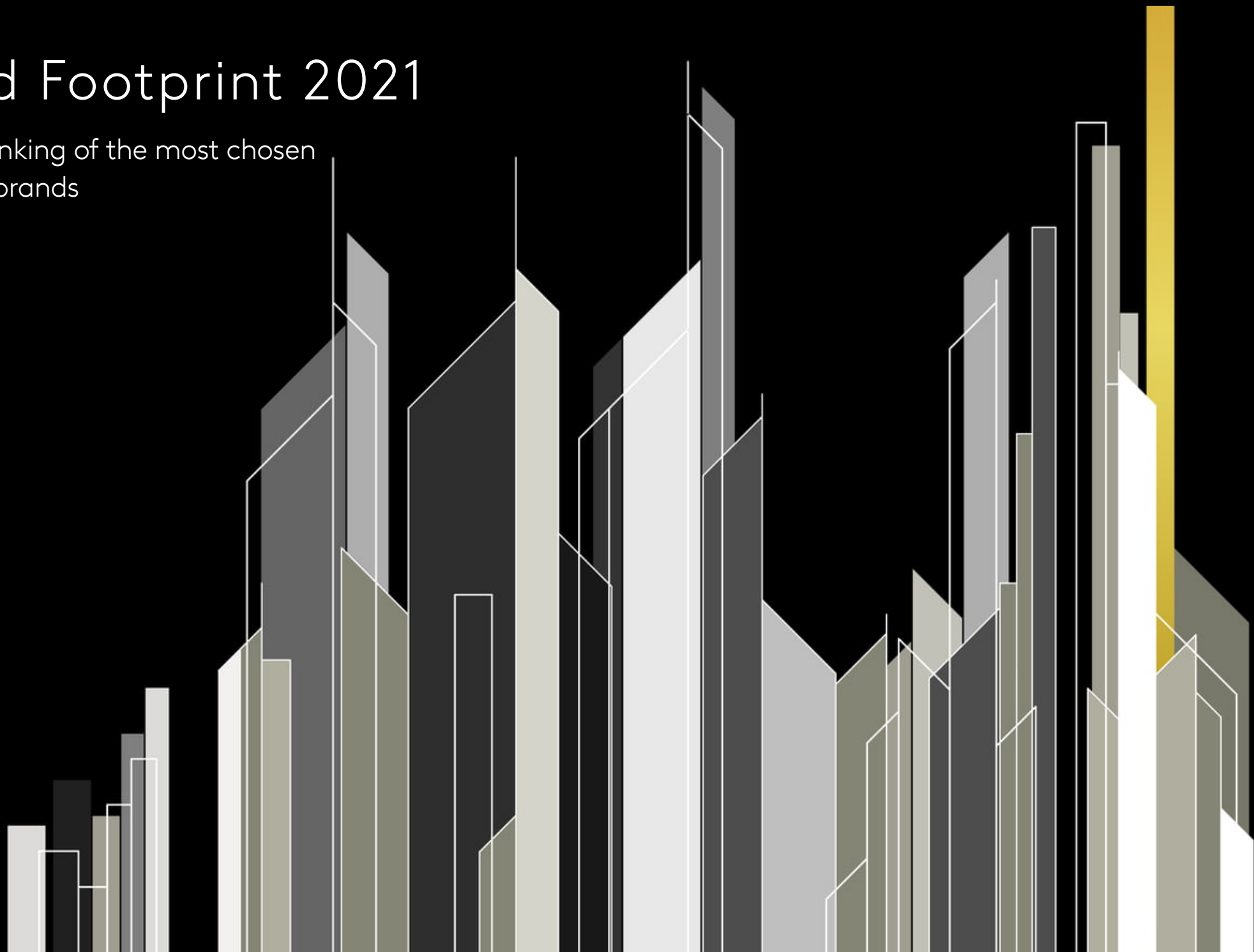


Brand Footprint 2021

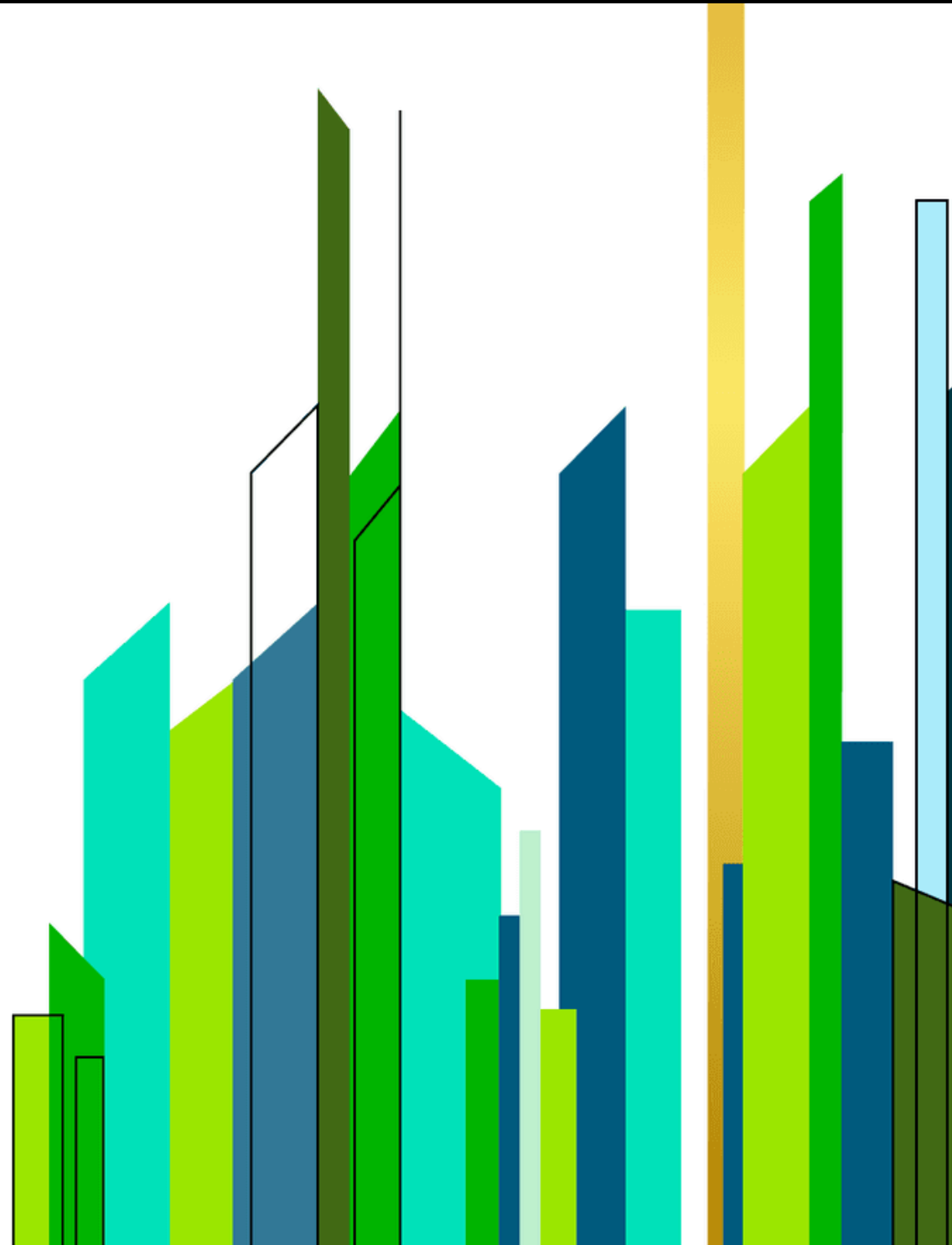
A global ranking of the most chosen consumer brands

Issue 9



Welcome

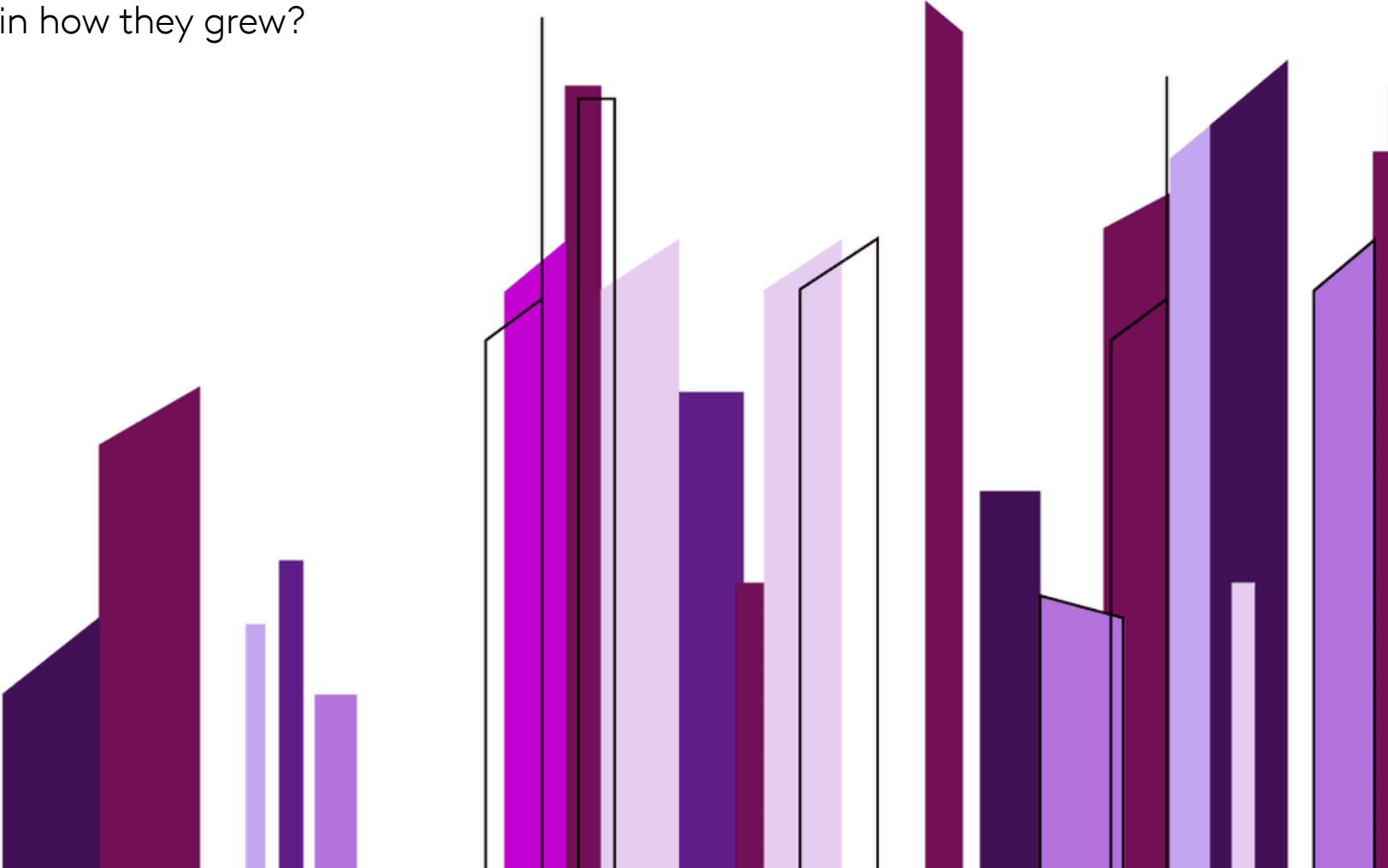
At this point last year, we were beginning to discover how COVID-19 was impacting us and our brand choices. But in this year's Brand Footprint, we can now see the true impact across 2020.



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How Brands Grew in 2020

As we reported in Winning Omnichannel 2021, take-home FMCG growth quadrupled from 2.5% in 2019 to 10% in 2020. But did this result in more brands growing or a change in how they grew?



How Brands Grew in 2020

Benjamin Cawthray,

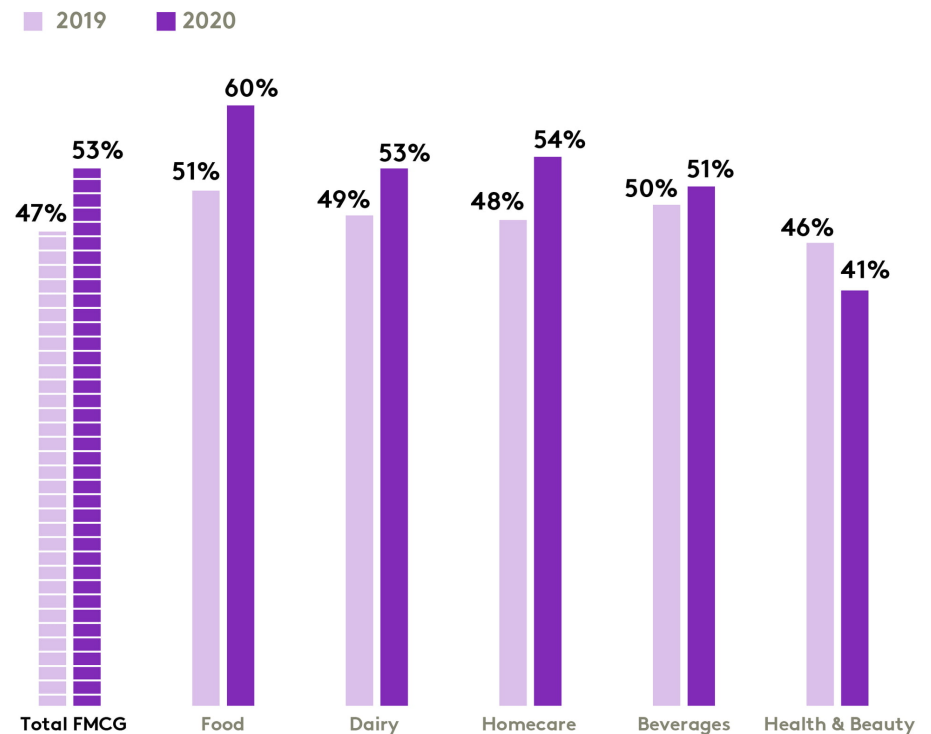
Global Thought Leadership Director,
Worldpanel Division, Kantar

Before COVID-19, the growth of global FMCG sales had slowed—with just 2-3% reported in 2017, 2018 and 2019. This slowdown made it harder for brands to find new growth.

