CAN DINOSAURS ADAPT, SURVIVE, THRIVE?

A CASE STUDY OF TWO ANTIPODEAN ENDANGERED SPECIES

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"A hard earned thirst is a big cold beer, and the best cold beer is Vic".

Abstract

Beer and beef were the only two English traditions that the convict classes in the Antipodes had ever really valued. Every Boxing Day Bay 13 at the MCG was solely populated by males bedecked in shorts and thongs, meat pie in one hand and a can of VB firmly grasped in the other. By tea time their baying for blood was loudest if it was the pommie variety on offer - the bluer the better. Douglas Jardine casts a long shadow and Bert Woodfull's words echo ever more strident as the umpires emerge for the final session.

The organizations catering for the insatiable appetites of the blue singlet brigade predate the "Ashes" urn. VB had its product launch in the 1890s. The beer bottles then were supplied by ACI Packaging Pty Limited and they still are. The pie ingredients have a more checkered history and although the "Golden Arches" do not yet command the catering contracts at the sacred sites such as the SCG the ubiquitous "Big Mac" can be consumed one handed.

The beef and the beer are the products of two separate yet related networks of organizations. This paper uses secondary research to examine one of these networks in terms of its adaptation for surviving as demand parameters engender challenges.

Introduction.

As succinctly pointed out by Garnes (1995) whatever apparently simply product we choose to examine by looking upstream what is revealed is "a variety of complex production processes, mammoth distribution systems, and huge amounts of different plants". The question of how this complexity attains effectiveness has been debated for eons. Williamson (1985) identifies two different governance structures to achieve coordination between buyers and sellers so as to employ resources economically: the market and the hierarchy. Coordination is achieved in the market model through the use of price signals that serve to inform independent actors of the availability of resources. In the hierarchy model, one actor dominates the resources and manages coordination among the participants. Hakansson and Snehota (1995, p.3) offer an alternate view to the achievement of coordination. They view interfirm relationships "...as part of a broader network structure, rather than as isolated entities where a network is defined as a set of institutionally independent actors involved in activities and utilizing resources which are interdependent." Implicit here is "that history casts a long shadow" – that parties involved in a network are in somewhat unique positions in relation to other network members. While they play specialized roles their interdependence means that activity changes by one network member will necessitate changes for others. For the network to survive network entities must cooperate rather than compete.

This preliminary study describes the features of a long-standing relationship between two well-established commercial organisations;

- ACI Glass Packaging Pty Ltd (ACI), the sole producer of glass products in Australia and
- Carlton & United Breweries Pty Ltd. (CUB), the market leader in the Australian beer industry.

CUB is a relatively well-known company. One of its products, Fosters lager, as well as being sold in 150 countries has been available in Britain for over 30 years. In contrast ACI enjoys the relative anonymity of most organisations operating in business markets. The study also aims to establish a framework to investigate how the ACI monopoly has adapted and survived along with the effect on other network entities. To some extent the

leading CUB brand, Victoria Bitter (VB) is used as a barometer of the ACI-CUB relationship over the two decades.

Hopefully this paper establishes the basis of a case study that meets the strictures spelt out by Easton (1995) that "Case research which would wish to lay claim to a realist epistemology must be carried out in a different way; to be inquisitive, to look for the roots of things, to disentangle complexities and to conceptualise and reconceptualise, test and retest, to be both rigorous and creative and above all to seek for the underlying reality through the thick veil which hides it". This study overlaps with earlier analysis conducted on relationships in the Australian soft drink industry (Donnan, 1994,1995).

Methodology

A combination of email exchange, telephone interviews, and personal interviews with individuals in both organizations was employed. Company archives were used extensively and were combined with published statistical data to provide background for interview preparation.

The longitudinal nature of this study posed some difficulties in that many of the individuals across all of the organisations had changed roles within them or during the period of the research had left the industry. The characteristics of the organisations have also undergone a large number of changes particularly during the turbulence of the mid '80s when change of ownership was a relative common occurrence. Thus, both the 'interaction environment' and 'atmosphere' between organisations have varied considerably across the two decades of the study.

Background.

1. End Users.

   Beer consumption is deeply ingrained into the psyche of Australian "mateship" and refusing to "shout" a round in ones turn in the pub is likely to earn the miscreant the derisive label of "bludger". However, beer does not hold the absolute dominance of the Australian alcohol beverage market it once enjoyed. Apparent per capita consumption has been declining for some years since the halcyon days of the 1970s.

Insert Chart 1 here.

It is speculated that this decline can be largely attributed to significant changes in at least four elements of the beer industries' macro-environment. The change has not been uniform. The Australian brewers cater for the various market segment with four types of lager: premium; full strength; mid strength; and low alcohol. So-called hardened drinkers consume full strength beer accounting for 65% of total beer consumption.

