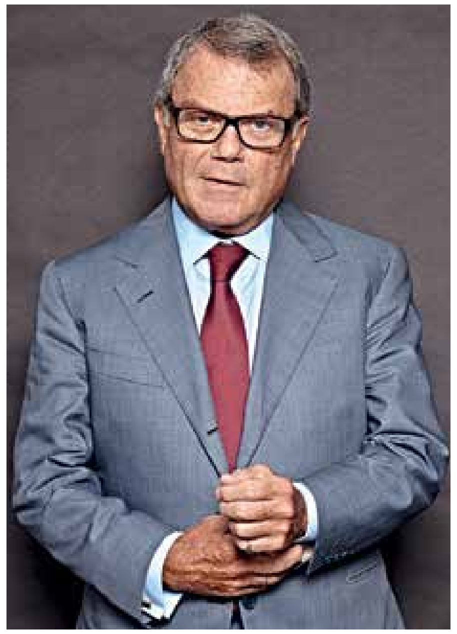
KANTAR WORLDPANEL

A Global Ranking of the Most Chosen Consumer Brands

BRAND FOOTPRINT

Brand Footprint Global Ranking Top 50



What is the strongest measure of your brand's success?

There is none more definitive than a consumer choosing to buy it rather than your competitor's.

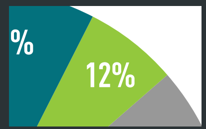
Brand Footprint, now in its third year, is a comprehensive study of brands that win at this moment of truth. Its conclusions are drawn from thousands of brands bought by 986 million households across 35 countries.

A unique metric, Consumer Reach Points, is the basis of Kantar Worldpanel's analysis, identifying the most chosen brands in the world. The report compares this data across countries, categories and competitors and provides insight into the competitive global retail landscape.

We hope the success stories in Brand Footprint 2015 inform and inspire you as champions of brands, global and local.

Sir Martin Sorrell, Founder and CEO, WPP

Contents



Brand Footprint: A roadmap for growth

What can we learn from brands winning at the moment of truth?

This year we reveal that growing FMCG brands follow one simple rule: growth is about penetration – retaining and increasing the number of shoppers choosing your brand

Brand Footprint is the most comprehensive study of FMCG brands across the globe, providing key findings for driving growth and success. The report identifies growth brands using our bespoke metric Consumer Reach Points (CRPs), which has penetration – the number of buyers of your brand – at its heart.

Growing penetration has become a strategic goal for many CEOs of FMCG companies. They use this metric to communicate to investors and the market, and it is often included in organisational objectives.

Of the 11,000 brands analysed in Brand Footprint 2015, we saw 50% grow with the majority of these (75%) expanding their penetration and thus their CRPs. It really is that straightforward. While 50% went down, most of these (80%) lost buyers/penetration.

Though brands face ever more complex challenges, they can succeed by doing something better than they did the previous year. We explore these winning strategies, so you can adapt them to your own brands, whatever their size and context.

The good news is that every brand has the potential to attract new shoppers. Only one brand in the world has a global penetration above 50% (see Global Ranking Top 50, pages 8-9).

To enable even better understanding of brand growth, this year's report includes more expert commentary than ever. You will hear from global and regional marketing chief officers about their growth strategies (see Brand Leaders Speak, pages 20-21). There is an increased focus, too, on future trends by Kantar Worldpanel specialists (see What's Next, pages 42-43).

We invite you to explore the data further at the report's enhanced microsite [www.brandfootprint-ranking.com], where you can also read 20 winning brand case studies.

I congratulate every brand featured in this report and hope you see it as a roadmap, valuable to you when navigating your brands' path to growth.

Josep Montserrat, CEO, Kantar Worldpanel

- **250bn** real shopper decisions
- **11,000** brands
- **200** categories
- **35** countries
- **4** continents
- **1** Brand Footprint Report

Brand Footprint at a glance

#1	Coca-Cola, the world's most chosen brand, is the #1 brand in 8 countries
#1	Downy, the top riser by Consumer Reach Points (CRPs), attracted 11m new shoppers in 2014, up 23%
19m	more shoppers bought Colgate in 2014 – more new shoppers across the globe than many other brand
+3	Dove rises from #12 to #9, reaching the global Top 10 for the first time
50%	of brands grew in 2014 while the other half showed decline

Behind the Numbers

This year's data has good news and a warning for the FMCG sector in the 2015 Global Ranking

In New York, a fan buys snacks to eat while watching a Giants game. In rural Vietnam, a mother purchases her daughter's first deodorant in a local store. Thousands of miles apart, these consumers are experiencing what Kantar Worldpanel calls the 'moment of truth': the point at which a shopper chooses one brand over another.

Brands adding the most shoppers in 2015

Colgate	19m
Maggi	18m
Lay's	17m
Vim	15m
Dove	14m
Sunsilk	14m
Dettol	13m
Hershey's	12m
Downy	11m
Doritos	11m

Sources: Kantar Worldpanel 2014. Germany, Italy, Russia and US data supplied by GfK and IRI

Today's value-chasing consumers are as likely to choose local brands, shaped by local cultures, tastes and nuances, as brands produced by global FMCG giants.

To buy or not to buy – that decision determines whether a brand will grow. Brand Footprint maps this growth using a bespoke metric, Consumer Reach Points (CRPs), to indicate how often and where in the world a brand is chosen by consumers (see page 8).

Using data from Kantar Worldpanel's 412,000-household panels in 35 countries*, the CRP metric provides a level playing field for comparing FMCG brands. These range from basic to luxury, local to global, applicable across all categories, from instant noodles to anti-ageing cream. All of this reflects how real shoppers purchased in 2014.

FMCG – NOT SO FAST MOVING

Nine out of the 2015 Top 10 brands by CRPs featured in 2014's leader board, with one new entrant for 2015: Dove.

This year's Global Ranking reveals that 50% of the 11,000 brands analysed are growing their CRPs, with 50% declining. This split is evident in the Top 10, where six brands have rising CRPs. This demonstrates the need for brand owners to balance their portfolios. Pantene's reductions in CRPs, for example, was counterbalanced by strong growth of other Procter & Gamble products such as Downy (+23%) and Oral-B (+9%).

Overall, growth brands expanded their CRPs by 9.8% last year; declining products saw a drop of 8.3%. This suggests that winning brands may have grown their categories at the expense of other FMCG purchases.

It's a reminder that with competition from other growing markets, FMCG is not guaranteed its current share of wallet. Interest needs to be stimulated through innovations, engagement with technology and the creation of brands that make consumers lives easier, happier or healthier.