But the events of 2020 turned this on its head. With the FMCG industry enjoying an impressive 10% global growth over this period, a bounce-back for brands was seen. 53% saw an increase in their CRPs—representing a +6% swing on the previous year.

At a sector level, the bounce-back reflected the value growth. Food brands saw the most significant swing (+9%), which also grew by 11.4% in value. At the opposite end, Health & Beauty brands saw 5% fewer brands growing in 2020—mirroring its fall in value.

% of brands growing in 2020



Source: Kantar, GfK, IRI, Intage

Extraordinary changes in the way we shopped

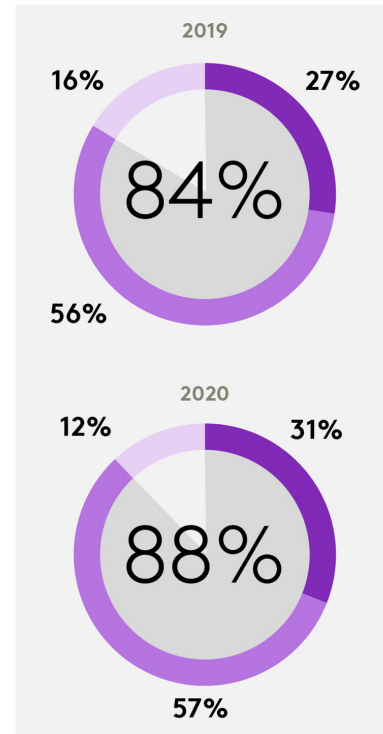
The average number of FMCG trips made by households fell by 2% across 2020. This may sound like a small number, but in reality, that's 1.6 billion fewer shopping trips being made in 2020. This means that almost all the growth across regions came from more spend per trip—a metric that increased by 11%.

In practice, this means that shoppers were putting more volume in their baskets, broadening the range of categories they were buying and often purchasing bigger pack sizes.

Did this change in behaviour impact how brands grew last year? In 2019, 84% of growing brands found more shoppers. But in 2020, this figure increased to 88%, **making finding more shoppers more important than ever.**

Drivers of CRP brand growth

■ Higher penetration only
 ■ Higher penetration & frequency
 ■ Higher frequency only



Small Brands (1-10% penetration)



Mid-size Brands (11-30% penetration)



Large Brands (>30% penetration)



Source: Kantar, GfK, IRI, Intage

The size of a brand also has an impact on this type of analysis, with different ratios of growth coming from finding more shoppers versus frequency. But the results were just as impressive when we controlled for size, with an increase in penetration-led growth seen across all the board.

This analysis also uncovered that **larger size brands made up a bigger proportion of growing brands increasing from 50% to 54%.** Combined with the fact that more brands grew, this shows that **shoppers returned to those they knew best during the pandemic.**



Rules for growth and 2021 target-setting

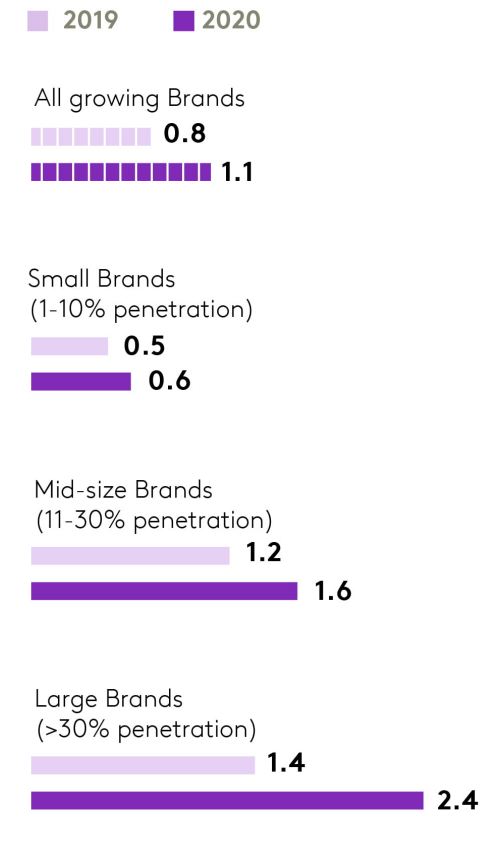
With finding more shoppers more important than ever, what is a realistic penetration target?

Growing brands in 2020 experienced more shopper gains than brands in 2019. The median increase was 1.1 penetration points—up from 0.8 the year before.

But is this down to more larger brands growing than previously? Again, controlling for size, there was an increase in penetration gains across the board. This shift helps guide us on what is realistic for 2021 brand growth.

A nuanced target between 2019 and 2020 gains would be sensible. If your brand is small, success looks like +0.5 penetration points gained, for mid-size brands +1.4, and for large brands +2.

Penetration Point Change amongst growing brands +



Source: Kantar, GfK, IRI, Intage

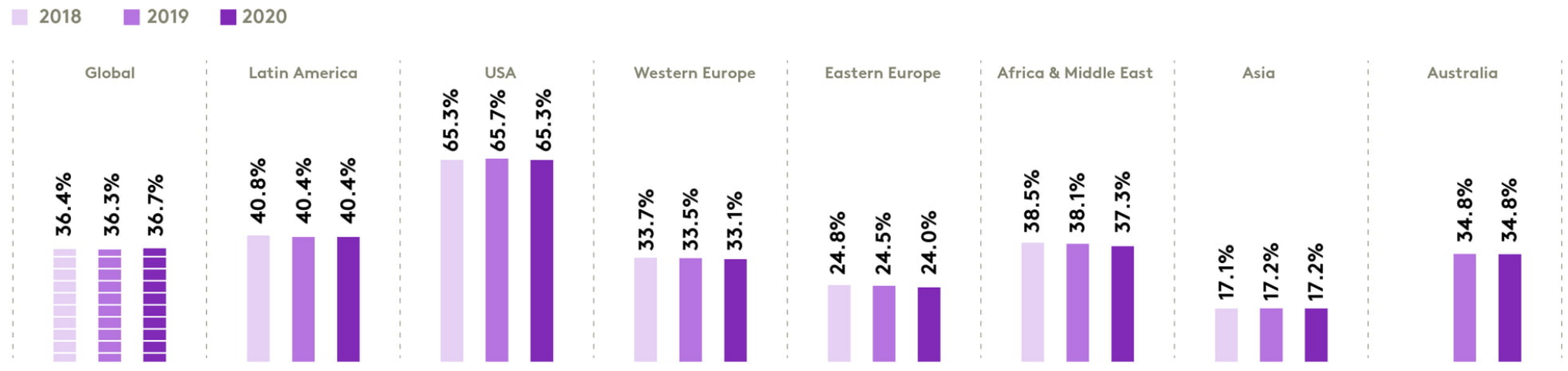
The return of global brands?

In recent editions of Brand Footprint, we have reported on local brands steadily winning share against global brands. And from the outset, it appears that global brands had a strong year, gaining back any losses from the previous few years.

However, the same split at a regional level shows that local brands are still winning share—particularly in the USA, where the share of global brand spend is much higher and the region is growing the fastest.

Despite larger brands doing well in 2020, the best performing markets display a mix of global and local brands—with the local brands still winning.

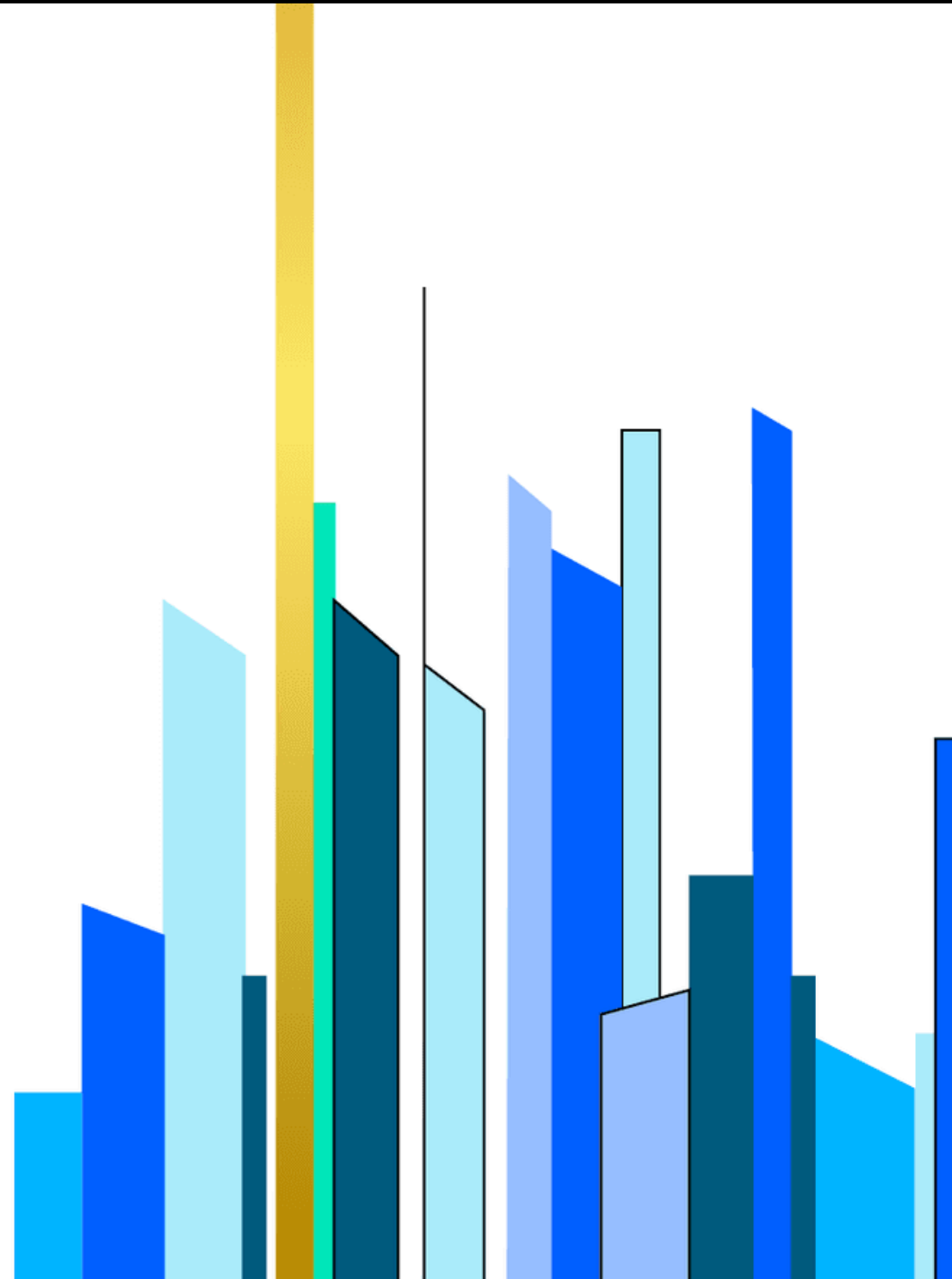
FMCG Global Brands Share% (of total brand spend)



Source: Kantar, GfK, IRI

The Most Chosen Global FMCG Brands 2020

With more brands growing within markets and a higher proportion of big brands winning, how did the most prominent global brands fair?



Born in the USA

Despite all the changes happening in the global FMCG landscape, we only saw one new entrant into the Top 50 this year—with American brand Campbell's entering the ranking for the first time.

For the past five years in a row, 44 brands have been mainstays in the Top 50 ranking and nine of the Top 10 have also remained present.

This showcases how strong, consistent, and resilient the brands are in this list. But this is no surprise considering the average age of brands in the Top 50 is 103.

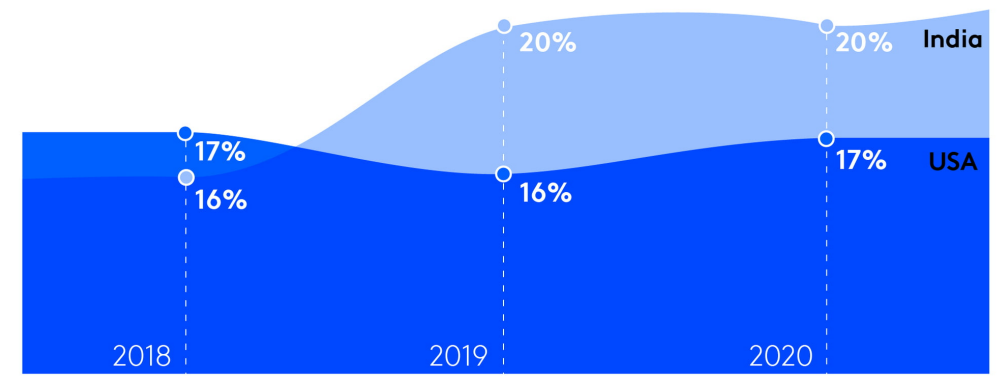
The history of these brands throws up some interesting facts about globalisation. 39 of these brands originated from just four countries—22 from the USA, seven from the UK, and five each from Switzerland and Germany.

