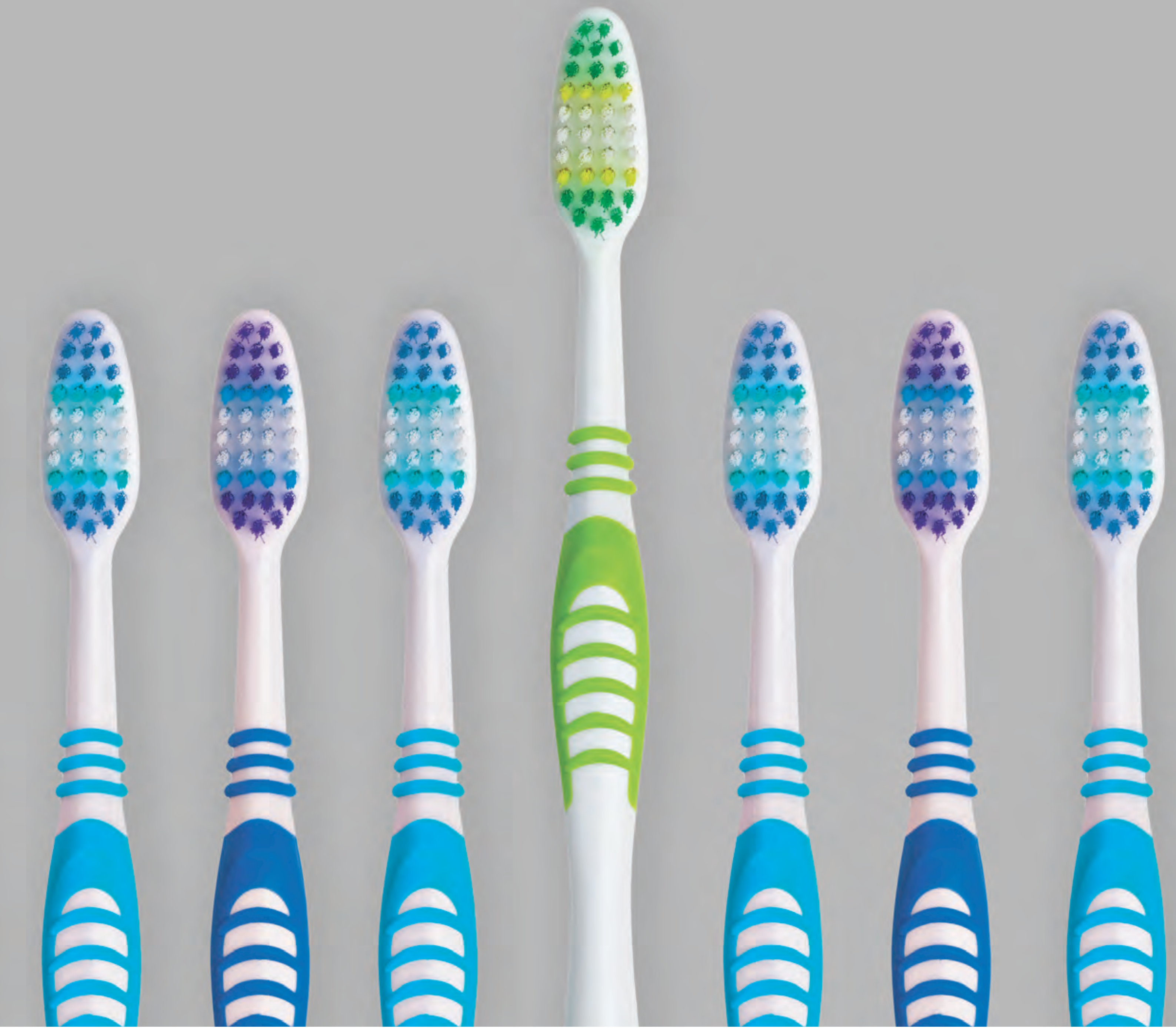
BRAND FOOTPRINT

A GLOBAL RANKING OF THE MOST CHOSEN CONSUMER BRANDS

ISSUE 7 | MAY 2019



KANTAR

FOREWORD

Eric Salama
Global CEO
Kantar

In March, we unveiled a new corporate identity for Kantar, unifying all sub-brands – including Worldpanel – under one name.

But fear not. While visually we've changed, *Brand Footprint* remains your source of inspiration for finding new shoppers and achieving growth.

It 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 drawing an intricate picture of how to win both globally and locally.

Brand Footprint is one of Kantar's flagship intelligence products, giving marketers, retailers and manufacturers the insight they need to make their brands a success—whether they're looking for growth in existing territories or launching in new ones.

By combining Kantar's unique Consumer Reach Point (CRP) metric with global and local stories, revealing the strategies of some of the world's most successful FMCG brands, *Brand Footprint* has become the undisputed guide to an ever-changing, increasingly complex market.

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Consumer reach points (CRPs) explained

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

72%

POPULATION COVERAGE

Josep Montserrat
Global CEO
Worldpanel Division

BRAND FOOTPRINT 2019: FINDING OPPORTUNITY IN FMCG

Years of political and economic turmoil across the globe have created a difficult environment for FMCG brands to operate in. Ours is an increasingly unpredictable world, which presents new challenges for brands of all sizes.

Global FMCG growth has slowed since 2018. In some markets, such as LATAM, it has dropped so drastically as to cause overall volume decline.

And the picture for brands is complicated further by the changes wrought by the proliferation of technology both in stores and at home. Meanwhile, increasing merger activity among the world's biggest grocery retailers is changing the traditional spaces in which brands play.

Yet, within these pages – the seventh annual edition of *Brand Footprint* – we have found many causes for celebration. What remains clear is that brands who can respond to challenges with agility will continue to achieve growth—providing inspirational stories of success for others to follow.

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

We do this by understanding the decisions shoppers make at the moment of truth, using two metrics: penetration and consumer choice. When combined, these form the basis of our unique Consumer Reach Point (CRP) measurement.

In this edition of *Brand Footprint*, we've expanded our analysis further than ever before. The largest publication of its type, it now covers more than 20,000 brands in 49 countries across five continents—representing 72% of the global population and 85% of gross domestic product (GDP).

My gratitude goes to our partners Europanel, GfK, IRI, Intage and CTR—whose work has helped us achieve our most comprehensive global market coverage to date.

This *Brand Footprint* also includes two new features, reflecting the fluctuating factors affecting brand growth. The first examines one of the most important, but frequently misunderstood, differentiators of shopper behaviour: age. We've also produced *Brand Footprint's* inaugural out-of-home ranking—a detailed look at the effect such purchases have on brand performance.

And e-commerce continues to play a vital role in many brands' omnichannel strategies for growth, so we've brought back the online-only ranking that we introduced last year.

Returning readers will find the same unique level of insight they are familiar with, courtesy of the prestigious brand interviewees that have contributed to this edition. I extend my thanks to representatives from Bimbo, Doritos, Dove, Haday and Kinder, who generously lent us their time and expertise.

I hope you enjoy this year's *Brand Footprint*, which continues to serve as the definitive guide to global and local trends in FMCG—and a signpost to the opportunities for growth that lie within.

FUNDAMENTALS TO GROWTH

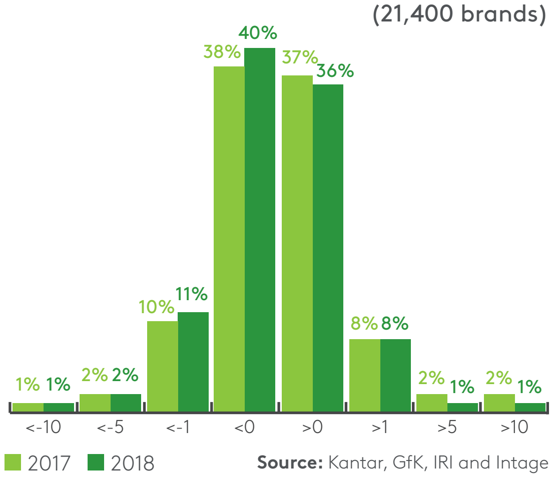
Benjamin Cawthray, Global Thought Leadership Director, Worldpanel division

Growth is hard to find, and it's only getting harder. Regardless of whether you are global or local, life as an FMCG brand is getting tougher.

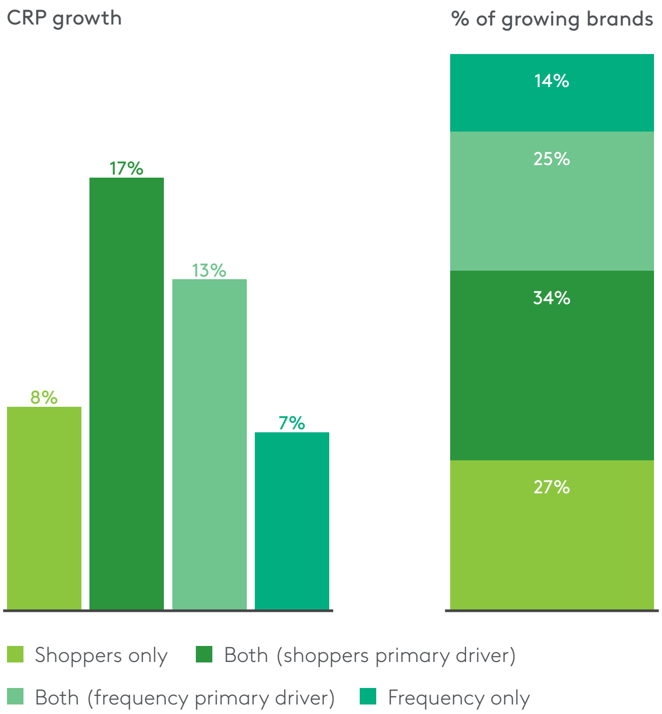
The FMCG market has continued to slow in 2018, and is down to 2.1% growth versus 2.8% in 2017. This is also reflected in the number of brands growing and declining, with 54% seeing a fall in CRPs in 2018 versus 51% in 2017.

But there is hope. The overall number of times brands are chosen each year is increasing, which means there are more opportunities for your brand win. To do so, you need an unrelenting drive to attract new shoppers at the heart of your strategy.