Brand Footprint calculates that 250 billion FMCG shopper decisions were taken last year – a similar figure the previous year. Flat CRP growth poses a key question for FMCG: is the sector in 2015 as 'fast-moving' as its name suggests it should be?

GEOGRAPHICAL HOTSPOTS

Emerging or fast growth markets are where 85% of the population lives; they account for 80% of CRP growth. Kantar Worldpanel forecasts that FMCG value in developing countries will grow by 7% in 2015.

While 50:50 is the global average brand growth: decline ratio, Peru, Russia and Brazil saw more brands grow than decline; in Italy, 74% of brands declined. All this emphasises the need for brands to balance their portfolio growth, to avoid overexposure to local conditions and mitigate the impact of local brand competition.

TOP RISERS: CONSISTENCY WINS THROUGH

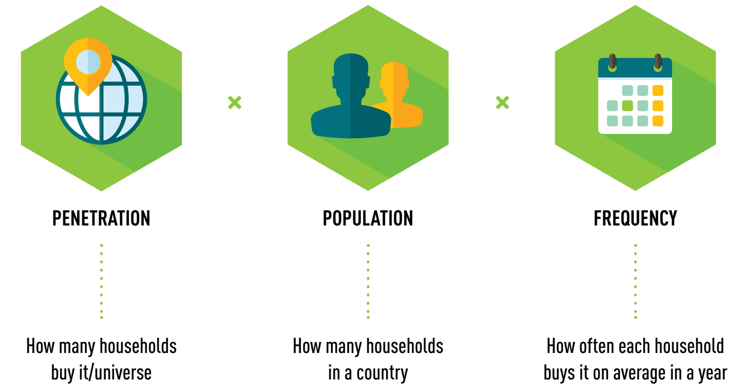
Observe the fastest growing brands globally to see they have added more than 13 million new households each—that's three times what other growing brands achieved. On average, brands growing globally add five million to their shopper base.

Fabric softener Downy leads the top CRP risers for the second year running, with Vim, Doritos, Lay's, Cheetos and Dove returning too. These brands also grow value consistently, on average by 10% globally.

"75% of all growing FMCG brands have expanded their shopper base

Luis Simoes, Global Strategy Director, Kantar Worldpanel

Consumer Reach Points



Downy has done particularly well in Indonesia, Philippines and Thailand, with rising penetration, brand stretching and innovation such as Downy Unstopables scent boosters helping to fuel a great CRP performance.

BRANDS WITH PURPOSE

Colgate is the brand which is recruiting the greatest number of new shoppers, most of whom are in India.

Consumers are increasingly responsive to brands such as Lifebuoy (+7%) that show a social purpose through their marketing and offer a gateway to healthier lifestyles.

BIG ROOM FOR BRAND GROWTH

The Global Ranking lists the world's most chosen brands, achieving high penetration in their markets. Yet only Colgate reaches more than half the world's households. All other FMCG brands, including table leader Coca-Cola, still do not penetrate a majority of households.

Of the 11,000 brands analysed, only 2% are purchased by more than 80% of a country's shoppers – so even the most successful brands have room to grow. (See page 6, Brand Growth: A roadmap).

* includes households from GfK (Russia, Italy, Germany) and IRI (USA)

See how your brand is doing and play with the data on www.brandfootprintranking.com

Brand Growth: A roadmap

What Brand Footprint data tells us about growing brands and shopper behaviour

There's a fundamental truth about FMCG brands: the key to growth is attracting more buyers. In other words, increasing penetration, as measured by the number of households buying a brand in one year, is the secret of successful FMCG brands and growing Consumer Reach Points (CRPs).

Many marketing theorists support the penetration proposition, including Professor Byron Sharp in How Brands Grow, where he uses empirical evidence that includes Kantar Worldpanel data.

Kantar Worldpanel's Brand Footprint has access to panels making up 412,000 households across 35 countries. Experts across the globe have observed consumer and shopper behaviour in relation to over 11,000 brands. Here we focus on four rules for brand growth that contribute to achieving consistently high CRP scores.

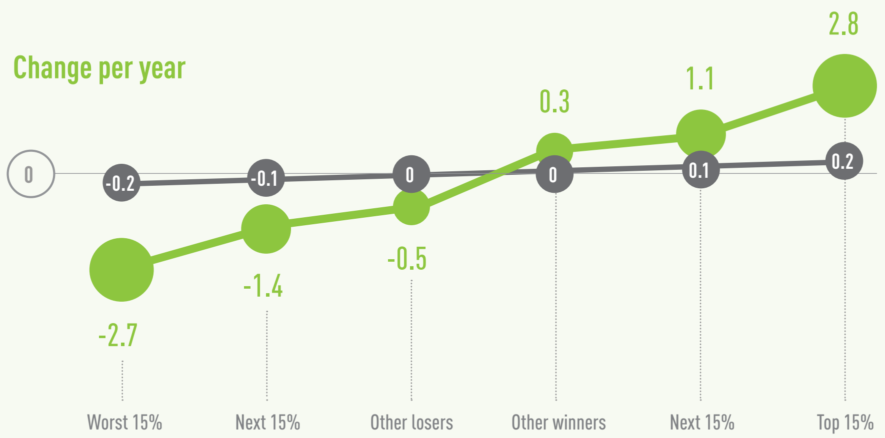
PENETRATION IS THE KEY TO GROWTH

Penetration · Frequency

Only 2% brands reach over 80% households

Source: Kantar Worldpanel 2014 and BG20 Europanel

Penetration	Brands
Over 80%	2%
60-80%	5%
40-60%	9%
20-40%	19%
10-20%	19%
5-10%	15%
Below 5%	32%



RULE 1
Increasing brand penetration is pivotal

Penetration is a measure of brand or category popularity. If your brand is popular, says Richard Herbert, Global Insight Director at Europanel, "everything else follows".

Europanel's BG20 study of 16 countries in Europe, Asia and the Americas explored 9,000 brands in 79 categories covering foods, beverages, household and personal care. The strong relationship between penetration growth and brand growth is clear, where no such correlation exists between frequency and growth. Few of the Top 10 brands in the Global Ranking Top 50 (page 8) dip below 20% penetration, with the strongest, Colgate, exceeding 60%. This means every brand has room for growth. Of all the growing brands in the world, 75% have grown in penetration.

SET YOUR PENETRATION GOALS

Innovation is a key penetration strategy for Top 50 growing brands. Downy, an outstanding example, increased CRPs last year by 23% with campaigns ensuring mental and physical availability across country and across category. In February 2015 the brand stretched outside the laundry category with the launch of the Unstopable Collection of home scenting products, including air sprays and candles. (More on Downy, page 12.)

