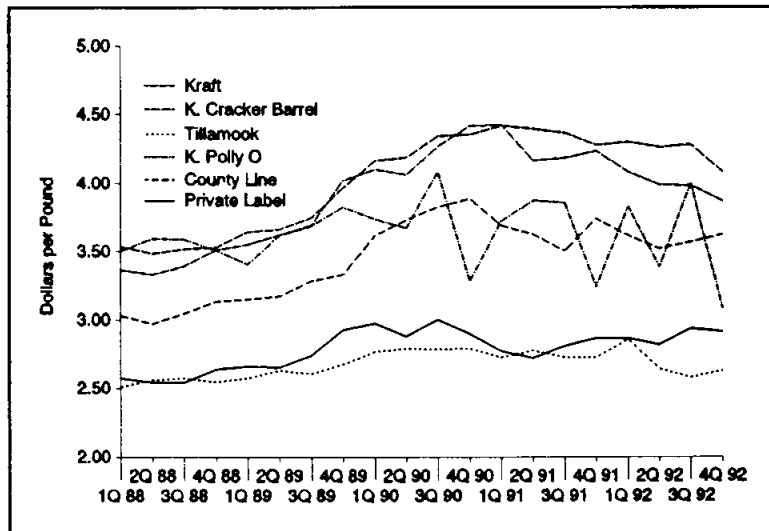


Figure 6 Price Trends, Natural Cheese, 1Q 1988 - 4Q 1992
Source: Table 13

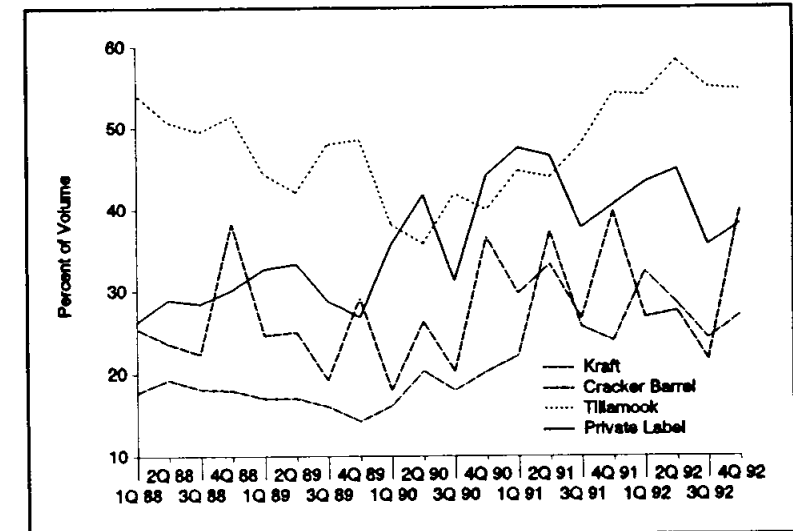


Figure 8 Percent Sold with Merchandising, Natural Cheese, 1Q 1988 - 4Q 1992
Source: Table 12

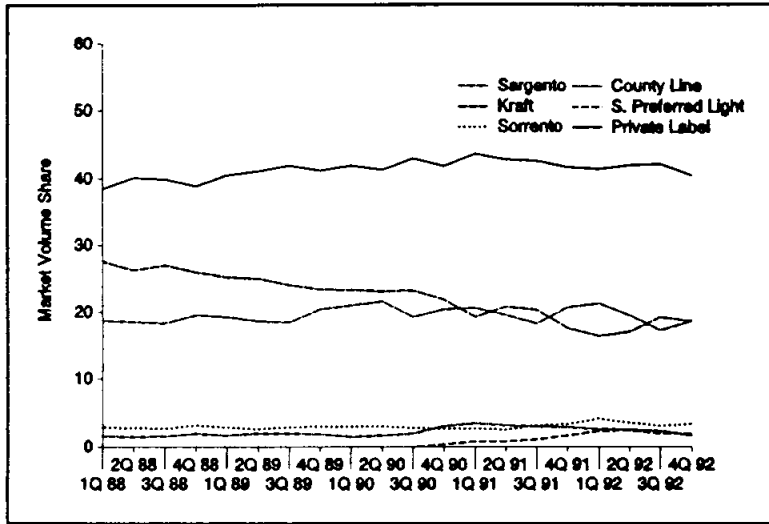


Figure 9 Volume Shares, Shredded Cheese, 1Q 1988 - 4Q 1992
Source: Table 15

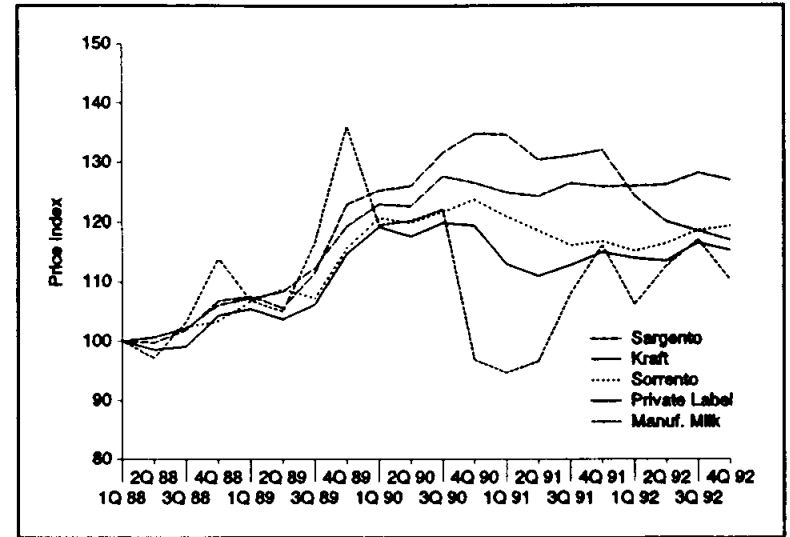


Figure 11 Price Index Trends, Shredded Cheese, 1Q 1988 - 4Q 1992
Source: Table 16