Insert Chart 2 here

Until 1970-71 bulk beer output exceeded total packaged beer. However, the growth in packaged beer output evident since the 1960s mirrored changes in consumer consumption habits. Less beer was being consumed in pubs as a number of factors enhanced off premises consumption. As previously reported (Donnan, 1995) Tooth & Co exploited this change brilliantly to achieve absolute market dominance in NSW. Through out the mid 60s-to-late 70s their focus was on higher filling rates using cans. Tooth KB lager attained 70% market share in the New South Wales packaged beer market – a brand dominance not achieved before or since. Yet despite the overall decline in total consumption coupled with the aluminium industry drive to dominate the carbonated beverage industry beer packaged in glass has experienced a sustained period of growth since 1984-85.

Insert Chart 3 here

This data evokes inquisitiveness. Why the change in emphasis back to glass packaging? Certainly such a marked change indicates that glass packaging must have been re-adopted for beers in the volumetric dominant full strength segment.

2. The Focal Entities. The two focal entities of the network studied, are in some respects typical of many Australian companies. The emergence of an embryonic Australian manufacturing industry in the mid-to-late 19th century was spurred on by a combination of the "gold rush" immigration surge and the financial capital derived from lucrative gold mining operations. The rich gold fields of Victoria led to its capital city Melbourne displacing Sydney as the pre-eminent city in Australia. For a brief period Melbourne even became the nation's capital. The long festering inter-city/inter-state rivalry became virulent. The governments of both New South Wales

and Victoria were so parochial that they failed to reach agreement on something as fundamental as a uniform national railway gauge. Those companies with head offices established in Melbourne strongly identified themselves as being Victorian and their then individual owners rapidly attained establishment status. Personal establishment status was confirmed by membership of still the most exclusive club in Australia; the Melbourne Club.

(a) ACI Glass Packaging Pty. Ltd. ACI is the sole manufacturer of glass packaging in Australia. ACI Glass Packaging Australia and New Zealand has six container manufacturing plants with annual sales approaching A$1 billion. ACI defines its key markets as being Beer, Wine, Spirits, Soft Drinks, Non - Alcoholic Beverages, Tonic, Fruit Juice, Food, Pharmaceutical, Cosmetic and Chemicals. Beer bottles account for 40% of total sales. ACI can trace its glass container manufacturing history back over a century. The Melbourne Glass Bottle Works Company was established in 1872 at South Melbourne by two pharmacists - Alfred Felton and Fredrick Sheppard Grimwade. The company moved soon afterwards to Spotswood (another Melbourne suburb) and changed its name to Australian Glass Manufacturers (AGM). The company was established as a major entity when it merged with seven other glass companies in 1916. In 1939 the company again changed its name to Australian Consolidated Industries (ACI). By this time glass container manufacturing plants were established in Melbourne, Sydney, Adelaide, Brisbane, Perth and New Zealand. In some States entry barriers to competitors were raised via the mechanism of a mineral lease on every known deposit of silica sand, the key raw material. In early 1998 ACI Packaging was acquired by Owens-Illinois, Inc. of the United States. The entities had worked together under a technical agreement for almost thirty years. This agreement enabled ACI to access leading edge glass technology and was a significant platform from which ACI expanded and managed the Asia-Pacific region.

(b) Carlton & United Brewers. Carlton & United Breweries (CUB) is Australia's leading brewer. It is the number one performer in three major segments of the

Australian beer market - premium, full-strength and lower alcohol. Carlton Brewery was established in 1864. In 1907 it amalgamated with six other Melbourne brewers to form Carlton & United Breweries Proprietary Limited. Over the next 70 years CUB acquired all other breweries within the State of Victoria and successfully defended its State monopoly position against a number of powerful new entrants including, in 1968, Courage Breweries (UK) Ltd. A significant element in their defense strategy was their widespread hotel ownership across Victoria. By acquisition CUB also expanded into the States of Queensland (1931,1952, 1961) Western Australia (1973), South Australia (1981) and Tasmania (1981). CUB only achieved true national status when in 1983 as an indirect outcome of the Trade Practices Act (1974) it was able to acquire Tooth & Co the then leading brewer in the nation's most populous State; New South Wales. After nearly a century an iconic Melbourne establishment company had finally prevailed over its upstart Sydney rival. The acquisition strategy continued off shore with UK brewer Courage (1986) followed by, in Canada, Carling O'Keefe (1987) and Molsin (1989) as well as at home with Matilda Brewing WA (1990) and Power Brewing Qld (1993).

