BRAND FOOTPRINT

A GLOBAL RANKING OF THE MOST CHOSEN CONSUMER BRANDS

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KANTAR WORLDPANEL

FOREWORD

Eric Salama
Chief Executive Officer
Kantar

Brand Footprint is the leading study of the most chosen and fastest-growing global FMCG brands. With behavioural purchase data collected from more than 40 countries worldwide, it provides a comprehensive, up-to-date picture of the most important consumer trends and the strategies deployed by winning FMCG brands—at both a global and local level.

Now in its sixth edition, *Brand Footprint* stands tall as one of Kantar and WPP's flagship intelligence products. It plays a vital role in helping marketers, retailers and manufacturers reflect on the success of their brands over the past year, in the context of the global FMCG market.

Drawing on Kantar Worldpanel's unique CRP metric, coupled with the views of some of the world's most successful FMCG brands, *Brand Footprint* offers unrivalled insight on market changes and future growth prospects.

These are challenging and competitive times, but there is undoubtedly reason for optimism. Whether you're a global giant or a local player, understanding shopper behaviour is paramount to driving growth and increasing market share. *Brand Footprint* is your guide.

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* GDP: Gross Domestic Product

73%

POPULATION COVERAGE

Josep Montserrat
Chief Executive Officer
Kantar Worldpanel

BRAND FOOTPRINT 2018: CELEBRATING GROWTH IN CHALLENGING TIMES

Last year, I wrote of the unprecedented changes happening across the world's political and economic landscapes—and the increasingly unpredictable waters that FMCG brands of all shapes and sizes would have to navigate as a result.

Twelve months later, despite the diversity of macroeconomic challenges the industry is facing, the primary objective for most brands – and their number one goal – is growth. After several years prioritising efficiency gains and cost savings to deliver value to stakeholders, most brands have realised that top-line growth is now the best way to achieve this.

The battle for consumer supremacy between local and global brands also rages on. They are fighting to find more shoppers, and to develop the relationship those people have with their brands—and they can win by leveraging their messages, their brand purpose, their availability, and their product or service's superior performance.

But things are further complicated by the global proliferation of digital devices, multi-screening, content distribution and the omnichannel strategies required to take advantage of them.

As we will explore further, the key metrics for a successful brand growth strategy are penetration and Kantar Worldpanel's exclusive Consumer Reach Point (CRP) measure, which allows us to rank the most successful brands by the number of times they are chosen by consumers throughout the year.

Despite this complex picture in these challenging times, there are brands with truly inspirational stories to tell—finding new shoppers and growing in a market that is experiencing slowdown across the board.

In this, the sixth annual edition of *Brand Footprint*, we are celebrating those brand success stories. *Brand Footprint* remains the leading ranking of FMCG brands, informing the business decisions of marketers, brands and agencies around the world.

The online ecosystem continues to transform with every passing year. For FMCG brands, new revenue opportunities will one moment be in vogue, before falling by the wayside as consumer behaviour evolves across different platforms.

Both in-store and online, an understanding of shopper choice is crucial for an accurate, in-depth picture of the global FMCG landscape.

To better review the omnichannel strategies – and e-commerce in particular – we have introduced an online-only ranking this year. Our analysis shows up some surprising brands heavily outperforming competitors online (look out for the first baby brand to feature in any *Brand Footprint* ranking) as well as those struggling to reach the same level of dominance they enjoy offline.

Since *Brand Footprint* was first published in 2013, we've built up an unrivalled picture of the choices consumers make, dissecting the performance of thousands of brands in order to help them grow both now and into the future.

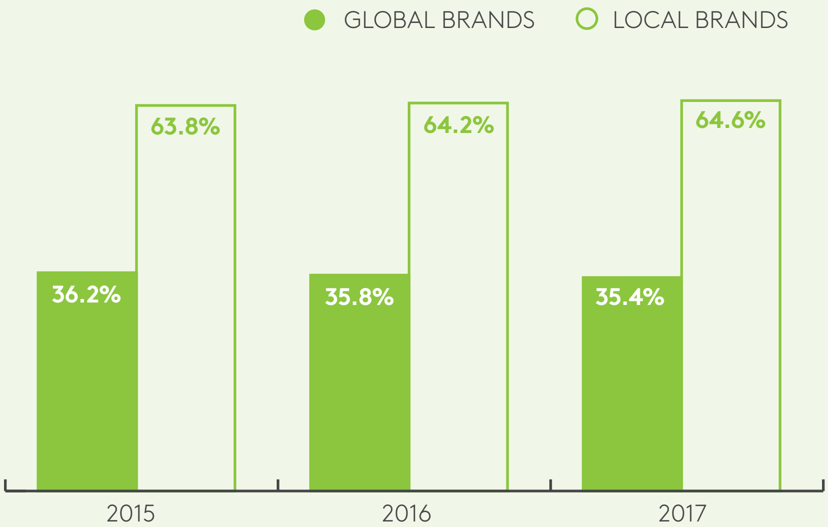
This publication is the largest of its type, covering over 18,000 brands in 43 countries across five continents—and representing 73% of the global population. This year's edition once again proves an essential guide to the trends affecting the FMCG landscape, the global and local factors that have created challenges for manufacturers, and the opportunities for growth that lie in wait.

2017 IN FMCG

The global FMCG industry has faced tough times in recent years. Even in the world's fastest-growing regions, FMCG performance has remained sluggish—matched by global growth of just 1.9% in 2017. The largest contributor to FMCG – the USA – saw only 0.5% growth, while Latin America grew due to high inflation rates rather than buoyed consumer confidence.

However, there are many brands that have bucked the trend and achieved growth against the odds. We define local brands as those with a presence in a single market, while regional brands are present in two or more, and global brands cross at least two continents. It is possible for brands to thrive in this challenging environment—you just need to know how.

Global versus local brand share of spend



The continued march of local brands

We have seen a trend of local players winning share from their global competitors in recent years, and that continued in 2017.

Local brands tend to adapt to market needs and trends, and higher penetration gains come more easily. But global brands manage performance across multiple countries and continents—making them less agile and meaning overall growth is more difficult. Ultimately, even the fastest-growing global brands will experience decline somewhere.

As we will see in the brand stories throughout this paper, some local players gain more CRPs in a single market than others do across their entire global portfolio.

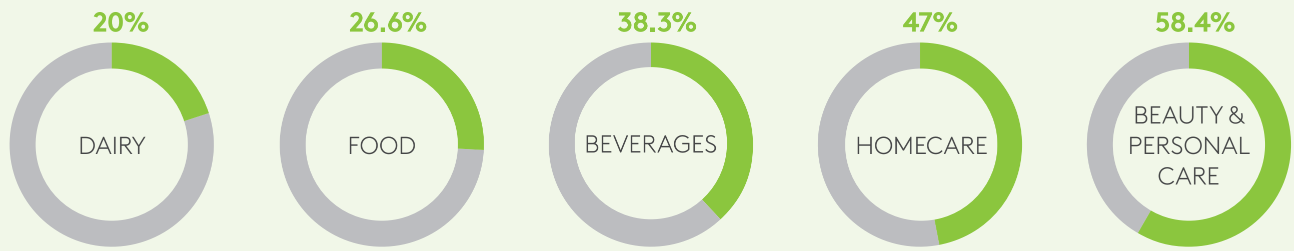
An increase in share of less than 1% over two years may seem trivial, but every 0.1% gained by local brands is worth US $500m.

A local brand's sector also influences choice. Shoppers generally value local brands for consumables, with an increased desire for locally sourced products at affordable prices. These brands also tend to better connect with local tastes.

While at first glance it appears they are less of a threat to global players in homecare and beauty and personal care, a deeper look reveals local brands are growing more than twice as fast in the former, and significantly in the latter.

Only within beverages did global brands surpass local ones in 2017. Later, we will look at Sprite – a top performer – and its recipe for success. As FMCG struggles continue, it's more important than ever to understand the fundamentals to growth.

Global brand share of spend by sector



Consumer reach points (CRPs) explained

Our CRP metric has undergone a small name change this year, with 'Occasions' renamed 'Consumer Choice'. While the number of occasions is the main driver of consumer choice, this alone fails to capture brands chosen for separate needs within a single trip—for example a brand present in both skincare and haircare. This won't impact most brands but is important for any that cross multiple categories.

POPULATION
NUMBER OF HOUSEHOLDS IN A COUNTRY

PENETRATION
% OF HOUSEHOLDS BUYING YOUR BRAND

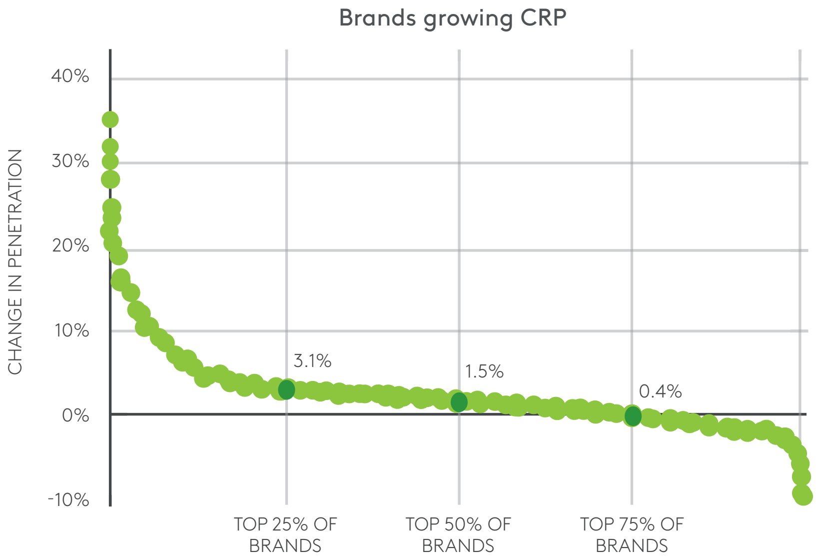
CONSUMER CHOICE
NUMBER OF INTERACTIONS WITH YOUR BRAND ACROSS CATEGORIES IN A YEAR

FUNDAMENTALS TO GROWTH

Benjamin Cawthray
Global Thought Leadership Director
Kantar Worldpanel

This year's *Brand Footprint* is our most comprehensive view of brand growth ever, with more data collected on more brands around the world. Despite FMCG growth remaining sluggish in 2017 – with a higher number of brands in decline – there is certainly reason for optimism amid opportunities for growth.