Despite this, there are some big variations in where the biggest brands are purchased and where their growth comes from.

India overtook the US in 2019, making up a higher share of the Top 50 CRPs than any other market—accounting for 20% (versus 17% for the USA).



% of Top 50 CRPs



Source: Kantar, GfK, IRI

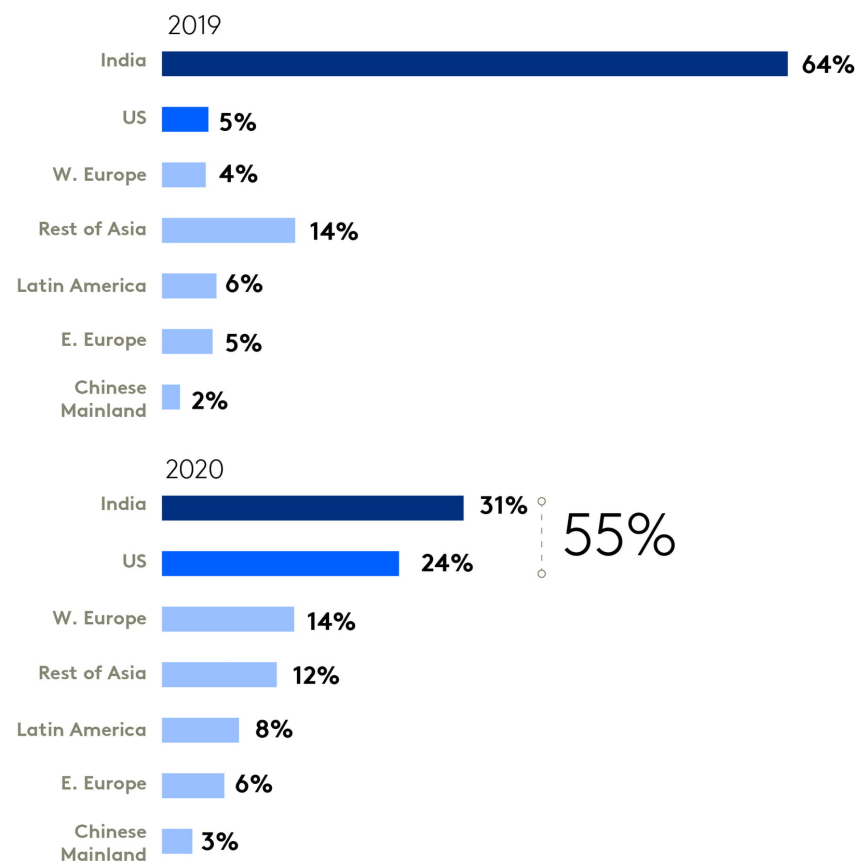
India also became the most important market for growth in 2019. And whilst this continued in 2020, the growth was more evenly distributed across markets—with the USA accounting for 24% of total CRP growth last year (compared to 5% in 2019).

What may be surprising for some is the level of contribution coming from the Chinese Mainland. Despite a slowdown in FMCG growth in 2020, the strength of local brands is very strong in this market—with 89% share (compared to 63% globally). In fact, the highest placed global brand in China – Lay’s – was ranked 13th, while all of the Top 10 were local or regional brands.

Despite the resilience and consistency of the Top 50 mentioned, it is possible to make an impact and shake up the order. Fuelled by India’s continued growth, four brands have moved up 10 or more places in the last five years—Brooke Bond, Close-Up, Dettol and Vim.

These two markets alone accounted for 55% of the growth.

Contribution to Top 50 Brand Growth ⊕



Source: Kantar, GfK, IRI

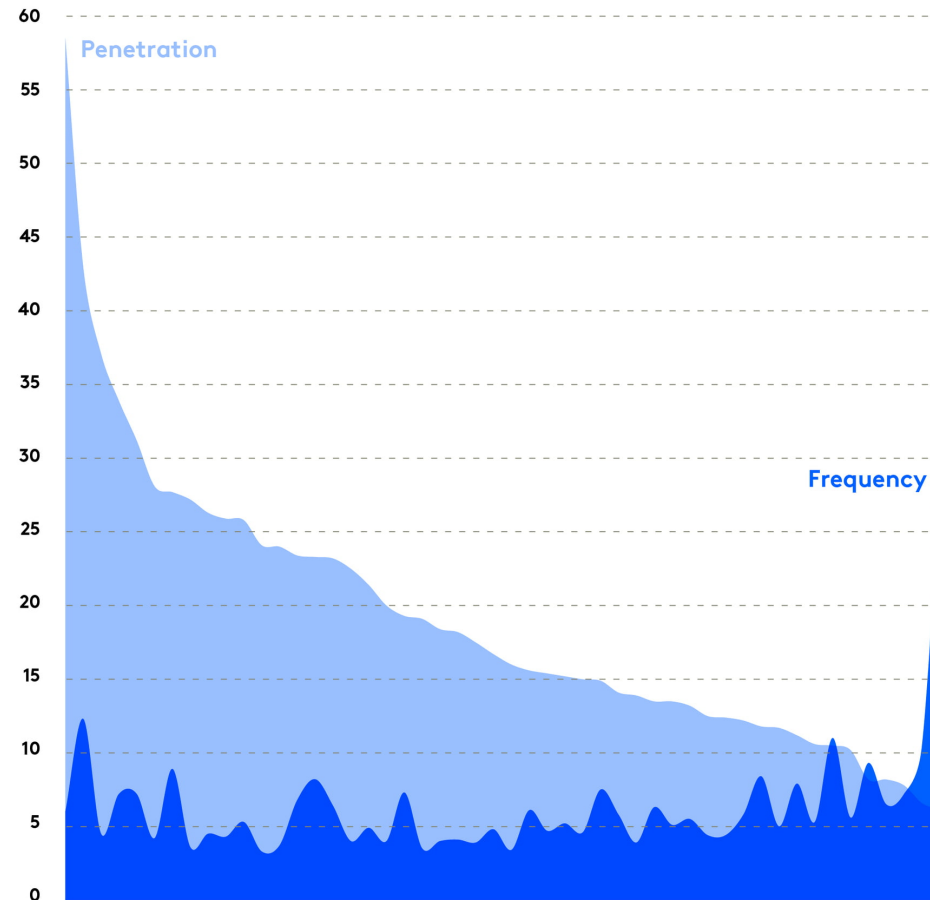
Breaking into the Top 50

There are two rules to follow if a brand wants to enter the ranking:

1. Global penetration of at least 10%
2. Being chosen five times or more per year

45 of the Top 50 brands have reached a penetration of over 10%, and those that don't are unique with a high footprint in specific markets. A few brands fall just outside of the Top 50 with penetration over 10% (the highest of these is 16.4%). However, none of these brands had a purchase frequency over five.

Top 50 Brands Penetration & Frequency



Source: Kantar, GfK, IRI



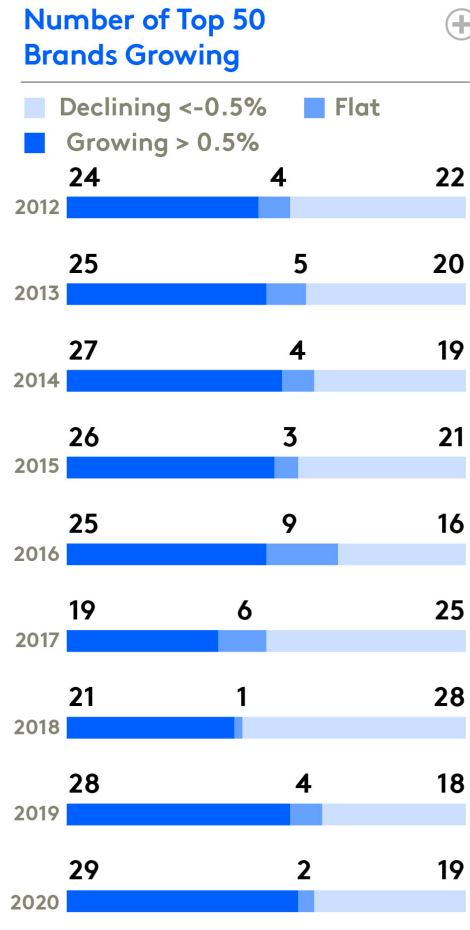
How did the biggest global brands fair?

Last year, 29 of the Top 50 global brands grew their CRPs. That's the highest number ever recorded in the nine years of Brand Footprint.

But given we saw the most robust global FMCG performance in quite some time (+10% value growth), should we have expected more growth from the Top 50?

The performance of the Top 50 is heavily linked with the sectors in which they operate. 22 of the brands play in Food & Dairy, and 16 of these grew.

15 of the brands operate in Health & Beauty, which is a disproportionately high number and shows the potential global reach of brands in this sector.



Source: Kantar, GfK, IRI.

However, only eight of these brands grew. And if we remove Dettol, Lifebuoy and Safeguard – all of which play within hand soap/ sanitisation – the number falls to five in 12, which is in line with the sector's slowdown in 2020.

Seven of the brands are beverages. Of these, only three grew, which highlights the continuing long-term trend and slowdown of carbonated soft drinks. However, for the first time since 2013, we saw a positive performance for both Coca-Cola and Pepsi—but, as we will discover in a later chapter, this isn't the complete picture because their out-of-home performance shines a different light on these results.

The remaining six brands are in the Homecare category, and only two

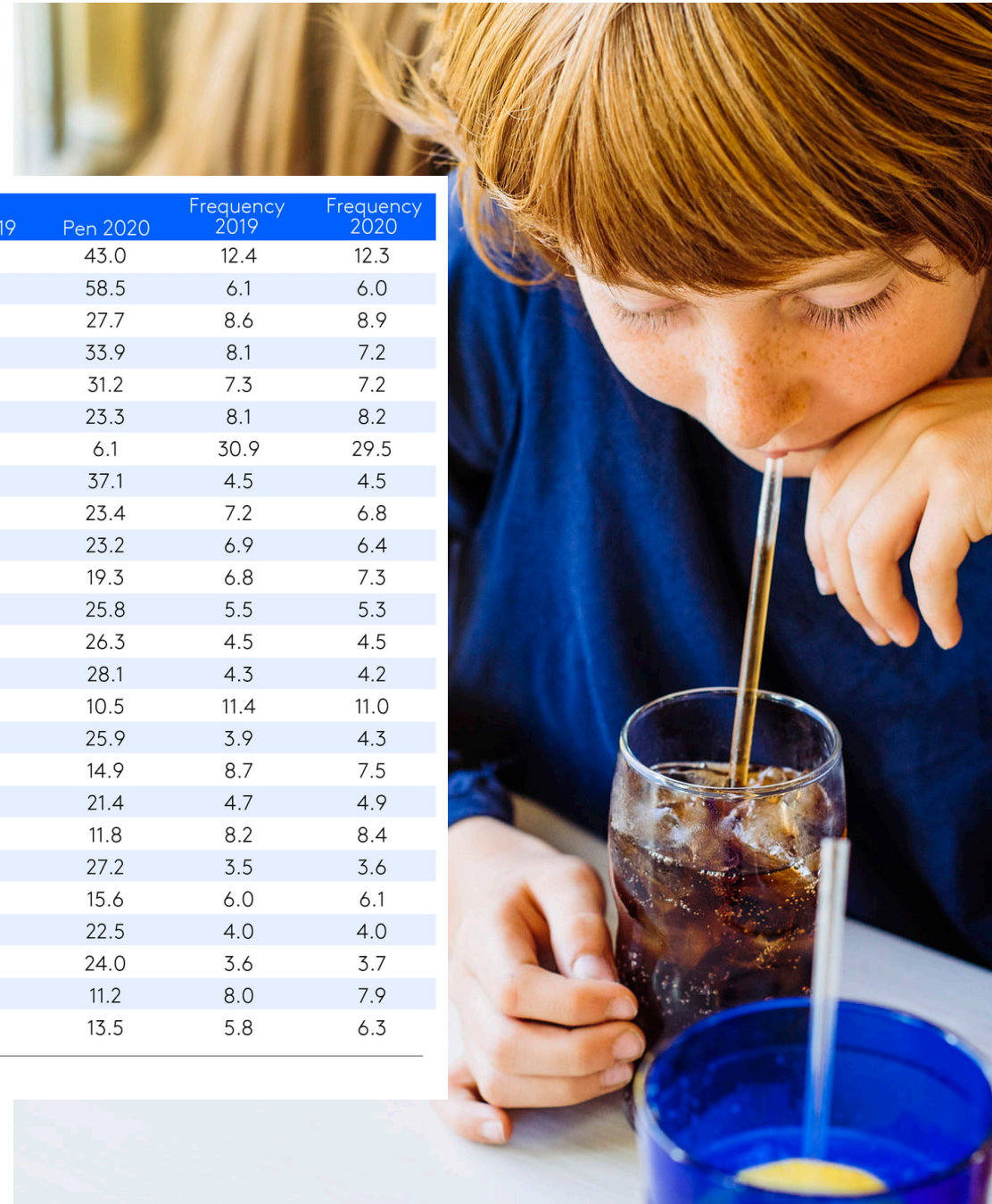
of these were in growth. Again, this is due to category performance, with four being fabric care brands and this category slowing in 2020.

