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DATE: March 26, 1993

FROM: Marketing Information & Analysis/Ellen Fitzgerald

SUBJECT: NEW BRAND TRACKING REPORT

This report summarizes the industry's new and test brand performances based on various marketplace tracking systems.

NEW DEVELOPMENTSRJR

- National shipments began in January for Monarch FF KS/100 box packings. The addition of the box packings to the Monarch brand family likely reflects "catch-up" with B&W and American, both of which have box packings in their Deep Discount franchises.

LORILLARD

- Shipments of True Box (KS/100) began in March to the following markets: California, Florida, upstate New York, Chicago, Minneapolis and Richmond. These packings have been in distribution in select high development True/box markets in Regions 1 & 2 since May 1991. The additional markets are also high development True and/or box geographies.

BRAND PERFORMANCE HIGHLIGHTSPHILIP MORRIS

- B&H King's January Nielsen share (1m) was 0.2 in Regions 1-4. Weighted effective distribution was 49%.

RJR

- Camel Special Lights introductory (February) shipment share was 0.4. The Pricing Study indicates a national distribution of 13% for week ending February 22, 1993.
- Doral January Nielsen share (1m) was 3.8, the lowest share level for this brand since August 1989. Doral's Nielsen share is currently -0.6 points versus YAG. Weighted effective distribution was 83%.
- December Nielsen share (1m) for Winston Select was 0.4, flat since September 1992. Weighted effective distribution was 75%.
- December Nielsen share (1m) for Camel Wides was 0.4, flat since September 1992. Weighted effective distribution was 76%.

AMERICAN

- American began shipments of Carlton Slim 100s (ultra light, regular/menthol) in February. Introductory shipment share (1m) was 0.2.
- Misty Ultra Lights Nielsen share (1m) in January was 0.1. Weighted effective distribution was 32%. Second month shipment share in February for Misty 120s continued to be negligible.
- January shipment share (3m) for American's Deep Discounts (Private Stock and Prime) was 1.1. January Nielsen share (1m) was 0.7. Weighted effective distribution was 6%.

LORILLARD

- Lorillard began shipments to test markets in October for Harley Davidson at a Premium price point in Minneapolis and Houston and at a Branded Discount price point in Pittsburgh. December shipment shares (3m) were 0.2, 0.5, and 0.2, respectively. Field Sales reports estimated distribution of 40-60% in these markets.

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