

*Lorillard*

MEMORANDUM

November 20, 1981

TO: Those Listed

FR: Barbara E. Kunkel

RE: Cigarette Research Audit -- September, 1981

Attached is your copy of the September, 1981 Cigarette Research Audit Report with a summary.

Liggett's Generic cigarettes, formerly listed as "other Liggett" are now reported in the following manner:

	TAR MGS.	SEPT. '81 S/MKT	FILTER CATEGORY
Generic Lights 85 NM	14	.37%	Low Tar
Generic Lights 85 M	14	.06	Low Tar
Generic Lights 100 NM	14	.09	Low Tar
Generic Lights 100 M	14	.03	Low Tar



B. E. K.

/sd

cc: J. R. Ave	P. R. Lawrence
D. R. Bigda (DFS)	P. J. McGrath (C & McG.)
W. R. Blake	J. R. Marx
T. E. Bohan (DFS)	J. P. Mastandrea
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S. L. Evans	R. H. Orcutt
J. G. Flinn	J. R. Oxee (FCB)
A. J. Giacoio	A. Pasheluk
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G. M. Hoefer (MCA)	J. A. Rinns
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F. J. Jacobs (D'Arcy)	E. M. Schmitz
S. T. Jones (GBO)	A. E. Spears (GBO)
C. H. Judge	G. R. Telford
M. A. Kayiatos	P. R. Tisch
E. M. Kiernan	C. W. Toti
S. R. LaMonte	C. W. Welborn (GBO)

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1)

SHARE OF MARKET: MAJOR COMPANIES - 1981 VS. 1980  
MONTH OF SEPT. 1981 & 12 MOS. TREND

COMPANIES RANKED ON ANNUAL SHARE	SEPT		3 MOS. AVERAGE		3 MOS. 1981 + - 1980		12 MOS. TREND	
	1980	1981	1980	1981	POINT	%	DEC. 1980	SEPT 1981
Reynolds	32.56%	31.44%	32.77%	32.36%	- .41	- 1.2%	32.70%	32.81%
Philip Morris	31.67	33.71	31.19	32.94	+1.75	+ 5.6	31.00	31.94
Brown & Williamson	13.53	14.13	13.64	14.20	+ .56	+ 4.1	13.70	13.84
American	10.42	9.13	10.54	9.39	-1.15	-10.9	10.63	9.70
Lorillard	9.54	9.09	9.58	8.56	-1.02	-10.6	9.63	9.25
Liggett & Myers	2.25	2.49	2.26	2.53	+ .27	+12.0	2.33	2.44
Other	.03	.01	.02	.02	± .0	*	.01	.02
Total	100%	100%	100%	100%	-	-	100%	100%

Based on the current three month audit period:

- Philip Morris - Continued its long term share growth trend with a current gain of 6%. Major brands contributing to this growth were: Virginia Slims (+12%), Marlboro (+7%), Merit (+6%) and B&H (+3%). Corporate share of market, for the month and quarter, ranked PM ahead of Reynolds.
- Brown & Williamson - Share gain of 2% due to the continued expansion of Barclay. Current average shares were .76% on the 80/85 mm and .57% on the 100mm packings.
- Liggett & Myers - Share gain of 12% due to the continued growth of their Generics. Current share for these cigarettes was .50%.
- Lorillard - Current quarterly share of 8.56% was down 11% from the 1980 level of 9.58%. Share declined on all major brands except Newport - Green. Complete details are shown on Table 3.

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TOTAL INDUSTRY ESTIMATED VOLUME

Based on sales data from the six major cigarette companies, MSA has developed monthly estimates of Industry volume. These data are thought to be the most reliable indicators of Industry trends.

SEPT. 1981  
(GROSS UNITS IN BILLIONS)

	<u>1980</u>	<u>1981</u>	<u>1981 % + - 1980</u>
Units	52.59	58.94	+12.1%
# of Days	21	21½	+ ½ Day
Daily Average	2.504	2.742	+ 9.5
<u>9</u> Mos. Cum. Units	460.82	475.34	+ 3.2
# Days	193½	192½	- 1 Day
Daily Average	2.382	2.469	+ 3.7

Above average performance reflects the Sept. 1981 price increase loading and the special terms offered by B&W and Philip Morris.