Now is the time to unveil this year's most chosen FMCG brands in the world. A big congratulations to all brands for being part of this elite group, and especially Dettol for being the fastest growing brand in the world in 2020. 26 brands are now chosen over one billion times in a year, with the Top 10 brands chosen on average three billion times.

The Top 25 Most Chosen Global FMCG Brands 2020

2020 Rank	Rank Movement	Brand	CRP (M)	CRP Performance	Pen 2019	Pen 2020	Frequency 2019	Frequency 2020
1	=	Coca-Cola	6509	4	42.2	43.0	12.4	12.3
2	=	Colgate	4311	-2	59.8	58.5	6.1	6.0
3	⬆️ 2	Lifebuoy	3014	15	25.5	27.7	8.6	8.9
4	⬇️ -1	Maggi	3004	-4	32.0	33.9	8.1	7.2
5	⬇️ -1	Lay's	2768	4	30.4	31.2	7.3	7.2
6	=	Pepsi	2354	6	22.7	23.3	8.1	8.2
7	=	Indomie	2221	0	6.0	6.1	30.9	29.5
8	⬆️ 1	Dove	2033	1	37.0	37.1	4.5	4.5
9	⬇️ -1	Sunsilk Sedal Seda	1943	-4	23.5	23.4	7.2	6.8
10	=	Nescafé	1814	-3	22.7	23.2	6.9	6.4
11	⬆️ 4	Vim	1735	22	17.4	19.3	6.8	7.3
12	⬇️ -1	Knorr	1674	1	25.3	25.8	5.5	5.3
13	⬆️ 3	Nestlé	1458	5	25.8	26.3	4.5	4.5
14	⬇️ -1	Lux	1434	-5	29.4	28.1	4.3	4.2
15	⬇️ -1	Sunlight	1419	-3	10.7	10.5	11.4	11.0
16	⬆️ 11	Dettol	1366	39	20.6	25.9	3.9	4.3
17	⬇️ -5	Downy	1356	-11	14.7	14.9	8.7	7.5
18	⬇️ -1	Heinz	1273	12	20.1	21.4	4.7	4.9
19	=	Brooke Bond	1203	8	11.3	11.8	8.2	8.4
20	⬆️ 2	Oreo	1188	11	25.7	27.2	3.5	3.6
21	=	Kinder	1173	7	15.2	15.6	6.0	6.1
22	⬇️ -4	Head & Shoulders	1092	-2	23.0	22.5	4.0	4.0
23	⬇️ -3	Sprite	1083	-2	25.2	24.0	3.6	3.7
24	⬇️ -1	Pepsodent	1078	1	11.1	11.2	8.0	7.9
25	⬆️ 5	Kraft	1037	9	13.6	13.5	5.8	6.3

Source: Kantar, GfK, IRI



The Next 25 Most Chosen Global FMCG Brands 2020

2020 Rank	Rank Movement	Brand	CRP (M)	CRP Performance	Pen 2019	Pen 2020	Frequency 2019	Frequency 2020
26	⬇️ -1	Danone	1003	-2	14.0	14.1	6.0	5.8
27	⬇️ -1	Palmolive	987	-1	15.8	16.7	5.2	4.8
28	⬇️ -4	Nivea	980	-4	24.8	24.1	3.4	3.3
29	=	Rexona	969	1	19.6	20.0	4.0	4.0
30	⬆️ 3	Cheetos	963	7	14.6	15.2	5.1	5.2
31	=	Bimbo	930	2	7.4	8.2	10.2	9.3
32	⬆️ 6	Close-Up	915	10	17.8	18.2	3.9	4.1
33	⬇️ -5	Pantene	907	-7	19.4	18.4	4.2	4.0
34	⬆️ 2	Quaker	893	5	15.2	15.4	4.7	4.7
35	⬆️ 2	Doritos	892	6	12.8	13.2	5.4	5.5
36	⬆️ 3	Dr. Oetker	866	10	12.0	12.2	5.5	5.8
37	⬆️ 4	Barilla	847	11	14.2	15.0	4.5	4.6
38	⬆️ 2	Mc Cormick	847	8	13.1	13.5	5.0	5.1
39	⬇️ -7	Ajinomoto	841	-8	6.6	6.6	11.4	10.4
40	⬇️ -5	Tide	829	-3	18.3	17.5	3.9	3.9
41	⬇️ -7	Fanta	826	-6	20.0	19.1	3.6	3.5
42	⬆️ 3	Hershey's	716	0	12.0	11.7	5.0	5.0
43	=	Activia	697	-5	10.5	10.2	5.8	5.6
44	⬇️ -2	Milo	694	-9	7.8	7.8	8.1	7.2
45	⬆️ 4	Milka	686	7	11.3	10.6	4.7	5.3
46	=	Safeguard Escudo	674	1	11.7	12.4	4.7	4.4
47	⬆️ 4	Comfort	672	7	11.8	12.5	4.4	4.4
48	⬆️ 2	Pond's	661	4	16.4	16.0	3.2	3.4
49	⬆️ 12	Campbell's	659	15	8.0	8.2	5.9	6.5
50	⬇️ -6	Ariel	657	-10	15.0	13.9	4.0	3.9

Source: Kantar, GfK, IRI

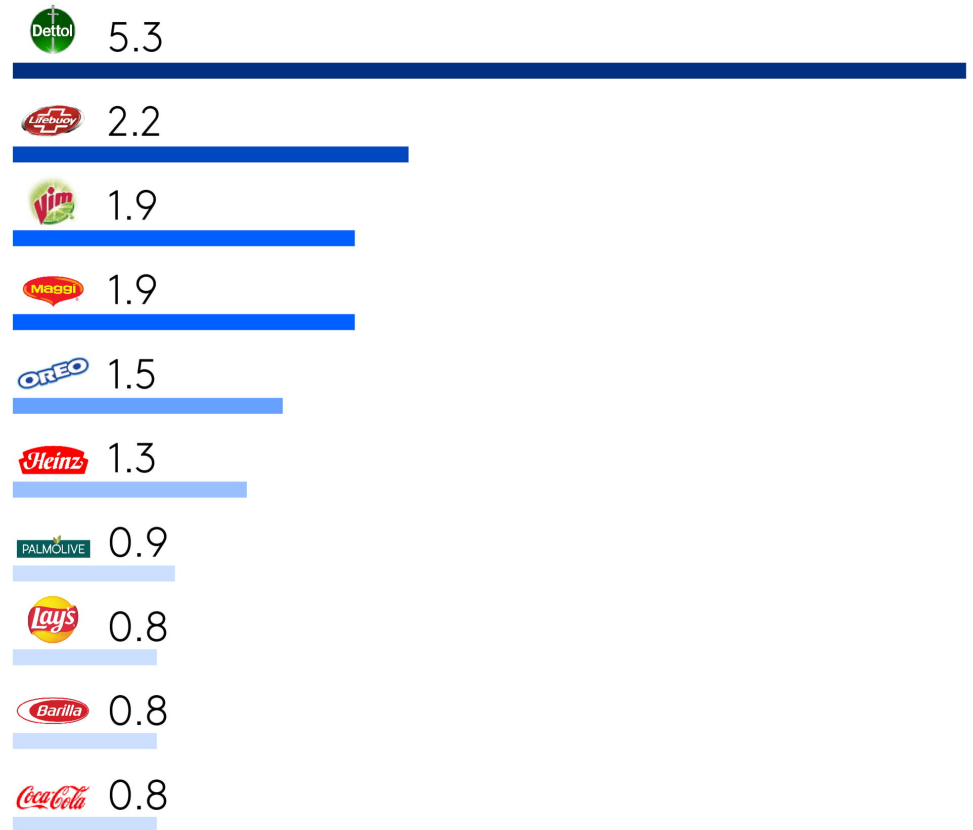


Biggest penetration gains 2020

With penetration being the crucial driver of brand growth, each year we have a secondary ranking of the most significant penetration gains.

This year, five of the 10 gains are more extensive than any seen in 2019, pointing to more consistent global growth with shopper gains seen across more markets.

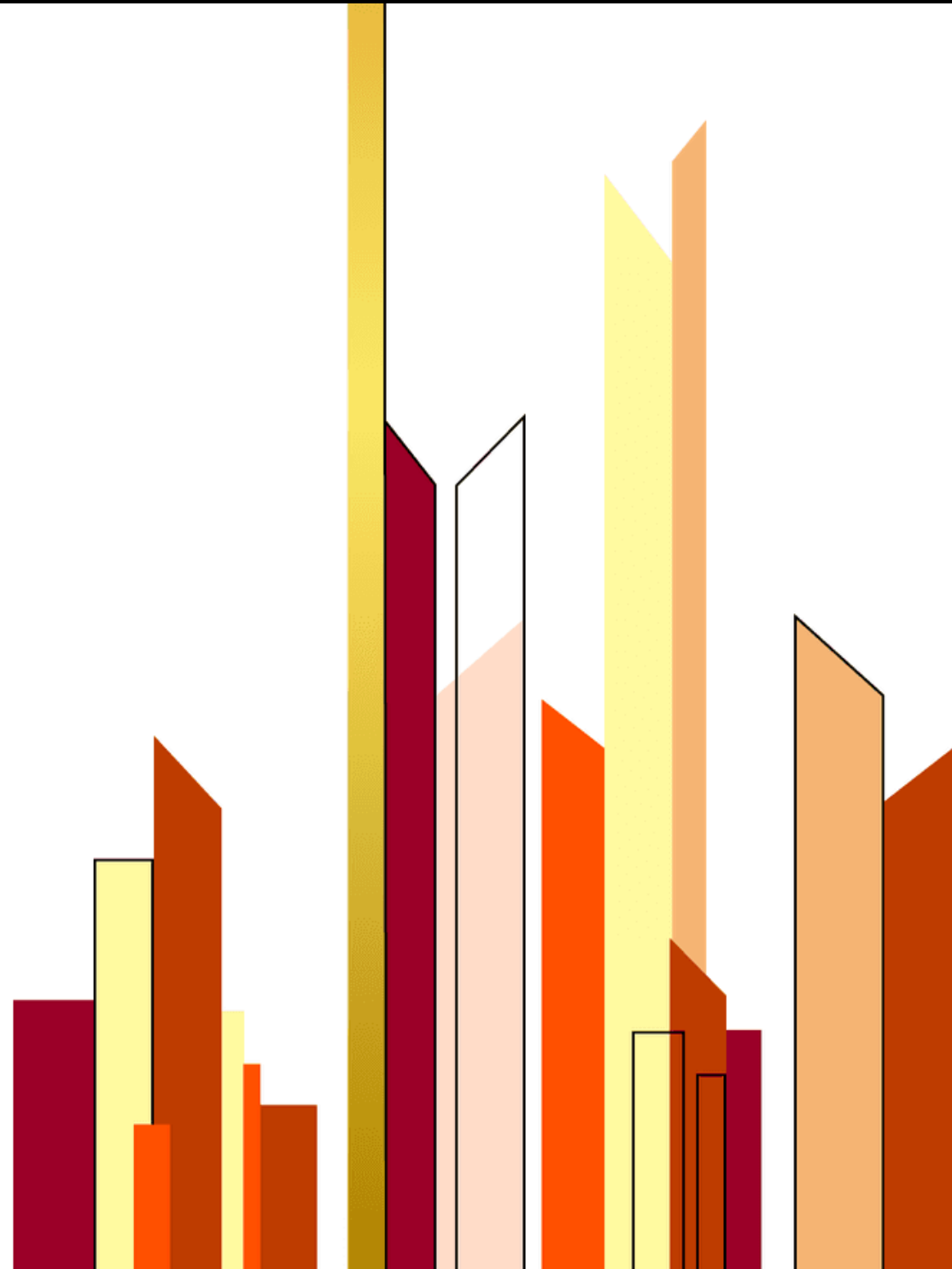
The Top 10 biggest global penetration gains +



Source: Kantar, GfK, IRI

Spotlight on Dettol

Dettol is officially the fastest growing global brand in our Top 50 most chosen brands. But was this a brand in the right place at the right time?



Consistency is key

COVID-19 has certainly accelerated Dettol's growth, which saw six years of CRP gains in 2020 alone.

However, what is most impressive about this brand is its long-term growth. Dettol is one of only three brands to have grown its CRPs in every edition of Brand Footprint.

Its growth has been both consistent and strong. Double-digit growth happened in four of the previous eight years (pre-COVID) and outperforming the Top 50 became the norm.

From British multinational manufacturer Reckitt, Dettol has risen more than 30 places since the inaugural ranking. It is now the 16th most chosen FMCG brand globally and the sixth most chosen Health and Beauty brand.