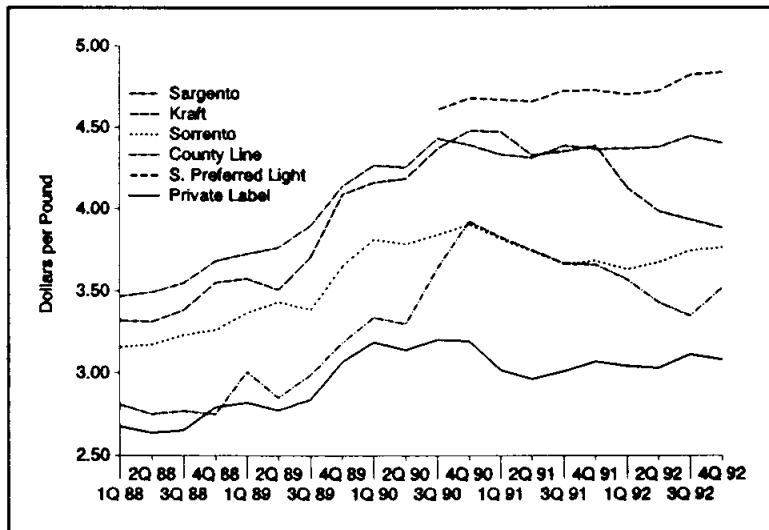


Figure 10 Price Trends, Shredded Cheese, 1Q 1988 - 4Q 1992
Source: Table 16

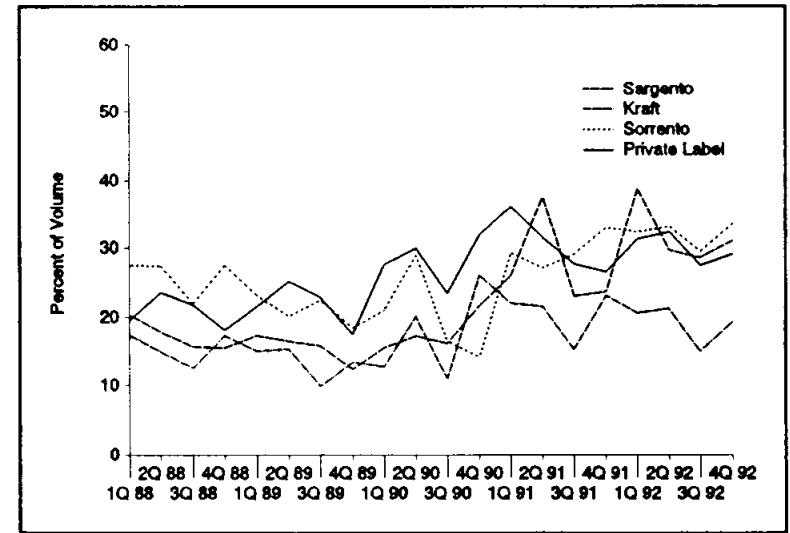


Figure 12 Percent Sold with Merchandising, Shredded Cheese, 1Q 1988 - 4Q 1992
Source: Table 15