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3)

LORILLARD SHARE OF MARKET BY BRAND 1981 VS. 1980 - SEPT. 1981  
AND TWELVE MONTHS TREND

	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>3 MOS. 1981</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>+ -</u>	<u>1980</u>	<u>DEC.</u>	<u>SEPT</u>
					<u>POINT</u>	<u>%</u>	<u>1980</u>	<u>1981</u>
Total	9.54%	9.09%	9.58%	8.56%	-1.02	-10.6%	9.63%	9.25%
Newport Green	1.96	2.20	1.93	2.10	+ .17	+ 8.8	1.86	2.08
Kent	1.94	1.80	1.95	1.69	- .26	-13.3	1.98	1.83
True	1.74	1.55	1.75	1.48	- .27	-15.4	1.76	1.62
Golden Lights	1.79	1.52	1.74	1.42	- .32	-18.4	1.79	1.59
Kent III	1.29	1.16	1.25	1.08	- .17	-13.6	1.26	1.21
Triumph	.27	.28	.41	.24	- .17	-41.5	.40	.37
Old Gold	.39	.36	.39	.33	- .06	-15.4	.41	.37
Max	.15	.16	.15	.14	- .01	--	.15	.14
Newport Red	--	.05	--	.07	+ .07	*	--	.04
Maverick	--	.00	--	.00	*	*	--	.00
Other	.01	.01	.01	.01	± 0	± 0	.02	.00

Based on the current three month audit period.

Newport Green - Continued its long term share growth trend with a current gain of 9%.  
 Parent brand packings were up 8% vs. a plus 13% for Lights.

Kent - Current share loss of 13% due to a 14% loss of the 80/85's and a 13% loss on the 100's.

Kent III - Current share loss of 14% due to a 20% loss on the 85's and a 4% loss on the 100's.

True - Current share loss of 15% due to a 19% loss on the 85's and a 10% loss on the 100's.

Golden Lights - Current share loss of 18% due to a 23% loss of the 85's and a 13% loss on the 100's.

As shown below, a composite share for these four major brands would indicate a continuing major softness for the King Size packings and a growing softness for the 100's.

	<u>1980</u>	<u>1981</u>	<u>%</u>
			<u>CHANGE</u>
Total 80/85	3.96%	3.23%	-18%
Total 100	2.73	2.44	-11
Total	6.69	5.67	-15

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SHARE OF MARKET: TOP TEN BRANDS 1981 VS. 1980

LINE EXTENSIONS VS. PARENT BRAND

MONTH OF SEPT. 1981 AND 12 MOS. TREND

	SEPT.		3 MOS. AVERAGE		3 MOS. 1981		12 MOS. TREND	
	1980	1981	1980	1981	+ - 1980		DEC.	SEPT
	POINT	%	POINT	%	POINT	%	1980	1981
Marlboro - Total	18.30%	19.53%	17.92%	19.13%	+1.21	+6.8%	17.74%	18.31%
Lights	4.21	4.77	3.78	4.64	+ .86	+22.8	3.62	4.26
Other Fi.	14.09	14.76	14.14	14.49	+ .35	+ 2.5	14.12	14.05
Winston - Total	13.16	12.54	13.28	12.98	- .30	- 2.3	13.27	13.26
Lights	3.61	3.26	3.64	3.41	- .23	- 6.3	3.55	3.52
Ultra	.05	.45	.02	.46	+ .44	*	.08	.49
Other Fi	9.50	8.83	9.62	9.11	- .51	- 5.3	9.64	9.25
Salem - Total	8.87	8.17	9.00	8.47	- .53	- 5.9	8.73	8.75
Lights	3.61	3.48	3.78	3.63	- .15	- 4.0	3.76	3.72
Ultra	.74	.57	.68	.58	- .10	-14.7	.37	.65
Other Fi.	4.52	4.12	4.54	4.26	- .28	- 6.2	4.60	4.38
Kool - Total	8.65	8.62	8.81	8.54	- .27	- 3.1	8.80	8.46
Super Lights	.68	.56	.72	.59	- .13	-18.1	.71	.63
Milds	1.04	1.10	1.06	1.09	+ .03	+ 2.8	1.04	1.06
Other Fi.	6.83	6.71	6.93	6.65	- .28	- 4.0	6.95	6.63
Straights	.10	.10	.10	.09	- .01	*	.10	.10
Lights	--	.08	--	.06	+ .06	*	--	.02
Ultra	--	.07	--	.06	+ .06	*	--	.02
Pall Mall - Total	5.03	4.45	5.12	4.66	- .46	- 9.0	5.09	4.74
Lights	.14	.10	.16	.11	- .05	*	.16	.12
Milds	.02	.02	.02	.02	± 0	*	.02	.02
Other Fi.	1.00	.90	1.01	.93	- .08	- 7.9	1.00	.95
Straights	3.87	3.43	3.93	3.60	- .33	- 8.4	3.91	3.65
Kent - Total	5.02	4.48	4.95	4.19	- .76	-15.4	5.03	4.63
Kent	1.94	1.80	1.95	1.69	- .26	-13.3	1.98	1.83
Golden Lights	1.79	1.52	1.75	1.42	- .33	-18.9	1.79	1.59
Kent III	1.29	1.16	1.25	1.08	- .17	-13.6	1.26	1.21
B & H - Total	4.63	4.83	4.55	4.69	+ .14	+ 3.1	4.61	4.63
Lights	1.77	1.89	1.72	1.85	+ .13	+ 7.6	1.72	1.80
Multi Fi.	.13	.13	.13	.12	- .01	*	.14	.13
Other Fi	2.73	2.81	2.70	2.72	+ .02	+ .7	2.75	2.70
Camel - Total	4.42	4.84	4.40	4.78	+ .38	+ 8.6	4.32	4.63
Lights	1.23	1.54	1.18	1.39	+ .21	+17.8	1.12	1.30
Other Fi.	.95	1.09	.94	1.12	+ .18	+19.2	.92	1.06
Straights	2.24	2.21	2.28	2.27	- .01	- .4	2.28	2.27
rit - Total	4.29	4.55	4.26	4.52	+ .26	+ 6.1	4.21	4.46
Ultra	.02	.57	.00	.58	+ .58	*	.00	.41
Other Fi.	4.27	3.98	4.26	3.94	- .32	- 7.5	4.21	4.05