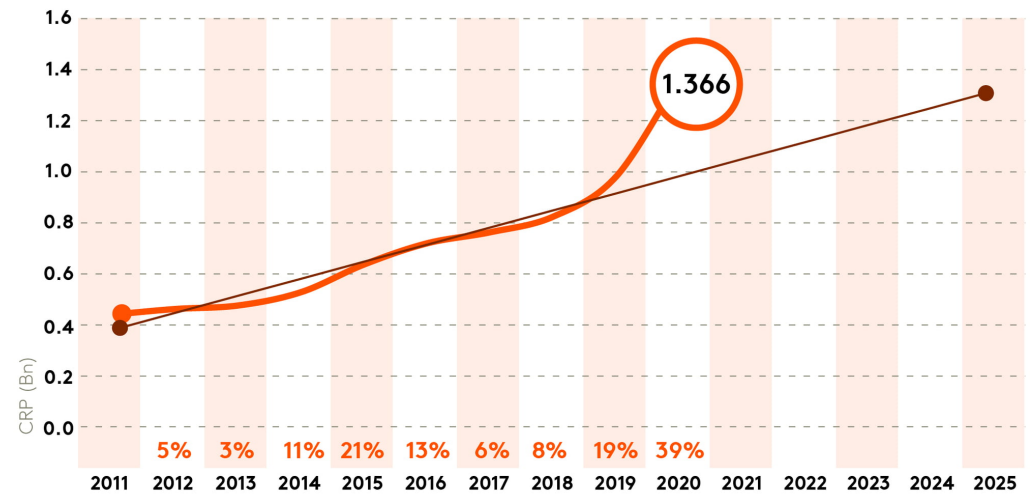
In that time, it has moved from being chosen 440 million times across the globe in 2011 to 1.37 billion times in 2020. This extraordinary growth means the brand was selected an additional one billion times last year compared to 10 years ago.

The key to this growth in CRP is brand penetration. It has gained 11.5 penetration points since 2012, moving from 14.5% global penetration to 25.9% - now the 10th highest global penetration. And the 5.3 penetration-point increase in 2020 was not just the biggest global gain this year, but the biggest we have seen in the history of Brand Footprint. This equates to 69 million more Dettol shoppers than in 2019.

Such impressive performance is down to consistency across markets. In 2019, Dettol achieved 1% penetration or higher in 24 markets, and the brand grew the number of shoppers in 23 of these.



Dettol Long-term CRP Performance



Source: Kantar, GfK, IRI

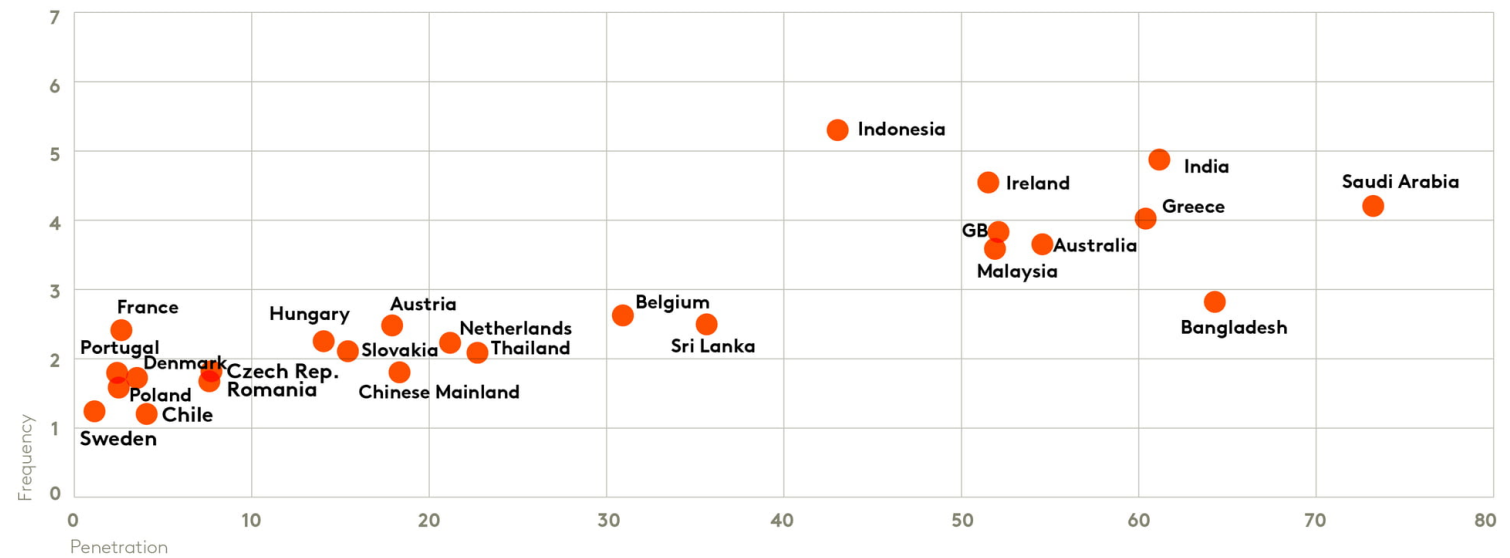
Future opportunities for growth

Dettol has even more room for growth in the future. For example, in the Chinese Mainland, less than one in five households bought the brand in 2020, meaning it has plenty of new buyers to target in the years to come. And even in the brand's biggest CRP market – India – there are still many shoppers to attract.

Dettol is also one of only a handful of brands that plays across sectors. In Asia, shoppers know Dettol as a Hand Soap brand, whilst in Europe, its range of Homecare products are better known.

With the current level at less than 20% of shoppers in most markets, another significant opportunity for the brand is encouraging cross-shopping between the two sectors.

Dettol – Penetration x Frequency by Market (2020)



Source: Kantar, GfK, IRI

This will happen naturally as the brand drives penetration, which should, in turn, deliver a double bonus for the brand in terms of CRP growth.

In specific markets, the level of cross-shop is low by design. For example, in India, Reckitt has the brand Lizol (known elsewhere as Lysol), which has a strong foothold in the Homecare sector. Trying to

drive Dettol's Homecare range in this market would be both counter-intuitive and potentially damaging for the portfolio.

To understand more about the brand and its success, we spoke with

Pankaj Duhan,
Dettol Global Category Director.



1. What makes Dettol unique?

Dettol Antiseptic Liquid was originally used in hospitals as an antiseptic for new mothers and patients coming out of surgery. This medical heritage still rings true today and is central to what makes our brand unique. We continue to be trusted by millions of parents around the world for protecting their families from germs and illness.

2. There are not many which are successful in multiple sectors, with Dettol present in both Personal Care and Home Care. What is the next horizon and how expandable do you believe Dettol to be?

Stretching brand equity depends both on the versatility and belief in the brand promise. Germ protection is a benefit that is relevant across multiple segments,

including Personal care, Surface disinfection, Home care and overall healthcare. Given it is one of the most trusted brands to deliver the benefit of germ protection, Dettol can effectively transcend multiple segments. Our aim will be to continue redefining germ protection in the existing categories with some major new innovations, as well as expand the benefit into adjacencies where the germ benefit is very relevant.

3. Where is your biggest opportunity for growth, be it a region, a category or a strategy?

COVID-19 has created the need for germ protection like never before, which aligns with our brand purpose to “protect life by reducing the burden of illness.” Seeing this, many new competitors have jumped into the germ protection fray—with varying levels of expertise. In personal care alone,

there was nearly a 400% increase in brands offering germ protection benefits in 2020. In this environment, it is important for a market leading brand like Dettol to continue taking germ protection to the next level and this remains our focus. At the same time, we are looking to expand into multiple new countries, new benefit segments and new spaces including B2B.

4. What’s been the key for Dettol’s consistent success over the past few years?

It has been an unflinching focus on what Dettol does best – ensuring the highest standard of germ protection. This focus has created a very clear purpose and a consistent brand footprint across the world.

5. How do you split your investment/attention between short-term execution and long-term brand building?

In a more stable external environment, the innovation funnel needs to focus on creating a very strong delivery in the medium term, anchored by “category shaping” ideas for the long term. In the short term, the focus has to be on building hygiene habits, reinforcing brand equity and executing with excellence in store. The future has been accelerated by COVID-19, but a good bank of ideas has allowed Dettol to extend into multiple segments across many countries.

6. We have seen lots of change in the way we behave due to COVID-19. Which changes in behaviour do you think will be long-term?

We have undertaken multiple studies to understand the long-

term impact of COVID-19 on consumer behaviour. Through all of them, we found that the hygiene habits of washing hands and disinfecting homes will remain at elevated levels post-pandemic – with the trend easing gradually as levels of concern decrease.

7. And what did Dettol do differently to adapt to the ever-changing situation?

The first task was to make sure there was ramped up supply and it took many months to be able to truly cater to it. At the same time, it was important to recognise that preventative hygiene habits like hand washing were the true defence against COVID-19 (in the absence of a vaccine).

Dettol partnered with many national governments and reputed NGOs to spread the message of the importance of hygiene habits in



tackling the spread of the virus. One of the standout examples was the Dettol Hand Wash Challenge, which received over 125 billion views on social media.

Dettol also expanded its presence in multiple new countries with the intent to increase access to quality disinfecting products and launched underpenetrated segments like

disinfectant sprays, Laundry sanitizers, Wipes and Surface triggers. As a responsible disinfection market leader, Reckitt also instituted an RB fight for access fund – mobilising and contributing 40 million GBP in the collective fight against the spread of COVID 19.

8. What is your view on how FMCG brands grow?

Marketers tend to have a simplistic view of brand growth with two levers – Penetration and Consumption. Whilst these metrics are imperative for growth, there is a clear role that brand purpose plays in driving long-term performance and – in turn – long-term penetration gains. When the clarity of purpose is reinforced by clear consumer understanding, brands tend to grow and grow consistently.

9. What changes have you seen in FMCG, Personal care and Home care which have surprised you the most over the past five years (prior to COVID-19)?

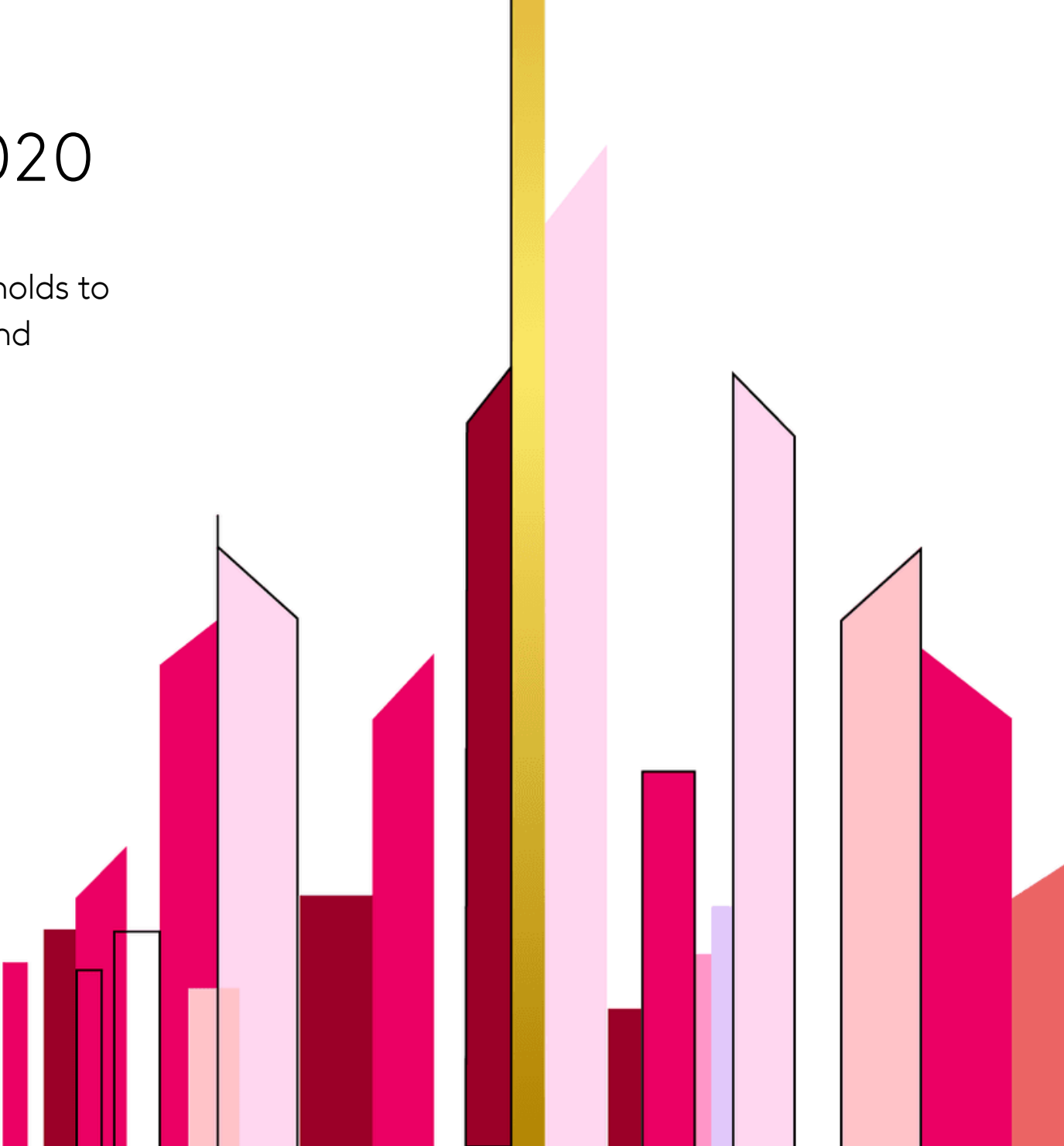
I continue to be amazed by the level of consumer sophistication and involvement in many of the personal and home care categories. For example, in personal care, a 13-step skincare regime is



commonplace in countries like Korea and Japan, whilst the level of sophistication expected from homecare products and appliances has skyrocketed on account of very knowledgeable consumers. Increased access to information, verified ratings and reviews, higher ingredient transparency and decreased barriers to entry have all contributed to this.