Only five brands in the world get close to 100% penetration in their markets – Coca-Cola in Mexico, for example – however the most common brand penetration is five per cent. So marketers need to be realistic in setting targets and these should be based on growing penetration.

RULE 2
Make your brand accessible to as many shoppers as possible

To win the penetration game, FMCG brands need to be distributed and marketed to as many consumers as possible. Sharp urges brands to 'refresh and build memory structures' with mass market advertising that features distinctive yet simple messaging.

The Top 50 brands spend millions of dollars annually on marketing in all its forms – expenditure that gives them a better chance of succeeding in the moment of truth and validate the CRPs they achieve.

Snack brand Lay's is one of the fastest growing brands in terms of CRP. Its launches in Italy and Brazil used all the levers to make its brand memorable, from traditional push-marketing (celebrity endorsement by footballer Lionel Messi in TV, outdoor, digital, in-store and on-pack advertising in time with the 2014 FIFA World Cup) to 'pull' marketing through a global crowd-sourcing campaign to create new flavours.

AVAILABLE TO PURCHASE

Coca-Cola, the world's leading FMCG brand by CRPs, has long made physical availability one of its three core marketing principles. Through global distribution networks and franchise systems, Coca-Cola has lived up to its late president Robert Woodruff's promise to put Coke's products "within arm's reach of desire".

In Asia's growing urban centres, distribution assumes even greater marketing significance. Local brand growth comes from concentrating on outlets in lower tier cities where global brands are often not found and boosting brand awareness in store. Chinese toothpaste brand Saky, for instance, has grown by being well-distributed and highly visible on store shelves.

RULE 3
Retain and attract light or occasional buyers

Penetration needs to be earned again and again. Kantar Worldpanel's historical panel data shows that the vast majority of your brand's buyers will buy your brand once, and that the most common shopper behaviour within the category is not to buy your brand at all. This is largely because in most FMCG categories, consumers have a multitude of brands to choose from.

The majority of a category's shopper base is light buyers, who are "very important because there are so many of them," notes Alison Martin, Director of Kantar Worldpanel.

"Heavy buyers are important too, but chances are there aren't so many." While new shoppers come in, others are lost; the challenge is to achieve a positive balance.

So brand penetration strategies need to focus on increasing the number of light buyers, rather than heavy or core shoppers. This can include targeting new usages, new consumption occasions, expanding equity into new categories, smart sizing or new brands to cover all price ranges.

RULE 4
Your buyers don't belong to you

Your buyers are another brand's buyers, who also buy your brand. Kantar Worldpanel data indicates that consumers buy a range of brands in most categories.

This underlines the need for constant buyer recruitment, even for high-penetration brands. A Kantar Worldpanel study of 2,000 brands in France in 2014 found 50% customer churn for each brand examined.

Chocolate spread Nutella is bought by 60% of households in France, but still has to renew a third of its customers every year.

Idriss El Ganari, Knowledge Director at Kantar Worldpanel France, says the reality of customer churn has implications for marketers focused on loyalty programmes. El Ganari explains: "Loyalty can't be efficient because customers don't come to your brand on a long term basis."

Brand Footprint Global Ranking Top 50

Rank 2014	Rank Change	Rank Movement	Brand Name	Manufacturer	Consumer Reach Points (m)	Penetration %	Frequency	Consumer Reach Points Growth %
1	←	0	Coca-Cola	The Coca-Cola Company	5,722	43.3	13.4	-2 ↓
2	←	0	Colgate	Colgate-Palmolive Company	3,992	64.6	6.3	3 ↑
3	←	0	Maggi	Nestlé	2,755	32.7	8.6	5 ↑
4	↑	1	Lifebuoy	Unilever	2,338	26.5	8.9	7 ↑
5	↓	-1	Nescafé	Nestlé	2,137	22.8	9.5	-8 ↓
6	←	0	Pepsi	PepsiCo	1,984	24.6	8.2	1 ↑
7	↑	2	Lay's	PepsiCo	1,747	27.2	6.5	6 ↑
8	↓	-1	Knorr	Unilever	1,647	29.4	5.7	-4 ↓
9	↑	3	Dove	Unilever	1,457	34.7	4.3	6 ↑
10	←	0	Tide	P&G	1,438	29.8	4.9	-1 ↓
11	↓	-3	Pantene	P&G	1,386	26.2	5.4	-17 ↓
12	↓	-1	Nestlé	Nestlé	1,375	29.2	4.8	0 ←
13	←	0	Lux	Unilever	1,316	31.8	4.2	1 ↑
14	↑	4	Downy	P&G	1,264	14.2	9.0	23 ↑
15	←	0	Sunsilk	Unilever	1,212	20.1	6.1	12 ↑
16	↓	-2	Kraft	Mondelez	1,143	15.2	7.7	-11 ↓
17	↓	-1	Palmolive	Colgate-Palmolive Company	1,059	18.9	5.7	-2 ↓
18	↓	-1	Danone	Danone	1,053	14.9	7.2	-1 ↓
19	↑	3	Pepsodent	Unilever	936	12.5	7.6	2 ↑
20	↑	1	Sprite	The Coca-Cola Company	928	25.0	3.8	1 ↑
21	↑	2	Oreo	Mondelez	921	25.0	3.7	0 ←
22	↓	-3	Ajinomoto	Ajinomoto	917	7.0	13.3	-5 ↓
23	↓	-3	Bimbo	Bimbo	912	6.8	13.6	-2 ↓
24	↑	1	Milo	Nestlé	893	7.8	11.5	0 ←
25	↑	2	Heinz	H.J. Heinz Company	889	18.4	4.9	4 ↑
26	↓	-2	Tang	Mondelez	876	11.6	7.6	-4 ↓
27	↓	-1	Head & Shoulders	P&G	868	23.6	3.7	-2 ↓
28	↑	1	Fanta	The Coca-Cola Company	757	21.2	3.6	0 ←
29	↓	-1	Activia	Danone	747	12.9	5.9	-8 ↓
30	↑	1	Surf	Unilever	743	4.3	17.7	3 ↑
31	↑	2	Hershey's	The Hershey Company	735	13.9	5.3	4 ↑
32	↓	-2	Safeguard	P&G	722	13.7	5.4	-2 ↓
33	↓	-1	McCormick	Mc Cormick & Company	721	14.5	5.1	1 ↑
34	↑	3	Cheetos	PepsiCo	714	14.5	5.0	7 ↑
35	←	0	Nivea	Beiersdorf	692	22.2	3.2	3 ↑
36	←	0	Rexona	Unilever	670	15.8	4.3	1 ↑
37	↑	2	Kinder	Ferrero	665	12.2	5.5	5 ↑
38	↑	4	Quaker	PepsiCo	636	15.5	4.2	4 ↑
39	↓	-1	Omo	Unilever	630	14.4	4.4	-2 ↓
40	↑	14	Vim	Unilever	621	12.6	5.0	18 ↑
41	↓	-1	Lipton	Unilever	617	15.5	4.0	-2 ↓
42	↑	2	Yoplait	General Mills	610	10.4	6.0	1 ↑
43	↓	-9	Del Monte	Del Monte Foods, Inc.	607	13.1	4.7	-11 ↓
44	↑	4	Doritos	PepsiCo	603	11.6	5.3	9 ↑
45	←	0	Gillette	P&G	601	22.0	2.8	4 ↑
46	↑	3	Yakult	Yakult	597	8.2	7.4	9 ↑
47	↓	-4	Barilla	Barilla Group	591	13.0	4.6	-3 ↓
48	↓	-7	Ariel	P&G	588	15.0	4.0	-6 ↓
49	↓	-3	Closeup	Unilever	570	16.4	3.5	1 ↑
50	↑	5	Mountain Dew	PepsiCo	562	5.8	9.9	7 ↑