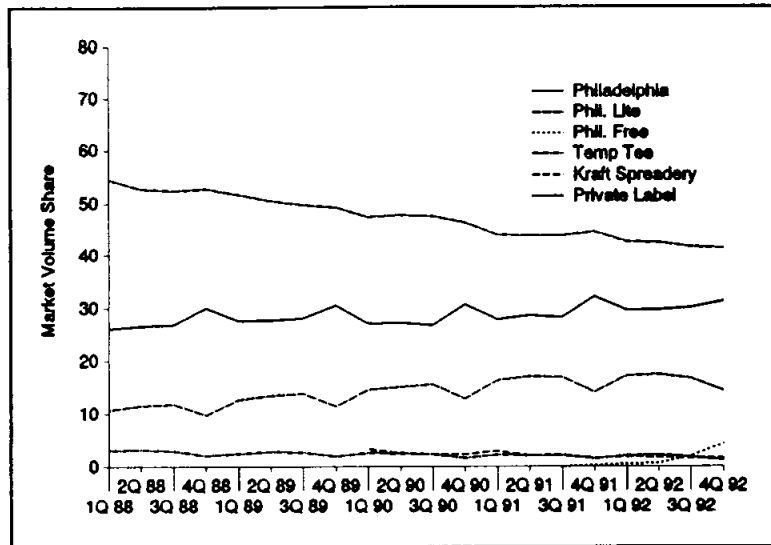


Figure 13 Volume Shares, Cream Cheese, 1Q 1988 - 4Q 1992
Source: Table 18

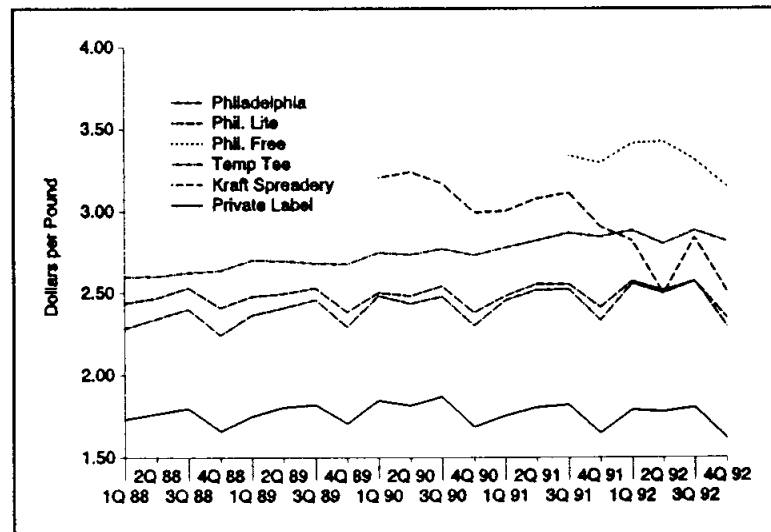


Figure 14 Price Trends, Cream Cheese, 1Q 1988 - 4Q 1992
Source: Table 19

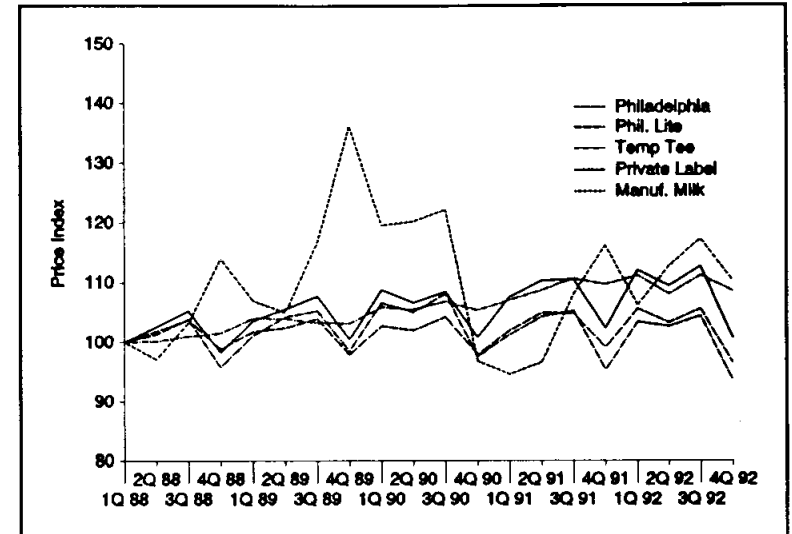


Figure 15 Price Index Trends, Cream Cheese, 1Q 1988 - 4Q 1992
Source: Table 19

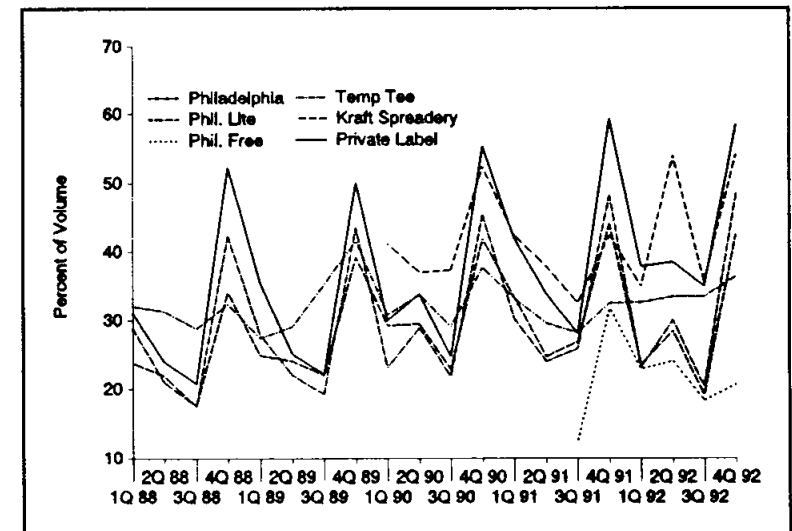


Figure 16 Percent Sold with Merchandising, Cream Cheese, 1Q 1988 - 4Q 1992
Source: Table 18

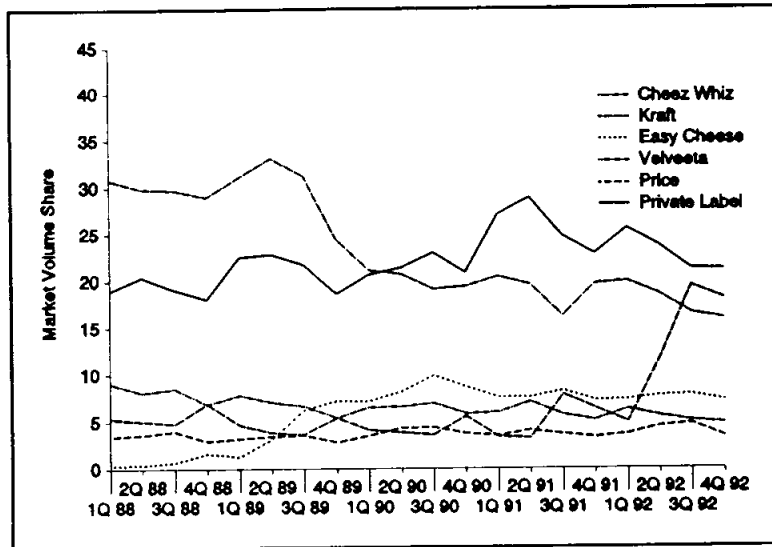


Figure 17 Volume Shares, Cheese Spreads & Balls, 1Q 1988 - 4Q 1992
Source: Table 21

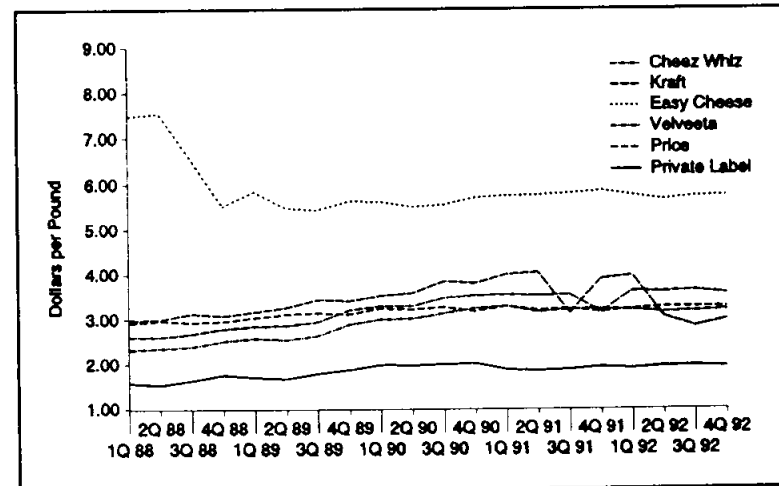


Figure 18 Price Trends, Cheese Spreads & Balls, 1Q 1988 - 4Q 1992
Source: Table 22