% of FMCG brands growing/declining by CRP (m) (21,400 brands)



Source: Kantar, GfK, IRI and Intage



Source: Kantar, GfK, IRI and Intage

Banging the drum

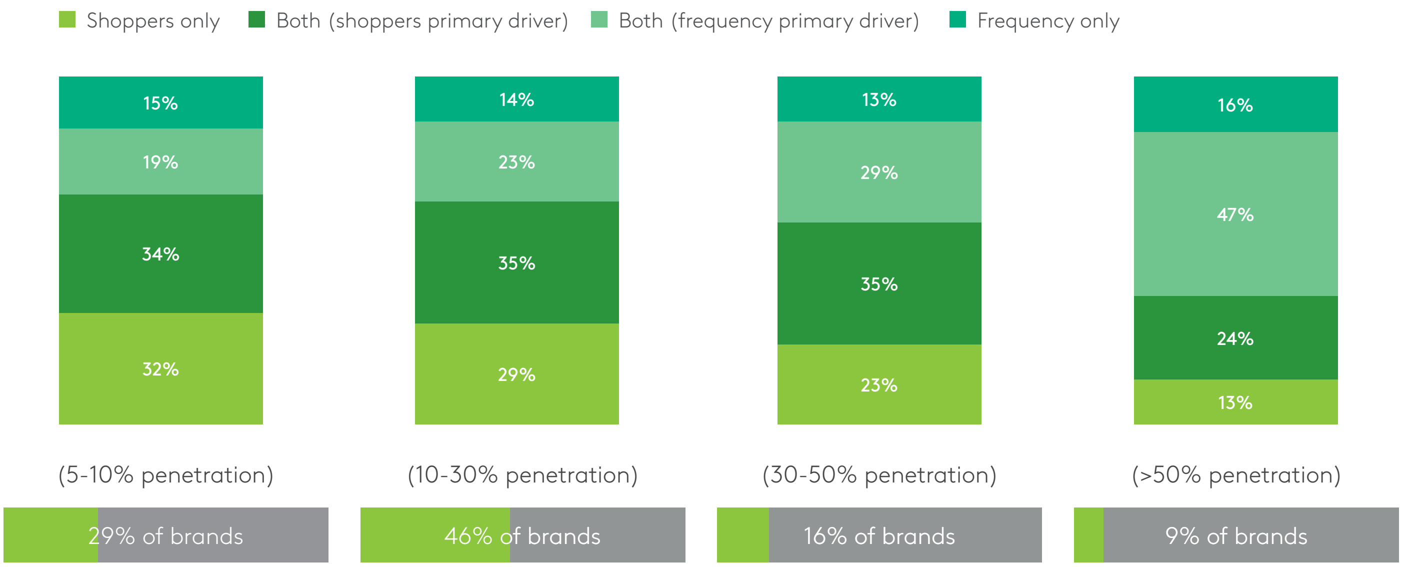
In every edition of *Brand Footprint*, we've spoken about the importance of finding more shoppers—and that's not going to change.

In 2018, 86% of growing brands found more shoppers. What's more, brands that had more shoppers as the primary driver grew faster than those reliant on frequency.

The size of a brand will of course have an impact. It's hard for big brands to see the levels of percentage growth that smaller brands can achieve, so we have controlled for size—and the results are just as compelling.

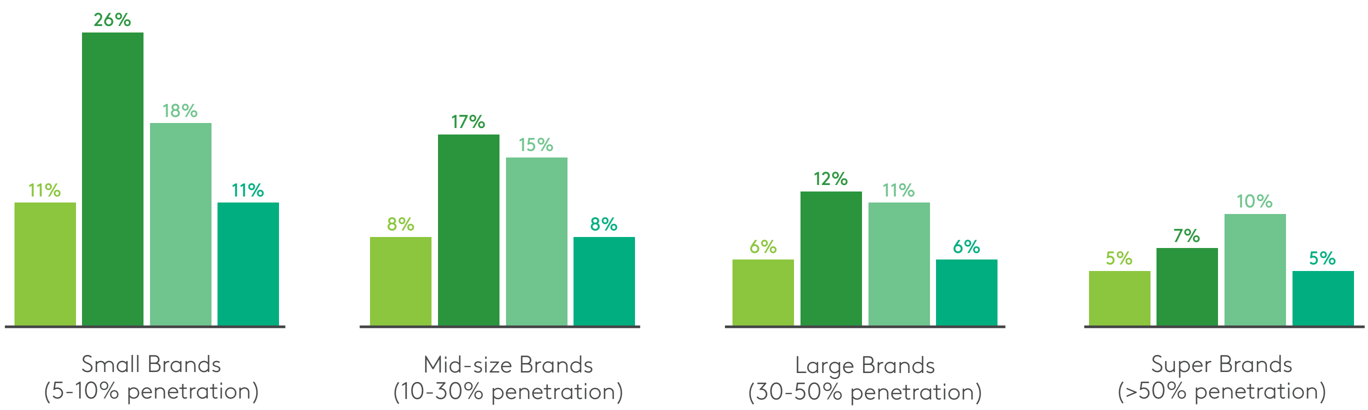
Of all the brands we've looked at, 75% can be classed as small or mid-sized—and the same pattern holds true for them. Of those growing CRPs by more than 2.5%, the majority did so through attracting additional shoppers.

% of brands growing CRPs by >2.5%



Source: Kantar, GfK, IRI and Intage

CRP growth by brand size



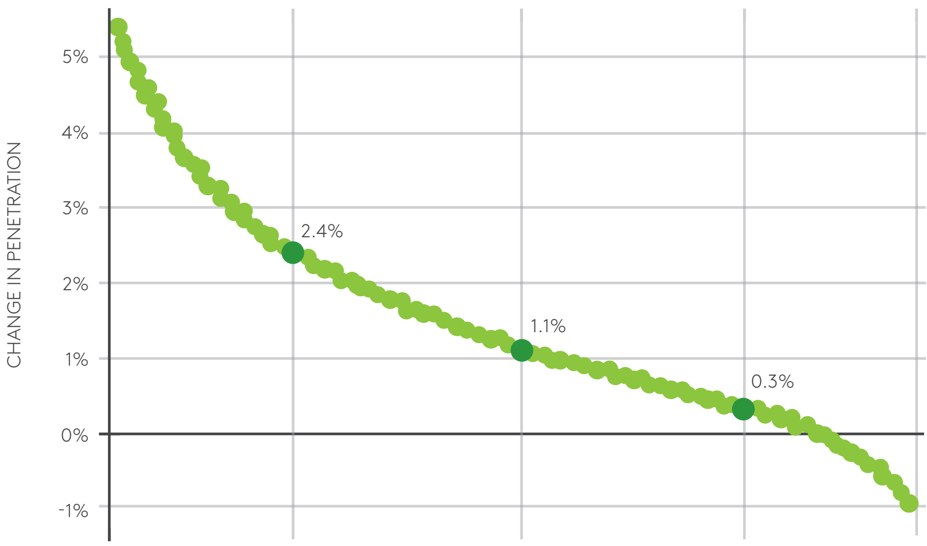
Source: Kantar, GfK, IRI and Intage

In fact, for all apart from Super Brands – which make up less than 10% – finding new shoppers is the best way to guarantee growth. Super Brands are where we see frequency becoming more dominant as the primary driver of growth, but additional shoppers still play a key role—with only 16% of these brands grew through frequency alone.

With this in mind, knowing how many shoppers to aim for within a market is vital. From the 5,380* brands we saw growing CRPs in 2018, the median penetration gain was 1.1%.

There are variations to this by location, category and brand size but, as a rule, aiming for 1% penetration gain by market over a one-year period will result in strong growth for your brands.

Penetration change



Source: Kantar, GfK, IRI and Intage

*growth defined as 2.5% increase in CRPs for brands with a starting penetration of 5% or more

Looking after number one

For global brands, a 1% penetration gain in every market would be a huge success, but we have yet to see any brand do this.

There's no magic number of markets you need to be winning in to grow, but what is imperative is to grow in your biggest. Of the Top 50 brands that grew in their number one market, 82% grew overall—and, of those that didn't grow in their number one market, 91% declined.

This is a simple and intuitive approach, but one only half the brands in the Top 50 followed.

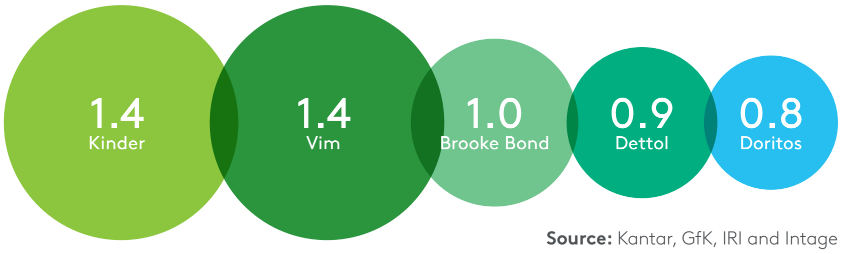
Kinder saw the joint highest global penetration gain in 2018 and ticks all the right boxes. It grew CRPs in 64% of its markets—and specifically its number one market, Germany. But beyond this impressive achievement, Kinder also pulled on the 'More Presence' lever and expanded rapidly in the US through the launch of Kinder Joy.

In turn, it has moved significantly up the rankings—and we'll be hearing more about its success later in this publication.

% of Top 50 brands seeing overall growth based on number one market performance

Source: Kantar, GfK, IRI and Intage

Biggest global penetration gains in 2018



Source: Kantar, GfK, IRI and Intage

Uncharted territories

For global brands, the best way to see significant growth is identifying uncharted territories and winning there. Whilst an expensive exercise, when done successfully the results are substantial.

And, for brands already available in all markets, look for those where you have the most shoppers to gain—through hitting more targets, playing in more categories, creating new needs or being available in more moments.

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 2018's Top 50 ranking, here's a refresher of our levers for growth.

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.

THE LONG AND THE SHORT OF IT

Luis Simoes, Global Chief Strategy Officer, Worldpanel Division

The annual evolution of our global *Brand Footprint* ranking tends to show marginal moves—and this year is no exception.

While 84% of brands in the ranking are the same brands that were in the Top 50 five years ago, only four of these have managed to grow every year since our first edition: Dettol, Dove, Nivea and Vim.

This illustrates the difficult art of building brands that stand the test of time—or, at least, that grow continuously. Most notably, it's remarkable to see that no brand in this ranking is a digital native, and the four brands that grew continuously are, on average, more than 100 years old.

This poses the question: what's more important, short-term fulfilment or long-term creation of demand? In reality, we often over-emphasise the short-term impact while underestimating the long-term.

In this seventh edition, we have identified four trends that will dramatically impact brand and categories dynamism in both the short- and the long-term:

1. Having an online offer is a must-have for every retailer and every brand
2. People aged over 50 are more important to FMCG brands than Millennials and Generation Z combined
3. Shopping and consumption frontiers are evolving, as out-of-home and take-home occasions continue to blur
4. There are 10 Indian and Chinese brands that would be in the Top 25 of our ranking if they expanded globally

In measuring and explaining brand success, there is no universal recipe for success. We believe the true value of *Brand Footprint* is in the empirical rules Kantar stands by—the ability to constantly attract more shoppers remains at the heart of every FMCG success story.