In 2017, the global population made 354 billion brand choices (excluding private label). That was an increase of almost one billion CRPs, meaning that – while fewer brands were in growth – the net impact of those growing outweighed the effect of those in decline. This highlights the importance of looking beyond the headline statistics to understand what success looks like in the current market.



Finding new shoppers is key

Last year's *Brand Footprint* discussed the predictable patterns of growth for FMCG, and the irrefutable fact that the world's biggest brands attract the most buyers. It's worth reminding ourselves again that the fundamentals do not change—in 2017, 90% of the brands that increased CRPs did so by adding new shoppers to their portfolio.

Measuring success

Brands that understand what 'good' looks like – in the context of the current economic climate, and versus competitors and similar brands – can measure against realistic benchmarks for success. With that in mind, setting sensible penetration goals is key. Across all brands that grew their CRP in 2017, the global median penetration increase was 1.5%. Of the brands that recorded growth in 2017, only 25% achieved more than 3% penetration increase—illustrating how hard it is to grow penetration dramatically in a single year.

While the drivers of CRP growth remain constant across countries, we do see fluctuations by market in terms of the average penetration uplift. The specific country a brand is selling in – rather than the wider region – should be the first lens looked through when setting growth targets.

Size matters

The second lens to consider – and one with just as big an impact on how success should be measured – is a brand's size.

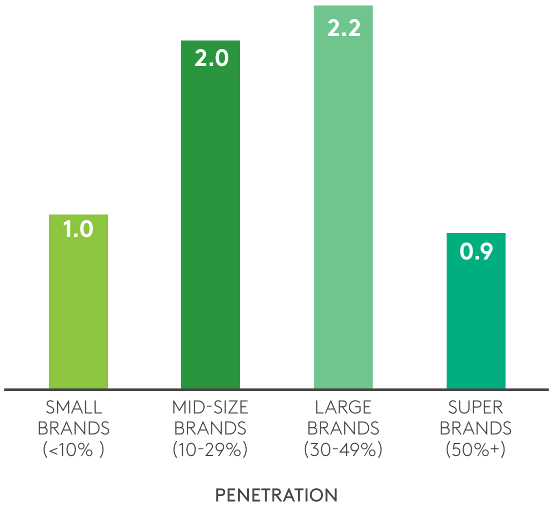
Mid-sized and large brands see the highest penetration gains (in actual terms, rather than percentage terms) thanks to established relationships that help ensure optimum shelf positioning and more prominent promotions.

Brands this size also tend to have the resources to invest in innovation—one of the biggest influences on success.

Once a company achieves 'super brand' status within a market (with penetration above 50%) we reach a tipping point. Beyond 50% penetration, many super brands will be reaching almost all the available category shoppers.

No brand has 100% category penetration, so there will always be more shoppers to find—and doing this will also increase the number of times the brand is chosen by existing customers.

Median penetration change by size of brand



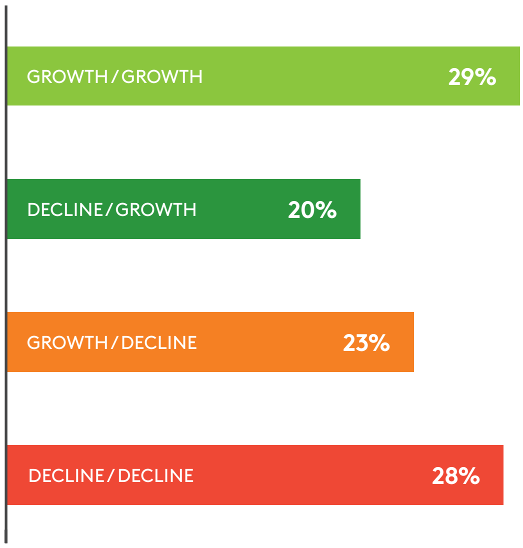
Consistent growth

The third lens is a brand's performance in the previous year, and its impact on growth the following year. Most commonly, brands will perform in a similar vein to the preceding year, as momentum takes hold. For example, 29% recorded growth in 2016 and followed up with growth in 2017, while 28% recorded a decline in both years.

Reversing decline by recording growth the following year is tough, but we saw 20% of brands do just that in 2017.

If a brand does turn things around, however, any penetration gain is likely to be lower than the global norm—our data shows the median for decline-to-growth brands was a 1.1% penetration increase in 2017.

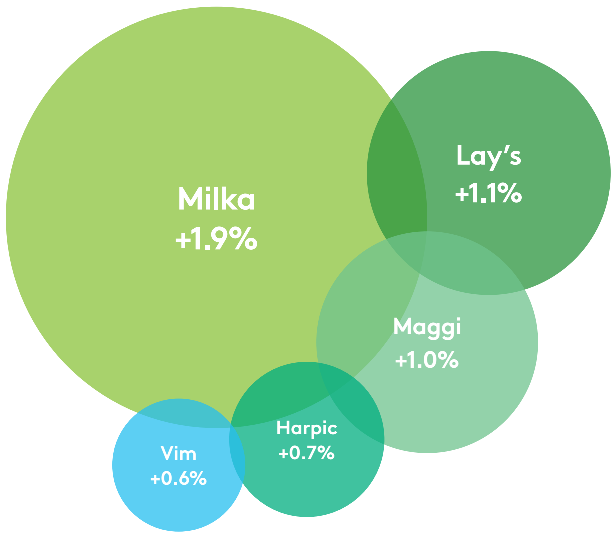
And, when we return to the drivers for growth, we can see that the brands displaying a consistent increase in CRPs are doing so predominantly through penetration—the clearest indication yet of the importance of penetration for longer-term growth.



Global targets

We've looked at brand performance within a single country but, for brands with a global reach – that are attempting growth across several markets – penetration gains are more difficult still. In fact, the median is +0.2%, with almost half of all growing global brands posting gains of just 0.1%.

Milka is the only brand showing a global penetration increase above +1.5% in 2017 (+1.9%). Lay's (+1.1%) and Maggi (+1%) have also performed strongly, and are two of the top five global brands for penetration growth. We will explore their stories in more detail later in this publication.



Top 5 global brand penetrations gains

LEVERS FOR GROWTH

For any brand, the best way to find new shoppers is to pull on as many of our strategic levers for growth as possible. Before we reveal 2017's Top 50 ranking, here's a refresher.

Look out for the associated icons throughout this year's publication, as we indicate which levers the most successful brands have pulled.

MORE TARGETS

To attract new buyers who do not currently purchase the brand or category, brands can create new variants which appeal to a broader range of individual requirements.

MORE PRESENCE

Many brands are increasing the number of geographical locations in which a shopper can choose the brand. This often requires adapting product ranges to suit local tastes.

MORE CATEGORIES

Stretching brands across categories can attract buyers whose needs are not met by any of the existing brands' function.

NEW NEEDS

Establishing a new category is the ultimate lever for growth. Brands that identify new needs and create effective and efficient ways to meet them, benefit from first-to-market advantage.

MORE MOMENTS

People buy a repertoire of brands, and at every category occasion there's a chance they might purchase yours. Brands must ensure they are available and relevant in as many moments of consumption as possible, by creating new formats or flavours for a broader range of occasions.

How to set penetration targets

1. Whether global or local, set country-specific targets
2. For mid-sized or large brands, be more ambitious
3. Be realistic if recovering from decline

BRAND FOOTPRINT 2018 GLOBAL RANKING TOP 50

2017 rank	2017 change	Brand name	Manufacturer	CRP growth %	Penetration %	Consumer choice	CRP (m)	
1	0	Coca-Cola	The Coca-Cola Company	-4	41.3	12.7	5817	●
2	0	Colgate	Colgate-Palmolive	0	61.6	5.7	3886	●
3	1	Maggi	Nestlé	14	30.4	7.4	2489	↑
4	-1	Lifebuoy	Unilever	-7	27.5	7.8	2375	↓
5	2	Lay's	PepsiCo	6	29.1	6.4	2073	↑
6	0	pepsi	PepsiCo	-5	22.7	7.8	1971	●
7	-2	NESCAFÉ	Nestlé	-8	22.3	7.9	1955	↓
8	0	Indomie	Indofood	-1	4.7	34.9	1817	●
9	1	sunsilk	Unilever	1	23.8	6.8	1799	↑
10	-1	Knorr	Unilever	-2	27.1	5.8	1748	↓
11	0	Dove	Unilever	5	36.8	4.3	1748	●
12	0	LUX	Unilever	0	32.6	4.2	1526	●
13	0	Nestlé	Nestlé	0	28.5	4.5	1439	●
14	0	Sunlight	Unilever	-8	11.4	10.4	1322	●
15	0	Downy	Procter & Gamble	-1	14.2	8.2	1290	●
16	0	PALMOLIVE	Colgate-Palmolive	-9	16.2	6.1	1105	●
17	2	Sprite	The Coca-Cola Company	1	24.8	3.8	1040	↑
18	4	BIMBO	Grupo Bimbo	3	8.3	10.8	989	↑
19	-2	Pepsodent	Unilever	-10	12.5	7.1	985	↓
20	0	DANONE	Danone	-2	14.1	6.2	970	●
21	2	Heinz	The Kraft-Heinz Company	2	18.5	4.7	970	↑
22	8	Vim	Unilever	11	15.7	5.4	948	↑
23	3	head & shoulders	Procter & Gamble	3	22.7	3.7	944	↑
24	-6	Tide	Procter & Gamble	-9	20.7	4.1	940	↓
25	-1	Kraft	The Kraft-Heinz Company	0	14.5	5.8	930	↓

Sources: Kantar Worldpanel, IRI (USA), IMRB (Sri Lanka, Bangladesh), GfK (Russia, South Africa, Italy, Poland, Germany) 2017
See page 4 for CRP definition