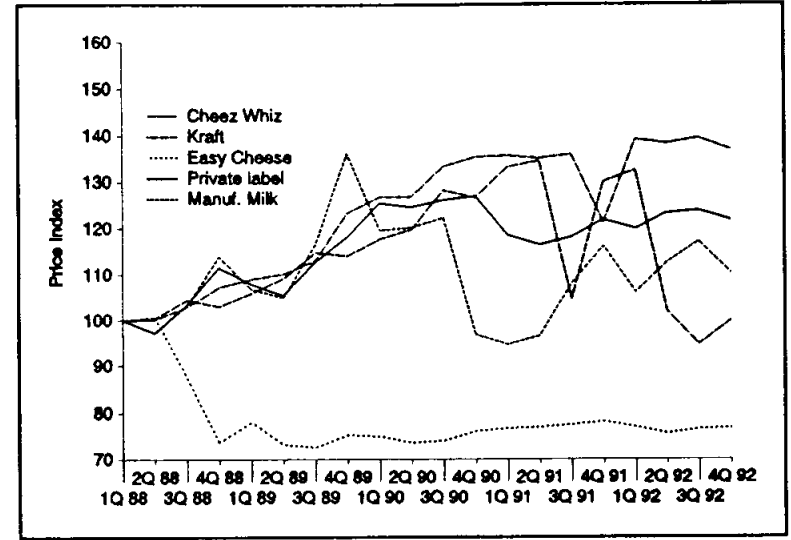


Figure 19 Price Index Trends, Cheese Spreads & Balls, 1Q 1988 - 4Q 1992
Source: Table 22

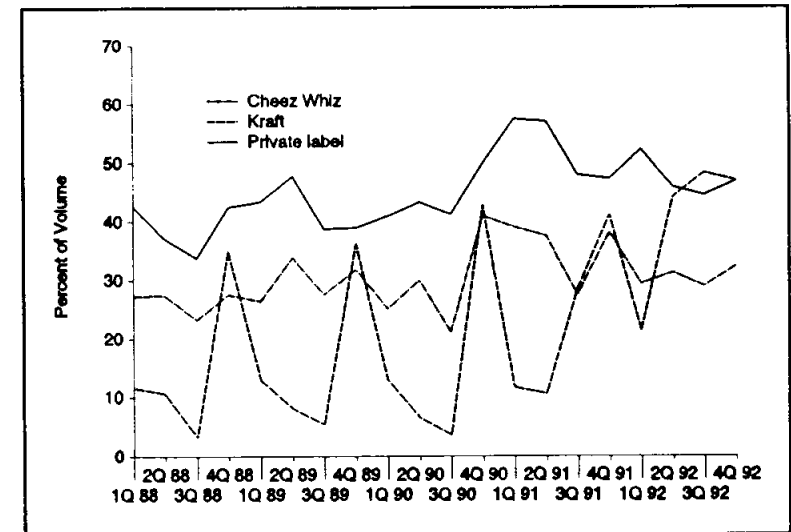


Figure 20 Percent Sold with Merchandising, Cheese Spreads & Balls, 1Q 1988 - 4Q 1992
Source: Table 21