BRAND FOOTPRINT 2018 GLOBAL RANKING TOP 50

2018 rank	Change vs. 2017	Brand name	Manufacturer	CRP (m)	CRP growth %	Penetration %	Consumer choice
1	0	Coca-Cola	The Coca-Cola Company	5965	-1	41.9	12.3
2	0	Colgate	Colgate-Palmolive	3872	-1	60.5	5.5
3	0	Maggi	Nestlé	2698	7	31.2	7.5
4	0	Lifebuoy	Unilever	2297	-3	26.3	7.5
5	0	Lay's	PepsiCo	2247	5	29.6	6.6
6	0	pepsi	PepsiCo	2001	-2	22.7	7.6
7	0	NESCAFÉ	Nestlé	1958	-3	22.7	7.5
8	3	Dove	Unilever	1833	3	37.1	4.3
9	1	sunsilk	Unilever	1821	2	23.5	6.7
10	-1	Indomie	Indofood	1782	-1	4.7	33.1
11	-3	Knorr	Unilever	1757	-4	27.4	5.5
12	0	LUX	Unilever	1428	-7	30.4	4.1
13	0	Sunlight	Unilever	1355	2	11.3	10.3
14	1	Downy	Procter & Gamble	1316	3	13.7	8.3
15	-1	Nestlé	Nestlé	1299	0	25.0	4.5
16	7	Vim	Unilever	1041	10	16.7	5.4
17	0	Sprite	The Coca-Cola Company	1037	-1	24.8	3.6
18	1	BIMBO	Grupo Bimbo	990	-1	8.0	10.8
19	-1	Heinz	The Kraft-Heinz Company	987	-2	18.7	4.6
20	1	head & shoulders	Procter & Gamble	981	3	22.3	3.8
21	-5	PALMOLIVE	Colgate-Palmolive	957	-10	15.8	5.2
22	5	OREO	Mondelēz International	956	3	24.9	3.3
23	7	Kinder	Ferrero	932	6	15.0	5.4
24	4	NIVEA	Beiersdorf	925	2	23.9	3.3
25	-5	Pepsodent	Unilever	922	-6	11.4	7.0

Source: Kantar, GfK and IRI (further details on page 30)See page 2 for CRP definition

2018 rank	Change vs. 2017	Brand name	Manufacturer	CRP (m)	CRP growth %	Penetration %	Consumer choice
26	-4	Danone	Danone	920	-3	13.8	5.8
27	-2	Pantene Pro-V	Procter & Gamble	918	-1	19.2	4.1
28	1	Rexona	Unilever	899	-1	19.5	4.0
29	4	Brooke Bond	Unilever	891	7	10.7	7.2
30	-4	Kraft	The Kraft-Heinz Company	884	-4	13.4	5.7
31	-7	Tide	Procter & Gamble	876	-8	19.6	3.9
32	2	Cheetos	PepsiCo	849	2	14.4	5.1
33	-1	Fanta	The Coca-Cola Company	836	-1	20.3	3.6
34	-3	Ajinomoto	Ajinomoto	804	-7	5.9	11.9
35	1	Quaker	PepsiCo	796	-1	14.8	4.7
36	6	Doritos	PepsiCo	772	7	12.7	5.2
37	0	McCormick	McCormick & Company	769	-1	13.0	5.1
38	5	Dettol	Reckitt Benckiser Group	767	8	19.6	3.4
39	-4	Milo	Nestlé	748	-9	7.3	8.8
40	-2	Surf	Unilever	726	-6	6.4	9.7
41	-1	Hershey's	The Hershey Company	716	-2	12.0	5.2
42	-1	Activia	Danone	705	-3	10.8	5.6
43	1	Closeup	Unilever	694	2	17.3	3.5
44	2	Barilla	Barilla Group	693	2	14.0	4.3
45	2	Dr. Oetker	Del Monte Foods	682	1	11.3	5.2
46	-1	Safeguard	Procter & Gamble	663	-2	12.0	4.8
47	2	Yakult	Yakult	642	1	8.3	6.6
48	2	Lipton	Unilever	638	2	13.7	4.0
49	2	Ariel	Procter & Gamble	629	3	14.1	3.9
50	-11	Tang	Mondelēz International	618	-18	9.0	5.9

GRUPO BIMBO

Alfonso Argudín, Global CMO

Mexico's Grupo Bimbo is a global manufacturer of baked goods and one of the Top 20 most chosen brands on the planet, having been chosen nearly one billion times in 2018. We spoke to Alfonso Argudín, Global CMO, about the company's recipe for success.

What makes Grupo Bimbo unique?
For me, it's the way we plan for the future. In every country and category we're in, we always think about what's best in the long term.

Of course, we want to fight for our short-term sales targets. However, we also have a longer-term strategic plan which aims to provide sustainability over time. That's why we've been around for nearly 75 years and we're still growing.

Secondly, we're a company that's all about performance. We start by setting our ultimate goal – to provide the best quality and freshness in our products – and we work back from there. The way we manufacture our products is set up so we execute with perfection and provide consumers with the best product every day.

Our brands also set us apart. As we've grown, we've looked for new brands to give us an added 'extra'.

Where does Bimbo see its greatest opportunity for growth?
To be sustainable, we need to continue growing. We don't see a specific opportunity that makes us say "this country, or this channel, is the one that will give us growth". We are always looking for multiple ways to grow across different countries and categories.

One of the top 20 most chosen brands on the planet

Focusing on where I think the biggest opportunity lies, I'd say it's with what we call the 'crown jewels'—the most successful and unique products that we have in the 32 countries in which we operate.

Today, what we're doing is seeing what the best practices are in these markets – which are the most successful products – and considering how we replicate them in other places.

Over the past five years, which change in consumer behaviour has been most significant?
The consumer's search for transparency has been a big change—they're now demanding a lot more from brands. It's not just "I like or I don't like what I consume", but "who is behind it and what is their purpose?"

Another behaviour that will continue to grow is immediacy. What the consumer wants, they want now.

If you go to places like China today, you see it—consumers get what they want immediately, through the emerging channels that are appearing. This trend will continue to spread to other countries.

DOVE

Steve Miles, Global EVP

Dove is one of only four brands to have achieved growth in every edition of *Brand Footprint*—and does so once again, for the seventh year in a row, proving that big brands can find growth year after year. We spoke to Steve Miles, Global EVP, about Dove's unique position in the Beauty and Personal Care market.

What makes Dove unique?
Dove is a brand with a track record of great stewardship, inspiration, discipline and consistency over many decades. I'm not sure that's 'unique', but it's certainly not commonplace.

If your brand doesn't have these important ingredients, it's up to you to put it on the right path. Find – or re-find – your roots and essence. Nurture the things that make you different, and find ways to re-express them in this highly diverse, challenging world.

How has Dove maintained growth, despite already being such a big brand?
Mindset is everything. If you allow others to define you with prejudicial terms like 'legacy brand', you are likely to fail.

'Big' brands are simply the arithmetic total of consumer decisions made each day. If you focus on winning at all those moments then you will grow, no matter how many of them there are.

Brand purpose has come to the fore in recent years. How will Dove ensure it continues to differentiate and lead in this area?
By continually listening and learning. By further evolving our executional approaches, and by deepening our commitments.

We have many collaborations around the world. Partnering with the right people, who genuinely share our values and purpose, is an important part of how we will continue to broaden and deepen our relevance.

Look at #ShowUs and the positive response it's had everywhere due to its relevance. Partnerships have to work alongside the voice of our purchasers and our supporters, whose authentic voices remain our best form of advocacy.

What's next for the Beauty and Personal Care sector?
Competition and complexity will continue to explode. The only route to success is focusing on the fundamental skills of brand marketing. Brands need to be agile yet consistent, engaging with the 'new stuff' we all have to master.

And all this needs to be viewed through the lens of brand purpose.

And what's next for Dove?
Vital though innovation is, growth doesn't just come from there—it's also driven by the less glamorous, yet equally vital, process of driving our core products. The most important job for us is to make people aware of our existing star products and purpose—creating brand affinity.

Dove has achieved growth for seven years in a row

KINDER

Emiliano Laricchiuta, Head of Kinder Surprise

As we've seen, Kinder achieved the joint-largest penetration gain (+1.4%) of any global brand in 2018—winning approximately 18.5 million additional shoppers and moving up seven places in the global ranking. We spoke to Emiliano Laricchiuta, Head of Kinder Surprise at Ferrero.

What makes Kinder unique?
Kinder was created in 1968 and originated from a desire to offer a product specially made for children and approved by parents. We offer products in small portion sizes designed to be enjoyed in moderation as part of a varied diet.

At Kinder, we believe that happy children today will make better adults tomorrow, and we know that little moments mean a lot for parents and for children. This is the spirit behind our products; little portions with a lot of taste, made with a lot of care.

Where is your biggest opportunity for growth?
Our biggest opportunity is to keep innovating in our current categories (chocolate, chilled, bakery), geographical expansion, and extending into adjacent categories in the Sweet Packaged Food industry with a new portfolio—like biscuits or ice cream.

What was your biggest success in 2018?
We successfully entered the US market with the launch of Kinder Joy in the US. It's the biggest confectionary market in the world and highly competitive, and we were able to make a mark with Kinder Joy—which has been one of the most successful confectionary innovations of 2018.

Approximately **18.5 million** additional shoppers

How do you think 2018 in FMCG will be remembered?
When we look at the FMCG industry, we see a growing trend of advancing and diversifying customer experience towards convenience, customisation, personalisation, and creating new purchasing behaviours.

Over the past five years, which change in consumer behaviour has been most significant?
There is a well-known declining trust in traditional sources of information and authority. On the other side, new generations rely much more on information on social media, bloggers, and so on—and the role of social influencers is evolving, including the development of specific skills and building on individual styles of interaction, shared preferences and common interests.

What do you think the next five years will hold?
Ethical concerns in society are emerging. Companies and brands are expected not only to act ethically and responsibly and communicate their progress on the objectives set, but to engage with consumers and institutions on these topics to share their intent and challenges in a transparent and consistent way.

GLOBAL BRAND STORIES

Procter & Gamble: The Tide has turned

Last year, we suggested global manufacturing powerhouse P&G was turning a corner. And that's been confirmed by CRP losses more than halving since, with 2019 looking like another strong year.

Downy, P&G's biggest global brand, has reversed the decline we saw in 2017. In fact, it recorded more CRPs in 2018 than it had in 2016, driven by growth in Indonesia, its biggest CRP market, and in the US. And Head & Shoulders has grown for a second consecutive year, with its biggest growth contributor – India – demonstrating the importance of success in your number one market. Its growth in other key markets such as Colombia has also helped.

But it's in China Mainland that P&G has seen the biggest turnaround. Here, it has regained all the losses its portfolio suffered in 2017. Tide (-3.7 million) and Ariel (-1.2 million) lost significant numbers of Chinese shoppers in 2017 but bounced back in 2018 to gain 3.8 million and 2.7 million respectively in 2018—a net gain of 1.6 million shoppers and a great example of how to win with a portfolio.

For the multi-brand, multi-country players, it's the big swings that matter. P&G is starting to win this battle but needs to keep on the right track in the US, China Mainland and India. Shopper losses in India have reduced from more than 12 million in 2017, to just one million in 2018—with Gillette, Oral-B and Head & Shoulders influential.

Coca-Cola: Strong performance in challenging times

Despite a host of pressures in different markets, Coca-Cola retains its number one position in this year's global ranking. While it is in decline, 2018 marked a significant improvement for the brand.

