

M E M O R A N D U M

The American Tobacco Company
A DIVISION OF AMERICAN BRANDS, INC.

| | |
|------|--|
| DATE | May 15, 1974 |
| TO | See Below |
| FROM | P. J. Paoluccio, Executive Sales Manager |
| REF | |

Mr. Robert K. Heilmann, President

Mr. Richard H. Stinnette, Assistant to the Chairman of the Board

Mr. C. R. McKeever, Marketing Director ✓

Mr. P. H. Cohen, Director of Advertising

Mr. John B. Hager, Department of Research and Development

Attached is the national Cigarette and Smoking Tobacco Share of Market Report covering the first three months of 1974.

Attachment

cc: Mr. Francis X. Whelan

REPORT FOR NATION

AS OF MAR 74

| C O M P A N Y | 3 MONTH MOVING RANK | S H A R E O F M A R K E T - C U R R E N T Y E A R | | | | | | | | | | | | 12 MTH MOVING | |
|---------------|---------------------------|---|------|------|------|-----|-----|-----|-----|-----|-----|-----|-----|------------------|-----------|
| | | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | | YR TO DTE |
| R J REYNOLDS | 1 | 28.0 | 27.8 | 28.1 | 28.1 | | | | | | | | | 28.0 | 28.4 |
| PHIL MORRIS | 2 | 24.3 | 24.7 | 24.8 | 24.2 | | | | | | | | | 24.3 | 23.6 |
| BROWN & WIL | 3 | 17.4 | 17.6 | 17.4 | 17.2 | | | | | | | | | 17.4 | 17.3 |
| AMERICAN | 4 | 13.4 | 13.6 | 13.7 | 13.0 | | | | | | | | | 13.4 | 13.6 |
| P LORILLARD | 5 | 9.2 | 9.1 | 9.3 | 9.3 | | | | | | | | | 9.2 | 9.4 |
| LIG & MYERS | 6 | 5.6 | 5.2 | 5.5 | 6.1 | | | | | | | | | 5.6 | 5.4 |

CHANGE CODES

LEGEND - 1 - ONE OR MORE ADDITIONAL JOBBERS REPORTING AS OF MONTH INDICATED
2 - ONE OR MORE JOBBERS NO LONGER REPORTING AS OF MONTH INDICATED
* - INDICATES LESS THAN .1%, BUT GREATER THAN 0%.

REPORT FOR NATION

AS OF MAR 74

| C O M P A N Y | 3 MONTH MOVING RANK | S H A R E O F M A R K E T - C U R R E N T Y E A R | | | | | | | | | | | | 12 MTH MOVING % | |
|---------------|---------------------------|---|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------------------|----------------|
| | | JAN % | FEB % | MAR % | APR % | MAY % | JUN % | JUL % | AUG % | SEP % | OCT % | NOV % | DEC % | | YR TO DTE % |
| R J REYNOLDS | 1 | 22.9 | 23.5 | 25.3 | 21.1 | | | | | | | | | 22.9 | 24.7 |
| AMERICAN | 2 | 16.0 | 15.7 | 20.6 | 13.4 | | | | | | | | | 16.0 | 17.1 |
| RONICKS INT | 3 | 14.2 | 14.3 | 9.2 | 17.0 | | | | | | | | | 14.2 | 10.5 |
| US TOBACCO | 4 | 12.1 | 12.6 | 10.3 | 12.8 | | | | | | | | | 12.1 | 11.4 |
| BROWN & WILL | 5 | 10.8 | 11.2 | 11.8 | 10.0 | | | | | | | | | 10.8 | 12.4 |
| J. MIDDLETON | 6 | 6.3 | 5.9 | 5.4 | 7.1 | | | | | | | | | 6.3 | 5.5 |
| PHIL MORRIS | 7 | 4.7 | 4.9 | 5.0 | 4.5 | | | | | | | | | 4.7 | 4.8 |
| SUTLIFF TOB | 8 | 4.5 | 3.9 | 3.5 | 5.4 | | | | | | | | | 4.5 | 4.0 |
| LIG & MYERS | 9 | 2.7 | 3.0 | 3.5 | 2.1 | | | | | | | | | 2.7 | 3.2 |
| NIEMEYER | 10 | 2.3 | 1.8 | 1.9 | 2.8 | | | | | | | | | 2.3 | 1.6 |
| EDGENORTH | 11 | 2.1 | 2.0 | 2.1 | 2.2 | | | | | | | | | 2.1 | 2.7 |
| WHITEHALL | 12 | 1.4 | 1.1 | 1.3 | 1.6 | | | | | | | | | 1.4 | 1.3 |