2017 rank	2017 change	Brand name	Manufacturer	CRP growth %	Penetration %	Consumer choice	CRP (m)	
26	-1	OREO	Mondelēz International	1	24.8	3.4	925	↓
27	-6	PANTENE PRO-V	Procter & Gamble	-6	20.4	4.1	922	↓
28	1	Rexona	Unilever	-1	19.6	4	876	↑
29	-2	AJINOMOTO	Ajinomoto	-5	6.1	12.6	862	↓
30	3	NIVEA	Beiersdorf	3	22.9	3.3	838	↑
31	4	Brooke Bond	Unilever	6	10	7.5	833	↑
32	-4	MILO	Nestlé	-7	7.5	9.8	819	↓
33	-1	FANTA	The Coca-Cola Company	-2	20.4	3.6	818	↓
34	5	Cheetos	PepsiCo	7	14.6	5	810	↑
35	1	QUAKER	PepsiCo	2	15.2	4.7	795	↑
36	-2	Surf	Unilever	-4	6.5	10.7	779	↓
37	1	McCormick	McCormick & Company	1	13.4	5.1	763	↑
38	-7	TANG	Mondelēz International	-11	10	6.8	758	↓
39	2	HERSHEY'S	The Hershey Company	1	12.6	5.2	735	↑
40	2	Doritos	PepsiCo	0	11.9	5.4	724	↑
41	5	Dettol	Reckitt Benckiser Group	6	18.8	3.4	709	↑
42	1	Kinder	Ferrero	-3	12.1	5.2	697	↑
43	-3	ACTIVIA	Danone	-8	10.6	5.7	680	↓
44	1	Safeguard	Procter & Gamble	0	12.1	5	678	↑
45	-1	Closeup	Unilever	-4	17.5	3.5	676	↓
46	4	Barilla	Barilla Group	1	13.4	4.4	653	↑
47	0	Del Monte	Del Monte Foods	-4	12	4.8	638	●
48	0	Yakult	Yakult	-4	8.4	6.8	635	●
49	2	Lipton	Unilever	-1	13.7	3.9	600	↑
50	5	ARIEL	Procter & Gamble	4	13.7	3.9	598	↑

FASTEST-GROWING GLOBAL BRANDS

Every year, *Brand Footprint* celebrates fast, sustainable growth. Here, we focus on the fastest-growing global brands—and how they have used the levers for growth to increase penetration and CRPs.

Premium penetration

Head & Shoulders, the star of the P&G portfolio, saw strong performance in Asia—meaning it is now chosen by more than 250 million shoppers. The region accounts for 68% of Head & Shoulders' total CRP, and 70% of its CRP growth.

In the Philippines and Indonesia – countries driving half its total penetration growth – the shampoo brand has focused on distributing its most popular variant, Cool Menthol, through traditional channels. In China, Head & Shoulders Supreme has pushed it into conditioners—a new category that has seen it attract more upmarket shoppers.

Head & Shoulders' success in these countries is proof that a brand's core range should play hand-in-hand with its innovation strategy.

Communicating clearly

A top performing brand, Lay's gained 123 million CRPs (including Sabritas and Walkers Crisps)—despite decreased CRPs in ten markets.

Lay's recruited almost two million new shoppers in Russia alone. While families with children remain the key target, Lay's Stax have attracted younger shoppers. Collaborations, including with pop-rap artist Timati and comedian Garik Kharlamov, have contributed to a 26% increase in brand volume.

Innovation has been instrumental to Lay's success in Indonesia. New flavour launches – such as Fried Chicken, Spicy Lobster, Pepper & Lime, and Steak – added five million new shoppers, and its "Life Needs Flavour" campaign encouraged sharing moments. An online campaign for a special "smile pack" offered shoppers prizes in return for social media selfies.

In India, Lay's bounced back from declining CRPs in 2016—inspiring a turnaround through promotions on small- and mid-sized packs, and its "more chips in every bag" message. Success here meant Lay's reclaimed occasions it had lost to traditional salty snacks, adding five million Indian shoppers in 2017.

Innovating for growth

A *Brand Footprint* regular, Dove is one of the few global brands adding CRPs year-on-year. The beauty and personal care giant did it again in 2017, accelerating growth from 2% to 5% and adding 86 million CRPs.

Dove products are now purchased by 410 million households – an increase of more than 11 million new shoppers – and category expansion through product innovation is a key driver. As we saw in last year's Innovating for Growth paper, this is much harder than it sounds—less than half (45%) of global innovation has a positive category impact.

One such innovation was Baby Dove, launched first in Brazil, India and select South American markets in 2016, before rolling out in markets including the UK and the USA in 2017.

Yet Dove's positive showing in deodorants, skin cleansing and haircare was not matched by a flat performance in skin moisturising.

2017 saw the brand expand into natural beauty, with launches including Dove Nourishing Secrets and Dove Men+Care Elements. In haircare, Dove tackled the anti-dandruff segment with its Dermacare Scalp range, and increased shelf-presence in skin cleansing, with new formats such as shower foams and body scrubs.

The comeback king

Maggi increased CRPs by 365 million, making it the fastest-growing global brand in our ranking. Significantly, this growth came almost entirely from India.

Rewind to 2016 and Maggi faced disaster, losing nearly 200 million CRPs in India – a country representing 29% of its CRPs – after several high-profile product recalls. But manufacturer Nestlé invested heavily in media spend and rebuilding trust to get products back on shelves, and today Maggi's CRPs outstrip its 2015 position.

Some 20 million shoppers returned last year, choosing Maggi products more often across different categories and signalling a remarkable comeback.

There was notable growth elsewhere, too. The rising price of meat in Egypt saw consumers use stock cubes to flavour rice and vegetables, and Maggi reaped the rewards—it's the fastest-growing brand in the category, with a 6% penetration increase across the country.

Nigeria is a country that loves to cook, and eight in 10 households will use a Maggi seasoning product. As recession has bitten, Maggi has introduced new products to meet changing needs—including the Maggi Naija Pot. This pack of 50 seasoning cubes offers better value, and its launch was supported by promotional activity including advertising and in-store activations.

Defying the gloom

2017 saw beverage brands lose a combined two billion CRPs. Yet Sprite defies the slowdown, gaining CRPs for the second year running through strong growth in key markets.

In the US, where it gained the most CRPs globally, Sprite increased penetration amongst younger consumers—recruiting basketball star LeBron James to drive awareness. American consumers also chose Sprite more often to accompany dinners and lunches, both at home and on-the-go, as well as for treat occasions.

In Russia, Sprite increased CRPs by 16%. Product innovation was key—especially Sprite Cucumber, which offered a new taste and experience. Its success was such that Sprite would otherwise show a decline in Russia.

Sprite used a combination of marketing and innovation in Indonesia to grow CRPs there by 9%. Its "Nyatanya Nyegerin" (Truly Refreshing) campaign included TV commercials featuring voiceovers from popular local comedian Cak Lontong, while it targeted a younger demographic and specific price tier (IDR 3,500) with a new 250ml format—helping grow penetration by 2% in middle-income households.

Above-the-line campaigns in South Korea – such as one with a member of K-pop girl group Apink – created more moments with younger shoppers and a 23% increase in CRPs. Messages such as "Sprite & Meal" positioned the soft drink as the perfect accompaniment.

A resurgence in the UK saw Sprite achieve a 1.5% increase in penetration and 19% growth in CRPs—spearheaded by its Regular and Zero variants. Regular found new shoppers in Asda supermarkets, while Zero saw penetration gains in retailers including the discounter Aldi.

ONLINE BRAND RANKING

Eric Batty
Global E-commerce Business Development Director
Kantar Worldpanel

E-commerce represents 5.8% of the global FMCG market and remains the most dynamic channel worldwide, with a further 15% growth in 2017. For manufacturers, not investing online is a threat to their growth—especially in countries where FMCG evolution is flat.

For the first time, we are publishing a ranking based on online CRPs—to measure who the big winners in e-commerce are so far.

We have focused on four markets where online shopping is most developed: South Korea, China, the UK and France.

Online success is driven by category

E-commerce answers to very specific shopper needs. Young, well-off and time-poor families are seeking convenience by purchasing online—and, as a result, baby and homecare brands top our ranking by responding to this trend.

Beauty and personal care brands also stand out online. Beyond convenience, e-commerce also adds easy access to a wider choice of products. It's interesting to see that, in beauty categories, specialist retailers display significant growth by offering experiences.

Key trends in e-commerce

Stock-up shopping is twice as important online

Baby care, homecare and personal care continue to thrive online

Food and beverage brands struggle for impulse purchases

Baby brands

Huggies sits 98 places higher in our online ranking than it does in the traditional Brand Footprint table. It's the typical, bulky product that speaks so well to e-commerce trends—adapted to both sociodemographic profiles (young families with children) and stock-up shopping missions.

Homecare

Kleenex, Fairy and Dettol rank second, third and fourth respectively, with around 10% of their CRPs coming from online channels. They are replenishment products, and popularity is driven by convenience—Dettol climbs 37 places in the online ranking, while Kleenex is 32 positions higher and Fairy is up by 21.

Personal care

L'Oréal Paris and Nivea only appear in the top 10 brands online, essentially driven by purchases from Chinese customers.

Food and Dairy

For food and dairy brands, we generally observe a poor comparative performance online due to the lack of impulse purchasing. There are exceptions to the rule, which set a precedent and can be learned from—such as Yoplait, the diary brand, which sits fifth place in our online ranking.

Beverages

The beverage business needs to crack the online code and prompt e-commerce shoppers to buy on impulse. While we can see mineral water and orange juice in the top brands online in France, the biggest hitters offline slip below their Brand Footprint rank—with both Coca-Cola and Pepsi placing lower.

Brand	Online % of Total CRPs	CRP (m) 2017
Huggies	33.2%	10.6
Kleenex	11.6%	9.9
Fairy	9.5%	9.9
Dettol	9.4%	7.1
Yoplait	9.3%	14.7
L'Oréal Paris	8.0%	11.5
Nutella	7.8%	7.3
Quaker	7.8%	8.2
Nivea	7.4%	12.8
Comfort	7.4%	8.6
Heinz	7.1%	30.4
Dove	7.0%	9.8
Wall's	6.8%	9.9
Tropicana	6.2%	7.1
KitKat	6.1%	6.8
Activia	5.6%	11.5
Nescafé	5.2%	12.8
Colgate	4.9%	15.0
Président	4.8%	10.8
Coca-Cola	4.6%	28.6
Nestlé Good Food, Good Life	4.6%	11.1
Knorr	4.4%	7.4
Pepsi	3.9%	10.7
Oreo	2.8%	8.6
Lay's	2.6%	8.1

This ranking features the top-performing FMCG brands based on their online CRPs.
We have focused on four markets where online shopping is most developed: South Korea, China, the UK and France.