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SHARE OF MARKET: TOP TEN BRANDS 1981 VS. 1980  
LINE EXTENSIONS VS. PARENT BRAND  
MONTH OF SEPT. 1981 AND 12 MOS. TREND

	SEPT.		3 MOS. AVERAGE		3 MOS. 1981 + - 1980		12 MOS. TREND	
	1980	1981	1980	1981	POINT	%	DEC. 1980	SEPT 1981
Vantage - Total	3.76%	3.46%	3.78%	3.62%	- .16	- 4.2%	3.84%	3.80%
Ultra	.76	.64	.74	.67	- .07	- 9.5	.76	.79
Other Fi.	3.02	2.82	3.04	2.95	- .09	- 3.0	3.98	3.01
Total Above	76.15%	75.47%	76.07%	75.58%	- .49	- .6	75.64%	75.67%
% Change		-.9%		-.6%				± 0
Total Lights/Milds/								
Ultra	19.67%	20.62%	19.25%	20.56%	+1.31	+ 6.8%	18.70%	20.40%
% Change		+4.8%		+6.8%				+9.1%
Total Other	56.48%	54.85%	56.82%	55.02%	-1.80	- 3.2%	56.94%	55.27%
% Change		-2.9%		-3.2%				-2.9%

The top 10 brands continued to account for over 75% of the Total Industry share gains were reported for four of these leaders: Camel (+9%), Marlboro (+7%), Merit (+6%), and B&H (+3%).

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## AND TWELVE MONTHS TREND

	SEPT.		3 MOS. AVERAGE		12 MOS. TREND	
	1980	1981	1980	1981	DEC. 1980	SEPT. 1981
<u>Benson &amp; Hedges</u>	4.48%	4.68%	4.41%	4.56%	4.45%	4.49%
Soft Pack	1.36	1.35	1.35	1.32	1.37	1.32
Soft Pack (100)	1.09	1.16	1.08	1.13	1.09	1.11
Box	.16	.17	.16	.16	.16	.16
Box (M)	.10	.11	.10	.10	.11	.10
Lights	.95	1.00	.92	.98	.92	.96
Lights (M)	.82	.89	.80	.87	.80	.84
<u>Marlboro</u>	3.62	4.11	3.57	4.01	3.55	3.80
Soft Pack	1.75	1.89	1.74	1.85	1.75	1.79
Box	.68	.78	.68	.75	.68	.71
Lights	1.19	1.44	1.15	1.41	1.12	1.30
<u>Winston</u>	3.45	3.53	3.45	3.66	3.52	3.70
Soft Pack	2.20	2.09	2.21	2.16	2.21	2.18
Soft Pack (M)	.00	.00	.00	.00	.07	.00
Lights	1.23	1.15	1.23	1.20	1.20	1.23
Ultra	.02	.29	.01	.30	.04	.29
<u>Salem</u>	3.60	3.40	3.62	3.52	3.47	3.62
Soft Pack (M)	1.73	1.60	1.73	1.65	1.73	1.69
Lights (M)	1.45	1.43	1.54	1.49	1.53	1.51
Ultra (M)	.42	.37	.35	.38	.21	.42
<u>Virginia Slims</u>	2.33	2.66	2.30	2.57	2.29	2.49
Soft Pack	.67	.72	.67	.70	.68	.68
Soft Pack (M)	.62	.66	.62	.64	.63	.63
Lights	.47	.58	.45	.55	.44	.53
Lights (M)	.57	.70	.56	.68	.54	.65
<u>Kent</u>	2.08	1.94	2.05	1.83	2.07	1.99
Soft Pack	.68	.64	.69	.60	.70	.65
Soft Pack (M)	.02	.02	.02	.02	.02	.02
Golden Lights	.69	.62	.67	.59	.69	.64
Golden Lights (M)	.16	.14	.16	.13	.17	.15
Kent III	.53	.52	.51	.49	.49	.53
<u>Kool</u>	1.93	1.97	1.95	1.96	1.93	1.92
Soft Pack (M)	1.46	1.49	1.46	1.48	1.46	1.46
Super Lights (M)	.35	.29	.36	.31	.36	.33
Milds (M)	.12	.11	.13	.11	.11	.11
Lights	--	.04	--	.03	--	.01
Ultra	--	.04	--	.03	--	.01
<u>Merit</u>	1.60	1.61	1.58	1.60	1.56	1.59
Soft Pack	1.26	1.27	1.25	1.27	1.23	1.26
Soft Pack (M)	.34	.34	.33	.33	.33	.33