The Next 20

Rank 2014	Rank Change	Rank Movement	Brand Name	Manufacturer	Consumer Reach Points (m)	Penetration %	Frequency	Consumer Reach Points Growth %
51	↓	-1	Gatorade	PepsiCo	546	8.6	6.4	0 ←
52	↓	-5	Crest	Procter & Gamble	545	17.1	3.2	-3 ↓
53	↓	-2	POND'S	Unilever	533	16.4	3.3	-1 ↓
54	↓	-2	Hellmann's	Unilever	521	13.2	4.0	-2 ↓
55	↓	-2	Kleenex	Kimberly Clark	514	12.6	4.1	-3 ↓
56	←	0	CLEAR	Unilever	487	11.2	4.4	-2 ↓
57	↑	5	Dettol	Reckitt Benckiser	475	15.7	3.1	11 ↑
58	↓	-1	Clorox	The Clorox Company	470	10.4	4.6	-5 ↓
59	↓	-1	Johnson's	Johnson & Johnson	469	15.9	3.0	0 ←
60	←	0	m&m's	Mars	467	13.7	3.5	3 ↑
61	↓	-2	Philadelphia	Mondelez	447	11.5	4.0	-2 ↓
62	↑	3	Snickers	Mars	430	13.1	3.3	3 ↑
63	↑	4	Coffee-mate	Nestlé	430	5.8	7.5	6 ↑
64	↓	-3	Minute Maid	The Coca-Cola Company	423	13.2	3.2	-4 ↓
65	↓	-2	Dr Pepper	The Coca-Cola Company	415	5.0	8.4	-1 ↓
66	←	0	Tostitos	PepsiCo	413	6.9	6.1	1 ↑
67	↑	4	Oral-B	P&G	410	18.3	2.3	9 ↑
68	↑	2	Pringles	Kellogg Company	401	11.0	3.7	7 ↑
69	↓	-5	Pampers	P&G	393	6.1	6.5	-6 ↓
70	↓	-1	always	P&G	389	10.7	3.7	2 ↑

Source: KWP Brand Footprint 2015

For full global, regional, country and sector rankings, information on panel sizes and a complete index of the Top 50 brands included in this report, visit **www.brandfootprint-ranking.com**

The brands knocking on the door of the Top 50

Notable in the Next 20 this year are budding brands within global portfolios

Plucky and dynamic, the strongest growth among these is achieved by Dettol. Its 10.9% increase in CRPs saw it climb five places in the 2015 Global Ranking to number 57.

Also rising fast are Procter & Gamble's premium toothpaste Oral-B and Kellogg's latest recruit, Pringles, as strong marketing investment pays dividends for both players.

KEEPING IT CLEAN

Launched in Indian hospitals over 80 years ago, Dettol Antiseptic Liquid was first used during surgical procedures. Since then, the brand has diversified to categories including bar soaps, liquid hand wash, body wash, shaving cream and plasters.

Universally positioned as 'protector from germs', it gains most of its CRPs from Asia and the Middle East, in particular India, where it experienced double digit growth in 2014 alone. Dettol's brand equity there is such that the Indian Prime Minister launched its latest campaign, Swachh Bharat, endorsing its Clean India message as one of his key governmental policies.

Like many premium brands in the report, Dettol recently launched a smaller, affordable pack, increasing penetration in rural areas and smaller towns.

Most of Dettol's European sales are within the UK, with CRPs growing by 13%. Its new 'Laundry Sanitiser' product extends the anti-bacterial pledge to the washing machine.

TEETH AND TECH

Oral-B rose three places to enter the Next 20 for the first time. With a 9% increase in global CRPs, it is the world's 67th most chosen brand and the fifth most chosen in oral care.

One of P&G's billion-dollar brands, Oral-B is on the cusp of a truly global reach, among the top 100 brands in three continents: US, Latin America and Europe. Growth has been slower in Asia and the Middle East, but it has nonetheless climbed the ranking in every region across the world, especially in Europe (+15.2%) and Latin America, where its Dare to Change campaign contributed to a 10.4% rise in CRPs.

While toothpaste has the highest global penetration in the health and beauty category, there is still headroom for brand growth in oral care. Mouthwash, for example, has only 27.3% global penetration and new ranges such as whitening toothpastes have bolstered sales in many markets.

But Oral-B shows most promise in premiumisation. Investing heavily in new product development, the brand demonstrates the first real collaboration between FMCG and technology.

This year it introduced a toothbrush for the information age, which connects via Bluetooth to a smartphone app, congratulates users on brushing strategy and warns them if they 'missed a bit'.

SNAP, CRACKLE... AND POP

Squeezed by changing breakfast habits in its key markets of Germany and the UK, Kellogg's needed a star brand to spearhead the growth of its snack portfolio. It appears to have found it in Pringles.

Well established in USA and Europe, Pringles' 6.7% rise in CRPs saw it climb two places in the global ranking to become 68th most chosen brand, mainly due to fast growth in its core US market, the UK, Germany, France and Russia.

Pringles is both leading and riding a category wave. One of the fastest-growing FMCG categories this year, savoury snacks are in very good health: now bought by 11% of households globally. Sales within the category increased by 80% in 2014.