In fact, Coca-Cola enjoyed strong growth in every region other than Mexico (-7%), which is its biggest market. If Mexico had simply remained flat, the brand would have been in growth overall—reiterating the importance of any brand's number one market.

Regular Coca-Cola continues to lose share globally, losing 1.9 million buyers across key European markets and demographics in 2018. However, with 30% of volume lost due to shoppers switching to Coke Zero, this picture isn't as bleak as it sounds.

Strong performance in China Mainland and the UK paved the way for the manufacturer's resurgence in 2018, as it gained more shoppers in both markets.

Buoyed by an unusually hot summer and England's success at the football World Cup, Coke Zero was the key to the brand's success in the UK—gaining eight penetration points in the 12-month period.

In China Mainland, a focus on smaller pack sizes (both single- and multi-serve) helped drive growth across major cities. Coke No Sugar also performed well, playing to consumer demand for healthier options.

Interestingly, the markets where sugar taxes have been introduced are generally where the brand performed best.

Coca-Cola has successfully innovated to meet the challenge by introducing smaller pack sizes and a range of region-specific flavour variants—such as Coke plus Coffee in Vietnam.

DORITOS

Salvador Padron, Senior Marketing Director, Global Doritos and Cheetos Marketing, New York

In 2018, Doritos grew CRPs 7%—gaining 0.8% in penetration points with 11.5 million additional shoppers. It sits at 36th in our global ranking, having moved up six places since last year—growing well in the US, its largest market, and enjoying strong shopper gains in China (+2.7 million) and Indonesia (+3.8 million). We spoke to Salvador Padron, Senior Marketing Director, Global Doritos and Cheetos Marketing.

What makes Doritos unique?
Its boldness. For many years, Doritos has stood for disrupting the status quo in a way that has inspired people to reimagine what's possible and connect in a very authentic way. We have always believed in the power of enabling people to be their most authentic self.

This brand positioning, paired with delicious products known for their unique crunch, intense flavour and iconic triangle shape, have made Doritos internationally loved and one of PepsiCo's fastest-growing snack brands.

Where is your biggest opportunity for growth?
Even though Doritos is one of the largest savoury snack brands in the world, it still has a number of opportunities to expand into new geographies where it is not yet available—as well as penetrating further into markets in which it is already available.

Doritos launched in China and India in 2017—two of the fastest-growing markets in the world. While tortilla chips are not a staple in these countries, Doritos has seen a very strong start since launch, and we know there's still huge potential in years to come.

11.5 million additional shoppers

What do you think the next five years will hold?
I'm watching closely how artificial intelligence and voice assistants will develop. As people continue leveraging digital solutions to drive convenience in their lives, more and more manufacturers will adopt these technologies and make them part of the mainstream—especially across developed markets. These environments will require brands to interact with people in different ways and to offer value beyond traditional product benefits.

How do you think 2018 in FMCG will be remembered?
I believe recent examples of very big acquisitions in the FMCG space have shown how purely focusing on cost-cutting strategies at the expense of brand building is just not sustainable. This has re-appraised the importance of the marketing function within organisations and elevated it to new heights with the realisation that creating real connections and driving brand love directly impacts the sustainable growth of organisations around the world.

HADAY

Zhang Xin, Secretary of the Board and CMO

Haday, a seasoning manufacturer, was chosen more than 520 million times in China Mainland in 2018—growing CRPs 6% and attracting six million new shoppers. We spoke to Zhang Xin, Secretary of the Board and CMO, about how a brand more than 300 years old is still finding new shoppers today.

What makes Haday unique?
Haday is a brand with more than 300 years of history, dating back to the reign of Qianlong during the mid-Qing Dynasty.

We use traditional methods – such as exposure to sunlight in the brewing process for a natural flavour and freshness – to ensure our soy sauce is authentic in taste, alongside modern technologies – such as big data, information technology, artificial intelligence and automation – to achieve large-scale production.

Chosen more than 520 million times in China Mainland in 2018

Where do you see future opportunities for Haday?
Our long-term strategy is to make the best seasoning products, increase consumer quality of life and expand our global footprint.

To do that, Haday is working to increase the accessibility of our products to every consumer. In 2018, we achieved a sales revenue of more than 100 million Yuan (around $15 million) in more than 90% of provinces in China Mainland—a result of many years of hard work.

Over the past five years, which change in consumer behaviour has been most significant?
More and more consumers are shopping online, which is driving integration between online and offline channels. Rapid growth in e-commerce is currently transforming traditional offline sales into these integrated channels. The FMCG industry should pay full attention to the future development of this trend.

What do you think the next five years will hold?
No matter how consumption behaviour changes, quality remains the top priority for consumers. However, consumers now have a more diverse range of products to choose from.

In the past, they were constrained to products that were available locally, and later to any China Mainland products available for sale online. Today, they can order any international product at their own will, meaning Chinese manufacturers are faced with new competition from foreign brands.

In closely keeping track of consumption changes, Chinese enterprise also needs to maintain a global leadership role in product research and development—in order to enhance market competitiveness and take "Made in China" to the next level.

HOW OLD IS YOUR BRAND?

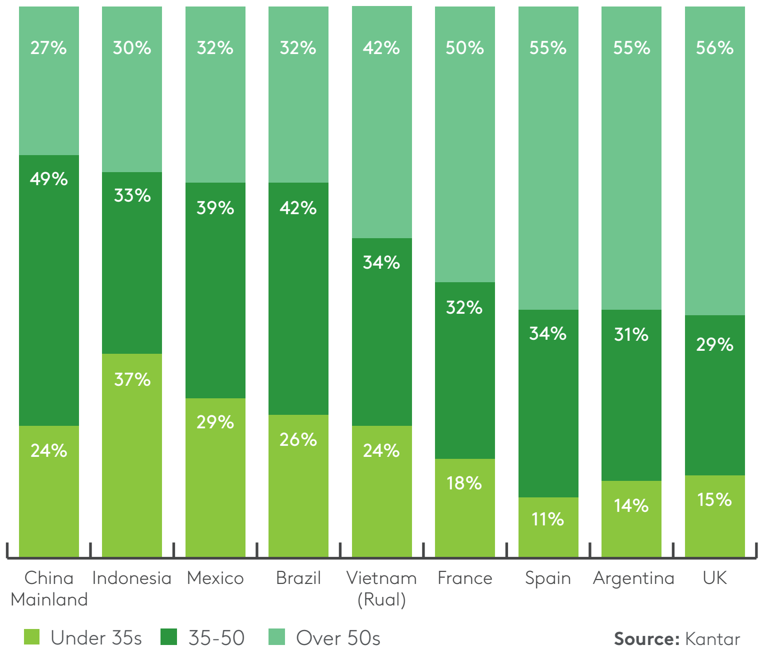
We can dissect shopper behaviour in many ways, and one of the most important differentiators is age. It identifies brand variances better than most standard demographics and showcases areas for growth—such as the importance of the oft-forgotten over 50s.

But are too many marketers focusing too much effort and expenditure on buzzworthy age groups like Millennials and Generation Z?

We've looked at the proportion of take-home CRPs accounted for by three age groups – under 35s, those aged 35 to 50, and over 50s – across nine key markets: Argentina, Brazil, China Mainland, France, Indonesia, Mexico, Spain, the UK, and Rural Vietnam.

In line with population size, what's clear is that, while the majority of industry discussion focuses on younger audiences, Millennials and Generation Z – both of which fall within our under 35s age group – are the smallest driver of CRPs in eight of the nine markets we've studied—with Indonesia the exception.

% of CRPs (top 200 brands) by main shopper age



Source: Kantar

I'd like to buy the world a Coke

Coca-Cola, the most chosen brand on the planet, is often seen as a brand for younger people. While that's true in many markets, its buyer demographic varies dramatically.

In the likes of France, Spain and the UK, there's a clear skew towards younger shoppers—over-indexing with under 35s and with significant room for improvement among the over 50s.

But in Mexico – Coca-Cola's biggest and most important market – the opposite is true.

Combining all nine markets we've looked at, under 35s represent less than a quarter of all the times the brand is chosen—while the over 50s account for almost 40%.

Unsurprisingly, Coca-Cola has a good spread of CRPs across each age group. You don't become the most chosen brand in the world without achieving this, and that is true for all brands aiming to reach 'big' status.

Its 'A Coke is a Coke' campaign – which plays on a famous quote from Andy Warhol and had a prominent spot during the 2019 Super Bowl in the US – is a clever way to speak to all demographics.

% of Coca-Cola CRPs by age across markets

Source: Kantar

For most other global brands, the proportion of times they're chosen by over 50s is higher than that of the under 35s—which remains at a similar level for all brands. The real differences come with those aged 35 and above. Even for a brand like Lay's, which will naturally attract younger shoppers, the number of times it's chosen by under 35s is both similar to others and lower than that of older shoppers.

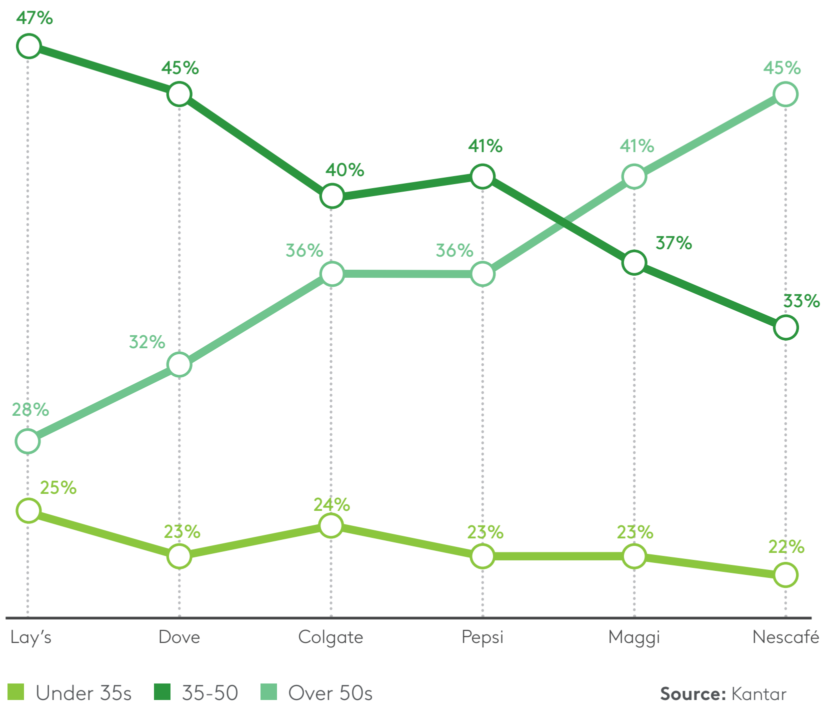
Early warning signs?
What this doesn't mean is that brands should ignore younger shoppers and focus all their attention on older age groups. As well as truly understanding how old your brand is, looking through the lens of age can act as an early warning sign for demographics you may be missing out on—or reveal whether your brand is too reliant on a specific age group.

Much advertising targets younger shoppers to attract those who have purchasing power for the first time and are new to the myriad products offered by FMCG brands—and who have not yet built many brand associations.