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5a)

SHARE OF MARKET: MAJOR 100MM BRAND MONTH OF SEPT. 1981AND TWELVE MONTHS TREND

	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>DEC.</u>	<u>SEPT</u>
					<u>1980</u>	<u>1981</u>
<u>Carlton</u>	1.25%	1.11%	1.32%	1.17%	1.35%	1.25%
Soft Pack	.77	.68	.84	.72	.90	.77
Soft Pack (M)	.33	.30	.37	.32	.37	.34
Box	.15	.13	.11	.13	.08	.14
<u>Vantage</u>	1.12	1.06	1.12	1.12	1.14	1.17
Soft Pack	.74	.72	.75	.75	.76	.76
Ultra	.38	.35	.37	.37	.38	.41
<u>Pall Mall</u>	1.12	.99	1.15	1.03	1.16	1.06
Soft Pack	.98	.89	.99	.92	1.00	.94
Lights	.09	.06	.11	.07	.11	.07
Lights (M)	.05	.04	.05	.04	.05	.05
<u>Tareyton</u>	.73	.64	.73	.64	.76	.68
Soft Pack	.57	.50	.57	.51	.58	.53
Lights	.16	.14	.16	.13	.18	.15
<u>Que</u>	.69	.64	.68	.61	.68	.65
Soft Pack	.45	.41	.44	.39	.44	.42
Soft Pack (M)	.24	.23	.24	.22	.24	.23
<u>Raleigh</u>	.61	.63	.61	.62	.61	.62
Soft Pack	.46	.45	.46	.45	.46	.45
Lights	.15	.18	.15	.17	.15	.17
<u>Belair (M)</u>	.49	.48	.49	.48	.49	.48
<u>Viceroy</u>	.48	.43	.48	.42	.49	.41
Soft Pack	.31	.30	.31	.29	.31	.29
Rich Lights	.17	.13	.17	.13	.18	.14
<u>Parliament Lights</u>	.46	.47	.45	.46	.46	.45
<u>Now</u>	.28	.32	.29	.33	.30	.32
Soft Pack	.17	.19	.18	.20	.18	.19
Soft Pack (M)	.11	.13	.11	.13	.12	.13
Box	--	.00	--	.00	--	.00
<u>Barclay</u>	.05	.48	.02	.57	.02	.29
Soft Pack	.05	.38	.02	.40	.02	.23
Soft Pack (M)	--	.10	--	.17	--	.06
<u>Camel Lights</u>	.24	.27	.25	.27	.24	.28
<u>Newport Green</u>	.20	.26	.19	.24	.18	.23
Soft Pack	.20	.23	.19	.22	.18	.21
Lights	--	.03	--	.02	--	.02

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5b)