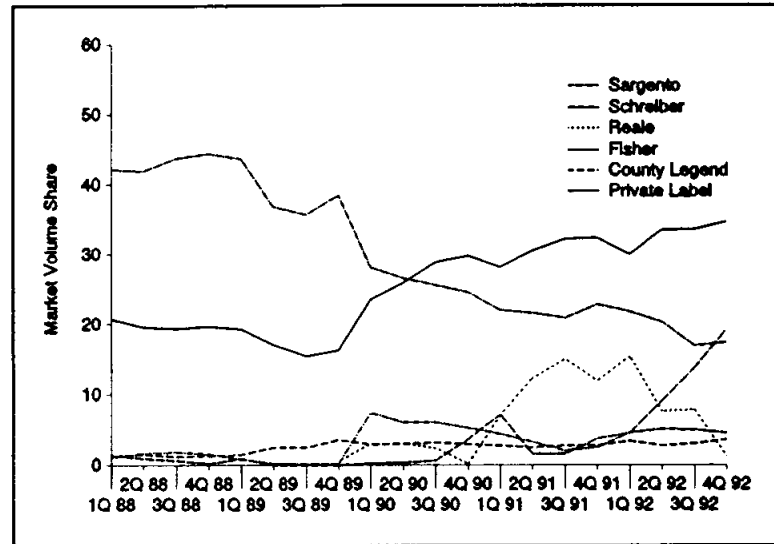


Figure 21 Volume Shares, Imitation Cheese, 1Q 1988 - 4Q 1992
 Source: Table 24

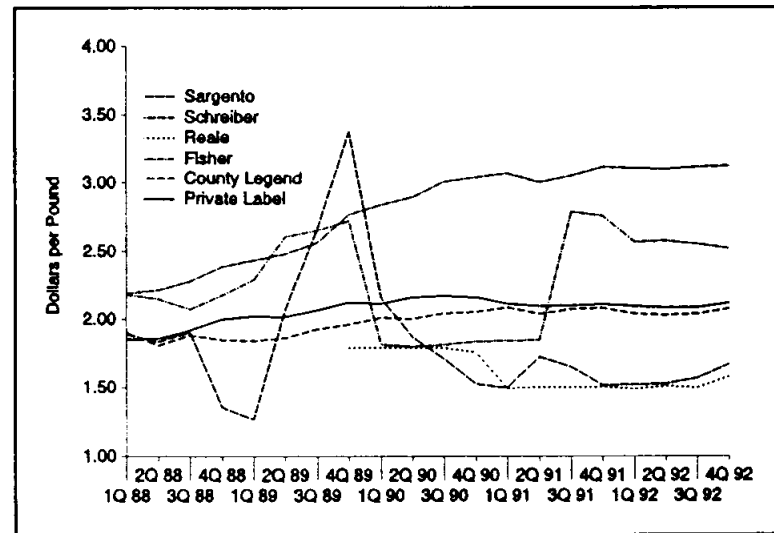


Figure 22 Price Trends, Imitation Cheese, 1Q 1988 - 4Q 1992
 Source: Table 25

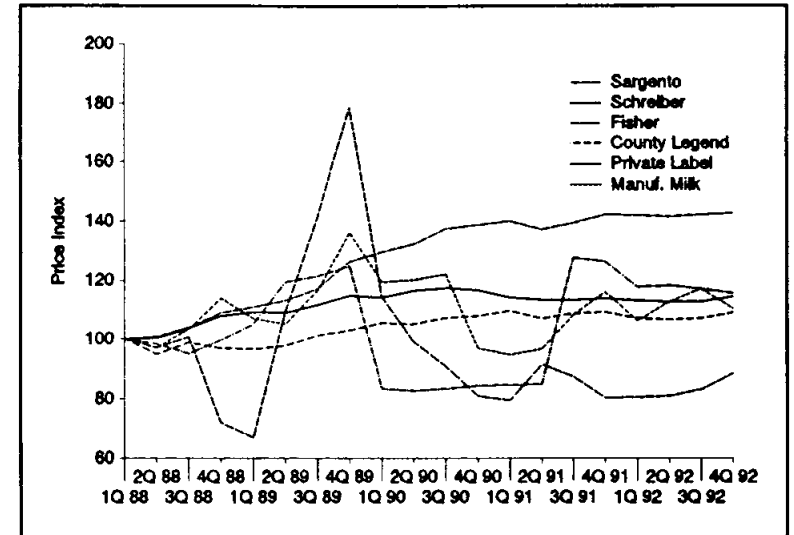


Figure 23 Price Index Trends, Imitation Cheese, 1Q 1988 - 4Q 1992
 Source: Table 25

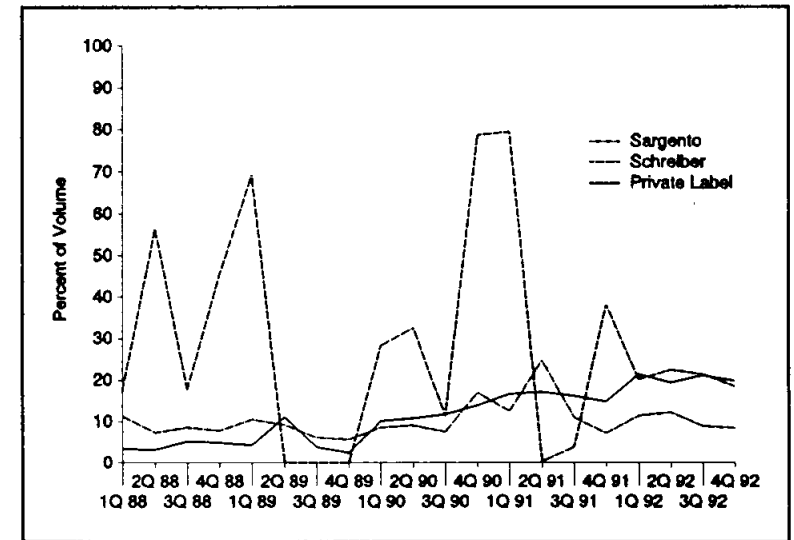


Figure 24 Percent Sold with Merchandising, Imitation Cheese, 1Q 1988 - 4Q 1992
 Source: Table 24

Table A1 American Cheese Average All Commodity Volume Weighted Distribution, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	95.777	95.652	96.142	95.986	95.957	95.652	96.625	96.976	95.388	95.533	96.08	96.49
Philip Morris												
Kraft	99.884	99.847	99.837	99.789	99.814	99.843	99.718	99.804	99.427	99.302	99.371	99.41
Velveeta	99.853	99.824	99.654	99.677	99.71	99.816	99.783	99.828	99.408	99.171	99.371	99.398
Kraft Free									1.263	4.132	4.537	4.566
Kraft Light	10.521	8.572	8.177	7.792	7.822	7.585	7.763	7.615	8.035	7.294	12.125	68.605
Borden Inc.												
Borden	81.806	82.173	83.16	83.16	83.511	84.38	85.615	86.98	86.546	86.349	86.15	87.21
Land O' Lakes Inc.												
Land O' Lakes	31.441	30.687	30.167	29.771	29.449	29.462	29.736	29.226	28.992	29.542	30.667	31.029
Crystal Foods Inc.												
Crystal Farms	2.724	2.839	2.728	2.636	2.88	3.099	3.208	3.283	4.044	4.888	5.08	5.175
Schreiber Foods Inc.												
American Heritage	5.337	6.992	7.279	6.896	7.138	7.669	7.861	7.218	7.478	7.185	6.73	6.876
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label	96.265	96.324	97.072	97.302	97.158	96.884	96.525	96.675				
Philip Morris												
Kraft	99.408	99.4	99.917	100.011	100.019	100.019	100.019	100.015				
Velveeta	99.402	99.4	99.89	99.968	99.982	100.007	99.982	100.003				
Kraft Free	6.445	26.001	45.509	56.048	81.912	92.64	95.904	96.365				
Velveeta Light	6.322	72.365	88.283	90.4	90.703	89.882	88.388	84.986				
Kraft Light	88.439	92.246	93.732	92.65	93.376	91.646	91.22	88.089				
Kraft Singles						9.033	14.33	11.312				
Borden Inc.												
Borden	88.173	89.343	89.492	88.257	85.945	83.996	83.923	83.453				
Land O' Lakes Inc.												
Land O' Lakes	30.355	30.132	30.068	30.628	32.027	33.451	33.787	32.603				
Crystal Foods Inc.												
Crystal Farms	5.33	5.378	5.921	5.832	5.585	5.433	5.224	5.056				
Schreiber Foods Inc.												
American Heritage	7.689	7.353	8.058	8.865	9.21	8.83	8.98	8.263				

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table A2 Cream Cheese Volume Sales, Total U.S., 1988-1992 Quarterly