3. Technology. Ford (2002) suggests that "Technology decisions are very long term and can profoundly affect a company's ability to develop and fulfill its offering for many years." Ford's observations have specific relevance here. In Australia by the 1960s these two firmly entrenched Melbourne establishments had become virtual monopolies within Victorian State boundaries. One result of their parallel long term strategies of horizontal acquisition was they had inadvertently created a single supplier/single customer situation at the "upstream" end of the Victorian packaged beer market supply chain embedded in glass technology. The product ACI Glass Packaging supplied CUB since the 1930s for the relatively unattractive packaged beer market was the venerable crown sealed 750 ml long shouldered brown bottle. CUB's primary concern then was on bulk beer (in 50 litre stainless steel kegs) sold through its owned or "tied" hotels throughout Victoria. For its part ACI had other

products in other markets that needed more attention than their beer bottle particularly in the burgeoning wine market.

Aluminum and the Beverage Industry. Steel cans were being adopted in the USA for the packaging of beer and carbonated soft drinks by 1960. In 1965 Coca Cola built two plants at Danang and Qui-Nhon in South Vietnam to supply US troops with their product packaged in steel cans since returnable bottles presenting quite a problem in that arena (Pendergast 1994). By the middle of the 1960s a major Australian brewer, Tooth & Co, had made the change from the traditional 750 ml. long neck brown bottle to 375 ml. three piece steel cans. These cans were produced in Australia by Containers Limited and Gadsden-Hughes under license to Crown Cork and Seal (USA) and National Can (USA) respectively.

Concurrently, in the U.S.A. Alcoa worked jointly with Crown Cork and Seal to successfully develop and market the two-piece cold drawn aluminum can with U.S.A. brewers being the early adopters. By 1965 Comalco had approached both Containers and Gadsden-Hughes with a proposal for them to manufacture two-piece aluminum beverage cans for the Australian market. Both refused. Comalco went ahead without them and constructed can making plants in Sydney (NSW) and Melbourne (Victoria) and within five years aluminum was the preferred can among the major beer and soft drink producers. By 1970 Comalco had sold its Sydney and Melbourne can making operations to Containers and Gadsden respectively.

With the development of the steel, and shortly after the aluminium, carbonated beverage can in the 1960s the only producer of glass bottles, ACI Glass Packaging, was faced with real competition in the take-out beer market for the first time. ACI supplied brewers nationally with the 750 ml long shouldered crown sealed brown glass models virtually unaltered for 40 years. These bottles were outperformed by aluminium cans in virtually every aspect. They were heavy and breakage rates were high. Filling rates on the bottling line were much slower than for aluminium cans. For 1960s consumers beer in cans tasted better (then beer in a can needed less preservative than the same product in a bottle), they didn't have to carry a bottle opener and a 'slab' of 24 cans weighed a lot less and was easier to carry than a carton of 12 bottles – and the beer got colder quicker.

Insert Table 1 here.

The growth rate in the "canned" column in Table 1 from 1963-64 to 1990-91 evidences the impact of the aluminium cans in beer packaging. These statistics reflect the change from glass to aluminium as Brewers across the country installed the necessary modern filling lines geared to exploit the faster filling rates made possible by the adoption of cans. CUB was the first Australian brewer to adopt aluminium cans in the mid 60s and Swan Brewery were the last to convert in 1985.

ACI Glass Packaging was experiencing rapid erosion of a generation long term of market dominance in the packaged beer segment – and its fellow Victorian, CUB had been one of the first to change! CUB had eyed with envy the success its entrenched NSW rival Tooth & Co had enjoyed with KB lager by the simple expedient of linking that product to a generational change in packaging.

Their adoption of aluminium cans for VB lager positioned CUB in a separate network which featured two rival local can suppliers who were very actively supported by Alcoa and Comalco, both multinational and, upstream from the can producers completely hierarchical. From the mid 60s these multinationals fully funded the Aluminium Development Corporation and its offshoot, the Aluminium Can Group. Technological support and market development was made freely available to adopters of aluminium. The network membership overlapped to some degree with that of the glass packaging group but the differences were very significant technologically particularly with can printing, can lining and handling as well as with filling line.

Glass and the Beverage Industry. Being aware of the importance of packaging to brand image CUB had long since adopted a special shaped bottle for its Crown Lager in the premium segment. Thus despite the inroads made by aluminium ACI continued as a supplier of beer bottles although one very reduced economically in importance to CUB. The newer faster filling lines at CUB were designed for use with aluminium cans and utilised for VB. Victoria Bitter (VB) was originally launched in the 1890s and has remained the dominant brand in the full strength segment for many years. However the Table 1 data for beer packaged in bottles shows a significant turn

around in bottle use since 1992-93. Why would major brewers reverse the trend to aluminium cans so evident since 1968-69?

One industry analyst provided this explanation.