SHARE OF MARKET: MAJOR 100MM BRAND MONTH OF SEPT. 1981AND TWELVE MONTHS TREND

	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>DEC. 1980</u>	<u>SEPT 1981</u>
<u>More Lights</u>	--	.40%	--	.45%	--	.18%
Soft Pack	--	.22	--	.25	--	.10
Soft Pack (M)	--	.18	--	.20	--	.08
<u>Cambridge</u>	.20	.17	.18	.16	.15	.18
<u>Triumph</u>	--	.07	--	.05	.00	.10
Soft Pack	--	.04	--	.03	.00	.06
Soft Pack (M)	--	.03	--	.02	.00	.04
Total Above	31.01%	32.32%	30.89%	32.33%	30.87%	31.95%
% Change		+4.2%		+4.7%		+3.5%
Total All 100MM	31.98%	33.17%	31.85%	33.17%	31.87%	32.91%
% Change		+3.7%		+4.1%		+3.3%
Total 100MM NM	21.07%	21.87%	20.94%	21.82%	21.01%	21.72%
% Change		+3.8%		+4.2%		+3.4%
Total 100MM (M)	10.91%	11.30%	10.91%	11.35%	10.86%	11.19%
% Change		+3.6%		+4.0%		+3.0%

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## AND TWELVE MONTHS TREND

	SEPT.		3 MOS. AVERAGE		12 MOS. TREND	
					DEC.	SEPT
	1980	1981	1980	1981	1980	1981
<u>Marlboro</u>	14.67%	15.40%	14.35%	15.12%	14.19%	14.51%
85	5.62	5.78	5.69	5.74	5.68	5.60
85 (M)	.22	.24	.21	.23	.21	.22
80 Box	5.81	6.05	5.82	5.92	5.80	5.73
Lights 85	2.51	2.52	2.46	2.47	2.33	2.32
Lights 80 Box	.51	.81	.17	.76	.17	.64
<u>Winston</u>	9.71	9.01	9.83	9.32	9.75	9.56
85	6.87	6.33	6.97	6.53	6.93	6.65
80 Box	.43	.41	.44	.42	.43	.42
Lights	2.38	2.11	2.41	2.21	2.35	2.29
Ultra	.03	.16	.01	.16	.04	.20
<u>Kool</u>	6.63	6.55	6.76	6.49	6.77	6.44
85 (M)	5.04	4.87	5.13	4.83	5.15	4.84
80 Box (M)	.34	.35	.34	.34	.34	.33
Milds (M)	.92	.99	.93	.98	.93	.95
Super Lights (M)	.33	.27	.36	.28	.35	.30
Lights	--	.04	--	.03	--	.01
Ultra	--	.03	--	.03	--	.01
<u>alem</u>	5.26	4.79	5.38	4.95	5.26	5.13
85 (M)	2.78	2.54	2.81	2.61	2.80	2.69
80 Box (M)	.00	.00	.00	.00	.07	.00
Lights (M)	2.16	2.05	2.24	2.14	2.23	2.21
Ultra (M)	.32	.20	.33	.20	.16	.23
<u>Merit</u>	2.70	2.93	2.68	2.92	2.65	2.87
85	2.23	1.98	2.23	1.97	2.21	2.07
85 (M)	.45	.38	.45	.37	.44	.39
Ultra	.01	.39	.00	.40	.00	.27
Ultra (M)	.01	.18	.00	.18	.00	.14
<u>Kent</u>	2.92	2.52	2.90	2.36	2.96	2.64
85	1.20	1.10	1.21	1.04	1.22	1.13
80	.04	.03	.03	.03	.04	.03
Golden Lights	.86	.69	.85	.65	.86	.74
Golden Lights (M)	.07	.06	.07	.05	.07	.06
Kent III	.75	.64	.74	.59	.77	.68
<u>Vantage</u>	2.65	2.39	2.66	2.50	2.70	2.63
85	1.83	1.70	1.85	1.78	1.86	1.81
85 (M)	.44	.41	.44	.42	.46	.44
Ultra	.38	.29	.37	.30	.38	.38
<u>Camel</u>	1.93	2.36	1.87	2.24	1.80	2.08
35	.94	1.09	.94	1.12	.92	1.06
Lights 85	.87	1.18	.86	1.03	.83	.93
Lights 80 Box	.12	.09	.07	.09	.05	.09

89905904

6a)