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REPORT FOR NATION

AS OF MAR 74

| GRAND | | 3 MONTH MOVING RANK % | | SHARE OF MARKET - CURRENT YEAR | | | | | | | | | | | | 12 MTH MOVING % |
|-------------------------|-----|-----------------------------|----------|--------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------------|------|-----------------------|
| | | JAN % | FEB % | MAR % | APR % | MAY % | JUN % | JUL % | AUG % | SEP % | OCT % | NOV % | DEC % | YR TO DTE % | | |
| WINSTON | KF | 1 | 9.7 | 9.6 | | 9.9 | 9.7 | | | | | | | 9.7 | 10.0 | |
| KOOL M | KFM | 2 | 8.1 | 8.1 | | 8.1 | 8.0 | | | | | | | 8.1 | 8.0 | |
| MARLBORO | BF | 3 | 7.2 | 7.2 | | 7.2 | 7.1 | | | | | | | 7.2 | 7.0 | |
| PALL MALL | K | 4 | 6.1 | 6.1 | | 6.3 | 6.0 | | | | | | | 6.1 | 6.4 | |
| SALEM M | KFM | 5 | 5.5 | 5.5 | | 5.6 | 5.5 | | | | | | | 5.5 | 5.7 | |
| | | | | | | | | | | | | | | | | |
| MARLBORO | KF | 6 | 5.1 | 5.2 | | 4.9 | 5.1 | | | | | | | 5.1 | 5.1 | |
| KENT | KF | 7 | 3.6 | 3.5 | | 3.6 | 3.6 | | | | | | | 3.6 | 3.7 | |
| CAMEL | R | 8 | 3.4 | 3.5 | | 3.5 | 3.4 | | | | | | | 3.4 | 3.6 | |
| B. HEDGES 100 | XF | 9 | 2.7 | 2.8 | | 2.7 | 2.7 | | | | | | | 2.7 | 2.6 | |
| WINSTON 100 | XF | 10 | 2.7 | 2.7 | | 2.7 | 2.7 | | | | | | | 2.7 | 2.7 | |
| TOP TEN SHARE OF MARKET | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | |
| SALEM M 100 | KFM | 11 | 2.4 | 2.4 | | 2.4 | 2.5 | | | | | | | 2.4 | 2.4 | |
| VICEBOY | KF | 12 | 2.4 | 2.4 | | 2.4 | 2.4 | | | | | | | 2.4 | 2.5 | |
| TAREYTON | KF | 13 | 2.1 | 2.2 | | 2.1 | 2.0 | | | | | | | 2.1 | 2.2 | |
| P. MALL FIL. 100 | XF | 14 | 1.9 | 1.8 | | 2.0 | 1.7 | | | | | | | 1.9 | 1.8 | |
| KOOL M 100 | KFM | 15 | 1.8 | 1.8 | | 1.8 | 1.8 | | | | | | | 1.8 | 1.7 | |
| | | | | | | | | | | | | | | | | |
| LUCKY STRIKE | R | 16 | 1.7 | 1.7 | | 1.7 | 1.6 | | | | | | | 1.7 | 1.8 | |
| L & K | KF | 17 | 1.7 | 1.6 | | 1.6 | 1.8 | | | | | | | 1.7 | 1.6 | |
| B. HEDGES M 100 | KFM | 18 | 1.6 | 1.6 | | 1.5 | 1.8 | | | | | | | 1.6 | 1.5 | |
| KENT 100 | XF | 19 | 1.5 | 1.4 | | 1.5 | 1.5 | | | | | | | 1.5 | 1.4 | |
| RALEIGH | KF | 20 | 1.5 | 1.5 | | 1.5 | 1.4 | | | | | | | 1.5 | 1.6 | |
| | | | | | | | | | | | | | | | | |
| MARLBORO 100 | XF | 21 | 1.4 | 1.4 | | 1.4 | 1.4 | | | | | | | 1.4 | 1.3 | |
| TAREYTON 100 | XF | 22 | 1.3 | 1.4 | | 1.2 | 1.4 | | | | | | | 1.3 | 1.3 | |
| TRUE | KF | 23 | 1.2 | 1.1 | | 1.2 | 1.2 | | | | | | | 1.2 | 1.2 | |
| VANTAGE | KF | 24 | 1.2 | 1.1 | | 1.2 | 1.2 | | | | | | | 1.2 | 1.1 | |
| CHESTERFIELD | K | 25 | 1.1 | 1.0 | | 1.0 | 1.2 | | | | | | | 1.1 | 1.1 | |
| | | | | | | | | | | | | | | | | |
| BELAIR M | KFM | 26 | 1.0 | 1.0 | | 1.0 | 1.0 | | | | | | | 1.0 | 1.0 | |
| LARK | KF | 27 | 1.0 | .9 | | .9 | 1.1 | | | | | | | 1.0 | 0.9 | |
| CAMEL | XF | 28 | 0.9 | .9 | | .8 | .9 | | | | | | | 0.9 | 0.9 | |
| PARLIAMENT | KF | 29 | 0.8 | .9 | | .8 | .8 | | | | | | | 0.8 | 0.9 | |
| VA. SLIMS 100 | XF | 30 | 0.8 | .8 | | .8 | .8 | | | | | | | 0.8 | 0.8 | |
| | | | | | | | | | | | | | | | | |
| PARLIAMENT | BF | 31 | 0.8 | .8 | | .7 | .7 | | | | | | | 0.8 | 0.8 | |
| MARLBORO LIGHTS | KF | 32 | 0.7 | .7 | | .7 | .7 | | | | | | | 0.7 | 0.6 | |
| VA. SLIMS M 100 | KFM | 33 | 0.7 | .7 | | .7 | .7 | | | | | | | 0.7 | 0.6 | |
| DORAL | KF | 34 | 0.7 | .7 | | .7 | .7 | | | | | | | 0.7 | 0.7 | |
| OLD GOLD | KF | 35 | 0.7 | .7 | | .6 | .7 | | | | | | | 0.7 | 0.7 | |