"*It has been well publicised that over the past two years there has been a significant decline in the volume of 2P aluminium cans used by fillers in the Australian carbonated beverage market. In soft drinks, usage of PET has grown, and in beer there has been a switch to glass. There have been two main reasons for the decline in can consumption:*

- *Firstly, beer drinkers are preferring to purchase the product in glass packaging. Clear glass bottles are the only packaging used for new popular beers such as Carlton Cold Filtered and Hahn Ice.*
- *Secondly, glass bottles have become cheaper than cans. ACI, the sole producer of glass bottles in Australia has been very aggressive with its pricing strategy. It has offered large volume rebates to encourage fillers to use glass bottles.*

We understand that the major brewing companies are buying glass bottles, crown seals and labels for around 10.6c per unit versus 13c for a can. The slower filling times and transport disadvantages for bottles versus cans does not offset the 2.4 cents cost advantage. A 1 cent moving or saving in price can be material for the fillers."

*(Tony Young, Analyst, Report on Amcor Limited, CS First Boston, 21 December **1993**, pg 3).*

Tony Young offers the lower per unit purchasing price that ACI offered as one reason for the switch back to glass. However CUB only gradually changed back to the "stubby" for VB lager as switching costs (from can to bottle filling lines) are very high. Moreover there is no evidence that the "hard earned thirst brigade" preferred drinking out of a bottle to a can. How was it that ACI were able to be so very aggressive with their pricing strategy? Consider the following information about the humble VB "stubby" bottle.

Insert Table 2 here

This illustrates that ACI have subjected this very basic bottle to a great deal of product development over a considerable period of time. The capacity of the bottle has remained at 375ml yet its empty (or tare) weight has been significantly reduced. The lower bottle weight equates to reduced raw material content per bottle as well as less energy needs in production for glass melting thereby considerably reducing manufacturing cost. The lower VB "stubby" weight will also have significantly reduced outward goods transport costs for ACI. While the empty VB stubby bottle is still 10 times heavier than the equivalent 375 ml aluminium beverage can this product development program underlines ACI's commitment to provide CUB with "value". The 70 gram reduction in weight of one VB "stubby" equates to 100 tonne per annum less finished goods shipping weight for CUB in 2001 compared to 1981. Moreover in 1988 the outside diameter of the VB "stubby" bottle was 69 mm. By 1997 the VB 'stubby' bottle outside diameter has been reduced to 67 mm. At the 67 mm bottle OD the number of 24 bottle cartons of VB per standard 18 tonne shipping container can be maximized thus further providing CUB with "value".

Concluding Remarks.

Study Limitations.

There are a number of limitations to this study. First is with the quantitative data. The ABS output statistics employed is for the commodity beer product at a national level. Over the four decades of the output data employed the change in relative importance of ACI is accurately portrayed in the "bottled" statistics. There is no directly equivalent data for CUB. The VB "stubby" data is likewise problematic. The ACI "stubby" output figures for the years 1981 – 2001 are required if this product is to be useful as an interfirm relationship barometer. VB market share data by package type for the same 20 years would also be required.

Second, the use of secondary data and not primary data to build a relationship history is problematic. Secondary data does not provide the valuable potential personal insights that might accrue from in depth relationship research. However the secondary data does provide a platform and perspective complimentary to the personal calls made to industry executives.

Third, one party, CUB, to the "relationship" studied here is part of two distinct yet rival "packaging" networks. Both of these networks are rich in relationships that are not mainstream but nevertheless crucial to understanding them. For example one issue is hygiene. Beer is a food product. This necessitates hygiene protocols that are package type specific. In terms of information exchange alone these relationships are critical to network viability. There are many other issues important to both networks such as raw material processing, packaging item quality monitoring and glass recycling.

Conclusions.

The traditional explanation for ACI regaining much of the packaging of VB lager is the one offered by Tony Young - an explanation consistent with the market "use of price signals" as proposed by Williamson. However case factors raise other issues that could be seen as influencing CUB.

- Was the century long trading history between ACI and CUB a factor? Sriram and Mummalaneni (1990) concluded that source loyalty was not associated with length of relationship.
- Was the 40 year long joint reliance by ACI and CUB on the 750 ml brown bottle of itself a "barrier against innovation"? Paliwoda and Bruce (1987) suggest that relationships can work in this way.
- While the continuity of supply since the 60s of bottles to CUB for their premium and low alcohol segment products was important in the preservation of the, albeit economically much weakened network was this "continuity" crucial in the adoption by CUB of the "stubby" for VB in 1981? Their experience with the beverage can revolution of the mid 60s may have led them to believe that the benefit derived from being able to "shop around" exceeded that gained from investment in a long term relationship.
- How important was ACI and CUB both being fellow "pillars of the Melbourne establishment" a factor? Again case context is important. The "glass" technology based network contained many other Victorian firms

(suppliers of bottle labels, label glue, bottle coatings etc) whose economic roles in the network were considerably diminished by the CUB switch to cans.