Kellogg's continues to work the brand hard. Pringles Tortilla launched in the US, Mexico and Central America last summer with three different flavours, and its 2014 World Cup marketing in the UK saw it boost CRPs by 12% in the country.

See how your brand is doing and play with the data on www.brandfootprintranking.com

Movers and Shakers

The 10 fastest growing brands in the top 50 have had an exceptional 2014, cumulatively reaching consumers on an additional 10.6 billion occasions

Six of the top 10 return from last year: Downy (top for the second year running), Vim, Doritos, Lay's, Cheetos and Dove. This shows that even the very biggest brands have the capacity to grow consistently.

DOWNY STAYS UP

The Procter&Gamble fabric softener Downy remains the world's fastest growing brand, increasing its Consumer Reach Points by 23%, and moving up four places to 14. This is the first time Downy has achieved over 1billion CRPs, joining the Billionaire Club.

TOP 10 RISERS GLOBALLY BASED ON CRP GROWTH

Growth has been fuelled by Indonesia, Brazil, Thailand, Peru, Venezuela and the Philippines. Building on its multi-sensory campaign, Downy used a Game of Thrones theme encouraging dual usage such as Downy fabric conditioner with Tide Laundry.

While its global growth levels are not reflected in the US, Downy features in the US top 100 with penetration of 28.4 of US households. 2014 saw the launch of the 'Rip your clothes on' commercial during the Victoria's Secret fashion show. The importance of softness and comfort is further promoted with the #Hugmore video and consumers have been invited to design the next Downy Simple Pleasure scent.

MOUNTAIN DEW'S GLOBAL RANGE

Moving five places up the ranking and increasing its CRPs by 7%, Mountain Dew has entered the ranking at number 50. While the US is Mountain Dew's biggest market, we have seen growth in Asia, especially in Thailand and Vietnam.

Mountain Dew has managed this strong performance in the face of a slow-down in the carbonated soft drinks market as consumers lean towards healthier alternatives. 2014 saw plenty of innovation with new variants and flavours as well as a Mountain Dew Diet, promoted by car racer Dale Earnhardt. With the Millennial target clearly in mind, the 'Dew After Dark' game-on tournament featured the newly released Call of Duty Advanced Warfare.

SUNSILK: SMOOTH GROWTH

Sunsilk, also known as Sedal or Sedã, has consistently innovated across the marketing mix, making it more accessible to young, middle-class women in developing regions.

In Malaysia and Indonesia, Sunsilk engaged young hijab-wearing working women: its Hijabista campaign in 2013 ranged from TV to targeting hijab bloggers. In 2014 the brand saw nearly 22% CRP growth in the Philippines, 12.5% in Mexico and 12.1% in Indonesia.

LAY'S: FOOTBALL AND FLAVOURS

The PepsiCo-owned snack brand features in the top 10 recruiters for 2014. Strong CRP growth in the core US market (up 5.4%) has been backed up by Asia and the Middle East (up 10.6%) and Europe (up 7.4%).

LIFEBUOY: PROFIT THROUGH PHILANTHROPY

With Lifebuoy, Unilever's ambitious task is to change the hygiene behaviour of 1 billion consumers across Asia, Africa and Latin America. Lifebuoy has executed educational campaigns, such as World Handwashing Day, and local initiatives supported by NGOs to spread awareness about hygiene among children.

Developing products to suit new usage occasions, such as the colour-changing handwash indicating when germs have been killed, the Lifebuoy Handwashing Behaviour Change Programme has helped increase the brand's CRPs 7% globally.

DID YOU KNOW?

2 out of 3 Filipino homes buy 3-in-1 White Coffee

The Next Generation: Beyond the top 70

Today's smaller but rapidly climbing brands could well be tomorrow's major global brands

Growth typically comes in at least one of three ways: acquiring brands to extend portfolio, extending into new or adjacent categories and positioning to cover new targets, consumption occasions or price tiers.

Here we look beyond the Top 70 to our next generation of brand titans according to CRP growth. What strategies are these promising brands using to improve penetration and frequency in different markets?

IF YOU CAN'T BUILD IT, BUY IT

Professor John Quelch, Professor of Business Administration at Harvard Business School, told Brand Footprint:

"If you are a multi-national corporation looking to grow a brand globally, one option is to develop one's own product portfolio, or alternatively acquire established local brands. International beer companies have principally operated in that fashion."

Indeed, Brahma's global success is a story of mergers and acquisitions. In 1999, Ambev acquired the brand along with its longstanding rival Antarctica and was widely tipped to be Brazil's first international player. But it was only to enjoy global distribution upon its merger with Belgian brewer Interbrew five years later.

The brand has nonetheless become a totem of success for Brazil, which according to Devin Kelly, Inbev's vice president at the time, was always its ambition. "The emotional context of Brahma, at the heart and soul of this incredible country called Brazil, was the single most important factor."

In 2005, Brahma was made available for the first time in 15 countries, including the UK, US, Canada, Russia and France. Now, as part of American-based brewing giant Anheuser-Busch, it is the world's third most chosen beer brand and has seen 63% growth in spend.

In the 2015 ranking Brahma has seen 23% CRP growth and it has shown consistent growth in the ranking over the past three years.

RISING STARS

Haircare brand Tresemmé has been part of the Unilever portfolio since 2010 with rapid roll out around the world in the last five years. Now placed at 105 in the global brand rankings, it looks set to soon join the top 100.

Marketed as 'used by the professionals' due to the brand's heritage in salons, Tresemmé is priced to fit into a niche more expensive than value brands but still an everyday option.

CRP growth has been particularly strong in Asia (94%) where the brand has risen 51 places, and yet is a relative unknown currently only reaching 1.3% of this vast population.