GLOBAL MANUFACTURER RANKING

Simon Skeldon, Global Account Director, Kantar Worldpanel
Thomas Spony, International Consumer Insight Director, Europanel
Tom Pattinson, Global Account Director, Kantar Worldpanel

For the first time, Brand Footprint this year includes analysis of how the world's biggest manufacturers are impacted by their brands' performance—something we have achieved by reviewing all the brands in a company's portfolio, far beyond the top 50.

We have classified the most successful global manufacturers by CRP to create a ranking of the top 18. Their brands were chosen 112 billion times in 2017—32% of global CRPs. And these manufacturers – which have both a global and local footprint – represent 40% of total brand spend, showing that shoppers are still willing to pay a premium for the right brand.

Looking after Number One

Nestlé and PepsiCo are the two manufacturers that have added the most CRPs to their portfolio in 2017—both showcasing the importance of looking after their number one brand. We have already seen that Maggi and Lay's had a positive 2017 – bouncing back after a decline in their CRPs in 2016 – turning around Nestlé's overall performance and accelerating PepsiCo's.

These brands are hugely important to their parent manufacturer. Without Maggi, Nestlé's growth would be flat, while Lay's represents two thirds of PepsiCo's. Across all global manufacturers it holds true that, for the parent company to be growing overall, the biggest brand in their portfolio needs to be flat or in growth. Even in a situation where more brands are growing than declining, it is very difficult for manufacturers to make up the losses of their number one brand.

2017 Rank	Manufacturer	CRP 2017
1	Unilever	36 BN
2	Nestlé Good Food, Good Life	12.4 BN
3	P&G	11 BN
4	PEPSICO	10.5 BN
5	The Coca-Cola Company	9.7 BN
6	COLGATE-PALMOLIVE	6.6 BN
7	Mondelēz International	5.3 BN
8	DANONE	4.6 BN
9	KraftHeinz	3 BN
10	MARS	2.6 BN
11	Reckitt Benckiser	1.9 BN
12	Kimberly-Clark	1.8 BN
13	L'ORÉAL	1.6 BN
14	Henkel	1.5 BN
15	FERRERO	1.5 BN
16	Kellogg's	1.4 BN
17	SC Johnson A Family Company	1.2 BN
18	Johnson & Johnson	1 BN

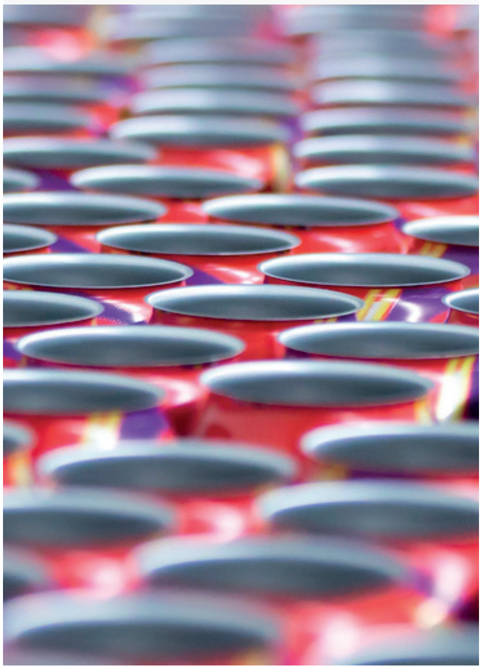
The CRP measure predominantly captures FMCG brands within manufacturer portfolios

UNILEVER LEADS THE WAY

With a significant presence across many categories, it comes as no surprise that Unilever tops our ranking, with its brands chosen 36 billion times around the world each year. Its vast portfolio, and its presence in all countries, gives us almost 1,000 different brand choices to analyse—meaning we have a deeper understanding of its growth patterns.

In 2017, more than 90% of Unilever's CRP movements were in the plus or minus 10 million range. However, the real drivers of performance come into play when growth or decline is greater than this. Understanding which brands – and which countries – are causing these shifts, will act as a guide for what needs fixing and what needs replicating elsewhere. This is true for all manufacturers.

For Unilever, one of the biggest drains on its global CRPs in 2017 was Lifebuoy – its number one brand globally – which lost more than 10 million in both India and Indonesia. However, Unilever is a manufacturer with many great brands and some of these tail-end losses have been recovered, particularly by the performance of Surf Excel detergent in India.



PROCTER & GAMBLE: TURNING A CORNER?

P&G is the third-largest manufacturer globally, chosen over 10 billion times a year across multiple categories. 2017 saw CRP losses slow versus 2016—with its beauty and personal care brands turning the corner.

Leading the way are P&G's haircare brands, thanks to positive performance in Europe and Latin America. Head & Shoulders has added more CRPs than any other P&G brand, and Pantene has found growth in Latin America. Macro trends in facial hair fashions and aggressive competition from subscription services spelled a challenging year for Gillette—but it saw continued growth in India and Mexico, and performance in Brazil was steady. With an average in-country penetration of more than 20%, India offers huge potential for the brand.

While P&G continues to lose CRPs in homecare, there are shoots of recovery—such as Ariel's growth. But Downy – P&G's number one brand in terms of CRP – saw slight decline, making it very hard for the overall portfolio to be in growth. If Downy can stem shopper losses in Indonesia and continue success in the USA, it – and P&G – has a good chance of returning to growth.

BEYOND THE COCA-COLA BRAND

The beverages industry continues to be a challenging one, not least due to increased scrutiny on products high in fat, salt or sugar, and a trend towards more 'natural' choices. While it remains the most chosen of all global FMCG brands, the Coca-Cola brand did suffer declining CRPs in 2017.

Its 3.4% decline can be explained by significant losses in a small number of highly important markets. Its trade in Mexico accounts for nearly half of all losses this year, while Latin America as a region has been challenging. Coca-Cola will hope that, as its zero-sugar variants continue to reach new markets, penetration losses in its cola business will slow.

But there remain plenty of positives for its parent manufacturer. 2017 saw The Coca-Cola brand grow in close to 40% of countries, with its Sprite and Minute Maid brands making strong progress. And, as it continues to become a 'total beverages' company, it's significant to note that four of the top five CRP increases for the business this year were driven by brands that are not part of the Coca-Cola brand stable.

COLGATE PALMOLIVE: GROWING PENETRATION

Owner of the number one brand for penetration globally, Colgate-Palmolive often operates in a lofty position within its categories. Some 18 of its brand-country combinations have a penetration of 80% or higher, but CRPs have fallen in 2017.

Two-thirds of the manufacturer's CRP losses were due to Palmolive's performance in the Philippines, with shoppers switching to competitors—another example of shifts in the extreme ends of a manufacturer's portfolio significantly impacting its overall growth.

Challenger brands and local players remain a threat, but there are signs of strong performance under pressure—especially for Colgate in India and Brazil, where penetration is already at more than 85%.

Consumer Reach Points (millions)

See page 31 for coverage

Sources: Kantar Worldpanel, IRI (USA), IMRB (Sri Lanka, Bangladesh), GfK (Russia, South Africa, Italy, Poland, Germany) 2017


Spain
140
Coca-Cola
France
223
Herta
Germany
299
Dr.Oetker
Poland
241
MLEKOVITA
Italy
254
Mulino Bianco
Russia
484
Mainland China
1218
伊利
South Korea
103
Taiwan
68
IMEI
Vietnam
54
VINAMILK
Philippines
812
Lucky Me!
Thailand
294
Dutch Mill
Malaysia
40
Maggi
Indonesia
1230
Indomie
Bangladesh
248
sunsilk
Sri Lanka
101
Munchee BISCUITS
South Africa
130
Sunlight
Nigeria
464
Indomie
Ghana
65
ONGA
Saudi Arabia
535
المراعي
Almarai
Kenya
74
Royco
India
4623
PARLE
Egypt
513
العروسة
El AROSA

PATANJALI®
Prakriti ka Aashirwad

FOCUS ON PATANJALI

Ravikumar Narayanan
Group Account Director
Kantar Worldpanel

Sometimes, the most impressive growth stories can be heard locally.Here, we explore the local brands growing CRPs and penetration in specific markets—and why they should be celebrated just as much as their global peers.

We begin with Patanjali, a brand that featured in last year's *Brand Footprint* but that deserves another, more in-depth analysis given its continued success throughout 2017. While Maggi remains the fastest-growing brand with a global reach, Patanjali's jaw-dropping increase of 400 million CRPs in Asia makes it officially the biggest grower in our ranking.

Patanjali has seen stunning growth over the past two years. From 14% penetration in 2015, the brand leapt to 45% in 2017—more than 85 million new shoppers. Any brand achieving such success will undoubtedly pull more than one lever for growth, and Patanjali does not disappoint. It's pulling on all five.

More Targets

Launching suitable variants has helped expand its reach to new households with diverse needs. In Patanjali's second-largest category, bathing soaps, it has a range of products that each contain a different natural ingredient with a specific benefit. Most only buy one type of bathing soap, but Patanjali now reaches additional households with alternative products.

More Presence

Reaching new geographies has also helped Patanjali maintain momentum. In 2017, it focused its marketing activity in Southern and rural India—with South India seeing the highest penetration growth (183%) and rural areas having far higher growth than urban.

More Categories

Category expansion means it now has more than 30 products, but the retention of the Patanjali brand name across its portfolio has ensured unified branding and communication. It's paying off, with Patanjali reaching more households and inspiring existing buyers to buy a wider range of products. Customers now choose an average of 3.1 Patanjali products in 2017, versus 2.6 in 2016.

New Needs

Patanjali's flagship toothpaste is designed to address pain relief—a key need for Indian consumers. According to Kantar Worldpanel's research, relief from tooth pain or sensitivity, or swollen or bleeding gums, are among the top factors attracting Indian consumers to the product.

Patanjali is unique in that pain relief is not a benefit associated with any other mainstream toothpaste in the Asian market, and it plays up its use of the age-old medicinal practice 'Ayurveda' to meet this need.