In which case, if a brand is struggling to be chosen by younger shoppers, does this indicate the beginning of the end? Not necessarily, but it could suggest potential future challenges.

Take Nescafé, for instance. While it faces a category challenge – with more and more customers turning to coffee pods and out-of-home purchases over instant varieties – it also has an over-reliance on older shoppers, especially in markets such as the UK, where 70% of its CRPs are from the over 50s.

% of CRPs by age across markets



Source: Kantar

KEY TAKEAWAYS

Don't underestimate the importance of older shoppers.
Both in deciding who to target – particularly in this digital age of precision targeting – and how you speak to each audience.

Think about your marketing campaigns and how they resonate—people over 50 are not just pensioners with grey hair. They also have higher disposable income on average, and arguably a greater desire for choice than the other two age groups.

Shopper behaviour is more complex and more nuanced than date of birth.
While this analysis should act as a guide, the age groups are broad, and brand strategies should be considered for the sub-groups within.

For example, the under 35s group ranges from people just leaving university or entering the workplace, to those who have been in a job for more than a decade or are starting families.

OUT-OF-HOME BRAND RANKING

Maria Josep Martínez, Global OOH Director, Worldpanel Division

For snacking foods and non-alcoholic beverages, a large percentage of purchases are made for out-of-home (OOH) consumption.

As stated in our *Out-of-home, out of mind?* publication, OOH accounts for 41% of all spend for these two sectors across nine global markets.

Given the importance of OOH purchasing, we've looked at eight of these markets – Brazil, China Mainland, France, Indonesia, Mexico, Portugal, Thailand and the UK – and have created our first ever ranking of this type, to see which brands do better in these occasions.

OOH drives brand growth

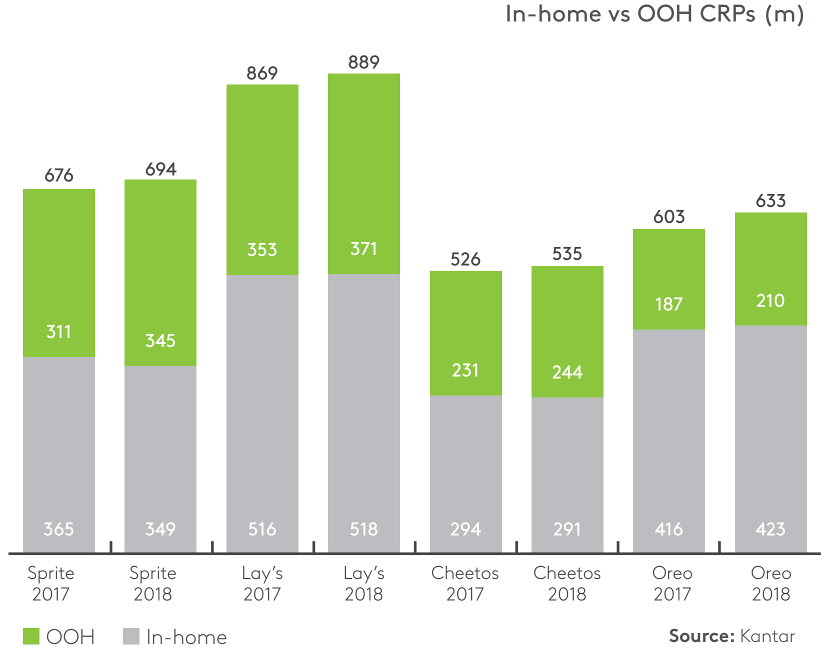
There has been an increased focus on health and wellbeing across the food and beverage industries, with healthy snacking on the up and fragmentation of the non-alcoholic beverages market—making it harder for brands perceived as 'unhealthy' to grow or maintain a level of sales they may have been accustomed to.

However, when they're on the go, consumers are more likely to make impulse purchases without the same level of consideration. Understanding this and having a strategy to win on-the-go – particularly in the channels outside of modern trade that perform stronger in OOH – can help brands achieve growth when they would otherwise be struggling.

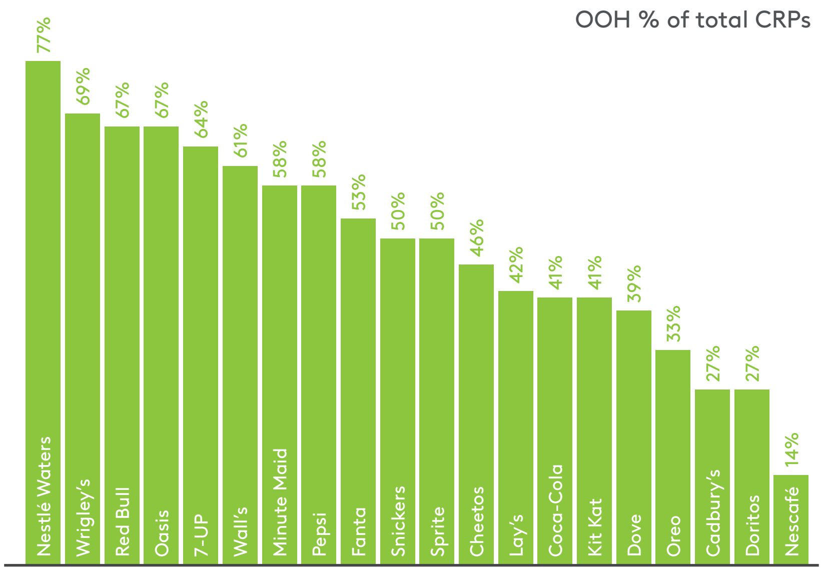
In 2018, Oreo (+12%), Sprite (+11%), Cheetos (+6%) and Lay's (+5%) all saw strong OOH CRP growth, turning what would have been flat overall performance – or, in Sprite's case, a 4% decline – into growth. For brands in these categories, winning OOH isn't just a nice-to-have—it's a must.

Doubling up

For some brands, when we add their OOH CRPs to their take-home performance, the number of times they're chosen more than doubles. In these cases, it's partly down to category—Wall's wins the OOH ice-cream occasion, for example, whilst other brands are winning in the convenience and 'horeca' (hotels, restaurants and cafés) channels that are stronger for OOH purchasing.



Source: Kantar



Source: Kantar

Non-alcoholic beverages

2018 Rank	Brand name	Manufacturer	OOH CRPs (m)	CRP growth
1	Coca-Cola	The Coca-Cola Company	1767	-3%
2	pepsi	PepsiCo	924	-2%
3	Fanta	The Coca-Cola Company	420	0%
4	Sprite	The Coca-Cola Company	345	11%
5	Minute Maid	The Coca-Cola Company	218	-12%
6	Red Bull	Red Bull	177	3%
7	Nestlé Waters	Nestlé	166	-14%
8	7UP	PepsiCo	141	-8%
9	NESCAFÉ	Nestlé	112	-22%
10	Oasis	Orangina Schweppes / The Coca-Cola Company	94	16%

Source: Kantar

Snacking

2018 Rank	Brand name	Manufacturer	OOH CRPs (m)	CRP growth
1	Wall's	Unilever	406	5%
2	Lay's	PepsiCo	371	5%
3	WRIGLEY A Subsidiary of Mars, Incorporated	Mars	359	-7%
4	Cadbury	Mondelēz International	248	-8%
5	Cheetos	PepsiCo	244	6%
6	OREO	Mondelēz International	210	12%
7	KitKat	Nestlé	98	-6%
8	SNICKERS	Mars	94	1%
9	Dove	Mars	86	5%
10	Doritos	PepsiCo	85	-14%

Source: Kantar

ONLINE BRAND RANKING

Stéphane Roger, Global Shopper & Retail Director, Worldpanel Division

A brand's performance should not be solely judged on its offline success. As we explored in our most recent *Winning Omnichannel* publication, e-commerce is the fastest-growing channel globally, as shoppers increasingly swap bricks for clicks.

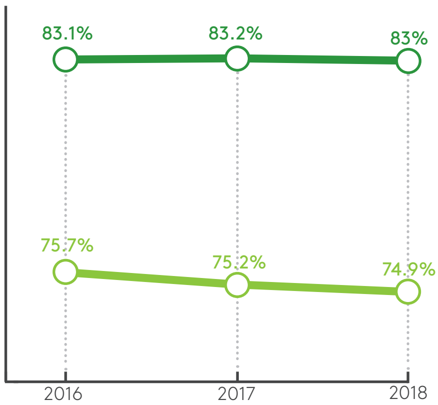
Online is a natural space for brands

We've studied the relationship between online and overall growth for brands in five key countries driving the e-commerce explosion in FMCG: China Mainland, South Korea, Taiwan, France and the UK.

On average, the share for brands – versus private-label – is 83% online but falls to 74.9% offline. Online shoppers are urban, young and affluent, so are more prone to buying branded goods.

Brands have maintained value share online—in contrast to the overall picture, which shows brands continuing to lose share to private labels.

% value share manufacturers FMCG



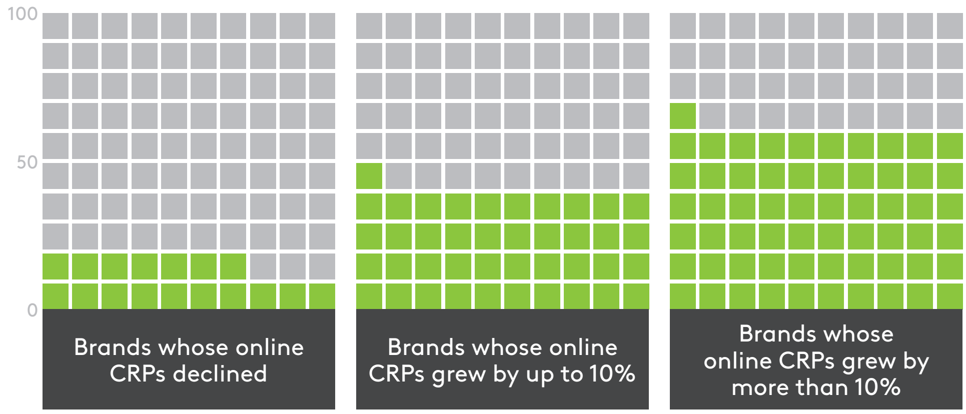
Total country E-commerce

Source: Kantar

How e-commerce impacts overall growth

When looking at all the brands growing in this year's *Brand Footprint* ranking, online has driven more than half (53%) of this growth on average. E-commerce commands less than 10% share versus other channels—meaning that, in the countries we've studied, e-commerce in fact drives five times as much growth as would be expected from its fair share. But it's important to understand that this low share also means that positive performance online does not guarantee overall growth.

Based on the Top 100 online brands



Overall growth

Source: Kantar

Kleenex: an online success story

Kleenex has the most significant share of CRPs online, with 12.2% of its total coming from e-commerce. It's a brand completely reliant on its online performance—without which it would not have grown at all.

Its online CRPs increased 20% in 2018, especially thanks to a new online strategy it launched in South Korea in 2016.