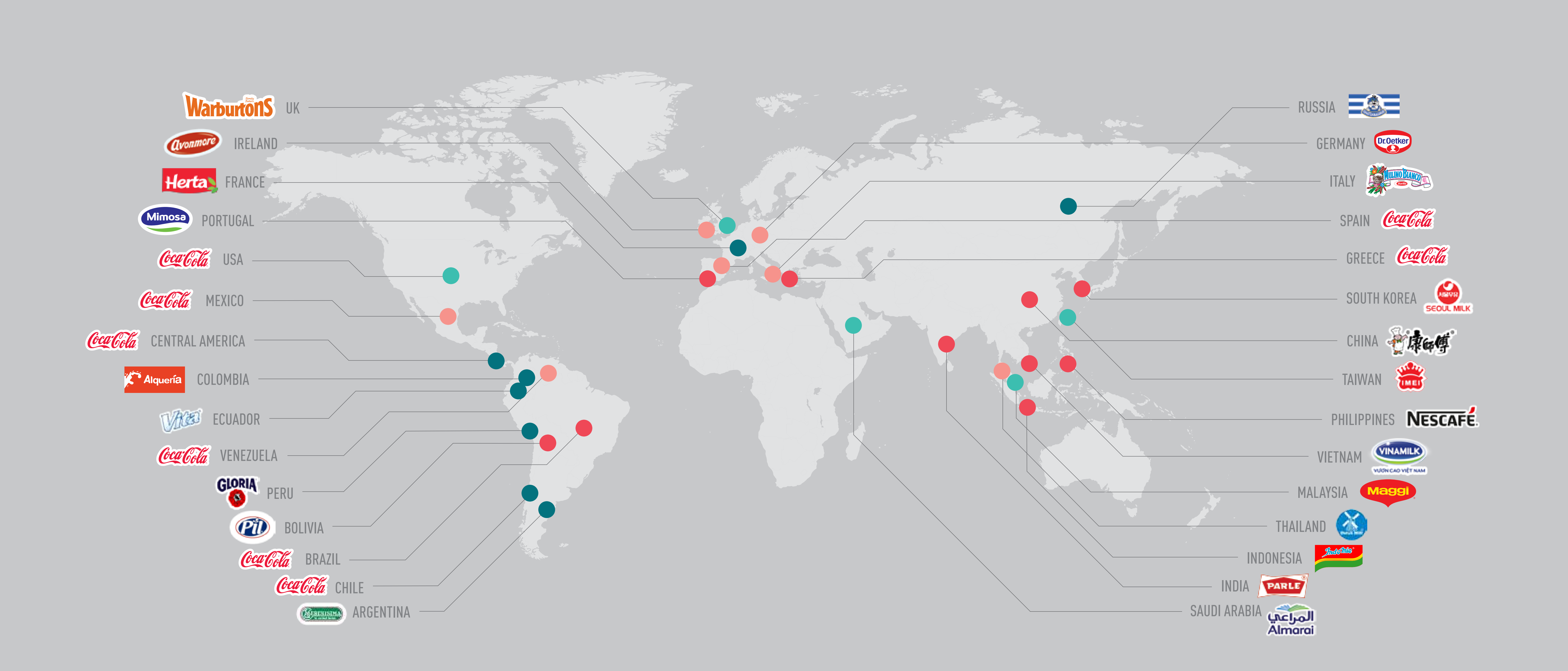
A partnership with the television show 'Asia's next top model' has raised awareness across the region, especially India and Indonesia.

The range has continually expanded across shampoos, conditioners and styling aids. Much success has come from the innovative 7 Day Keratin Smooth system.

Coffee brand Dolce Gusto CRP has grown by 16% in the last year, powered by strong performances in Western Europe, especially Spain and France. The most recent opening of a new factory in Brazil (the first outside Europe) shows the brand has the ambition to grow globally.

Consumers the world over love coffee. Instant, roast and ground coffee are purchased and taken home by at least half of shoppers globally. The ease of preparation and long shelf life of instant make it the most likely entry point to the category in countries with a weaker coffee culture. Consuming on the go or in a café is an affordable piece of luxury. Coffee capsules have helped create the holy grail of marketing a new category – combining the indulgence of café culture with the convenience and speed of the capsules.

> "If you are a multi-national corporation looking to grow a brand globally, either develop your own product portfolio, or acquire established local brands



Number 1 Brand By Country

KEY

+3% | 1 to 3% | 0% | up to -4% | -4% onwards

Indonesia, China and Vietnam: growth based on urban population
CRP growth, based on top 50 FMCG brands in each country.

Countries worldwide have different brand preferences, as depicted in our map of top brands around the globe, with food and beverage products dominating the list

On average, number one brands reach 85% of shoppers in their country, a level achieved by only one per cent of FMCG brands across the world. While this level of penetration is crucial to success, Consumer Reach Points (CRPs) are dependent on purchase frequency also, which tends to be higher in food and beverage categories. With the exception of Coca-Cola, top brands per country are invariably local, integral to a country´s culture and symbols of both consumer habits and tastes.

"We see local brands taking the number one position in more than three quarters of the 35 countries profiled," says Virginia Garavaglia, Global Brand Footprint Project Director." These brands tend to be tried and trusted by almost every household in the country. They are part of consumers' daily lives, generation after generation."

A mere five brands in the world have reached over 99% shoppers locally. These are Pil in Bolivia, Coca-Cola in Chile and Mexico, Indomie in Indonesia, Gloria in Peru and Almarai in Saudi Arabia. These brands have reached the Holy Grail in terms of attracting buyers and can now focus on increasing the number of times they are purchased.

PENETRATION BOOSTS ALQUERÍA

Noteworthy is the performance of dairy brand Alquería, which this year takes top spot as Colombia´s number one brand based on CRPs. In doing so, it nudges aside fellow local dairy and food producer Colanta, 2014´s leading brand in Colombia.

Alquería is a study in meticulously planned local expansion. The family-owned brand owner was founded in 1959 as a milk processor and has gradually diversified into other foods and beverages such as juices and ice cream. "Alquería started small, but growth was steady; consistent with its ambition to be market leader," says Garavaglia. Garavaglia highlights Alquería´s high penetration rate of 71% and notes the company partners to gain necessary expertise in new categories. Alquería has, for instance, embarked on a joint venture with Danone, to create DASA which supplies the local market with yogurt products.

TRUST MATTERS

Another change in this year's Number One Brand By Country ranking saw Taiwanese food brand I-Mei emerge triumphant from a market marred by food safety scandals. As its competitors lost shoppers, I-Mei stood out as a company willing to act fast and take responsibility. Held up as a role model for food standards nationwide, I-Mei was able to trade on a reputation for honesty and integrity. It is now the most popular brand in the country and purchased by 82% of Taiwanese households. I-Mei products were chosen 44 million times in 2014, which contributed to a sales increase of 4.7%.

KANTAR WORLDPANEL

India is polarised in terms of FMCG performance: sales volume is down by 3% year-on-year in rural areas but buoyant in urban areas

Country Focus: India

A rise in disposable income in India, especially among urban consumers, is fuelling a boost in confidence and significant change in FMCG purchasing habits

India has one of the world's fastest growing and confident economies: the International Monetary Fund forecasts growth of 7.5% this year, exceeding that of China.

This confidence is displayed in FMCG, which has seen a large proportion of successful premium brand launches in 2014. In bar soaps, for instance, the share of spend on premium brands increased from 30% to 33%, while premium brand share for shampoos grew from 34% to 36%.