More Moments

Exclusive Patanjali stores stock a wide range of products under one roof, increasing moments of interaction and triggering trial purchases. And, in most of the other modern trade outlets in which its products are present, Patanjali has negotiated separate shelf space for its products to be displayed together—increasing the likelihood of shoppers buying another product from its range.

LUIZ CLAUDIO LORENZO
COMMERCIAL DIRECTOR

Brazilian brand Piracanjuba is one of the five largest dairy manufacturers in the country. It added 26 million CRPs in 2017 by increasing both penetration and consumer choice.

Where is your biggest opportunity for growth?

We want to double revenues within five years. We expect dairy to go through a period of consolidation, due to the turbulence everyone in the industry is experiencing, but we need to spearhead that shift to establish ourselves as one of the largest companies in our sector.

We know Brazilians like cheese, but it's less affordable for lower-income consumers—so we are investing in efficiencies to bring costs down and offer our line of cheeses at a more accessible price. We are also developing wellness products and expanding into pharma.

How will consumer behaviour change over the next five years?

The 'how' and 'where' will change further, and we must keep up with it. E-commerce growth is inevitable and will begin to reach Brazilian and Latin shoppers' food staples. The challenge for us is the cost to deliver to consumers, so we are introducing partnerships to better navigate this.

We have strengthened our product R&D to ensure we're in the vanguard of category development, constantly looking for new products for the consumer. We're using new tools, including artificial intelligence, to better understand the profile of our consumers and products.

How can smaller brands survive and grow?

Consumers are hypercritical, so if you promise something you must deliver it. It's no use putting out a product that will fool the consumer. That is a key pillar for any brand to grow.

ZHOU LI
BOARD SECRETARY

Nongfu Spring, a beverages brand, is now one of the top 10 brands in Mainland China by CRP. It continued its strong performance in 2017 through product innovations—including flavoured water and Tea Pai.

What makes you unique as a business?

We are principled despite being profit-driven. We insist on using natural water, establishing bottling plants at source, and filling water on-site. After 20 years in the field, we also value knowledge and technological development—and celebrate this in our products.

We run more than 40 research projects every year and can quickly launch new products that meet customers' high expectations.

How has consumer behaviour changed for you over the past five years?

Consumers are no longer just paying for physical goods and services, they're paying for knowledge and experiences. Even though we produce physical goods, we can still strengthen the experience—whether sensory or emotional.

Our Oriental Leaf brand was a late bloomer. Initial performance was poor because sugar-free tea was comparatively niche but, seven years later, it is the top brand in the category—and we believe it can develop further.

How can smaller brands survive and grow?

Question how new needs can be dug out of existing ones, or how current solutions can be improved. With higher consumption and more diverse subcategories, there is plenty of opportunity.

ADELINE MULLER
MARKETING MANAGER

French organic food brand Bjorg added 8 million CRPs in 2017—becoming one of the country's Top 50 FMCG brands. Consistent growth has brought in two million new shoppers over the past two years, with penetration now reaching 34% in France.

What makes Bjorg unique as a business?

We're celebrating our 30th anniversary this year—Bjorg has been around since the early days of the 'organic' movement in France. We are unique in that we exist to help people eat better every day—our products are available for each moment of consumption, helping people to make healthier life choices.

Where is your biggest opportunity for growth?

French consumers continue to demand healthier, natural, or 'free-from' choices—we are increasingly looking at ways to add additional nutritional value to our products. The flexitarian trend is also a big opportunity for us and we are investing heavily in plant-based alternatives.

How do you think 2017 will be remembered in FMCG?

2017 was the year the trend of consuming less volume in favour of better quality products went mainstream. People are consciously reducing their footprints to become more responsible shoppers.

How can smaller brands survive and grow?

Any brand consistent with its claim and transparent with its customers can do well in this market. With a strong point of view on how to consume better, small brands can differentiate themselves from the big players.

Tim Kidd
Managing Director
Kantar Worldpanel UK, Ireland and US

EUROPE

The European economy expanded robustly in 2017. Gross domestic product (GDP) increased by 0.6% in the fourth quarter, supported by rebounding investment and tightening labour market conditions. The initial fears surrounding the Brexit vote in 2016 settled down, creating cautious optimism amongst businesses and governments.

The story for European FMCG growth, however, is less rosy. Although Western Europe improved its value performance in 2017 – growing 2.2% compared with 0.3% in 2016 – it failed to reach the heights of other developed regions.

Spain and Portugal
Pescanova

Pescanova is a Spanish seafood brand with a presence across continental Europe. It enjoyed 9% CRP growth regionally in 2017, with 13% in Spain specifically—where it grew penetration by 4%. It also gained new shoppers in Portugal, where it now sees more than 50% penetration.

During 2017, its growth was triggered by several product launches that allowed it to meet more consumer needs. Additionally, after many years without advertising, the brand deployed several media campaigns to accompany these launches—raising the overall visibility of the brand.

France, Italy and the UK
Bonne Maman

Although Bonne Maman is an established French brand, it can be considered regional as five million shoppers enjoyed its range in Italy and the UK. However, with a 14% increase and an additional 13 million CRPs in 2017, it is the brand's growth in France that has been most impressive.

Despite already being chosen by more than 60% of the French population, the brand added one million new shoppers last year. It achieved this by playing on its well-established image, attracting consumers seeking natural products.

Whilst it plays across dairy and compotes, the growth has come through innovations within the jam and biscuits categories. Its new range in jam – Bonne Maman Intense, with less sugar but a stronger flavour – was the highest-ranking innovation on the French market in 2017. The brand saw 11.5% of shoppers trialling the new product and 40% coming back to buy it again.

France
Petit Navire

Petit Navire was one of the top-performing French brands in 2017, with a 16% increase in CRPs. With penetration already at 55%, the brand added more than one million new shoppers.

Known as a tinned fish brand, predominantly for tuna and mackerel, Petit Navire has brought more categories to its range, including fresh fish. These new lines, which tend to sit in packaged grocery aisles, have attracted more than 6% of French households—increasing penetration by 1.5% in 2017.

Despite this innovation in a new category, the brand has not neglected its core range. Petit Navire continued to invest in aperitif ranges and cleaner recipes (including MSC- and WWF-certified). Linked to higher promotional activity and decreasing competition, all these factors mean the brand appears in more baskets and remains available at appropriate price points.

UK
Tate & Lyle

Tate & Lyle is one of the longest-established FMCG brands in the UK, with a story more than 150 years old. After a difficult 2016 for its CRPs, the brand recovered in 2017 with one of the biggest gains in the market, adding 11 million CRPs—a 26% increase.

Growth has been driven by new shoppers, with 2.7 million households returning to the brand last year and representing a 10% increase in penetration.

Tate & Lyle has demonstrated the importance of good relationships with retail partners. In 2017, Tesco moved from a competitor brand to Tate & Lyle—causing sales to double in its stores over the course of the year. Tesco is the UK's biggest retailer and attracts shoppers from all demographics, allowing Tate & Lyle to target shoppers across all groups. The brand did particularly well with young family households, one of Tesco's prime shopper groups.

Germany and the UK
Arla

With a presence in seven European countries, Arla is truly a regional brand. Having seen its CRPs increase by 24 million in 2017, it is Europe's most successful dairy brand. Arla is now purchased by more than 35 million households—an increase of 2.2 million.

Germany and the UK are the brand's main source of CRPs, with the latter responsible for over half its growth. In the UK, Arla increased its CRPs by 13 million, seeing penetration increase from 16% to 22%.

The key drivers of Arla's performance are its milk and yoghurt brands, particularly its Best of Both Milk, Arla Farmers Milk, Arla Protein and Skyr. Arla has further increased its presence in the milk aisle by adding its organic line to the range, and this saw 1.4% penetration by October 2017.

The Skyr and Protein yoghurts' strong performance has seen the brand add new lines to the range, further increasing Arla's presence in-store. Arla has been particularly successful at tapping into changing consumer needs, whether this be organic, premium or additive health.

Germany and the UK
Alpro

Alpro is another highly successful regional dairy brand heavily reliant on Germany and the UK—which combined account for 85% of its CRPs. The UK drove 70% of CRP growth in 2017, adding 17 million CRPs. Alpro has plenty of room for shopper growth, as its combined penetration in the countries it plays in is less than 14%.

Given its specialist nature, the brand has tapped into the 'health' message. Its 'free-from' range has been a strength, particularly with pre-family and young family shoppers, as well as empty nesters and retired life-stages. The free-from trend was traditionally London-centric, appealing to more affluent consumers, but Alpro has achieved growth across all demographics.

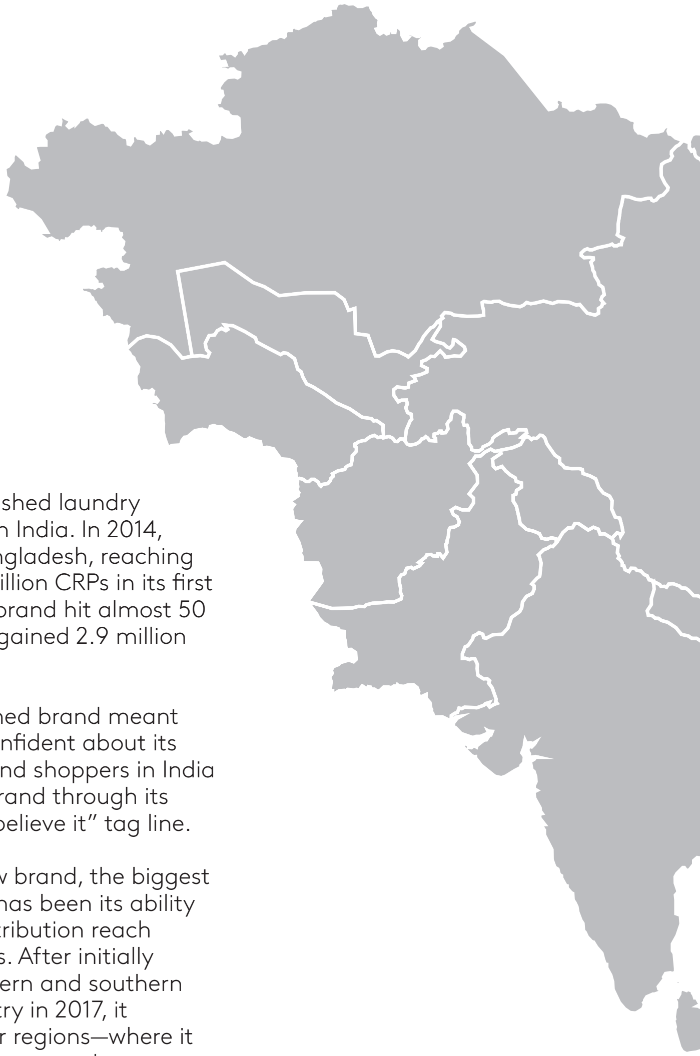
It has also driven growth by capitalising on the growing importance of breakfast, and is 87% more likely to be chosen for this occasion than the category average. But its launch into new categories – specifically coffee-flavoured milks and potted desserts – has been pivotal—with a 142% value increase here in 2017. Alpro has also extended its range into other new flavours, including strawberry yogurt variants.