Cross-brand collaboration

Kleenex partnered with Yuhan, a top household item manufacturer, to sell brand favourites and newly launched 'daily necessities' at Gmarket—one of South Korea's biggest e-commerce websites.

In our *Generating Incremental Growth Through Promotions* publication, we showed that promotions represent 36.1% of value sales online, versus 20.5% offline. And Kleenex has embraced this, applying limited-time discounts and promotional campaigns across the tissue category, and investing in calendar moments including Black Friday and Double 11 (Singles Day), as Korean retailers begin to buy into these events.

It also partnered with KAKAO FRIENDS – characters from popular instant messaging app KakaoTalk – running further promotional activity online.

2018 Rank	Brand name	Manufacturer	Online % of total CRPs	Online CRPs (m)	Online CRP growth %
1	Kleenex	Kimberly-Clark	12.2%	12.3	20%
2	Anchor	Arla Foods / Fonterra	11.3%	7.7	16%
3	Dettol	Reckitt Benckiser	9.9%	8.9	27%
4	McCain	McCain Foods	9.3%	17.4	-1%
5	Yoplait	General Mills	9.2%	13.5	-4%
6	L'ORÉAL PARIS	L'Oreal Group	8.7%	12.6	16%
7	Fairy	Procter & Gamble	8.3%	9.2	-5%
8	NESCAFÉ	Nestlé	8.1%	21.4	15%
9	Comfort	Unilever	7.6%	9.5	12%
10	NIVEA	Beiersdorf	7.0%	13.1	13%
11	Heinz	The Kraft-Heinz Company	6.9%	30.1	1%
12	WALL'S	Unilever	6.8%	13.4	2%
13	Dove	Unilever	6.8%	10.2	14%
14	Quaker	PepsiCo	6.6%	8.4	2%
15	McVitie's	Pladis	6.6%	18.9	-1%
16	Nestlé	Nestlé	6.4%	11.3	9%
17	head & shoulders	Procter & Gamble	6.3%	8.0	25%
18	ACTIVIA	Danone	5.5%	11.0	-5%
19	Colgate	Colgate-Palmolive	5.2%	16.0	9%
20	PRÉSIDENT	Lactalis	5.1%	11.6	7%
21	Knorr	Unilever	4.6%	7.6	4%
22	pepsi	PepsiCo	4.3%	12.7	23%
23	Coca-Cola	The Coca-Cola Company	4.2%	27.8	-1%
24	Lay's	PepsiCo	3.0%	9.7	20%
25	OREO	Mondelēz International	2.9%	9.2	8%

Source: Kantar

Idriss El Ganari
Business Development Director – A&ME
Worldpanel Division

AFRICA & THE MIDDLE EAST

Across all markets in Africa and the Middle East (A&ME), shoppers are becoming more demanding—especially on price. Many markets saw limited growth in 2018, while the likes of Saudi Arabia and the Ivory Coast even saw a decline.

Brands need to adapt quickly, with optimisation and return on investment the top priorities. As shoppers move to different channels, they also change their habits—buying less each trip and choosing smaller formats.

Brands that understood the right price point, format and channel were the winners of 2018. Immediate and short-term relevance is the key to growth.

Levers for growth:

- MORE TARGETS
- MORE PRESENCE
- MORE CATEGORIES
- NEW NEEDS
- MORE MOMENTS

Ivory Coast
Flash

In a mature and saturated category like laundry bars – which has 99.5% penetration in Ivory Coast – Flash has found 68.1 penetration points in one year, becoming the third most chosen brand behind Magico and Kdo. This exceptional performance is driven by a combination of factors, including affordability (5% cheaper than average) and having similar branding, positioning and pack size availability as the market leader.

This, combined with strong trade activity in non-formal channels, promotions and a 'commando' team, has led to +44% penetration with street vendors and +18% penetration on the open market.

Nigeria
Kellogg's

Kellogg's is the fastest-growing brand in ready-to-eat cereals, bringing innovation to the category and encouraging snacking outside the breakfast occasion. The brand has relaunched varieties such as Corn Flakes, Frosties and Fruit & Fibre.

Its best performing variant has been Coco Pops, which performed particularly well in the South West—mostly driven by lower social class households with young families. It also succeeded by offering lower-priced packs, leading to a 28% increase in penetration for Kellogg's in 2018.

Ghana
Champion Carbolic

Champion Carbolic, an unwrapped soap, stands out as the key performer for Unilever—winning shoppers consistently over the past four years. It is now found in more than half of all Ghanaian households.

Its affordable price point has landed well with consumers, increasing the average number of times it is purchased from seven to nine over the past three years. The brand has also demonstrated strong appeal across all regions and demographics.

Saudi Arabia
Close-Up

Close-Up, the global toothpaste brand, successfully grew its CRPs by 14% in 2018. This is a strong performance in the context of the Saudi market, where households are continuously lowering their FMCG spend. It has now broken into the category's top three most-penetrated brands.

Retailer partnerships were one of the key drivers of its growth. It improved its presence in one of the leading retailers in the market, resulting in improved penetration in the most dominant trade channel in the category. The brand saw growth across all regions and demographics through setting itself apart from the traditional advertising narrative of 'family' in Saudi Arabia, and focusing on 'bringing you closer to your loved ones'.

Egypt
Oxi

Oxi is a laundry detergent brand owned by Arma. It had a strong 2018, reaching 85% of Egyptian households. With shoppers seeking better value, the brand succeeded by understanding the need for well-priced products.

Oxi invested not only in promotions but also in innovation, launching SKUs at attractive price points. As a result, Oxi was able to recruit across all demographics—especially C2 class shoppers. The brand also improved its distribution, recruiting households in both specialised channels and rural areas.

To support these initiatives, Oxi invested heavily in media – both TV and digital – using fashion designers on its Facebook page to promote its powder and gel products.

South Africa
Rhodes

Rhodes Food Group (RFG) is an international manufacturer available throughout South Africa and sub-Saharan Africa. The brand portfolio includes canned and bottled goods, jams, fruit juices, packaged foods, fresh and frozen convenience meals, bakery and dairy products—with a focus on convenience.

In South Africa, the brand moved up 12 places in the rankings, increasing its CRPs by 13%. There were two key drivers of success in 2018: expanding into the baby category with a new range of fruit and vegetable purees and juices, and introducing localised flavours like the addition of rooibos to its new pear and peach puree.

Kenya
Downy

Procter & Gamble launched Downy fabric softener in Kenya at the end of 2015—the first sub-Saharan country to have the product. In 2018, nearly half (40%) of Kenyan households purchased the brand, up from less than 20% in 2016.

Downy achieved growth through its 20ml sachet packs, making it accessible to most households with a competitive price positioning of KSh 20 (around $0.20)—challenging more established brands like SoSoft. It successfully leveraged Ariel's number one position in the laundry detergent category through cross-category bundling promotions, to help drive initial trial.

Marcy Kou
CEO – Asia
Worldpanel Division

ASIA

Total FMCG growth in Asia remains fairly stable, most recently showing a slight year-on-year increase at 4.3% in Q4 2018 compared with 4.1% at the same point the year before. Homecare has seen the most stable growth across all quarters, propelled by improved living standards and increased hygiene awareness.

As we saw in our *Winning Omnichannel* publication in 2018, Asian markets – especially the East and Southeast – are also leading the way in e-commerce. China Mainland's online FMCG sales grew faster than any other developed country (29%) in 2017, with $15 billion in total e-commerce sales.

Levers for growth:

- MORE TARGETS
- MORE PRESENCE
- MORE CATEGORIES
- NEW NEEDS
- MORE MOMENTS

China Mainland
Liu Shen

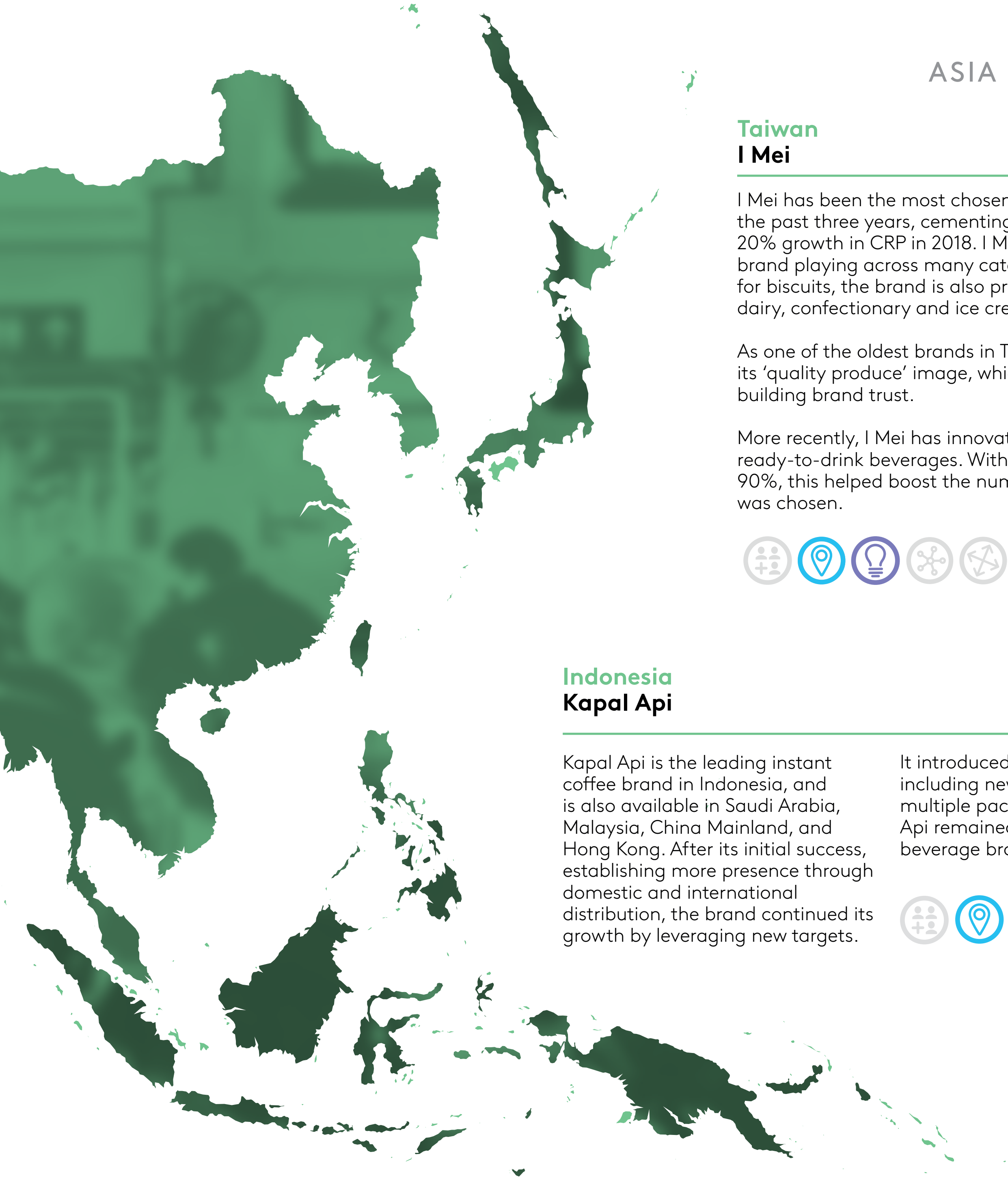
Liu Shen is a local personal care brand in China Mainland. In 2018, it was chosen 136 million times by urban Chinese households, equating to a 5% increase in CRPs, and is now one of the top 50 brands in the market. Liu Shen is famous for its floral water product, whilst also offering body wash, soaps, powder and baby products.