The Most Chosen Brands Online in 2020

Online doubled its rate of growth in 2020, attracting an additional 67 million households to the channel. But how did this impact brand performance?



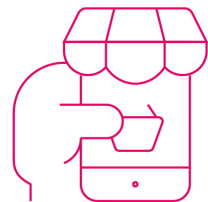
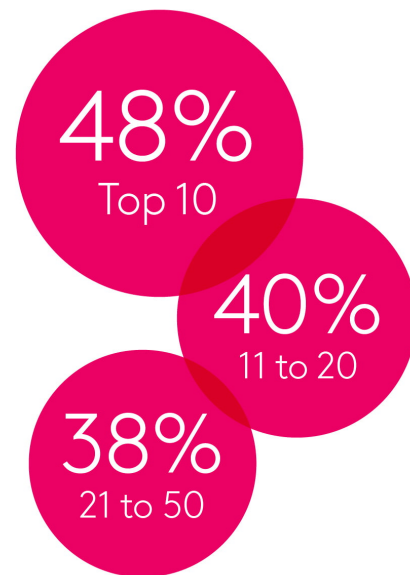
Shoppers turn to the most prominent brands when online

Unsurprisingly, the most chosen brands online all grew—with an average growth rate of +39%. And for the Top 10, this growth jumps to +48%, which is even more impressive given it came from a larger base.

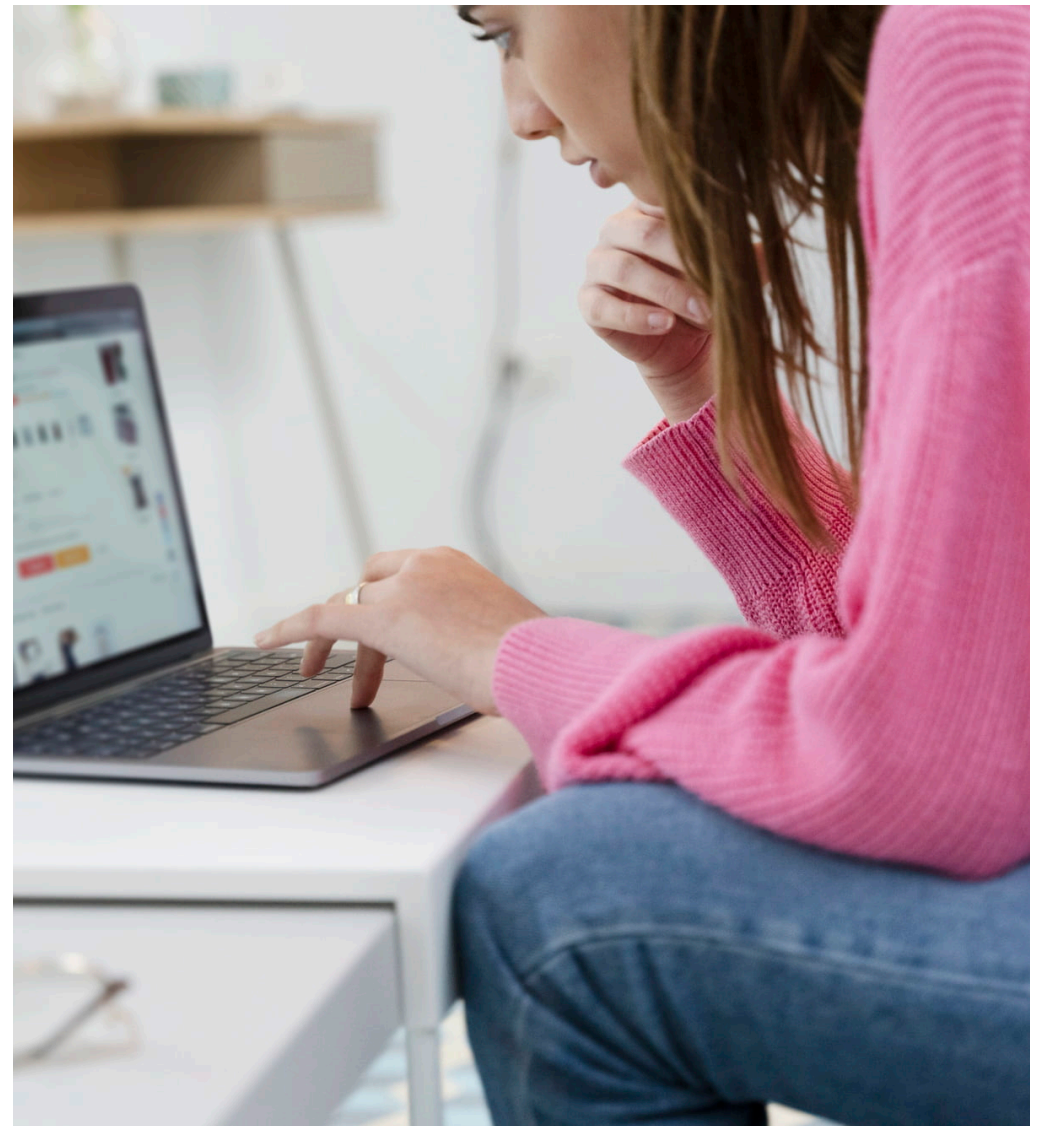
All the Top 20 brands gained shoppers, which contributed to this exceptional growth.

The average online penetration gain was +0.7 penetration points, with a high of +1.4 for Coca-Cola—moving the brand from the joint-second to the number one most penetrated online brand.

CRP Growth Online



Source: Kantar



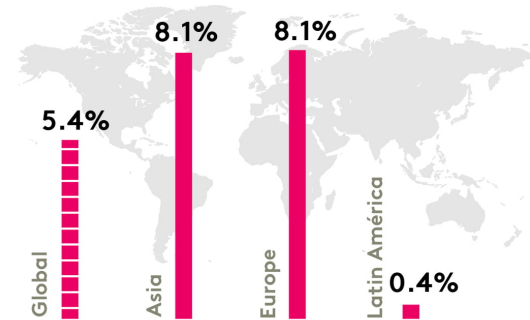
The importance of online for brand choice

With the channel performing so strongly, we wanted to expand the scope of this year's online brand ranking to include markets from Latin America and South-East Asia.

Within this expanded scope, online has 5.4% of CRPs amongst the Top 20. In Asia and Europe, this jumps to 8.1% for both regions, whilst in Latin America it is just 0.4%.

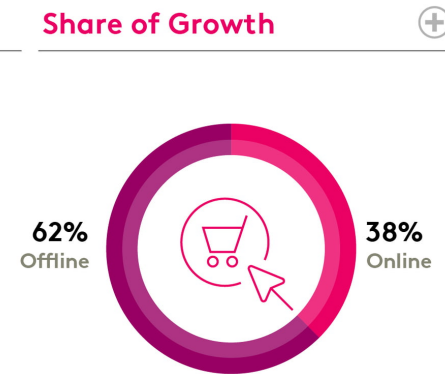
However, these markets are still crucial for online brand choice. Returning to Coca-Cola as an example, Latin America's share of CRP jumps to 6.7%.

Online Share of CRPs



Source: Kantar

Share of Growth



But its contribution to growing brands is even more impressive.

Among the brands that were growing offline, online accounted for 38% of the growth. Therefore, online's contribution to growth is seven times more significant than its size.



The Top 20 Most Chosen Global FMCG Brands Online 2020

Markets included: Argentina, Bolivia, Brazil, Central America, Chile, Chinese Mainland, Colombia, France, GB, Greece, Indonesia, Ireland, Malaysia, Mexico, Peru, Philippines, Portugal, South Korea, Spain, Taiwan, Thailand, Vietnam

For more information on the Online rankings in your region or market, please get in touch with your usual client service contacts or fill in the form.

Rankings available for Argentina, Brazil, Chinese Mainland, France, GB, Ireland, Malaysia, Portugal, South Korea, Spain, Taiwan, Thailand, Vietnam

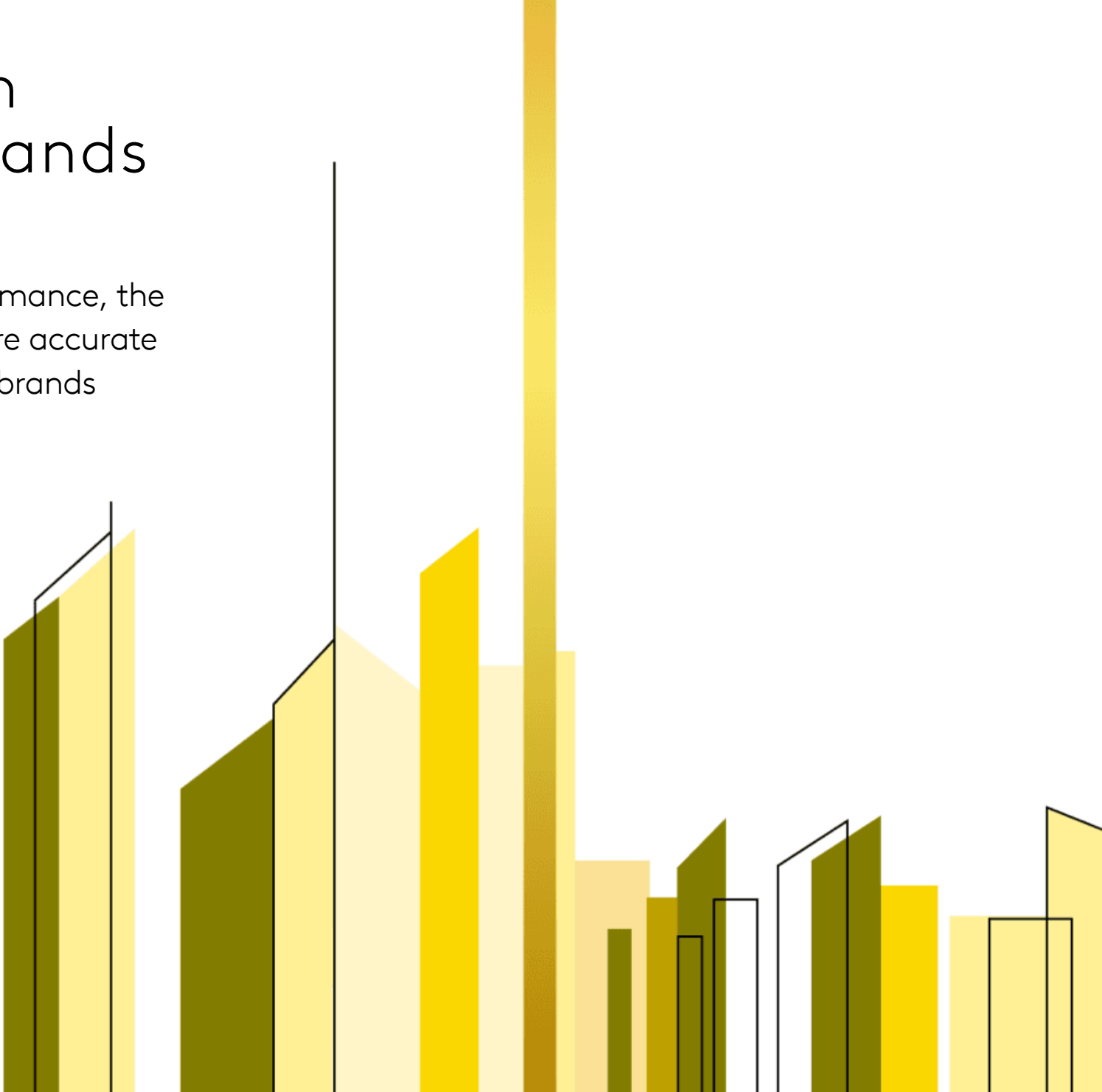
Prices start from \$3,000

Online Rank	Rank Movement	Brand	Online				Offline		
			CRPs (m)	CRP Performance	Penetration	Frequency	% of Total CRPs	CRPs (m)	CRP Performance
1	=	Coca-Cola	59	50%	3.6	3.0	1%	3925	2%
2	⬆️ 1	Heinz	46	38%	2.3	3.6	8%	511	3%
3	⬇️ -1	Nescafé	46	29%	3.0	2.7	3%	1347	-6%
4	=	Colgate	30	38%	2.9	1.9	2%	1486	-8%
5	⬆️ 4	Lay's	28	70%	2.5	2.0	4%	635	5%
6	⬆️ 1	Nestlé	27	57%	2.6	1.9	5%	536	-1%
7	⬇️ -2	L'Oreal Paris	27	35%	3.0	1.6	17%	135	-11%
8	⬆️ 4	Oreo	26	64%	2.6	1.8	4%	545	8%
9	⬇️ -1	Pepsi	25	49%	1.6	2.8	2%	1033	2%
10	=	Dove	25	49%	2.6	1.7	3%	705	-5%
11	⬇️ -5	Nivea	24	33%	2.4	1.8	5%	473	-4%
12	⬆️ 2	Activia	19	46%	1.0	3.3	6%	279	-10%
13	=	Yoplait	19	29%	1.0	3.5	6%	275	-3%
14	⬆️ 3	Dettol	19	56%	1.8	1.8	6%	293	14%
15	=	Head & Shoulders	19	47%	2.2	1.5	3%	572	-3%
16	⬇️ -5	Kleenex	18	14%	1.5	2.2	12%	132	5%
17	⬆️ 2	Omo	18	66%	2.1	1.5	3%	518	0%
18	⬇️ -2	Comfort	16	31%	1.6	1.8	4%	366	-2%
19	⬇️ -1	Quaker	16	39%	1.3	2.1	5%	301	-4%
20	=	Anchor	15	38%	1.1	2.5	6%	242	-1%