Marcy Kou
Chief Executive Officer
Kantar Worldpanel Asia

ASIA

Compared to other developed regions, such as the USA or Europe, Asia performed relatively well in 2017—achieving 4.3% value growth in FMCG. Boosted by a rising population and increased shopper confidence, it is likely to fuel the growth of the global grocery market over the next five years.

With the region expected to add over $1 trillion in grocery sales by 2022, Asia represents a huge opportunity for both global and local brands. Its large, diverse consumer base, growing consumption in rural areas and secondary cities, and its burgeoning middle classes – especially in Mainland China, India and Indonesia – make the region a hotbed for potential growth.



Bangladesh
Ghari

Ghari is an established laundry detergent brand in India. In 2014, it launched in Bangladesh, reaching just short of 20 million CRPs in its first year. In 2017, the brand hit almost 50 million CRPs and gained 2.9 million new shoppers.

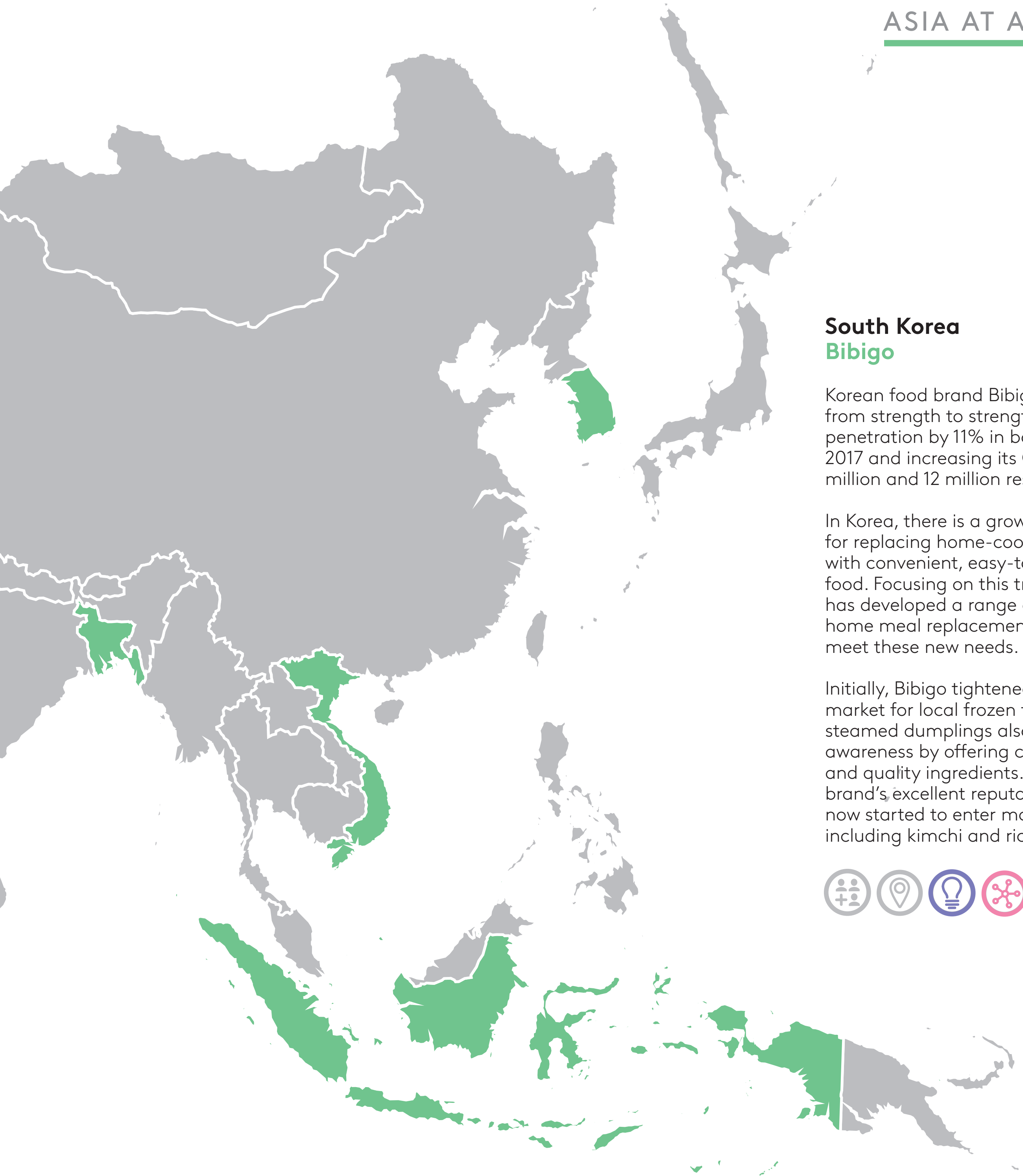
Being an established brand meant that Ghari was confident about its product quality, and shoppers in India bought into the brand through its "first use it, then believe it" tag line.

As a relatively new brand, the biggest driver for growth has been its ability to increase its distribution reach in multiple regions. After initially focusing on northern and southern parts of the country in 2017, it expanded to other regions—where it secured even higher growth.

Indonesia
Richoco

Kaldu Sari Nabati-owned Richoco is a local Indonesian biscuit brand and, in 2017, it achieved 70% penetration in urban areas—adding more than two million shoppers to the brand. In rural areas, this figure rises to 90%.

This impressive growth has been achieved through consistently launching new variants across different price points. In addition to successful mass-audience promotional activities – such as TV and radio advertising – Richoco has also focused on below-the-line campaigns for smaller, more targeted audiences—including in office buildings in big cities to raise awareness among higher social classes.



South Korea
Bibigo

Korean food brand Bibigo has gone from strength to strength, growing penetration by 11% in both 2016 and 2017 and increasing its CRPs by five million and 12 million respectively.

In Korea, there is a growing demand for replacing home-cooked meals with convenient, easy-to-prepare food. Focusing on this trend, Bibigo has developed a range of high-quality home meal replacement products to meet these new needs.

Initially, Bibigo tightened its grip on the market for local frozen foods. Bibigo's steamed dumplings also raised brand awareness by offering convenience and quality ingredients. Based on the brand's excellent reputation, it has now started to enter more categories—including kimchi and rice.

Vietnam
One One

Vietnamese snacks brand One One has more than doubled its CRPs over the past two years. Most of this growth occurred within the last 12 months, with penetration increasing from less than 20% in 2015 to over 35% in rural Vietnam last year. Three million new shoppers are now choosing the brand.

A key driver behind this success has been improved distribution—especially in rural Vietnam, where traditional channels still dominate trade. One One's price is relatively low compared with other snack or biscuit products, which explains why the brand is seeing stronger growth in rural areas.

Furthermore, its main ingredient is rice, which Vietnamese consumers are very familiar and comfortable with. Rice is also perceived as being a natural and healthy snack—in line with a growing trend for healthier living.

One One has also introduced new flavours such as beef, lobster and corn. The brand has looked to reach beyond younger shoppers, targeting the whole family by introducing the 'bag-in-bag' format—making it easier to share.

Sonia Bueno
Chief Executive Officer
Kantar Worldpanel Latam
Kantar President Brazil

LATIN AMERICA

Despite growth remaining slow across the region, the Latin American FMCG market continued to improve in 2017. While the 1.7% growth in CRPs was slower than the 2.6% seen in 2016 – with most countries either flat or declining – it's important to remember that this represents recovery from a previous downward trend.

The region's GDP growth followed a similar pattern, recovering from the 0.9% decrease in 2016 but remaining relatively sluggish at 1.7% growth. Furthermore, average household spend on FMCG was just $1,450 last year—equivalent to $1 per person, per day.

Mexico
La Costeña

La Costeña enjoys more than 90% penetration in Mexico—something only 1% of brands globally can claim for any given market. Over half of brands with penetration this large lost CRP in 2017, but La Costeña managed to grow its own by 24 million.

Although most of its CRP growth comes from providing more consumer choice, it has also successfully found new shoppers. Chillies make up over half La Costeña's CRPs, and the brand has successfully expanded in this category through clever reformulations and pack changes—such as adding a spicy thermometer to the label, enabling shoppers to choose the right heat for them.

Another simple packaging change – using "Salsa Mexicana tatemada" on the label – has given products a more homemade, Mexican feel.

El Salvador
La Chula

La Chula, a food brand from El Salvador, has expanded into other Central America countries including Guatemala and Costa Rica—seeing 31% growth in CRPs in 2017. It has two main categories – beans (most prominent in Guatemala) and tomato-based products – with the latter performing especially well in its native country and in Costa Rica.

La Chula's strategy focuses on low prices and distribution partnerships with retailers across Central America. It has also found success selling larger pack sizes.

The brand's logo, which represents a traditional Central American woman, has also played a part in attracting shoppers to the brand. La Chula is well known as a local company that is agile and able to maintain a competitive advantage over its competitors.

Ecuador
Nutri

Nutri is an Ecuadorian milk brand. It added 11 million CRPs in 2017 – an increase of 28% – and cemented its place in the top five most chosen brands in Ecuador. With penetration remaining relatively flat in 2017 (59%), the number of times Nutri was chosen by each household was the main driver for growth.