ASPIRATIONAL DRIVE TO PREMIUM

Consumer aspiration to purchase premium brands is not about replacing cheaper counterparts, but is on top of their existing shopping baskets. Nearly half of biscuit buyers (45%), for instance, purchased premium as well as discount brands.

Pack size reduction has helped make such brands accessible to a wider socio-economic audience. Economic growth has also encouraged more consumers to purchase premium than before; milk food drinks, face and hand washes, and fabric softeners have seen good CRP growth in the past year.

At the same time the CRP ranking of mass market detergents Ghari and Wheel suffered, due to a significant fall in purchase frequency as premium alternatives become popular.

NEEDS DRIVE BRAND EXTENSIONS

In line with growing consumer affluence, Indian marketers are embracing needs-based marketing strategies. Personal care has seen product extensions as a result, with hair care brands now focusing on hair loss and smooth hair instead of relying on fragrance diversity. The biscuit category was able to carve out a health segment, which overall grew consumption by 5%. Pillsbury's Multigrain Atta dough grew CRPs by 8%.

LOCAL BRANDS ON THE RISE

In India, global-versus-local brand popularity by CRP splits 60/40, though that pendulum is shifting. Colgate is the one global brand in India's top 10 brand ranking, a new entrant for 2015 thanks to exceptional penetration of 87%.

Nearly half the fastest rising brands are local. Toothpaste brand Dabur Red capitalised on a surge in interest for herbal products, as did herbal shampoo Kesh King, a premium range that found success in its launch states. Indian biscuit brand Britannia has also entered the top five for the first time, boosted by growth of the biscuits category.

PERSONAL CARE POSITIONING

Intelligent positioning is key to success in Indian personal care. Fogg deodorants made a significant impact by pursuing a functional 'no gas' marketing strategy, rather than the more emotional positioning of competitors. This resonated with Indian consumers, and the brand is key to the category growth of deodorants overall.

Sunsilk is also thinking outside the box when it comes to the Indian market.

For the 2014 wedding season, Sunsilk launched 'BandBaajaBridesmaid', a campaign targeting the bride's friend, sister or cousin instead of the bride herself. This, alongside a partnership deal with the Bollywood film '2States' to help launch its Natural Recharge variant, helped the brand experience 10.4% CRP growth in 2014.

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Parle	4,219
Clinic Plus	3,350
Amul	2,654
Ghadi	2,154
Britannia	1,842

TOP 5 RISERS

Brands	CRP Growth %
Anmol	36
Sakthi	27
Dove	24
Thirumala	24
Arokya	20

Source: Brand Footprint 2015

Global Trends, Brand Responses

Understanding consumer trends and behaviour allows brands to plan for the future

Consumption habits around the world continue to evolve and brands that cater for these shifts create new opportunities for their businesses. The world is diverse in shopping behaviour and tastes, but there are four common trends to note.

DEMOGRAPHIC SHIFTS

Populations are changing the world over, but not necessarily in the same way. Rising affluence across Asia is changing how brands are positioned and bought. In India the rise of e-commerce is partly fuelled by more middle-class women going out to work.

The boom of the Millennial generation in developing markets brings consumers with different needs and attitudes. India's Engage, for example, offers couples matching deodorant pairs such as Rush & Blush, Frost & Drizzle.

In the West, L'Oreal Paris is using more mature models to appeal to specific targets, and smaller households are targeted by products such as Loyd Grossman for One sauce in the UK.

THE HEALTH PARALLEL

Some brands are moving beyond reactive health to proactive and restorative, with anti-ageing properties and nutritional boosts: Activia yoghurt's 'happy tummy' is one example.

The trend extends to personal care. Premium Chinese toothpaste YunNanBaiYao uses a traditional medicine to help with pain relief.

Brands and retailers are in step with the fight against obesity: discounter Lidl made a strong statement in 2014 by removing sweets and crisps from the checkout in 600+ stores in the UK.

BUILDING TRUST

In an age of abundant choice, consumers are drawn to brands with a commitment to deliver their promises. Confidence lost is hard to win back, as recent meat scandals in Taiwan and Europe showed.

Consumers are looking for sustainability as part of a brand's quality promise, in response to complex FMCG supply chains. French food producer and grocer Fleury Michon unveiled its #venezvérifier campaign so consumers can follow its surimi (fish and meat paste) range, from fishing vessels in Alaska to the supermarket shelf.

October 2014 saw Unilever launch its first TV ad to associate sustainability with the Unilever logo. Downy and Comfort single rinse fabric conditioners have thrived in South East Asia, saving precious water, good for the environment and good for the consumer.

ME, NOT WE

Consumers demand the unique and unexpected. Ferrero's Nutella partnered with premium British store Selfridges allowing shoppers to create a jar with their name on it. Crowd sourcing is popular, with brands such as Downy and Lay's developing new variants. Blends for Friends in the UK lets consumers design and name their own tea, while Concoction shampoo does the same personalisation for haircare.

> In India the rise of e-commerce is partly fuelled by more middle-class women going out to work

Digital Trends: Great expectations

The Millennial generation now expects brands and retailers to offer goods on their demanding, tech-savvy terms

Seamless integration

High mobile penetration means retail is now everywhere and instant – consumers can shop at home, in-store – encouraging brands to incorporate e-commerce into every digital touch point. H&M's 2014 Super Bowl shop-able ads, for example, displayed prompts to viewers using Samsung Smart TVs to buy the clothes featured in the ad.

Facebook and Twitter are investigating how to leverage sharing and conversational behaviour into conversion to purchase, testing 'buy' buttons letting users instantly pay for goods.

Digital data

Consumers want information as much as they want discounts. US craft beer outlets now use the Taplister app to tell their ale-loving customers which beers are on tap via Facebook, Twitter and the company website.

People use Facebook to get ideas from their friends; brands and retailers are doing the same with their fan bases, involving avid consumers in product line extensions, NPD research and testing. When Sunsilk used social media to canvass opinion on whether Indonesian women should use hair colourant or keep their natural black, over 70% of the 6m voters preferred the natural option and sales of the brand's Black & Shiny variant rose by 30%.

Convenience culture

Across the globe, long working days and tedious commutes are commonplace. In South Korea, Tesco introduced their Home Plus service in 2010: commuters now see products on digital posters at train stations, arranged in aisles like a conventional shop. Using QR codes, people can shop with their mobile phone on the platform, and their order is delivered when they get home.