The brand recruits shoppers from across the country and has benefited from being an early adopter of e-commerce. Liu Shen recently started appealing to younger shoppers through rebranding and advertising using young celebrity singer "HuaChenYu".

India
Parle

Parle has consistently topped the local *Brand Footprint* rankings in India. The brand primarily operates in the biscuits category and also has a small presence in salty snacks and rusk. It added more shoppers to the brand in 2018, reaching 74% penetration.

One of Parle's wins was communication during the Indian Premier League, which was watched by nearly 700 million people. This revolved around building awareness of the newly introduced premium Platina range by Parle. It also revamped its health offering with the launch of Nutricrunch.



Taiwan
I Mei

I Mei has been the most chosen brand in Taiwan for the past three years, cementing its place with around 20% growth in CRP in 2018. I Mei is a Taiwan Food brand playing across many categories. Most famous for biscuits, the brand is also present in frozen food, dairy, confectionary and ice cream.

As one of the oldest brands in Taiwan, it is proud of its 'quality produce' image, which has been vital for building brand trust.

More recently, I Mei has innovated by launching ready-to-drink beverages. With penetration already at 90%, this helped boost the number of times the brand was chosen.

Indonesia
Kapal Api

Kapal Api is the leading instant coffee brand in Indonesia, and is also available in Saudi Arabia, Malaysia, China Mainland, and Hong Kong. After its initial success, establishing more presence through domestic and international distribution, the brand continued its growth by leveraging new targets.

It introduced a host of new variants, including new flavours and multiple pack sizes. In 2018, Kapal Api remained the most chosen beverage brand in Indonesia.

Malaysia
Maggi Pedas Giler

The Malaysian instant noodle market has moved slowly over the past decade. However, in 2017, the Korean invasion of Sam Yang Super Spicy Noodles defied everything Malaysian manufacturers thought they knew—reeling in hundreds of thousands of shoppers at five times the price of other mass brands. A niche segment was suddenly a significant new moment.

Maggi, the most chosen brand among Malay ethnic shoppers (67% of the national population), knew it had little time to defend its throne. The brand quickly responded by integrating the 'super spicy' factor into the flavours most loved by Malay shoppers—Chicken and Tom Yum. Playing to the Malaysian palate for hot flavours, Maggi launched Maggi Pedas Giler (Maggi Crazy Spicy), bringing nearly 500,000 new households to the brand in 2018.

Vietnam
Orion Chocopie

Chocopie is a popular soft cake brand in Vietnam, with nearly 50% of households (in Urban 4 cities) buying the brand in 2018. Enjoyed not only for its unique taste and texture, it also appeals to consumers as a result of its advertising strapline, "Love like Chocopie".

The brand is now market leader, with 47% share in the soft cake category. At the end of 2017, the brand introduced 'Chocopie Dark', which has 70% more cacao concentration than the original. In little over a year since launch, the brand achieved a value growth of 18% and increased its total shopper base by 12%. This proved highly incremental for the brand.

Tim Kidd
MD – Europe and US
Worldpanel Division

EUROPE

The year 2018 was one of political volatility in Western Europe. Brexit preparations stalled as the UK and the EU failed to finalise a withdrawal agreement; differences over the Irish border hinging not only on trade but keeping the peace, too. Elsewhere, the French gilets jaunes protests gathered momentum while Spain wrestled with the aftermath of the Catalonian referendum.

Despite all that, FMCG volumes remained broadly stable and increased in value by 1.4%. We see a number of European shoppers were choosing to buy cheaper goods in 2018, reflected by growing private-label share across most markets—with the exception of France, where private-label share is down and the era of consuming 'less but better' is well established.

Levers for growth:

- MORE TARGETS
- MORE PRESENCE
- MORE CATEGORIES
- NEW NEEDS
- MORE MOMENTS

UK
Kenco

Kenco, owned by Jacobs Douwe Egberts, is the sixth most chosen beverage brand in the UK. The coffee brand enjoyed 17% growth in CRPs last year, through a healthy 1.5% penetration point increase.

Kenco has expanded to meet the demand for premium coffee born of the UK's love of quality coffee shops. Its innovation has reflected this, now including coffee shop favourites such as salted caramel-flavoured variants, flat whites and iced coffees. The brand's media campaigns play on the concept of expertise, shown best in the high-profile 'Cofficionado' TV adverts.

Ireland
Keogh's

Keogh's is an Irish, family-owned snack food brand that has experienced huge growth in CRPs—increasing penetration points by 11.4% in the past two years. The brand's potato products have driven this, contributing more than 80% to its CRP growth this year, while expanding its range into new flavours and formats has also had an impact.

For such a commoditised category, Keogh's has succeeded by using the strength of its brand to win in a category dominated by private-label options. Its potato chips emphasise Irishness, featuring illustrations of local landmarks and scenes on the packaging—helping tell the story of the Keogh's family farm. Being gluten-free has also helped, with Irish consumers still invested in this trend.

Portugal
Danette

Global brand Danette – part of the Danone family – returned to the Portuguese market in late 2017 with a range of creamy desserts. In the year following, the brand reached more than 14% of Portuguese households and is now the 14th most-chosen dairy brand in the market.

This is a notable triumph in an environment where Danette's competitors have remained stable in terms of shoppers. It was the most successful dairy brand in 2018, recording the highest growth in CRPs. The brand has doubled the number of varieties available in its range, adapting to consumer needs and bringing new options to the category, while increasing product availability and brand awareness.

France
Bonduelle

Bonduelle, a canned and frozen vegetable manufacturer, is among the top 10 most chosen FMCG brands in France. While it has a presence across Europe, France is the market that drove a 5.6% increase in CRPs in 2018—adding 370,000 shoppers. This is impressive for a brand that already had a penetration of 75.7%, and now sits at 76.9%.

Bonduelle has tapped into the health message driving consumption trends in France. It naturally plays within the vegan and plant-based arenas, while boasting a local, "made in France" heritage. Recently, it has met more consumer needs by launching pesticide-free products and a "VeggissiMmm!" range, with a more explicit vegan positioning.

Greece
Violanta

Violanta is a Greek biscuit and cookies manufacturer that exports products to around 30 countries globally. The brand saw incredible growth in 2018 in its home market, now reaching almost 25% of Greek households after increasing penetration by 14%.

In the past three years, Violanta's focus has shifted to manufacturing a wide range of different products. It has particularly invested in the health and nutrition trend, with oat-based products proving the most successful launches.

In 2018, the company also launched a whole-bran range of cookies, "Pityron Cookies". The brand significantly increased its distribution and share of shelf in all major retailers, while spreading awareness through above-the-line campaigns featuring social media, TV commercials, sponsorship and product placement.

Spain
Gallina Blanca

Gallina Blanca is a leading Spanish soup brand from GBfoods, one of the most prominent manufacturers in the country. It is the country's 15th most chosen FMCG brand, having risen three places in our ranking. An increase of 600,000 shoppers means the brand currently reaches more than eight million Spanish households.

In Gallina Blanca's ambition to bring convenience to homemade food, it has launched the Caldo Casero range of homemade soups. This has expanded the brand into a new category, with flavours such as Pumpkin, Zucchini and 'Mediterranean'. The launch has been supported with a campaign emphasising the products' homemade message, fronted by journalist Mónica Carrillo.

Sonia Bueno
CEO – LATAM
Worldpanel Division

LATIN AMERICA

We've reached an important turning point in the LATAM region, where the FMCG market is no longer growing. The 8% volume increase we saw a decade ago, in 2009, has slowed every year—to the point where the last quarter of 2018 saw a small decline (-0.9%).

Consumers are buying in very different ways, representing a significant challenge for FMCG brands and manufacturers. Their habits are changing, and they're making new decisions—switching brands and channels, and prioritising health and environmentally friendly packaging.

Levers for growth:

- MORE TARGETS
- MORE PRESENCE
- MORE CATEGORIES
- NEW NEEDS
- MORE MOMENTS

Mexico
Hellmann's

Hellmann's, the global mayonnaise and dressings brand from Unilever, had a strong year in Mexico. CRPs grew more than 30%, it added 1.9 million new shoppers, and penetration increased to more than 40%.

Hellmann's launched three new mayonnaise variants – Casera, Reducida en Grasa and Aceite de Oliva – helping attract shoppers from low- and middle-income households. It also relaunched its flagship SKU—attracting higher income households and driving loyalty.

As part of this relaunch – under the banner, "the real pleasure is in the flavour" – Hellmann's focused on the importance of flavour in meals, highlighting the quality of its products and suggesting recipes.

Colombia
Head & Shoulders and Pantene

Head & Shoulders (H&S) and Pantene are global P&G haircare brands. In Colombia, both have increased CRPs—driving P&G's overall growth.

H&S, the number one P&G brand in the market, grew CRPs 15%, while Pantene's grew 57%—through penetration gains of 3% and 5% respectively. Growth came through offering premium brands at affordable prices, with sachet formats key.

Pantene launched its premium '3 Minute Miracle' product but, via smaller pack options, attracted less affluent households. H&S launched a similar product and, while trip volume fell, it saw both penetration and frequency gains—with more than half of all Colombian households buying it.

Central America
Pollo Rey

Pollo Rey is a Guatemalan brand that has expanded throughout Central America—particularly in Honduras and Costa Rica. It began life with products such as fresh chicken and pre-cooked foods, before successfully innovating to launch its 100% cooked line.

Manufactured by Corporación Multi Inversiones (CMI), it was chosen by more than 25% of Central American households in 2018—growing penetration more than 2% and driving 12% CRP growth.

Pollo Rey has developed its own chain of stores – "La Casa del Pollo Rey" – selling Pollo Rey and Toledo (another CMI brand) products. Already, 7% of households in Guatemala have visited one.

Ecuador
Olimpia

Olimpia is a cleanser brand from La Fabril in Ecuador, and followed up strong performance in 2017 to be chosen more than 10 million times in 2018. Its penetration has increased from 55% in 2016 to 62% in 2017, and now 65% in 2018.

Olimpia saw its biggest shopper gains in the Coastal region, especially through the launch of new fragrances. Lavanda and Eucalipto helped drive frequency, while Manzana Canela brought new shoppers.

The price of the 900ml format was also lowered by 4%, offering value for shoppers. Olimpia is consistently active on above-the-line media and digital channels, targeting lower-income households.