Success for the brand has come predominantly from two regions: Costa and Sierra. Where most other dairy players concentrate on one specific region, the brand has increased its presence across these two. Nutri's strategy has been to diversify the pack sizes available to shoppers, ensuring it hits price points across all income levels.

Colombia
Pony Malta

Beverages brand Pony Malta is an interesting example of a brand that bounced back in 2017. After a fake news story broke in 2016, the Colombian brand lost more than 200,000 households overnight. In 2017, it not only regained all these shoppers but managed to increase penetration to its highest level in the past three years.

Its key innovation, Pony Malta Plus – a variant that successfully attracted shoppers looking for healthier options – was the cornerstone of its recovery. The product has zinc and B vitamins that help strengthen the immune system, building a stronger association to healthy nutrition.

Brazil
Três Corações

Três Corações, known mainly for coffee, was Brazil's third-fastest-growing brand in 2017. It gained 25 million CRPs, increased penetration by 6% and added more than 3.7 million new shoppers. A major player in beverages, it further deepened its foothold in the sector by adding categories through launches in flavoured milk and powdered chocolate.

Its new cappuccino range – which includes single-serve sachets – helped it appeal to more people, while its growth within the coffee capsules market continues thanks to its competitively priced TRES machine. With coffee so often a social, sharing occasion, Três Corações has also created more opportunities by opening branded coffee shops nationwide.

The brand has seized the out-of-home opportunity to keep it front of mind, while further increasing presence and awareness by acquiring local coffee brands – such as Cia Iguaçu – and through its role as an official supporter of the Brazilian national football team.

Argentina
Armonía

Armonía is the 'second brand' of Mastellone Hermanos, one of the biggest dairy product manufacturers in Argentina. Its established distribution capabilities have enabled the brand to become one of the most chosen in its category in Argentina, adding an additional 32 million CRPs on top of the gains it made in its first full year in 2016.

The brand is now purchased by more than a quarter of Argentinian households, chosen on average once every two weeks. The main factor helping Armonía to gain relevance is consumers' desire to move away from more premium options as a result of long-term inflation and lower salaries.

Armonía has successfully continued its distribution gains but, until now, the brand has remained focussed on the Buenos Aires region—where it has reached almost half of all households (44%).

Idriss El Ganari
Business Development Director
Kantar Worldpanel

AFRICA & MIDDLE EAST

The Middle East and North Africa (MENA) region is one of the most diverse in the world. With its growing population and enviable supply of natural resources, it is home to some of the wealthiest countries globally. However, with others ranking among the poorest, it is also one of the most complex regions on the planet.

With 8.8% FMCG growth in 2017, MENA is the fastest-growing region in the world. But the picture is less positive in some of its countries—the FMCG industry in two of the region's biggest economies, Saudi Arabia and Egypt, is facing turbulence and new challenges due to changing laws and economic context. And, although the Sub-Saharan markets are growing, they are being supported mainly by high inflation and population growth.

While 2017 was a better year for the region, it is still awaiting long-term stability.

Ghana
Mok

Like many in the MENA region, Ghanaian households are feeling the squeeze. As a result, families are increasingly trading down to more affordable brands and formats. The Mok detergent brand has adapted well to this trend, successfully tapping into the fastest-growing pack size (125g)—which delivered 70% of its total volumes in 2017.

With the demand for smaller packaging formats increasing, Mok grew from 21% penetration in 2015 to more than 60% in 2017—correlating with a four-fold increase in CRPs over the past year.

Saudi Arabia
Herfy

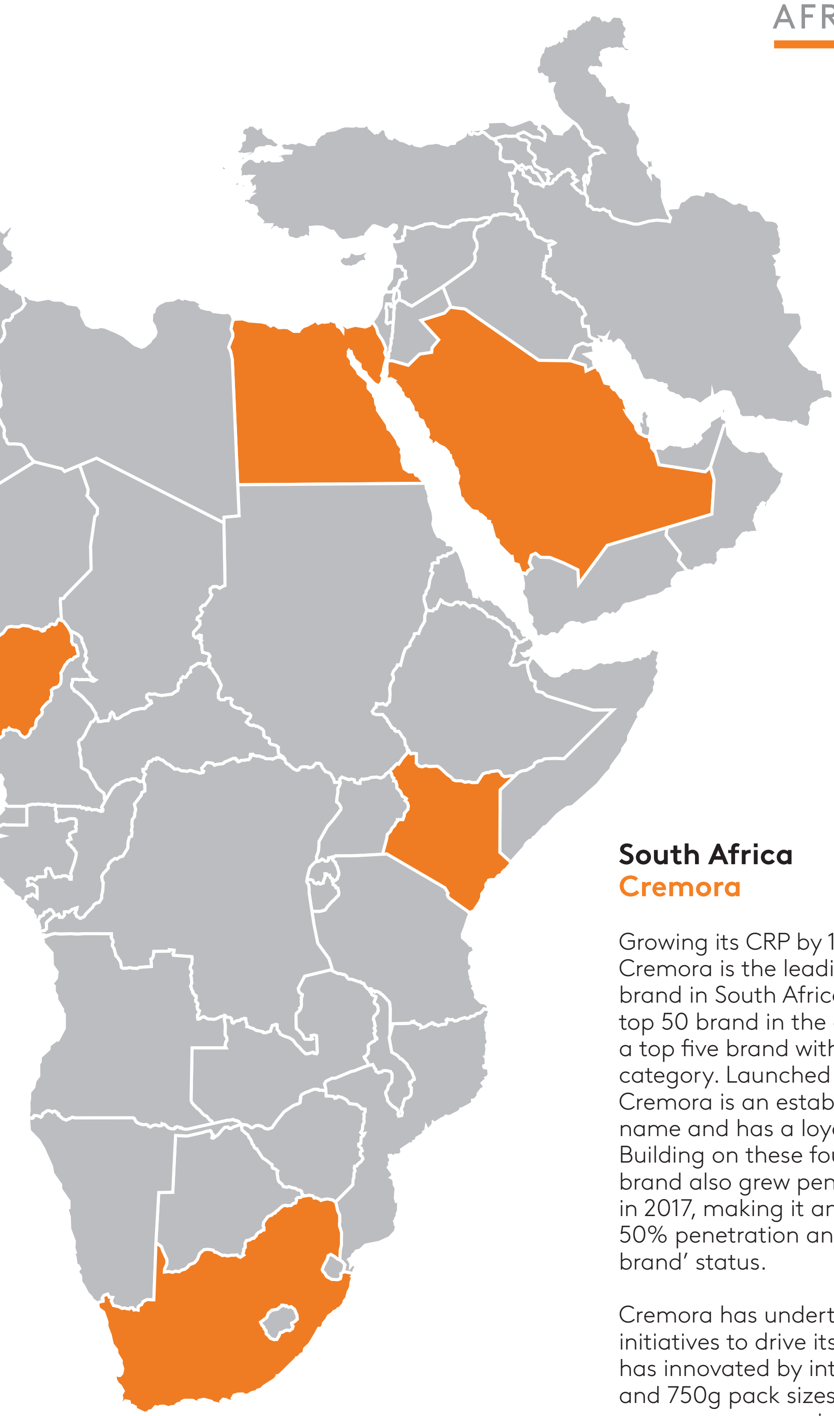
Saudi food brand Herfy performed exceptionally well in 2017. With a CRP growth of more than 50%, it is the fastest-growing of the top 75 brands in Saudi Arabia—an accomplishment attributed to its strong performance in the sliced bread category. It saw positive growth in all regions and demographics, increasing its penetration from 4% to 20% over the 12-month period.

The brand has performed well during tough times in the local market, with households continuously decreasing spend on FMCG. Given the current macro-economic climate in the country, its price gap with the market leader added another string to its bow.

Nigeria
Dano

Notably, Dano in Nigeria added 53 million CRPs in 2017—primarily through finding new shoppers. Last year, it introduced a more affordable product to its Dano Milk Powder range: Dano Cool Cow, a filled milk alternative to the more premium Dano Milk full cream range.

And the brand launched new, smaller pack sizes across its powdered milk portfolio, helping keep Cool Cow competitive on price. To appeal to new audiences, Dano deployed single-serve sachets in-store to drive trials amongst non-users and – by extending its above- and below-the-line promotional activities – increased its presence outside of its core regions.



Kenya
Raha

Kenyan brand Raha launched TV commercials to revitalise its chocolate milk and cocoa categories, growing its CRPs by 60% in 2017. It also broke the 50% penetration threshold, becoming a 'super brand' for the first time.

While it has recruited from across all social classes, Raha has attracted lower social class households in particular by hitting a specific price-point through the introduction of small pack sachets.

South Africa
Cremora

Growing its CRP by 17% in 2017, Cremora is the leading creamer brand in South Africa. It is now a top 50 brand in the country and a top five brand within the dairy category. Launched in the 1960s, Cremora is an established household name and has a loyal buyer base. Building on these foundations, the brand also grew penetration by 7% in 2017, making it another to exceed 50% penetration and reach 'super brand' status.

Cremora has undertaken numerous initiatives to drive its success. It has innovated by introducing 80g and 750g pack sizes, giving it more presence across price-points. It has also driven more moments through promotional and social media activity, boosting consumer awareness through campaigns like '#AlwaysBetterWithCremora' and '#CookingwithCremora'.

In addition, Cremora completed a nationwide roadshow to bring the brand to consumers and has been involved in cross-category promotions in-store alongside the Ricoffy brand.

Egypt
Juhayna

When a brand becomes a market leader, growth is harder to find. But not for Juhayna, Egypt's leading food brand specialising in the dairy and juice industries.

Formed in 1983, the brand has established itself as the market leader for UHT milk, 'spoonable' yoghurt, and drinking yoghurt—and is now chosen by more than 87% of Egyptian households.

Yet, despite this omnipresence, Juhayna has still managed to drive 2% growth in CRPs since 2015. With such high penetration, it has benefited predominantly from being chosen more often—increasing cross-purchasing, particularly in the dairy categories.

Juhayna's partnership with Tetra Pak has allowed it to engage in an ongoing public awareness campaign to highlight the potential health hazards of loose, unpackaged milk, promoting healthy living by improving public health standards.