- Was network communication concerning beer consumer preferences so effective that ACI were prepared to invest in "stubby" bottle development over a 20 year period?
- Is the development of the ACI-CUB relationship, one inherited rather than sought consistent with the various models (Ford 1980, Frazier 1983, Dwyer, Schurr & Oh 1987) espoused in the literature? Is the conceptualized relationship development cycle here more a sine wave than an "S" curve?
- In changing from one packaging material (aluminium) to another (glass) for its major product CUB were faced with significant technological change throughout its filling line process. This relatively sudden change by CUB back to glass evidences characteristics consistent with the concept of *friction* espoused by Hakansson and Waluszewski (2001).
- The reduction of the "stubby" OD by ACI to 67 mm to reduce CUB finished goods transport costs appears to be an example of a supplier's value creation taking place within a supplier-customer relationship. Further investigation at both ACI and CUB would be required to determine if CUB used a form of supplier capability profile as an indicator for specific value creation as suggested by Moller and Torronen (2000).

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- ***ACI Glass Packaging: Mr. Rob Barnett, General Manager.***
- ***ACI Glass Packaging: Mr. Don Barbour, Chief Designer.***
- ***ACI Glass Packaging: Ms. Sandra Thackray, Victorian State Sales Manager***
- ***ACI Glass Packaging: Mr. Chris Thorn, Production Engineer.***
- ***Australian Associated Brewers: Mr. Terry Mott, Executive Director.***
- ***Carlton & United Brewers; Greg Lane, Manager, Abbotsford Brewery***
- ***Deutche Bank: Mr. Tony Young, Senior Analyst.***

CHART 1.

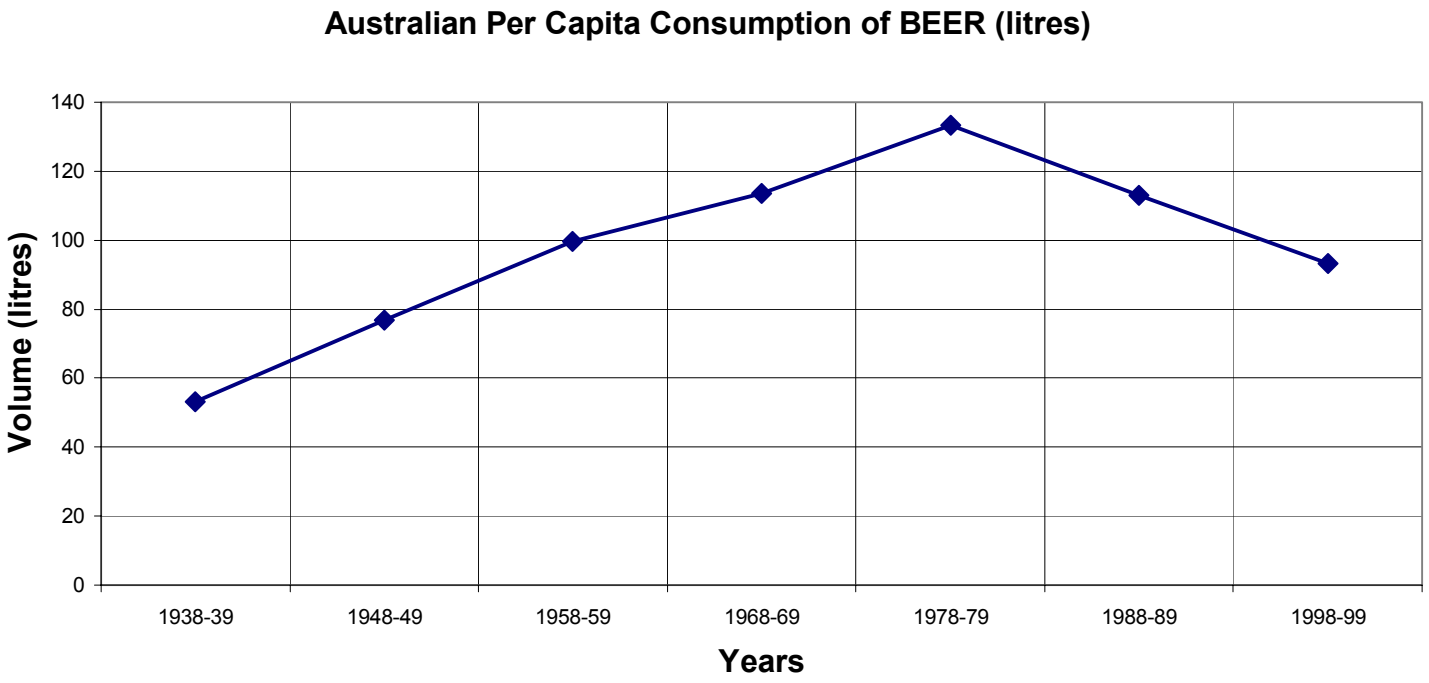
Australian Per Capita Consumption of BEER (litres)
Volume (litres)
140
120
100
80
60
40
20
0
1938-39
1948-49
1958-59
1968-69
1978-79
1988-89
1998-99
Years

Chart 2.