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REF ID: A66448

| | | | | | | | | | | | | | | |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------------|--------|
| 3 MONTH | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | YR TO DATE | MOVING |
| 1 MONTH | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | YR TO DATE | MOVING |

[illegible]

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REPORT FOR NATION

AS OF MAR 74

| B R A N D | | 3 MONTH MOVING RANK % | S H A R E O F M A R K E T - C U R R E N T Y E A R | | | | | | | | | | | | 12 MTH MOVING % | |
|-------------------|-----|-----------------------------|---|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------------------|----------------|
| | | | JAN % | FEB % | MAR % | APR % | MAY % | JUN % | JUL % | AUG % | SEP % | OCT % | NOV % | DEC % | | YR TO DTE % |
| HERB. YAREYTON | K | 71 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| OLD GOLD 100 | XF | 72 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| P. MALL EXTR MILD | KF | 73 0.1 | .1 | .2 | .1 | | | | | | | | | | 0.1 | 0.1 |
| CARLTON MENTHOL | KFM | 74 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| P. MORRIS | R | 75 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| LUCKY TEN | KF | 76 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| L & M | BF | 77 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| OLD GOLD | K | 78 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| ICEBERG | XFM | 79 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| MULTIFILTER M | KFM | 80 0.1 | .1 | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| CHESTERFIELD | KF | 81 0.1 | * | .1 | .1 | | | | | | | | | | 0.1 | 0.1 |
| LUCKY 100 | XF | 82 0.0 | | .1 | .1 | | | | | | | | | | 0.0 | 0.0 |
| MONTCLAIR M | KFM | 83 0.0 | * | * | * | | | | | | | | | | 0.0 | 0.0 |
| HALF AND HALF | KF | 84 0.0 | * | * | * | | | | | | | | | | 0.0 | 0.0 |
| OLD GOLD | R | 85 0.0 | * | * | * | | | | | | | | | | 0.0 | 0.0 |
| LUCKY FIL. 100 | XF | 86 0.0 | * | * | * | | | | | | | | | | 0.0 | 0.0 |
| TEMPO | KF | 87 0.0 | * | * | * | | | | | | | | | | 0.0 | 0.0 |
| BULL DURHAM | KF | 88 0.0 | | | | | | | | | | | | | 0.0 | 0.0 |
| CHESTERFIELD M | KFM | 89 0.0 | | | | | | | | | | | | | 0.0 | 0.0 |