SHARE OF MARKET: MAJOR BRANDS 80 & 85MM SEPT. 1981AND TWELVE MONTHS TREND

	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>DEC.</u> <u>1980</u>	<u>SEPT</u> <u>1981</u>
<u>Newport Green</u>	1.76%	1.94%	1.74%	1.86%	1.68%	1.85%
85 (M)	1.04	1.15	1.03	1.10	1.00	1.09
80 Box (M)	.49	.53	.48	.52	.46	.51
Lights 85 (M)	.21	.21	.20	.20	.20	.21
Lights 80 Box (M)	.02	.05	.03	.04	.02	.04
<u>Viceroy</u>	1.23	1.11	1.24	1.09	1.26	1.13
85	1.05	.97	1.06	.96	1.07	.98
Rich Lights	.18	.14	.18	.13	.19	.15
<u>Raleigh</u>	1.04	.95	1.04	.95	1.07	.99
85	.82	.74	.83	.74	.85	.77
Lights	.22	.21	.21	.21	.22	.22
<u>Carlton</u>	1.21	.83	1.15	.87	1.17	.98
85	.86	.59	.83	.62	.81	.70
85 (M)	.32	.23	.31	.24	.30	.27
80 Box	.03	.01	.01	.01	.06	.01
<u>True</u>	1.06	.90	1.07	.87	1.08	.97
35	.72	.60	.72	.58	.73	.65
85 (M)	.34	.30	.35	.29	.35	.32
<u>Tareyton</u>	.87	.73	.88	.74	.90	.79
85	.73	.63	.74	.65	.75	.68
Lights	.14	.10	.14	.09	.15	.11
<u>Parliament Lights</u>	.74	.74	.75	.72	.75	.72
85	.36	.36	.37	.35	.37	.35
80 Box	.38	.38	.38	.37	.38	.37
<u>L&amp;M</u>	.68	.56	.69	.58	.69	.62
85	.63	.53	.64	.55	.64	.59
80 Box	.03	.01	.03	.01	.03	.01
Lights	.02	.02	.02	.02	.02	.02
<u>Belair (M)</u>	.65	.61	.66	.60	.67	.62
<u>Barclay</u>	.06	.67	.02	.76	.02	.53
Soft Pack	.05	.45	.02	.46	.02	.36
Soft Pack (M)	--	.10	--	.18	--	.06
Box	.01	.12	.00	.12	.00	.11
<u>Now</u>	.38	.30	.37	.32	.44	.37
80 Box	.01	.00	.01	.00	.04	.01
90 Box (M)	.00	.00	.00	.00	.01	.00
85	.25	.19	.24	.21	.26	.24
85 (M)	.12	.11	.12	.11	.13	.12

89905905

6b)

SHARE OF MARKET: MAJOR BRANDS 80 & 85MM SEPT. 1981AND TWELVE MONTHS TREND

	<u>SEPT</u>		<u>3 MOS. AVERAGE</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>DEC.</u> <u>1980</u>	<u>SEPT</u> <u>1981</u>
<u>Doral</u>	.52%	.26%	.53%	.27%	.54%	.33%
85	.18	.00	.18	.00	.18	.03
85 (M)	.12	.00	.12	.00	.11	.02
Doral II	.13	.15	.13	.15	.15	.16
Doral II (M)	.09	.11	.10	.12	.10	.12
<u>Triumph</u>	.27	.21	.41	.19	.40	.27
85	.20	.14	.28	.13	.28	.19
85 (M)	.07	.07	.13	.06	.12	.08
<u>Cambridge</u>	.10	.08	.09	.06	.11	.09
Soft Pack	.09	.07	.08	.06	.09	.08
Box	.01	.01	.01	.00	.02	.01
<u>Newport Red</u>	--	.05	--	.07	--	.05
Soft Pack	--	.03	--	.04	--	.03
Box	--	.02	--	.03	--	.02
 Total Above % Change	57.04%	55.89% -2.0%	57.07%	55.85% -2.1%	56.86%	56.17% -1.2%
 Total All 80/85 % Change	58.01%	57.18% -1.4%	58.08%	57.08% -1.7%	58.04%	57.24% -1.4%
 Total 80/85 NM % Change	41.32%	40.95% -.9%	41.10%	40.78% -.8%	41.16%	40.86% -.7%
 Total 80/85 M % Change	16.69%	16.23% -2.8%	16.98%	16.30% -4.0%	16.88%	16.38% -3.0%

89905906

SHARE OF MARKET: MAJOR STRAIGHT PACKINGS

MONTH OF SEPT. 1981 AND 12 MONTHS TREND

	<u>SEPT</u>		<u>3 MOS. AVERAGE</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>DEC.</u> <u>1980</u>	<u>SEPT</u> <u>1981</u>
Pall Mall	3.87%	3.43%	3.93%	3.60%	3.91%	3.65%
Camel	2.24	2.21	2.28	2.27	2.28	2.27
Lucky Strike	.98	.85	.99	.89	.98	.91
Chesterfield - King	.49	.43	.49	.45	.49	.46
Philip Morris - King	.15	.16	.15	.14	.16	.14
Raleigh	.14	.14	.14	.13	.15	.14
Kool (M)	.10	.10	.10	.09	.10	.10
Chesterfield - Reg.	.09	.08	.09	.08	.09	.08
<b>Total Above</b>	<b>8.06%</b>	<b>7.40%</b>	<b>8.17%</b>	<b>7.65%</b>	<b>8.16%</b>	<b>7.75%</b>
<b>% Change</b>		<b>-8.2%</b>		<b>-6.4%</b>		<b>-5.0%</b>

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Long term share decline continued for all brands.