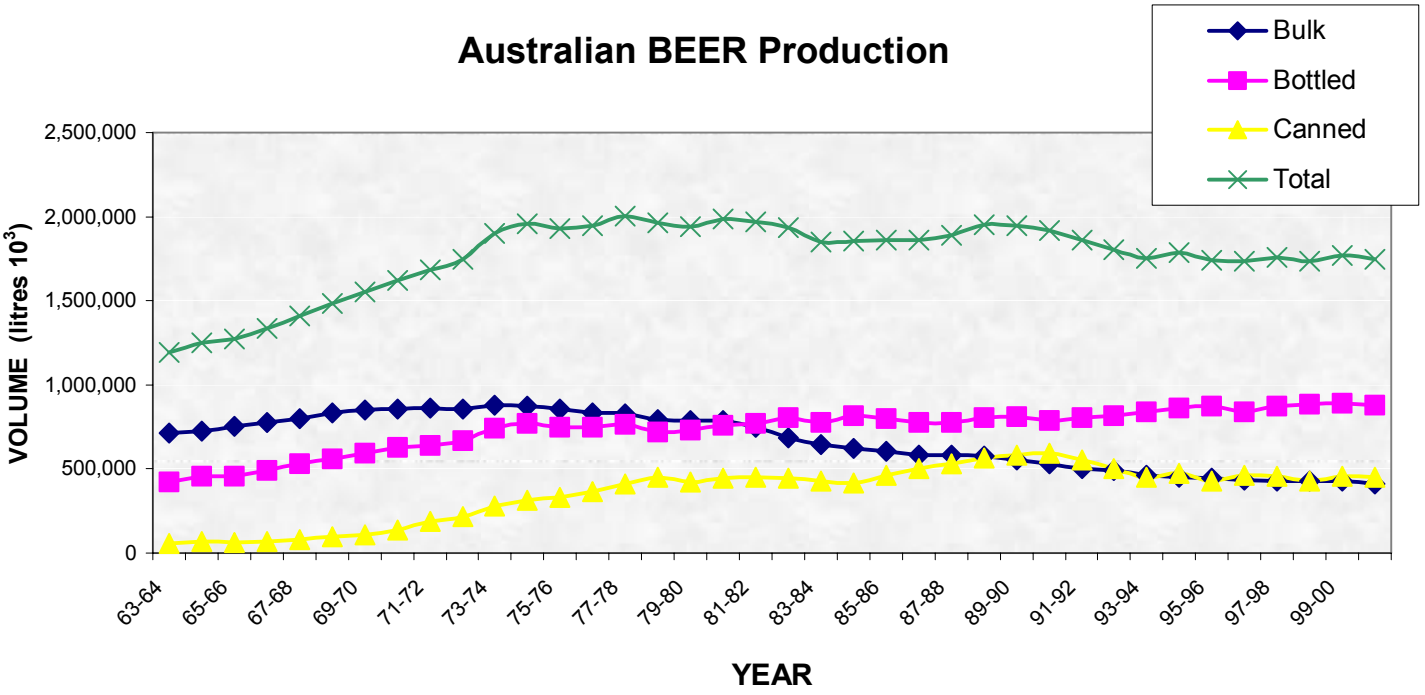

Chart 3.