Quarter	IQ 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	12.59	12.28	11.84	20.59	13.46	12.86	12.63	21.80	13.99	14.85	14.12	24.94
Philip Morris												
Philadelphia	26.30	24.28	23.07	36.11	25.26	23.43	22.36	35.10	24.42	26.08	25.02	37.65
Philadelphia Lite	5.17	5.37	5.23	6.67	6.24	6.25	6.22	8.19	7.50	8.22	8.17	10.44
Temp Tee	1.48	1.45	1.31	1.44	1.21	1.32	1.21	1.36	1.31	1.35	1.20	1.33
Kraft Spreadery									1.69	1.39	1.20	1.91
Unilever												
Shedds Country Crock										0.33	0.33	1.37
Bongrain												
Alouette	0.27	0.34	0.40	0.55	0.46	0.50	0.53	0.70	0.54	0.54	0.58	0.76
Crystal Foods Inc.												
Crystal Farms	0.23	0.21	0.17	0.37	0.29	0.26	0.22	0.39	0.24	0.36	0.33	0.64
Raskas Foods Inc.												
Brittany Lane	0.13	0.12	0.12	0.16	0.13	0.10	0.10	0.13	0.16	0.14	0.16	0.24
Anco Foods Corp.												
Rondelle	0.33	0.27	0.29	0.44	0.32	0.29	0.29	0.40	0.30	0.25	0.24	0.35

Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92
Private Label	16.43	15.38	15.27	25.97	16.53	17.13	16.64	26.71
Philip Morris								
Philadelphia	25.86	23.55	23.68	35.98	23.82	24.47	22.94	35.21
Philadelphia Lite	9.61	9.13	9.16	11.35	9.55	9.98	9.19	12.20
Philadelphia Free			0.002	0.17	0.26	0.35	1.06	3.69
Temp Tee	1.29	1.15	1.09	1.20	1.13	1.25	1.04	1.09
Kraft Spreadery	1.70	1.10	1.17	1.31	1.00	0.98	0.87	1.35
Unilever								
Shedds Country Crock	1.32	1.01	1.43	1.63	1.23	0.86	0.76	0.78
Bongrain								
Alouette	0.60	0.58	0.55	0.73	0.52	0.53	0.59	0.71
Crystal Foods Inc.								
Crystal Farms	0.40	0.38	0.34	0.65	0.32	0.46	0.40	0.72
Raskas Foods Inc.								
Brittany Lane	0.24	0.20	0.21	0.33	0.32	0.21	0.20	0.23
Anco Foods Corp.								
Rondelle	0.27	0.19	0.19	0.29	0.20	0.19	0.15	0.20

Note: Volume expressed in million pounds.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table A3 Branded Cheese Spreads & Balls Volume Sales, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label	5.41	5.47	5.10	6.62	6.91	7.20	6.55	7.65	6.38	6.34	6.58	7.82
Philip Morris												
Cheez Whiz	8.78	7.99	7.95	10.63	9.55	10.46	9.42	10.00	6.52	6.14	5.49	7.26
Kraft	1.53	1.36	1.29	2.54	1.44	1.22	1.10	2.22	1.28	1.14	1.03	2.08
Velveeta	2.58	2.16	2.27	2.52	2.40	2.23	2.02	2.24	2.01	1.95	1.99	2.19
RJR Nabisco, Inc.												
Easy Cheese	0.10	0.11	0.19	0.61	0.40	1.00	1.89	2.96	2.21	2.43	2.84	3.26
Fromageries Bel Inc.												
Price	0.97	0.98	1.06	1.07	1.00	1.08	1.09	1.15	1.07	1.27	1.26	1.39
WisPride	0.77	0.71	0.75	1.18	0.76	0.65	0.68	1.25	0.96	0.83	0.74	1.10
Laughing Cow	0.89	0.76	0.71	0.80	0.68	0.63	0.65	0.82	0.64	0.61	0.59	0.68
Kaukauna Cheese												
Kaukauna	0.72	0.59	0.60	1.31	0.66	0.60	0.61	1.49	0.82	0.75	0.71	1.71
Unilever												
Shedd's Country Crock			0.04	0.49	0.33	0.24	0.26	2.86	2.96	2.21	1.49	1.59
Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92				
Private Label	9.02	8.26	7.48	8.44	7.52	6.68	6.48	7.88				
Philip Morris												
Cheez Whiz	6.81	5.60	4.91	7.28	5.86	5.23	5.05	5.93				
Kraft	1.13	0.93	2.37	2.38	1.45	3.26	5.94	6.72				
Velveeta	2.00	2.02	1.73	1.91	1.87	1.58	1.55	1.79				
CW Zap a Pack		0.008	1.51	1.17	1.39	1.24	1.22	1.08				
RJR Nabisco, Inc.												
Easy Cheese	2.53	2.17	2.51	2.67	2.14	2.18	2.39	2.69				
Fromageries Bel Inc.												
Price	1.17	1.15	1.10	1.21	1.07	1.25	1.44	1.24				
WisPride	0.78	0.65	0.65	1.16	0.71	0.73	0.74	1.11				
Laughing Cow	0.60	0.57	0.54	0.62	0.55	0.52	0.50	0.59				
Kaukauna Cheese												
Kaukauna	0.93	0.69	0.52	1.39	0.58	0.42	0.39	1.46				
Unilever												
Shedd's Country Crock	1.41	0.88	1.26	1.34	0.98	0.56	0.49	0.55				

Note: Volume expressed in million pounds.

Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

Table A4 Branded Imitation Cheese Volume Sales and All Commodity Volume Weighted Distribution, Total U.S., 1988-1992 Quarterly