89305907

8)

SHARE OF MARKET: BY FILTER CATEGORY 1981 VS. 1980  
MONTH OF SEPT. 1981 & 12 MOS. TREND

	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>3 MOS. 1981</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>+ - 1980</u>		<u>DEC.</u>	<u>SEPT</u>
					<u>POINT</u>	<u>%</u>	<u>1980</u>	<u>1981</u>
Lo-Fi NM	33.26%	32.76%	33.51%	32.87%	- .64	- 1.9%	33.54%	32.69%
M	15.26	15.06	15.35	14.96	- .39	- 2.5	15.47	15.01
Total Lo Fi	48.52	47.82	48.86	47.83	-1.03	- 2.1	49.01	47.70
LT - NM	14.16	15.40	13.65	15.04	+1.39	+10.2	13.43	14.49
M	7.56	7.95	7.73	8.02	+ .29	+ 3.8	7.68	7.88
Total Lo Tar	21.72	23.35	21.38	23.06	+1.68	+ 7.9	21.11	22.37
VLT - NM	8.76	7.67	8.73	7.68	-1.05	-12.0	8.88	8.08
M	2.36	1.99	2.39	1.98	- .41	-17.1	2.45	2.12
Total Very Lo Tar	11.12	9.66	11.12	9.66	-1.46	-13.1	11.33	10.20
ULT NM	6.22	7.00	6.15	7.01	+ .86	+14.0	6.36	7.36
M	2.41	2.53	2.41	2.70	+ .29	+12.0	2.14	2.58
Total Ultra Lo Tar	8.63	9.53	8.56	9.71	+1.15	+13.4	8.50	9.94
Total Non Menthol	62.40	62.83	62.04	62.60	+ .56	+ .9	62.16	62.62
Menthol	27.59	27.53	27.88	27.66	- .22	- .8	27.74	27.59
Total Above	89.99	90.36	89.92	90.26	+ .34	+ .4	89.90	90.21
Total 120MM	1.83	2.13	1.78	1.96	+ .18	+10.1	1.79	1.92
Total Filters	91.82	92.49	91.70	92.22	+ .52	+ .6	91.74	92.13
Total Straights	8.15	7.47	8.26	7.74	- .52	- 6.3	8.24	7.82
Other	.03	.04	.04	.04	± 0	*	.02	.05
Total Industry	100%	100%	100%	100%	--	-	100%	100%

89905908

9)

## SHARE OF MARKET: MAJOR BRANDS IN SELECTED CATEGORIES

1981 VS. 1980 MONTH OF SEPT. 1981 & 12 MOS. TREND

	SEPT		3 MOS. AVERAGE		12 MOS. TREND	
	1980	1981	1980	1981	DEC. 1980	SEPT 1981
1) <u>Ultra Low Tar</u>						
Carlton	2.45%	1.94%	2.47%	2.04%	2.52%	2.23%
True	1.74	1.55	1.75	1.48	1.76	1.62
Kent III	1.29	1.16	1.25	1.08	1.26	1.21
Barclay	.12	1.15	.04	1.33	.04	.82
Vantage Ultra	.76	.64	.74	.67	.76	.79
Now	.66	.63	.66	.65	.74	.69
Salem Ultra	.74	.57	.68	.58	.37	.65
Winston Ultra	.05	.45	.02	.46	.08	.49
Merit Ultra	.02	.57	.00	.58	.00	.41
Triumph	.27	.28	.41	.24	.40	.37
Doral II	.22	.26	.23	.27	.25	.33
Cambridge	.30	.25	.27	.22	.26	.27
Kool Ultra	--	.07	--	.06	--	.02
Total Above ULT	8.62%	9.52%	8.52%	9.66%	8.44%	9.90%
% Change		+10.4%		+13.4%		+17.3%

2) Very Low Tar

Merit	4.27%	3.98%	4.26%	3.94%	4.21%	4.05%
Vantage	3.02	2.82	3.04	2.95	3.08	3.01
Golden Lights	1.79	1.52	1.75	1.42	1.79	1.59
Kool Super Lights	.68	.56	.72	.59	.71	.63
Viceroy Rich Lights	.35	.27	.35	.26	.37	.29
Tareyton Lights	.30	.24	.30	.22	.33	.26
L&M Lights	.12	.09	.12	.10	.15	.12
Pall Mall Lights 100	.09	.06	.11	.07	.11	.07
Kool Lights	--	.08	--	.06	--	.02
Total Above VLT	10.62%	9.62%	10.65%	9.61%	10.75%	10.04%
% Change		-9.4%		-9.8%		-6.6%