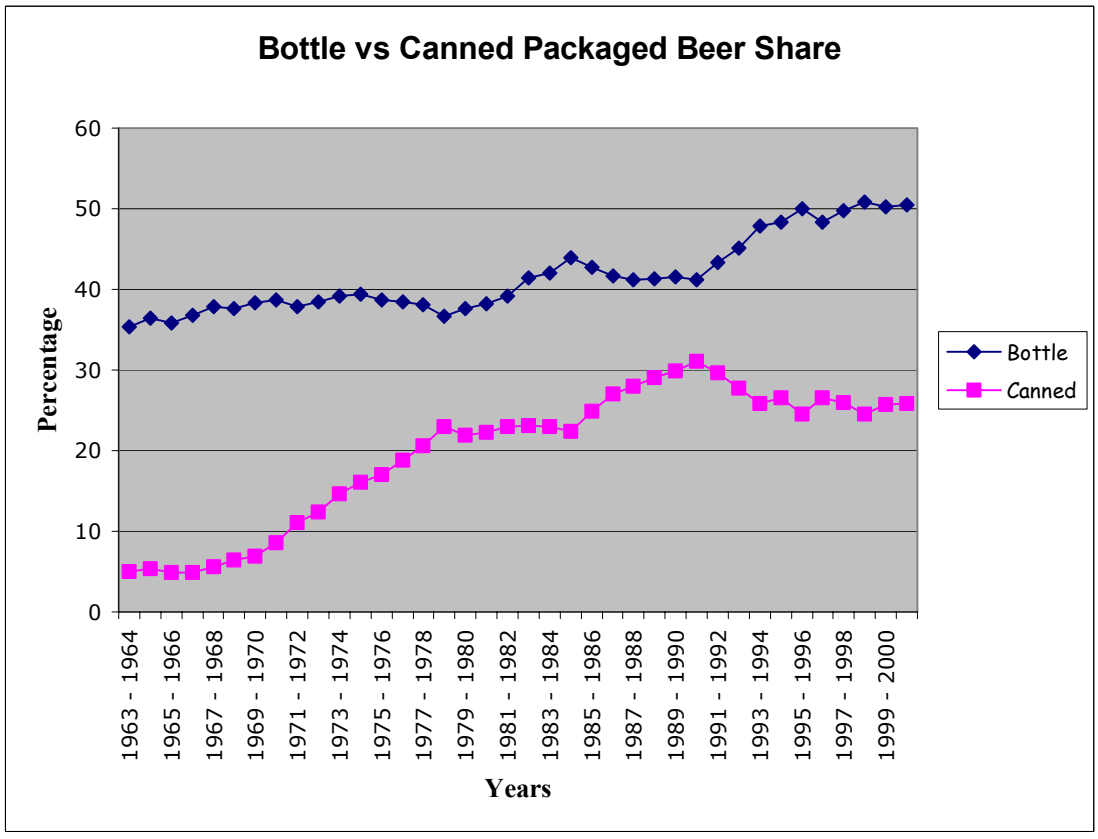

TABLE 1.

BEER Industry Statistics.				
{Sources: **a**; ABS, Historical Microfiche Series 83-065, 83-0				
Production				
	Commodity Code No.			
	172.02	172.04	172.06	
YEAR	**Bulk** (litres*10^3)	**Bottled** (litres*10^3)	**Canned** (litres*10^3)	**Total**[a] (litres*10^3)
1938-39	n.a.	n.a.	n.a.	405,657
1948-49	n.a.	n.a.	n.a.	656,691
1958-59	n.a.	n.a.	n.a.	1,016,494
59-60	n.a.	n.a.	n.a.	1,053,218
60-61	n.a.	n.a.	n.a.	1,074,734
61-62	n.a.	n.a.	n.a.	1,098,501
62-63	n.a.	n.a.	n.a.	1,125,128
63-64	712,183	421,201	59,258	1,192,642
64-65	727,644	455,583	66,473	1,249,700
65-66	753,366	454,855	62,427	1,270,649
66-67	778,379	490,965	65,909	1,335,253
67-68	797,009	532,817	78,443	1,408,268
1968-69	830,841	558,447	95,573	1,484,861
69-70	850,754	594,722	107,813	1,553,289
70-71	855,005	627,651	138,429	1,621,085
71-72	860,511	638,685	185,532	1,684,728
72-73	858,495	670,168	215,882	1,744,545
73-74	878,645	744,312	277,976	1,900,933
74-75	872,701	770,593	313,959	1,957,253
75-76	855,482	746,261	329,971	1,931,714
76-77	832,041	747,480	365,403	1,944,924
77-78	826,291	762,458	412,692	2,001,441
1978-79	793,089	720,018	451,820	1,964,927
79-80	787,159	730,097	425,157	1,942,413
80-81	785,425	758,941	443,374	1,987,740
81-82	744,925	771,812	451,464	1,968,201
82-83	686,595	802,109	446,786	1,935,490
83-84	647,294	778,363	426,232	1,851,889
84-85	624,850	813,875	416,095	1,854,820
85-86	603,736	796,362	462,613	1,862,711
86-87	583,382	774,187	501,451	1,859,020
87-88	583,486	778,198	529,559	1,891,243
1988-89	577,942	806,579	566,230	1,950,751
89-90	555,945	808,725	580,681	1,945,351
90-91	532,305	788,514	595,586	1,916,405
91-92	504,129	806,358	551,818	1,862,305
92-93	490,139	814,027	500,947	1,805,113
93-94	461,375	838,398	452,458	1,752,231
94-95	449,929	863,434	474,209	1,787,572
95-96	444,112	871,878	426,376	1,742,366
96-97	435,091	839,129	460,723	1,734,943
97-98	425,674	875,021	456,310	1,757,005
1998-99	426,872	884,106	426,798	1,737,776
99-00	425,573	888,059	454,249	1,767,881
00-01	412,997	881,414	450,448	1,744,858

TABLE 2.