Quarter	1Q 88	2Q 88	3Q 88	4Q 88	1Q 89	2Q 89	3Q 89	4Q 89	1Q 90	2Q 90	3Q 90	4Q 90
Private Label Sales	0.4762	0.3833	0.3795	0.4140	0.4701	0.3972	0.3585	0.4015	0.8243	0.8036	0.9119	0.9848
ACV Distribution	22.13	21.70	21.90	21.62	21.17	20.14	19.13	19.07	30.05	33.06	34.69	35.01
Sargento Cheese Co.												
Sargento	0.9617	0.8183	0.8551	0.9351	1.0639	0.8510	0.8295	0.9446	0.9846	0.8245	0.8077	0.8111
	48.75	46.52	46.76	48.10	48.07	48.66	48.77	48.72	46.22	45.32	46.40	46.06
Schreiber Foods Inc.												
Schreiber	0.0322	0.0178	0.0121	0.0039	0.0222	0.0009	0.0003	0.0000	0.0086	0.0108	0.0194	0.1226
	1.60	1.03	0.67	0.23	0.63	0.29	0.17	0.02	0.71	0.70	0.79	1.15
American Heritage	0.0013	0.0021	0.0037	0.0053	0.0664	0.2366	0.2914	0.1670	0.0256	0.0266	0.0293	0.0293
	0.17	0.44	0.68	0.75	1.56	2.85	3.10	2.76	1.87	2.01	2.28	2.25
A & J Foods Inc.												
Reale	0.0246	0.0327	0.0362	0.0335	0.0207	0.0056	0.0042	0.0037	0.2600	0.1864	0.1914	0.1712
	1.48	2.17	2.41	2.18	1.38	0.44	0.36	0.33	19.42	16.87	15.64	13.92
Borden Inc.	0.0101	0.0070	0.0051	0.0026	0.0089	0.0163	0.0191	0.0405	0.1498	0.1393	0.1500	0.1666
Fisher	1.39	1.36	0.87	0.73	1.25	1.83	2.09	3.57	6.90	7.69	8.09	8.29
Pizzamate												
Milkhouse Cheese Corp.												
County Legend	0.0283	0.0294	0.0233	0.0278	0.0354	0.0579	0.0565	0.0878	0.1041	0.0945	0.1021	0.0976
	2.30	2.10	1.67	1.46	1.73	2.21	2.90	4.19	4.61	4.39	4.05	3.52
N. Dorman & Co.												
Dorman	0.0002	0.0106	0.0514	0.0782	0.0002	0.0106	0.0514	0.0782	0.2575	0.2548	0.2258	0.2233
	0.26	2.45	9.14	12.40	0.26	2.45	9.14	12.40	27.40	26.85	26.51	24.08
Galaxy Cheese Co.												
Formagg	0.1607	0.1461	0.1292	0.1394	0.2048	0.1999	0.1856	0.1747	0.2122	0.1657	0.1438	0.1233
	16.08	18.69	19.32	20.83	23.49	29.07	31.73	32.90	34.88	32.31	30.89	28.06

Quarter	1Q 91	2Q 91	3Q 91	4Q 91	1Q 92	2Q 92	3Q 92	4Q 92
Private Label Sales	1.0369	0.8992	0.9616	0.9753	1.0232	0.9185	0.9570	0.8928
ACV Distribution	35.09	33.27	32.68	31.56	29.90	30.23	30.56	30.85
Sargento Cheese Co.								
Sargento	0.8095	0.6369	0.6247	0.6886	0.7448	0.5584	0.4852	0.4481
	46.44	46.34	44.95	44.46	43.41	41.25	39.75	37.76
Schreiber Foods Inc.								
Schreiber	0.2630	0.0450	0.0468	0.1124	0.1539	0.2493	0.3923	0.4973
	1.21	0.85	1.04	1.48	1.65	2.55	4.14	5.73
American Heritage	0.0288	0.0253	0.0318	0.0344	0.0351	0.0305	0.0274	0.0225
	2.43	2.40	2.64	2.72	2.92	2.85	2.59	2.15
A & J Foods Inc.								
Reale	0.2587	0.3613	0.4489	0.3597	0.5255	0.2089	0.2225	0.0311
	0.32	0.53	0.70	0.64	0.61	0.50	0.61	0.29
Borden Inc.								
Fisher	0.1622	0.0961	0.0598	0.0753	0.1557	0.1393	0.1408	0.1170
	12.79	11.06	8.92	8.78	10.70	10.81	10.03	7.70
Pizzamate	0.1633	0.1152	0.1210	0.1083	0.0494	0.0205	0.0147	0.0231
	8.02	7.87	7.60	5.90	2.79	2.13	1.72	2.75
Milkhouse Cheese Corp.								
County Legend	0.1013	0.0734	0.0832	0.0841	0.1158	0.0759	0.0873	0.0926
	3.58	2.97	3.34	3.08	3.06	2.99	3.25	3.48
N. Dorman & Co.								
Dorman	0.1891	0.1522	0.1103	0.1132	0.1255	0.0927	0.0677	0.0464
	21.82	21.57	21.27	21.07	21.53	19.57	16.06	13.91
Philip Morris Harvest Moon								
	0.0156				0.0602	0.0888	0.0924	0.0833
	1.64				4.27	5.72	5.67	5.37
Galaxy Cheese Co.								
Formagg	0.1148	0.0802	0.0609	0.0400	0.0564	0.0465	0.0389	0.0317
	27.14	21.99	18.09	13.14	14.88	13.74	11.84	10.35

Note: Volume expressed in million pounds, ACV weighted distribution expressed as a percent.
Source: I.R.I. Infoscan data, Food Marketing Policy Center, University of Connecticut

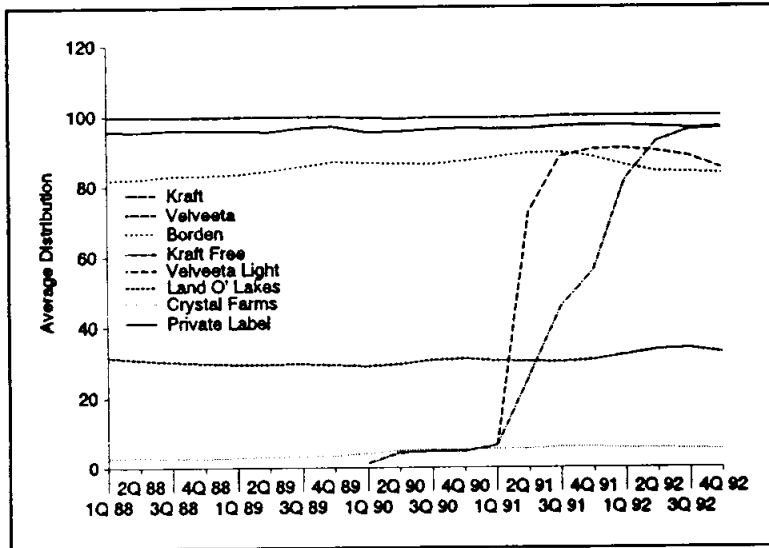


Figure A1 Average All-Commodity-Volume Distribution, American Cheese, 1Q 1988 - 4Q 1992