Source: Kantar

The Most Chosen Out-of-Home Brands in 2020

Despite the positive in-home performance, the in-and-out view paints a much more accurate image for snacking and beverages brands



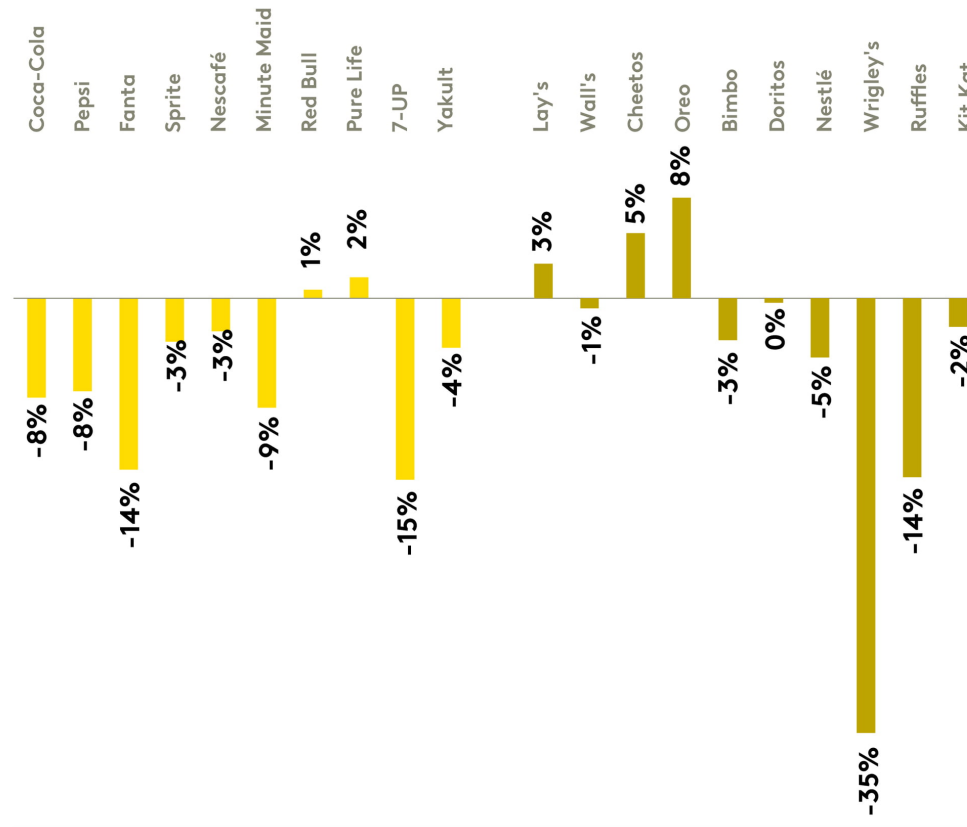
The complete 360° picture

When looking at combined sales for both out-of-home (OOH) and in-home for the snacking and non-alcoholic beverages sectors, the overall picture is negative.

Within the markets included in our analysis, OOH sales were down \$22 billion (-26%), whilst in-home sales were up \$8 billion (+8%). OOH sales declined in eight out of nine markets, which led to combined in-and-out sales being down in Spain, Great Britain, China, Thailand, France and Brazil.

This had a knock-on effect for brands in these sectors, with the number of growing brands dropping from 11 (based on just in-home performance) to five when including the OOH view.

In & Out CRP Performance ⊕



Source: Kantar OOH Purchase Panels

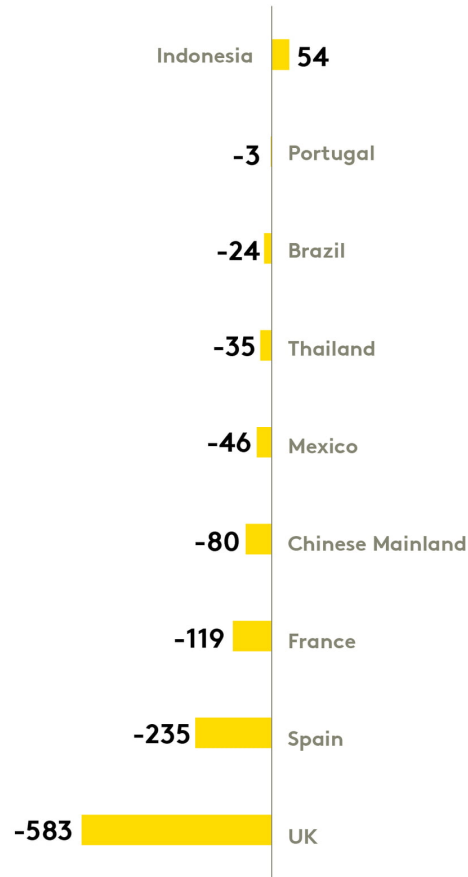


The handful of brands that bucked this trend and grew managed to do so primarily due to where most of their CRPs come from. With Indonesia for example still contributing positively to the Top 20.

Despite this fall in CRPs in 2020, OOH still accounted for approximately 45% of brand choices made in 2020.

As lockdowns ease and OOH consumption returns, knowing the full 360° view will be the only way to understand how your brand is truly performing.

Contribution to Top 20 OOH CRP Performance



Source: Kantar OOH Purchase Panels

The Top 20 Most Chosen Out-of-Home Brands

OOH share of In & Out



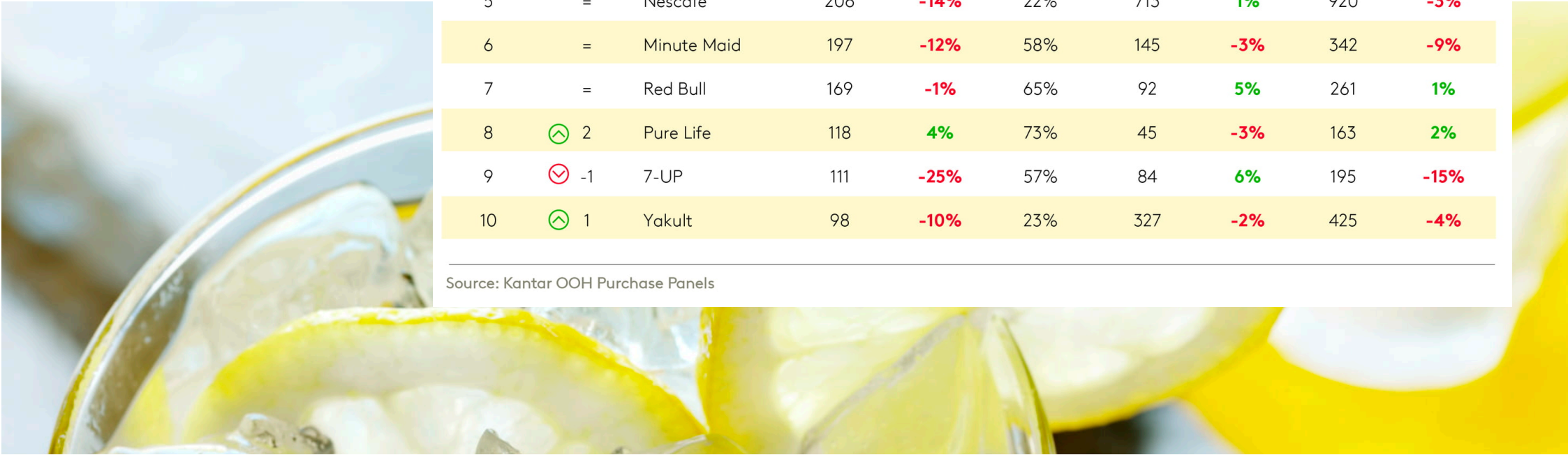
Source: Kantar OOH Purchase Panels

The Top 10 Most Chosen Out-of-Home Non-Alcoholic Beverages Brands 2020

Markets included: Brazil, Chinese Mainland, France, GB, Indonesia, Mexico, Portugal, Spain, Thailand

Rank	Rank Movement	Brand	Out of Home			In Home		In & Out	
			CRPs (m)	CRP Performance	% of Total CRPs	CRPs (m)	CRP Performance	CRPs (m)	CRP Performance
1	=	Coca-Cola	2174	-20%	45%	2698	5%	4872	-8%
2	=	Pepsi	753	-18%	49%	770	6%	1524	-8%
3	=	Fanta	408	-21%	50%	408	-5%	815	-14%
4	=	Sprite	357	-6%	49%	367	-1%	725	-3%
5	=	Nescafé	206	-14%	22%	713	1%	920	-3%
6	=	Minute Maid	197	-12%	58%	145	-3%	342	-9%
7	=	Red Bull	169	-1%	65%	92	5%	261	1%
8	⬆️ 2	Pure Life	118	4%	73%	45	-3%	163	2%
9	⬇️ -1	7-UP	111	-25%	57%	84	6%	195	-15%
10	⬆️ 1	Yakult	98	-10%	23%	327	-2%	425	-4%

Source: Kantar OOH Purchase Panels



The Top 10 Most Chosen Out-of-Home Snacking (inc Ice-Cream) Brands 2020

Markets included: Brazil, Chinese Mainland, France, GB, Indonesia, Mexico, Portugal, Spain, Thailand

For more information on the Out-of-Home rankings in your region or market, please get in touch with your usual client service contacts or fill in the form below.

Rankings available for Brazil, Chinese Mainland, France, GB, Indonesia, Mexico, Portugal, Spain, Thailand

Prices start from \$3,000

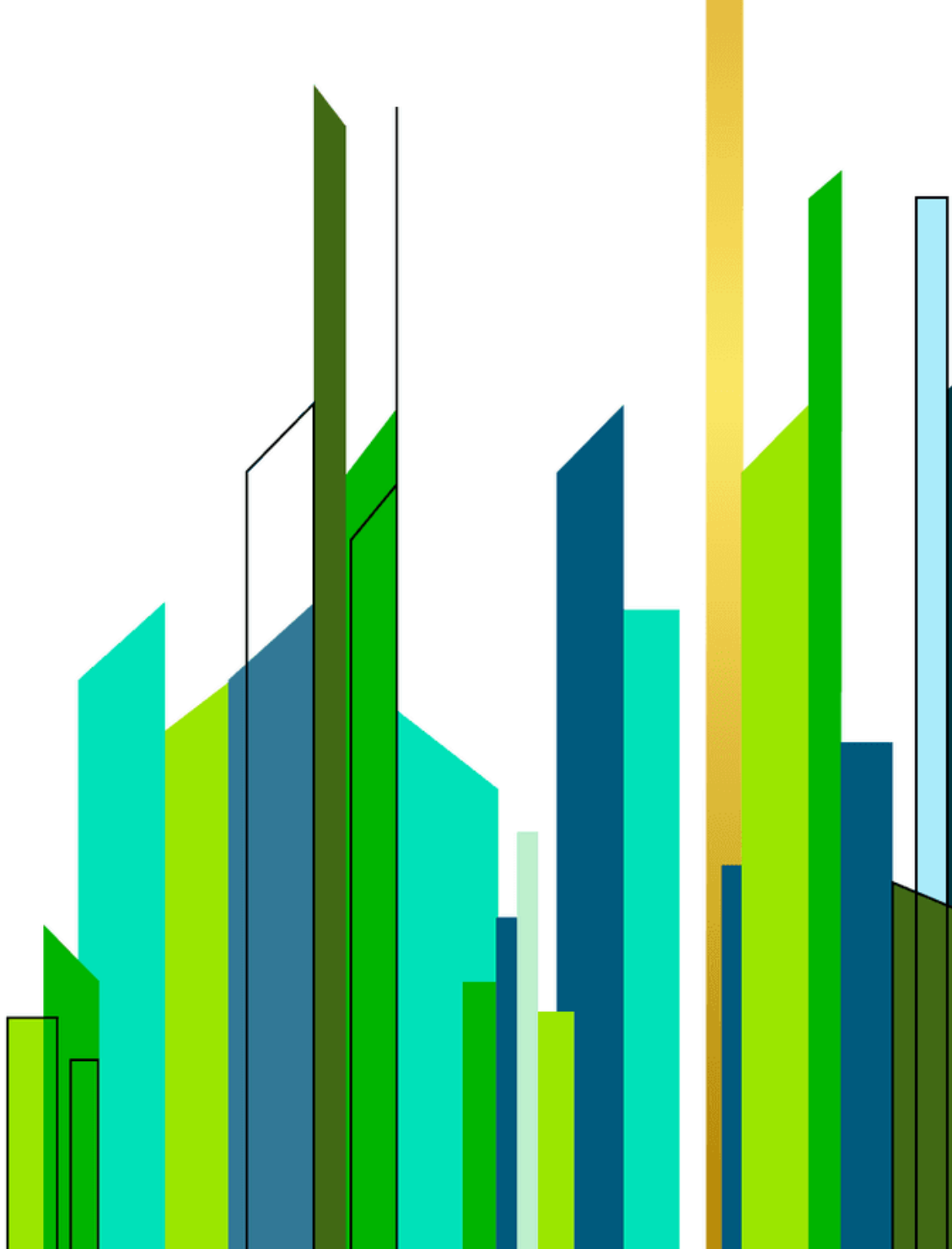
Rank	Rank Movement	Brand	Out of Home			In Home		In & Out	
			CRPs (m)	CRP Performance	% of Total CRPs	CRPs (m)	CRP Performance	CRPs (m)	CRP Performance
1	=	Lay's	431	-2%	41%	613	7%	1044	3%
2	=	Wall's	390	-4%	57%	292	4%	682	-1%
3	=	Cheetos	305	9%	47%	338	2%	643	5%
4	=	Oreo	243	6%	33%	490	10%	733	8%
5	⬆️ 1	Bimbo	132	-3%	18%	606	-3%	738	-3%
6	⬆️ 2	Doritos	95	-2%	37%	162	1%	257	0%
7	=	Nestlé	92	-15%	32%	191	1%	283	-5%
8	⬇️ -3	Wrigley's	86	-42%	66%	45	-15%	130	-35%
9	=	Ruffles	77	-19%	41%	109	-11%	187	-14%
10	⬆️ 1	Kit Kat	77	-17%	31%	170	6%	247	-2%

Source: Kantar OOH Purchase Panels



Ten Learnings from Brand Footprint 2021

Having gone through all the rankings of the most chosen brands, here are the key learnings from this year's Brand Footprint.