YEAR	MT VB "Stubby" Weight
1981	240 grams
1984	230 grams
1987	195 grams
1988	185 grams
1988	180 grams
1997	175 grams
2001	170 grams

Web Sites.

http://www.aci.com.au

http://www.fosters.com.au/corporate/brands/beer/vic_bitter.asp

http://www.brba.com.au/members/carlton.htm

http://www.packcoun.com.au/issues18.htm

http://www.pc.gov.au/ic/inquiry/49packag/chap2.pdf,

http://brewing.co.nz/news/businessherald/20001020lion.htm

http://www.abs.gov.au

Glossary

"Ashes" urn	A small wooden urn kept at Lords cricket ground in England. This urn has become the trophy awarded to the series winning side for cricket contests between Australia and England. Although most often held by Australia the English cricket authorities perversely refuse to allow the "Ashes" urn to leave Lords.
Can of VB	375-ml aluminium beverage can containing a very popular brand of lager. The capability to crush in one hand a full unopened can of VB is one of the early benchmarks for Australians attaining manhood status. However, it is a feat diminishing in importance as can wall thickness has been progressively reduced since 1969.
MCG	Melbourne Cricket Ground. Residents of the State of Victoria refer to this sporting venue as the "home" or "headquarters" of Australian cricket. Residents of the other States of Australia treat this assertion with disdain – it being just one more manifestation of Victorian inferiority complex as epitomised by Bill Lawry.
thongs	A type of sandal widely adopted by Australian males for footwear during summer. Usually cleaned with the garden hose while being worn.
Bluesinglet brigade	A socio-economic subset of males. Their title is derived from the standard upperbody underwear item favoured by working class males. A tattered and very faded blue singlet is a group membership badge akin to a school tie.
Douglas Jardine	Arguably, the most hated Englishman ever to visit Australia. Captain of the 1931-32 English touring cricket team Jardine introduced on field tactics Australians consider the epitome of poor sportsmanship. Rather oddly Australians befriended Harold Larwood, the principal weapon in Jardine's "bodyline" attack when Harold settled in Kingsford (near UNSW) after WW2.
Bert Woodfull	Captain of the Australian 1931-32 cricket team. Overheard saying to 'Gubby' Allen, English team manager during the Adelaide Test; "there are two teams out there but only one is playing cricket". Woodfull's remark was leaked to the Press and created a storm. In more recent times strong evidence has emerged that none other than Sir Donald Bradman made the leak. At that time any player who was party to such a leak was

	libel to the severest sanction.
Pie	Popular food item with the bluesinglet brigade. Consists of meat of very dubious origin enclosed in baked pastry. Must only be consumed while being held in one hand and bites taken between alternate swigs of lager.
Bay 13	A sector of the southern stand at the MCG monopolised by the bluesinglet brigade at every Test Match. A seat in Bay 13 subjected the unwary to a match long chorus of foul language and a plethora of witticisms directed at all visiting players, some umpires and every official. Any seat in Bay 13 also featured frequent spraying with lager interspersed with the occasional technicolour yawn.
Tea time	Has its origins in a rather quaint English custom. It is the period between 1540 and 1600 hours in the days play when the cricket players leave the field for "tea". It is also an interlude during which most Bay 13 inmates "point perc at the porcelain". It is inadvisable to attempt to remain seated in Bay 13 during either the lunch or tea adjournments.
Boxing Day	English cricket teams traditionally play five Test matches on their tour of Australia. At least one Test has always been played at the MCG and the first day of that five-day match is always December 26. Boxing Day is a public holiday throughout Australia. The temperature typically exceeds 30degrees C and spouse enforced extended family activities on the MelbourneTest eve generate a powerful thirst.
VB	VB is the acronym for Victoria Bitter. VB is the national market leader for the "full strength" segment of the Australian beer market. Its market success is sometimes ascribed to the simplicity of the acronym for which even the most inebriated have high brand name recall. This assertion is notional supported by the fact that VB claimed market leadership in 1981 from a Tooth & Co. lager titled KB.
Alcoa	A wholly owned subsidiary of Alcoa (USA) this company is vertically integrated into the entire bauxite mining, alumina refining, aluminum ingot production and finished product milling in Australia.
Comalco	For most of this period this company was a subsidiary of Kaiser Aluminum USA. Like Alcoa it is totally vertically integrated, albeit on a consortia basis, in aluminum industry.

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