Source: Appendix Table A1

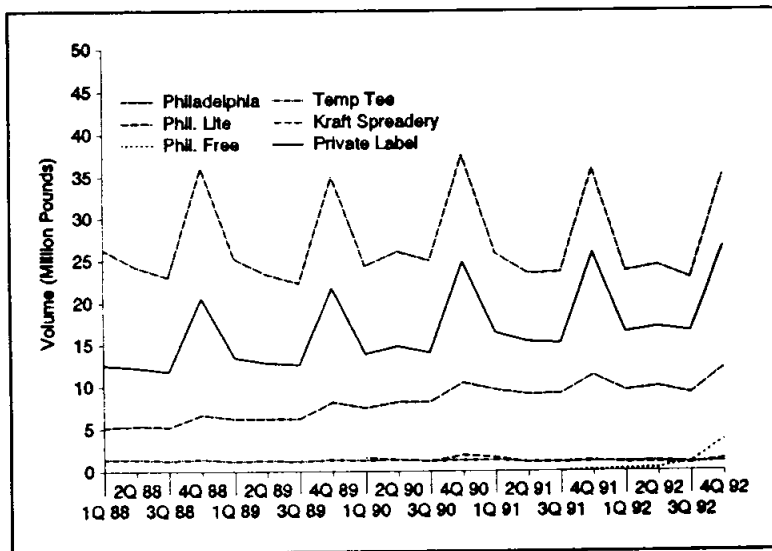


Figure A2 Volume Sales, Cream Cheese, 1Q 1988 - 4Q 1992

Source: Appendix Table A2

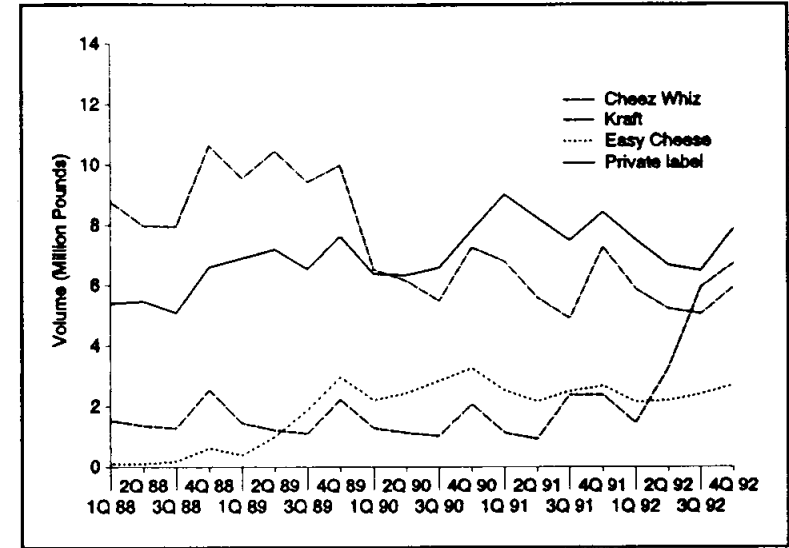


Figure A3 Volume Sales, Cheese Spreads & Balls, 1Q 1988 - 4Q 1992

Source: Appendix Table A3

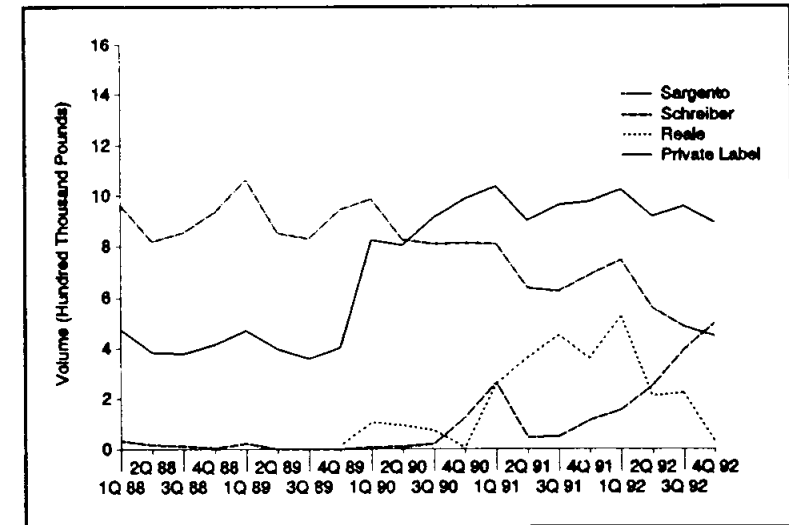


Figure A4 Volume Sales, Imitation Cheese, 1Q 1988 - 4Q 1992

Source: Appendix Table A4

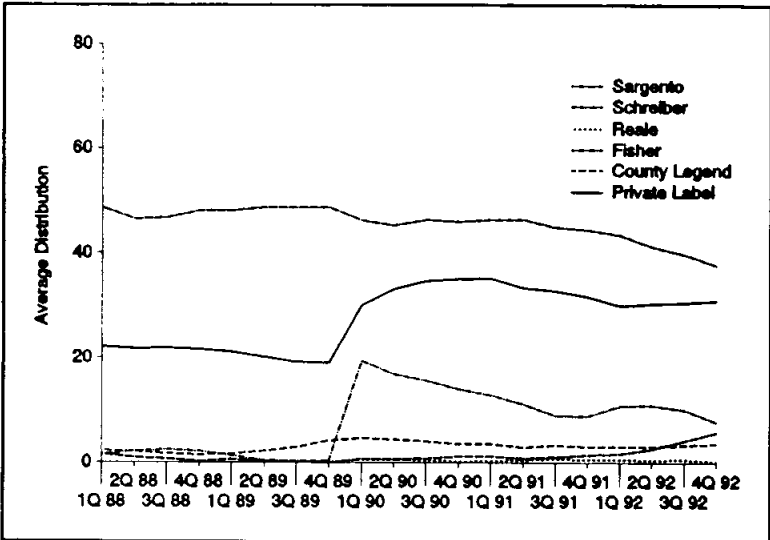


Figure A5 Average All-Commodity-Volume, Imitation Cheese, 1Q 1988 - 4Q 1992

Source: Appendix Table A4

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