Brazil
Tixan

Tixan, a Brazilian laundry brand part of the Ypê range, is the market's fourth most chosen homecare brand. Chosen 164 million times in 2018 (+17% versus 2017), it gained 4% penetration—finding an additional 3 million shoppers.

With a lower price than competitors, it's a smart choice for consumers and has gained brand awareness. Tixan also launched a new stain remover, entering a new category and further increasing penetration.

TV campaigns on Brazil's popular Rede Globo channel, with presenters Luciano Huck and Ana Maria Braga as ambassadors, increased Tixan's popularity. One such campaign, #OPoderDoX ("The Power of X"), offered the chance to win prizes including a house.

Argentina
Tregar

Tregar is Argentina's sixth most chosen dairy brand, with a portfolio predominantly made up of milk, yoghurt and cheese. It has grown CRPs by 24%, being chosen an additional 8 million times having gained 2 million new shoppers to reach almost 50% penetration.

Its success is partly down to being a mainstream brand with a more affordable price, but it's not only lower-income households that have been attracted. A quarter of shoppers gained are from upper and upper-middle households.

The brand also worked with the Despicable Me franchise to target households with children with its yogurt and flavoured milk products.

Peru
Milo

Milo, the global chocolate and malt powder megabrand manufactured by Nestlé, saw growth in Peru in 2018—where it has a strong association with several different moments of the day. Its CRPs grew 2%, returning its overall penetration to more than 73%.

The brand launched its ready-to-drink format, attracting households with children in particular—and providing an on-the-go beverage for out-of-home consumption—with growth coming through convenience stores such as Tambo+ and Oxxo.

In Peruvian culture children often go to school with a packed lunch. Milo created a branded lunchbox and positioned the brand as complementing children's daily lives, reaching 12.8% penetration and increasing frequency.

WHAT IS BRAND FOOTPRINT?

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

METHODOLOGY & CRITERIA
The categories: The complete ranking comprises five global FMCG sectors – Beverages, Food, Dairy, Beauty & Personal Care, and Homecare – tracked by Kantar through Worldpanel FMCG. 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 data collected covers 72% of the global population across 49 countries, and 85% of global GDP.

The data period: The *Brand Footprint* ranking is based on data collected over the 52-week period between November 2017 and October 2018.

Data source: *Brand Footprint* is a Kantar initiative. The ranking is created in collaboration with Europanel, GfK, IRI, Intage and CTR.

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. Data collected from Egypt, Ghana, Kenya and Japan is not included in the global ranking.

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

Data for Austria, Belgium, Czech Republic, Denmark, Germany, Hungary, Italy, Poland, Russia, Slovakia, South Africa and Sweden was provided by GfK

Data for the USA was provided by IRI

Data for Japan was provided by Intage

KANTAR WORLDPANEL
a CTR service in China

Kantar in collaboration with CTR in China

ABOUT THIS REPORT

The 2018 rankings include more countries than ever before, with seven new countries being added: Austria, Belgium, Czech Republic, Denmark, Hungary, Slovakia and Sweden. Also available are local rankings for Japan for the first time ever.

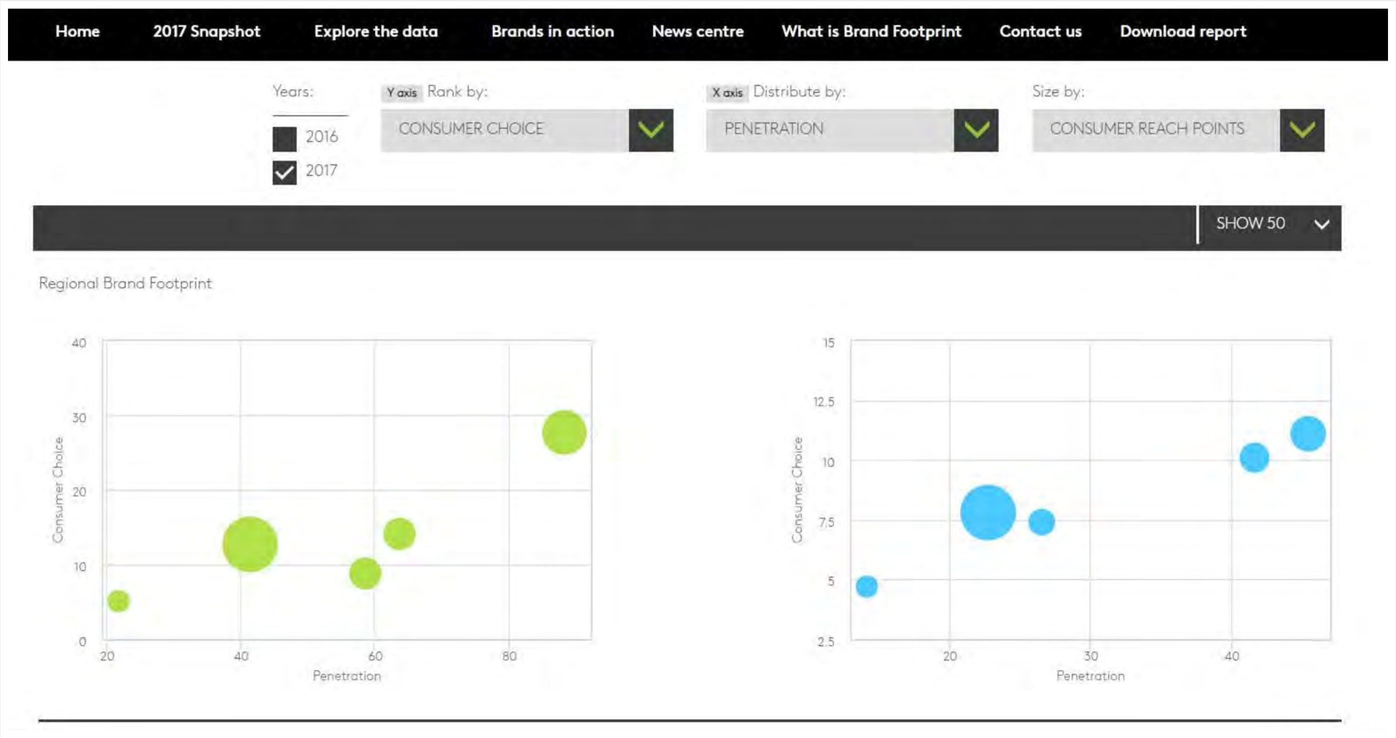
However, Venezuela data is no longer included in the ranking, and due to our panel size increase in Indonesia there will be some differences in the figures for this market.

We have continued to ensure the brand and category definitions used are identical across countries, and in the rare instances we found any products wrongly assigned we have ensured they are now correctly allocated.

The overall result is that this year's ranking is our most comprehensive and accurate reflection of global Consumer Reach Points, however the changes described above mean that in some cases the positions and metrics will have changed from previous rankings.

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

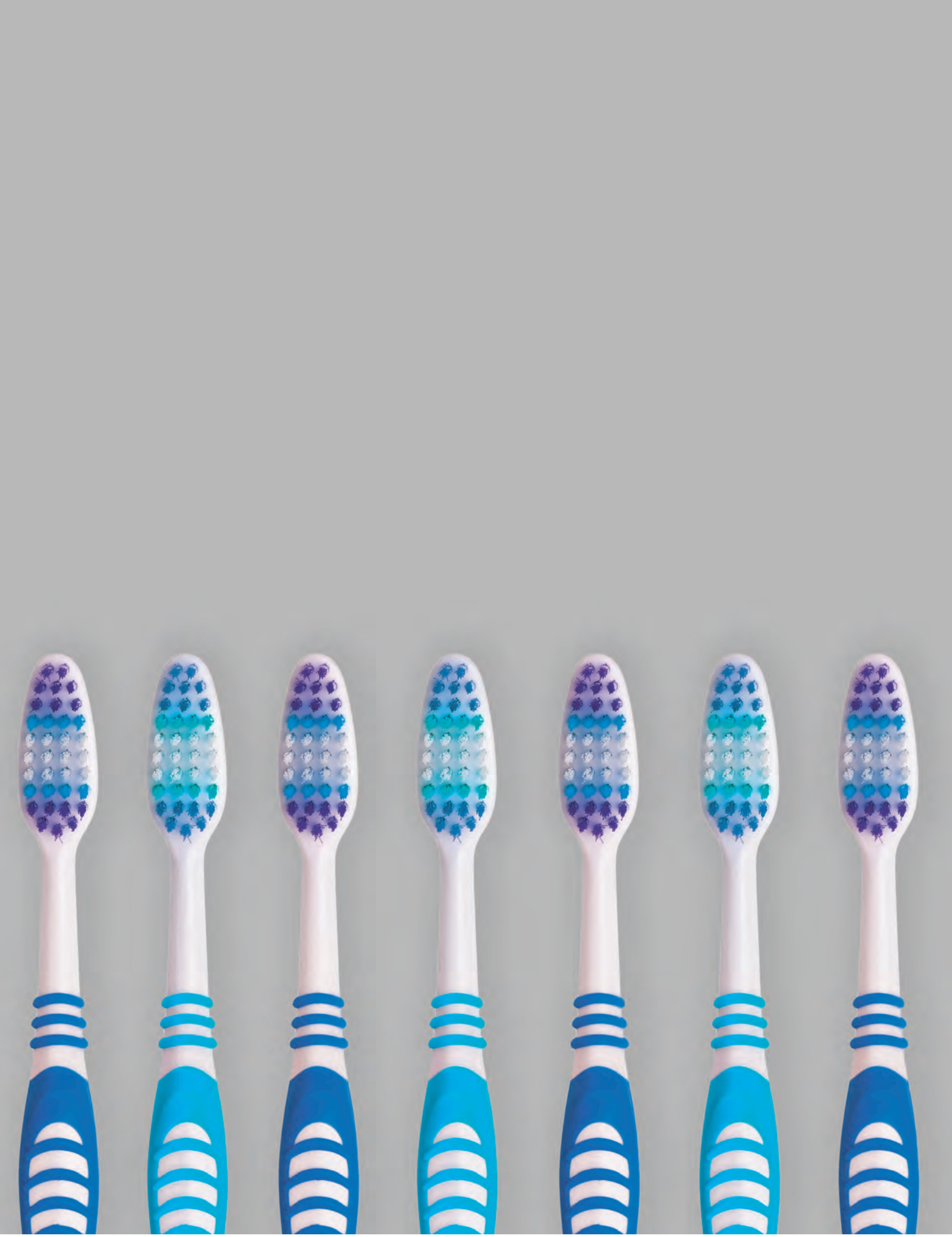
Kantar is the world's leading data, insights and consulting company. We understand more about how people think, feel, shop, share, vote and view than anyone else. Combining our expertise in human understanding with advanced technologies, Kantar's 30,000 people help the world's leading organisations succeed and grow.

FIND OUT MORE

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

Benjamin Cawthray
Global Thought Leadership Director
Worldpanel Division
benjamin.cawthray@kantarworldpanel.com
+44 7949 889 258

Pedro Costa
Head of Reporting
Worldpanel Division
pedro.costa@kantarworldpanel.com
+351 21 041 7626



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