Egypt
Kahraman

High unemployment and inflation has rocked consumer confidence in Egypt. As a result, there has been a growing trend for people cooking their own meals at home—especially inexpensive oriental dishes that require a lot of oil. Kahraman – a local cooking oil brand – has capitalised on this movement, growing by 31% and adding 59 million CRPs in 2017.

With over 90% penetration, Kahraman is already a popular brand in Egypt. Impressively, it still managed to find new shoppers in 2017 and achieve growth by being chosen more often—particularly amongst lower social classes. With consumer sensitivity to price at an all-time high in Egypt, Kahraman's value proposition is paying off.

Luis Simoes
Global Chief Strategy Officer
Kantar Worldpanel

THE PARADOX OF GROWTH IN MASS MARKETS

Ultimately, whether global or local, a brand's true strength is reflected by its ability to consistently attract more shoppers and command a premium.

But, in the quest to appeal to more shoppers, brands become mainstream by design—often losing the distinctiveness that brought success in the first place, and thus the ability to command a premium.

At the same time, technological and digital developments have made it possible to manufacture, distribute and communicate to much smaller, so-called "segments of one" at enormous scale.

But, if advertising aims to create a shared set of cultural meanings that will affect how a shopper is perceived by others – and, thus, their propensity to buy – then hyper-personalised strategies will inherently limit this network effect. We're left with brands fulfilling existing demand at scale, rather that creating demand for future growth.

Solving these paradoxes while growing a brand and navigating unpredictable individual purchase behaviour is incredibly difficult—which makes the 49% that have managed to do so even more remarkable.

It's exciting to see many of the top brands coming from India and China, and we expect brands from both countries to start appearing in our global rankings as soon as they expand out of Asia.

While we hope the identification of successful strategies in this report will inspire more beautiful brand stories, I will let the consumer in all of us speak: No strategy will win me over if it doesn't start by offering a good product at a fair price.

In measuring and explaining brands' success, we identify no universal recipe for success—but we believe the true value of our Brand Footprint report stands in the empirical rules Kantar Worldpanel stands by, as outlined below.

PENETRATION DRIVES VOLUME GROWTH

If ambitious, plan for your brand penetration to grow annually by 1.5% to 3% within each market, depending on your current size—but not more.

GROWING BRANDS PULL MULTIPLE LEVERS

Of our five levers for growth, the most successful brands pull on several simultaneously. But, once a brand achieves wide availability, the best strategy is to expand to more moments of consumption or usage.

E-COMMERCE GROWTH IS RELENTLESS

And it is completely reshuffling brands' relative positioning. Whether a brand is purchased at bulk or by impulse makes a huge difference to performance online. We anticipate even greater shifts in a voice-activated world.

SUCCESSFUL INNOVATION DRIVES INCREMENTALITY

But, as we explored in our Innovating for Growth paper, less than half (45%) of new launches have a positive effect on category sales. Knowing if a launch was actually incremental is the only way to truly measure innovation success.

MEDIA INVESTMENT IS ABOUT THE LONG TERM

More than a third of shoppers influenced by a brand's media are new in the short-term. And, as seen in our Media Investment paper, we know that the impact media has is long-term, with many of these shoppers becoming loyal.

OOH ALMOST DOUBLES THE ADDRESSABLE MARKET

For snacking and non-alcoholic beverages brands, out-of-home consumption accounts for 41% of consumer spend. We take a closer look in our *Out-of-Home, Out of Mind?* publication.

WHAT IS BRAND FOOTPRINT?

The *Brand Footprint* ranking reveals how consumers around the world today are buying FMCG brands, highlighting the opportunities that remain for brands to improve their position.

METHODOLOGY & CRITERIA

The categories: The complete ranking comprises five global FMCG sectors tracked by Kantar Worldpanel—across Beverages, Food, Dairy, Beauty & Personal Care and Homecare. Fresh food, batteries and pet food are not included in the global ranking.

All data relates to purchases brought into the home to be used or consumed there.

The '**universe**': The research behind the ranking covers 73% of the global population across 43 countries, and 75% of global GDP.

The data period: *Brand Footprint* data was collected over the 52-week period between November 2016 and October 2017.

Data source: *Brand Footprint* is a Kantar Worldpanel initiative. The ranking is created in collaboration with IMRB in Bangladesh and Sri Lanka, with GfK in Germany, Russia, Italy, Poland and South Africa, with IRI in the US, and in partnership with CTR in China.

Criteria of eligibility for a brand to appear in the Global ranking: Only global brands are analysed to create the global Top 50 Ranking. To be considered as global, a brand must be available in at least two continents.

Thanks to our partnership with Europanel we have been able to offer countries outside of the Kantar Worldpanel footprint

Data for Germany, Italy, Poland, Russia and South Africa was provided by GfK

Data for the USA was provided by IRI

Data for Bangladesh and Sri Lanka was supplied by IMRB. Kantar Worldpanel in collaboration with IMRB in India

Kantar Worldpanel in collaboration with CTR in China

ABOUT THIS REPORT

The 2017 ranking has undergone a few changes since 2016.

Turkey data is no longer included in the ranking, but back comes South Africa to ensure our global population reach remains the same. In our continuous improvement process, we have undertaken enhancements across a selection of our panels that have resulted in data reworks. The countries with such reworks include Argentina, Indonesia and the Philippines.

We have continued to improve our data collection and brand attribution, which has also resulted in changes in how we report the brands. For instance, we have further increased the number of brands that are reported across all markets—meaning we are collecting over 18,000 brand data points, versus just over 15,000 previously.

This allows us to provide new insights on total manufacturer reads and a more comprehensive data set, and realistic penetration targets. We have also ensured the category definitions used are identical across countries, whilst also splitting out dairy products from food and beverages to give insights on a fifth global sector.

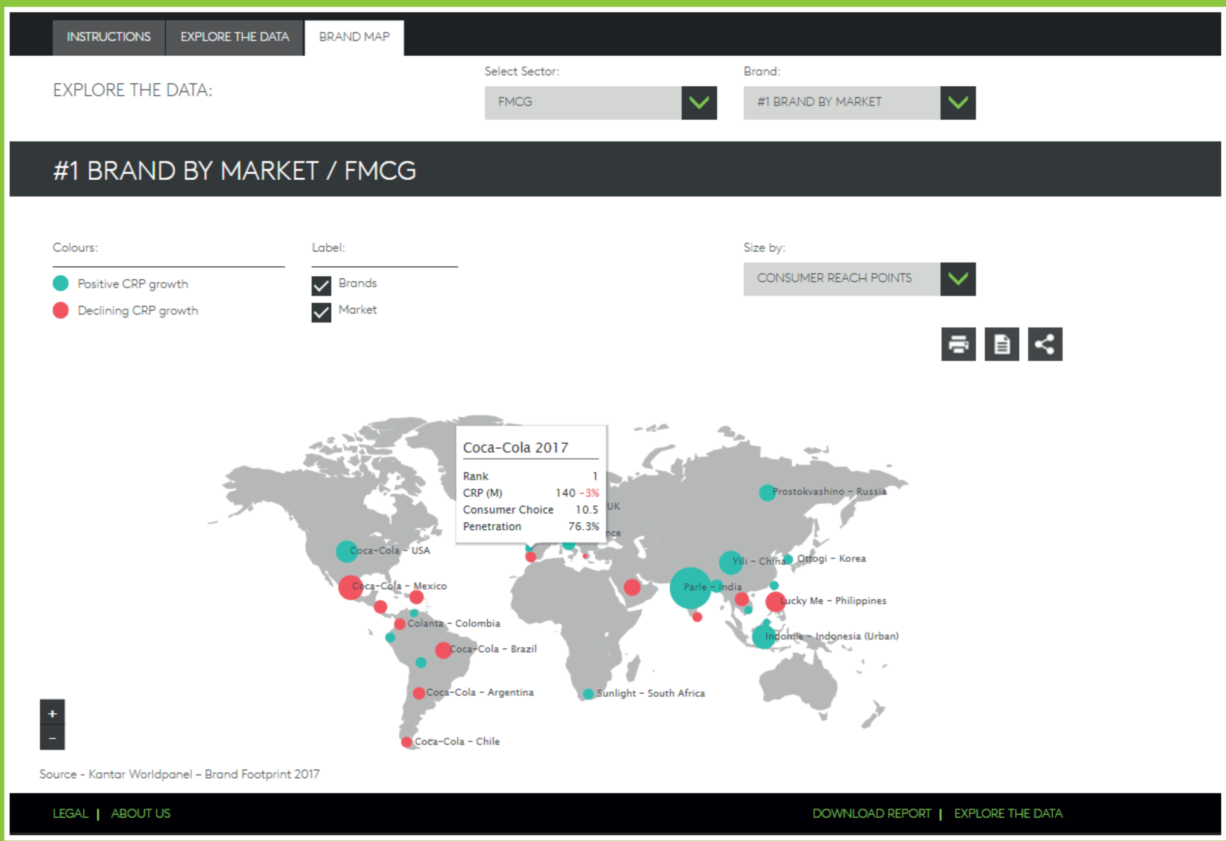
The overall result is that the 2017 ranking is our most accurate reflection ever. However, these changes mean that, in some cases, positions and metrics will differ from previous rankings.

Number one brand by market

Ghana, Nigeria and Kenya are not included in the global ranking. The listed brand for Vietnam is the most chosen in the top four urban areas only, and for Indonesia it is the most chosen in urban areas only.

EXPLORE THE DATA

You can access the data from all the countries and sectors in this year's *Brand Footprint* online. Learn more about your brand's global footprint and the most chosen brands in your sector and market.
www.kantarworldpanel.com/brandfootprint



ABOUT KANTAR WORLDPANEL

Kantar Worldpanel is the global expert in shoppers' behaviour. Through continuous monitoring, advanced analytics and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts and government organisations globally.

With over 60 years' experience, a team of 3,500, and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behaviour into competitive advantage in markets as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others.

FIND OUT MORE

If you'd like additional information on *Brand Footprint*, please get in touch with your usual Kantar Worldpanel contacts or email:

Benjamin Cawthray
Global Thought Leadership Director
benjamin.cawthray@kantarworldpanel.com
+44 (0) 7949 889 258