10 Key Learnings from Brand Footprint 2021

Luis Simoes,

Divisional Director, Strategy & Transformation,
Worldpanel Division, Kantar

1

29 of the global Top 50 grew in-home, more than any other edition of Brand Footprint, but local brands still continued to grow faster.

2

While in-home purchasing of food and beverages grew in 2020, the complete In-and-Out-of-Home measurement shows an actual shrinkage of 5%.

3

Only 10 of the 21 Homecare and Health & Beauty brands grew.

4

88% of winning brands won by attracting more shoppers.

5

Despite offering infinite shelves, eCommerce is even more favourable to the top global brands—enjoying growth 10% higher than the rest online.

6

Online has 5.4% share of CRPs but accounted for a remarkable 38% of the growth.

7

While the majority of the Top 50 are US born, India stands out as the main contributor to global growth.

8

The remarkable story of Dove, Vim and Dettol continued. They are the only three brands from the original Top 50 to have grown their footprint every year.

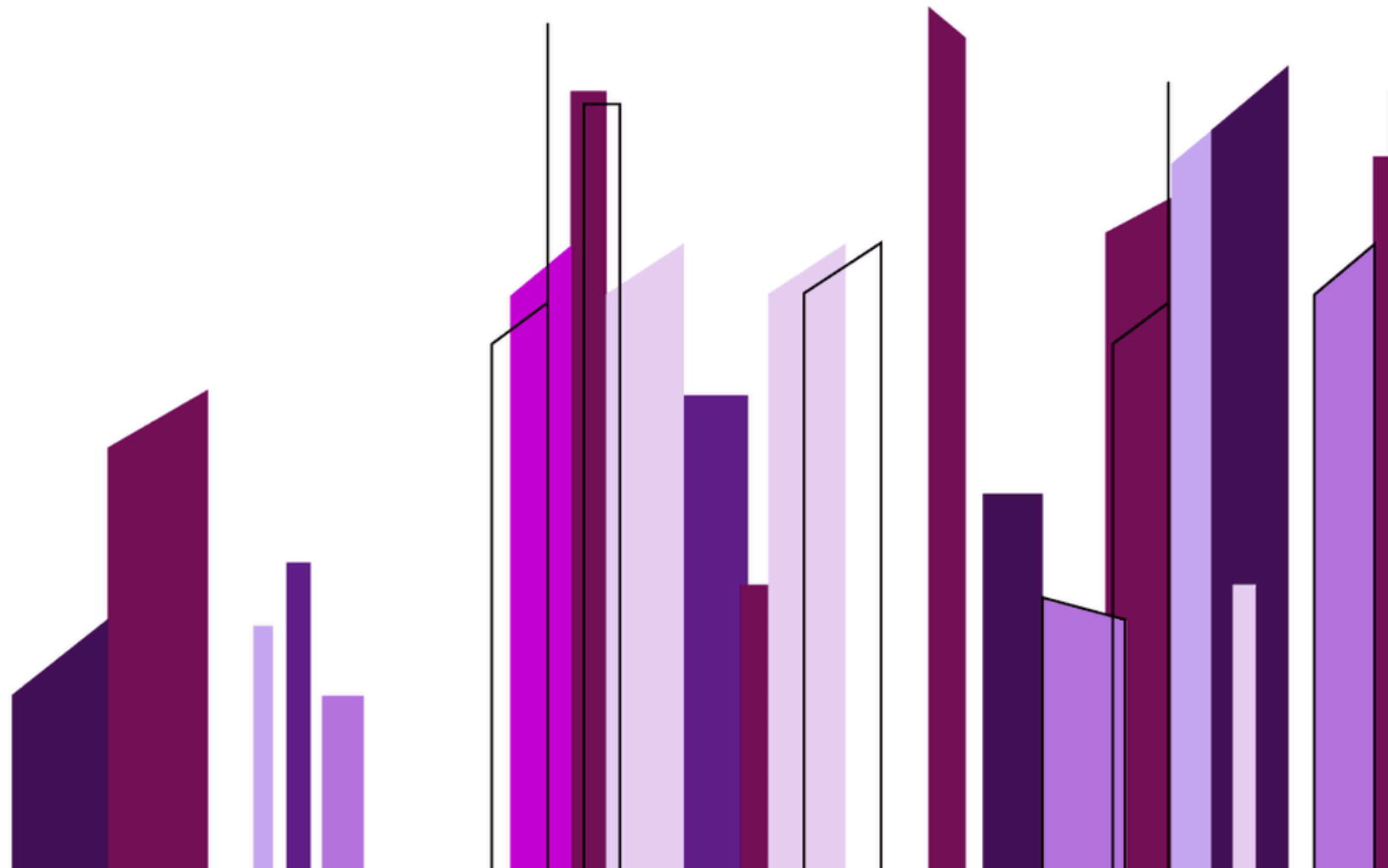
9

To achieve world class performance, brands need a global penetration of at least 10% and to be chosen five times or more per year.

10

Global progress is gaining between 0.5 and 2.0 penetration points.

What is Brand Footprint



The categories

The complete ranking comprises five global FMCG sectors – Beverages, Food, Dairy, Beauty and Personal Care, and Homecare – tracked by Kantar’s Worldpanel consumer panels. 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 data period

The Brand Footprint ranking is based on data collected over the 52-week period between November 2019 to the end of October 2020.

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, Japan, Kenya, Morocco, Nigeria and UAE is not included in the global ranking, and therefore if a brand is present in any of these

markets plus only one other continent it will not be considered global.

Brand Definition

Brand Footprint only covers consumer brands; retailers’ own-label brands are not included. Brands listed include all variants, categories and formats that sit within them – for instance Pantene includes all of its shampoo, conditioner, hair treatment, hairspray and hair oil products. Brands sold under different names in different countries are considered as individual brands – for instance Tide and Ace. However, for brands with a name that has been directly translated into a local language, for example Mr Muscle and Mr Músculo, both are counted as the same brand.

The ‘universe’

The data collected covers 73% of the global population across 54 markets, and 89% of global GDP.

Data source

Brand Footprint is a Kantar initiative.

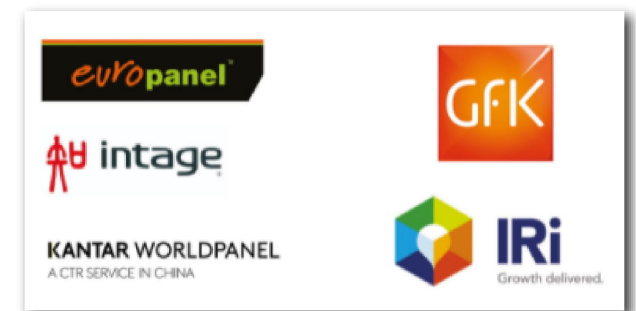
Thanks to our partnerships we have been able to offer countries outside of the Kantar footprint

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

Data for Australia and the USA was provided by IRI

Data for Japan was provided by Intage

Kantar in collaboration with CTR in China



About this report

The 2020 rankings include more countries than ever before. One new country, Australia, has been added for our most complete global view ever.

There may also be small changes in the data reported for Czech Republic, Hungary, Indonesia, Malaysia, Poland and Russia due to ongoing panel enhancements and data restatements.

We have continued to ensure the brand and category definitions used are identical across countries, and continuously improved our product classification.

The overall result is that this year's ranking is our most comprehensive and accurate reflection of global Consumer Reach Points.

About Kantar

Kantar is the world's leading evidence-based insights and consulting company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets.

By combining the deep expertise of our people, our data resources and benchmarks, our innovative analytics and technology, we help our clients understand people and inspire growth.

Explore the data

You can access this year's Brand Footprint data for all markets and sectors online. [Learn more about your brand's global footprint](#) and the most chosen brands in your sector and market.

Find out more

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

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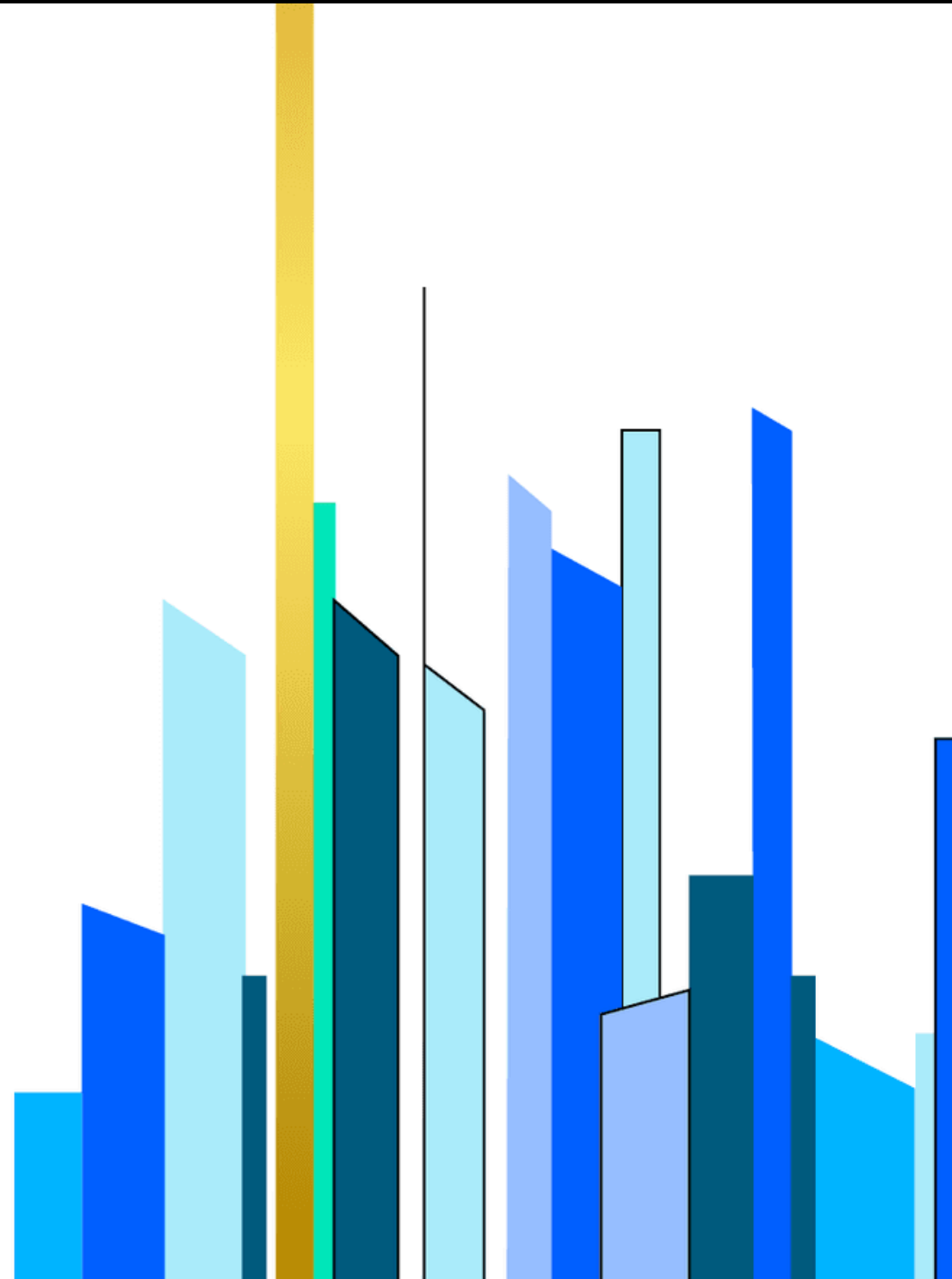
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Food for thought

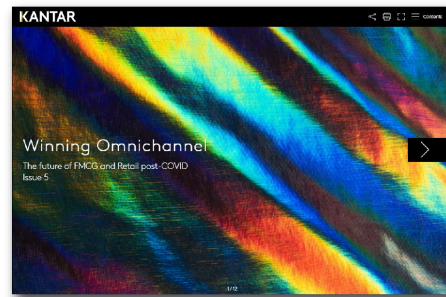
Explore our publications and discover our offer to find out how do we help brands grow.



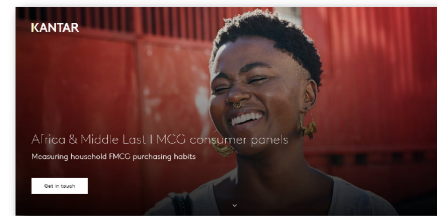
Food for thought



Brand Footprint 2020



Omnichannel 2021



**New South Africa
consumer panels**

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