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REPORT FOR NATION

AS OF MAR 74

| BRAND | 3 MONTH MOVING RANK % | SHARE OF MARKET - CURRENT YEAR | | | | | | | | | | 12 MTH MOVING % | | |
|-------------------------|-----------------------------|--------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----------------------|----------|----------|
| | | JAN % | FEB % | MAR % | APR % | MAY % | JUN % | JUL % | AUG % | SEP % | OCT % | | NOV % | DEC % |
| PRINCE ALBERT | 1 16.0 | 17.0 | 17.9 | 14.2 | | | | | | | | | 16.0 | 18.0 |
| AMPHORA COMB. | 2 14.2 | 14.3 | 9.2 | 17.0 | | | | | | | | | 14.2 | 10.5 |
| HALF AND HALF | 3 11.7 | 10.6 | 15.6 | 10.2 | | | | | | | | | 11.7 | 12.6 |
| DORKUM RIFF | 4 11.3 | 12.0 | 9.8 | 11.8 | | | | | | | | | 11.3 | 11.2 |
| SIR W RALEIGH | 5 10.8 | 11.2 | 11.8 | 10.0 | | | | | | | | | 10.8 | 12.4 |
| CHERRY BLEND | 6 6.3 | 5.9 | 5.4 | 7.1 | | | | | | | | | 6.3 | 5.5 |
| CARTER HALL | 7 5.5 | 5.3 | 6.1 | 5.2 | | | | | | | | | 5.5 | 5.5 |
| MIXTURE NO. 79 | 8 4.5 | 3.9 | 3.5 | 5.4 | | | | | | | | | 4.5 | 4.0 |
| PALADIN | 9 2.6 | 2.9 | 3.5 | 1.9 | | | | | | | | | 2.6 | 2.8 |
| SAIL | 10 2.3 | 1.8 | 1.9 | 2.8 | | | | | | | | | 2.3 | 1.6 |
| TOP TEN SHARE OF MARKET | | | | | | | | | | | | | | |
| BOND STREET | 11 2.2 | 2.3 | 2.5 | 2.0 | | | | | | | | | 2.2 | 2.3 |
| VELVET | 12 2.1 | 2.3 | 2.7 | 1.6 | | | | | | | | | 2.1 | 2.4 |
| BOURBON BLEND | 13 1.6 | 2.1 | 1.5 | 1.3 | | | | | | | | | 1.6 | 1.8 |
| MADEIRA | 14 1.4 | 1.2 | 1.3 | 1.7 | | | | | | | | | 1.4 | 1.3 |
| FIELD & STREAM | 15 1.4 | 1.5 | 1.4 | 1.4 | | | | | | | | | 1.4 | 1.4 |
| KENTUCKY CLUB | 16 1.4 | 1.1 | 1.3 | 1.6 | | | | | | | | | 1.4 | 1.3 |
| EDGEWORTH | 17 1.2 | 1.2 | 1.2 | 1.1 | | | | | | | | | 1.2 | 1.6 |
| REVELATION | 18 1.1 | 1.1 | 1.2 | 1.1 | | | | | | | | | 1.1 | 1.1 |
| HOLIDAY | 19 0.9 | .8 | .9 | 1.1 | | | | | | | | | 0.9 | 1.1 |
| UNION LEADER US | 20 0.8 | .8 | .5 | 1.0 | | | | | | | | | 0.8 | 0.2 |
| GRANGER | 21 0.6 | .6 | .8 | .5 | | | | | | | | | 0.6 | 0.8 |

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REPORT FOR NATION

AS OF MAR 74

| TYPE - STYLE | 3 MONTH MOVING RANK % | S H A R E O F M A R K E T - C U R R E N T Y E A R | | | | | | | | | | | | 12 MTH MOVING RANK % | |
|--------------|-----------------------------|---|------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|----------------------------|-----------|
| | | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | | YR TO DTE |
| | | % | % | % | % | % | % | % | % | % | % | % | % | | % |
| FILTER KING | 1 42.9 | 42.9 | 42.9 | 43.0 | | | | | | | | | | 42.9 | 42.2 |
| MENTHOL | 2 27.2 | 27.2 | 27.0 | 27.2 | | | | | | | | | | 27.2 | 26.8 |
| FILTER 100 | 3 16.3 | 16.3 | 16.2 | 16.3 | | | | | | | | | | 16.3 | 15.7 |
| NON-FILTER | 4 13.6 | 13.6 | 13.9 | 13.5 | | | | | | | | | | 13.6 | 14.2 |

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