89905909

9a)

SHARE OF MARKET: MAJOR BRANDS IN SELECTED CATEGORIESSEPT. 1981 & 12 MOS. TREND

	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>DEC. 1980</u>	<u>SEPT. 1981</u>
3) <u>Low Tar</u>						
Marlboro Lights	4.21%	4.77%	3.78%	4.64%	3.62%	4.26%
Salem Lights	3.61	3.48	3.78	3.63	3.76	3.72
Winston Lights	3.61	3.26	3.64	3.41	3.55	3.52
Kent	1.94	1.80	1.95	1.69	1.98	1.83
B&H Lights	1.77	1.89	1.72	1.85	1.72	1.80
Camel Lights	1.23	1.54	1.18	1.39	1.12	1.30
Virginia Slims Lights	1.04	1.28	1.01	1.23	.98	1.18
Parliament Lights	1.20	1.21	1.20	1.18	1.21	1.17
Belair	1.14	1.09	1.15	1.08	1.16	1.10
Kool Milds	1.04	1.10	1.06	1.09	1.04	1.06
Raleigh Lights	.37	.39	.36	.38	.37	.39
Generics	--	.55	--	.50	.05	.32
Newport Lights	.23	.29	.23	.26	.22	.27
More Lights	--	.40	--	.45	--	.18
Multi Fi.	.13	.13	.13	.12	.14	.13
Old Gold Lights	.07	.06	.07	.06	.06	.06
Total Above LT	21.59%	23.24%	21.26%	22.96%	20.98%	22.29%
% Change		+7.6%		+8.0%		+6.2%

Note: More Lights reclassified from Very Low Tar to Low Tar as of Sept. 1981.

Generics - Reclassified from separate category to Low Tar as of Sept. 1981.

4) Low Fi

Marlboro	14.09%	14.76%	14.14%	14.49%	14.12%	14.05%
Winston	9.50	8.83	9.62	9.11	9.64	9.25
Kool	6.83	6.71	6.93	6.65	6.95	6.63
Salem	4.52	4.12	4.54	4.26	4.60	4.38
B&H	2.73	2.81	2.70	2.72	2.75	2.70
Newport Green	1.73	1.91	1.70	1.84	1.64	1.81
Virginia Slims	1.29	1.38	1.29	1.34	1.31	1.31
Viceroy	1.36	1.27	1.37	1.25	1.38	1.27
Raleigh	1.28	1.19	1.29	1.19	1.31	1.22
Tareyton	1.30	1.13	1.31	1.16	1.33	1.21
Camel	.95	1.09	.94	1.12	.92	1.06
Pall Mall	1.00	.90	1.01	.93	1.00	.95
L&M	.85	.70	.87	.72	.85	.78
Newport Red	--	.05	--	.07	--	.04
Total Above LoFi	47.43%	46.85%	47.71%	46.85%	47.80%	46.66%
% Change		-1.2%		-1.8%		-2.4%

89905910



SHARE OF MARKET: BRAND PACKINGS 0-15 MGS. SEPT. 1981

<u>GROUP:</u>	<u>SEPT.</u>		<u>3 MOS. AVERAGE</u>		<u>3 MOS. 1981</u> <u>+ - 1980</u>		<u>12 MOS. TREND</u>	
	<u>1980</u>	<u>1981</u>	<u>1980</u>	<u>1981</u>	<u>POINT</u>	<u>%</u>	<u>DEC.</u> <u>1980</u>	<u>SEPT</u> <u>1981</u>
0 - 2 MGS.	2.05%	2.33%	2.03%	2.47%	+ .44	+21.7%	2.12%	2.43%
3 - 5 MGS.	4.71	6.05	4.75	5.84	+1.09	+23.0	4.65	5.60
Sub-Total	6.76	8.38	6.78	8.31	+1.53	+22.6	6.77	8.03
6 - 9 MGS.	10.87	15.63	10.78	15.32	+4.54	+42.1	10.85	13.64
10 - 16 MGS.	25.76	31.15	25.41	31.24	+5.83	+22.9	25.23	28.62
Total 0-15 MGS.	43.39%	55.16%	42.97%	54.86%	+11.89	+27.7%	42.85%	50.29%
% Change		+27.1%		+27.7%				+17.4%

89905911