In developed markets, the click-and-collect concept has come of age. In the UK, Waitrose is introducing hotel-style welcome desks to facilitate online shopping, while in the US, Walmart is testing online grocery delivery and in-store collection, looking to its UK chain Asda for inspiration. Asda offers delivery across 97% of the UK; in February 2015, the retailer bought 15 petrol stations where it is installing click-and-collect lockers.

Entertain me

Reaching digital-savvy consumers now demands a sophisticated mix of advertising, PR, sponsorship, social media and entertaining content.

From Downy's branded entertainment TV show in 2014, to chewing gum brand Trident sponsoring Trending 10, a TV show based on tweets, brands are exploring every possible digital-friendly platform to engage with consumers.

Global and Local: Brand leaders speak

Keith Weed, Global Marketing Officer of Unilever, one of the world's top three FMCG manufacturers, on the plan to double overall revenue from Unilever brands while halving its environmental impact

What is your view on how brands grow?

I have long held the view that the only sustainable growth is consumer-demand-led growth, and that is the job of marketers. Brands that are growing strongly and sustainably today are ones that give a consumer not just a product to buy, but an idea to buy into, and brands that have something to say.

We have a vision to decouple our growth from our environmental footprint, while increasing our positive impact. Our brands with a clearly defined social purpose consistently show strong growth – Lifebuoy saving lives through its hand washing programme, for example, or Dove building the self-esteem of women all over the world. That is because they stand for something real that people can get behind.

Which regions are leading Unilever's global growth?

Indonesia, India, Turkey and the Philippines, for example, all delivered a year of double digit growth in 2014. Growth was driven by global brands such as Magnum, Ben & Jerry's, Dove and Sunlight.

Why have specific brands such Lifebuoy and Dove recorded positive CRP growth?

They have a high ranking because they tap into a real human need and motivation, and have a strong and clearly defined social purpose. This creates strong, sustainable brands that consumers love. This is backed by great execution in the marketplace in terms of pricing, packaging and distribution. And I'm pleased to say they consistently outperform competitors in blind product tests.

Another iconic Unilever brand, Sunsilk, registered a 12% rise in CRPs this year. A refresh of Sunsilk's strategy and business model in 2012 focused on three key pillars.

First, forging empathy with our audience, ensuring we put the 'Sunsilk Girl' at the centre of everything we do, from product mixes to brand communications. Second, improving our expertise, particularly in the digital space.

Finally we looked at innovation, ensuring we built a balance into our pipeline between supporting our core, iconic variants, such as Black Shine and Smooth and Manageable in Asia or Ceramidas in Latin America, and new platforms that tap into emerging trends, such as the afro-descendant target in Latin America.

Which brands should we look out for in 2015?

One to highlight is the Unilever brand, which has been finding ways to connect people with sustainable living. Unilever products are used two billion times a day, and I want that Unilever 'U' in every home to stand for quality, value and sustainability.

Last year the Unilever brand launched its first ever TV campaign, Bright Future Speeches, featuring inspiring young people acting to create change. This is definitely one to watch in 2015.

Of course our biggest brands, like Dove and Lifebuoy, are brands to watch every year, since their continuous innovation is one reason why they command the footprint they do.

One brand to keep an eye on this year is Nexxus, a premium brand in our hair portfolio, which has re-launched in the US and launched in the UK.

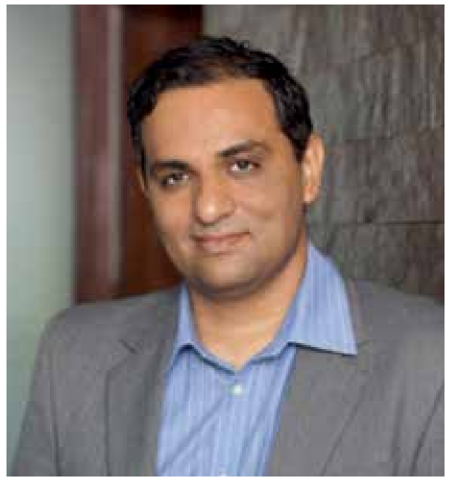
What's your view on Consumer Reach Points as an FMCG metric?

CRP is a good measure of how many people we touch, and that is very important. I strongly believe that out of sight is out of mind, and that means increasing CRPs is critical for sustained growth. As a company we define growth as the 4 'Gs' – growth that is consistent, competitive, profitable and sustainable. Things like CRP and brand equity are important enabler metrics in this.

Unilever Top 5 by CRP Growth

Vim	+18%
Sunsilk	+12%
Comfort	+7%
Lifebuoy	+7%
Dove	+6%

Source: Brand Footprint 2015



Sameer Satpathy, Chief Marketing Officer of Marico, the Mumbai-based FMCG dynamo, on how to build a global brand from East to West

What does success look like for you?

Marico has embarked on a very distinct journey. We now operate in 27 countries and it's been very consistent, organic growth. The key to our success is having a clear strategic mission from the beginning: a unity throughout the organisation. You need to know what you want to do.

Now, does it take a portfolio of brands to do it? Do you want to grow a single brand? Do you want to do it through value growth or volume growth? Do you want to try a combination? Which route you take is up to you. But clarity and unity of vision are crucial.

Where do you see opportunity for growth within existing markets?

In the past few years our core objective has been to grow market share. Now we are leaders in most of our categories, in most of our markets. And that puts the onus on us to develop the market.

In under-penetrated categories the game is to get more consumers. Having a clear proposition will give you a set of values which will appeal to a certain sector of people. A sense of uniqueness about your brands and positioning, gives you scope to develop and appeal to new consumers.

We go wrong when we try to place too many bets on the table. You must envision the future and then ask whether your portfolio is in line with this future.

What advantages are there to being a relatively young brand-owner?

Social, economic and political environments have always been volatile in some countries and that naturally affects the future and the fortunes of FMCG markets across the world. What is required of a company in this context is nimble-footedness, resilience and people who are committed for the long term.

We firmly believe consumers still need basics, and that their consumer impulses remain the same. The need for hygiene is still there. The need to be presentable is still there. The need to eat every day is still there. And as long as we keep focusing on the consumer and their needs, the short term disruption should not impact us.

When the environment shifts, you have to be prepared to change your plans. If oil drops to $40 from $100 a barrel, is that going to impact business? Yes. Some say it will be positive, some say it will be negative but it will definitely change your plans. You have to be agile enough to come back, regroup and re-grow.

That speed is critical and relies on the ability of the organisation to gel together as a single fighting unit. If everyone understands the cause, they understand why the change is required and it's implemented very quickly.

How are you planning for global expansion?

Marico started with the luxury of operating in one large plane in a single market. There are some countries where we are dominant leaders and those where we are not. We need to share this knowledge to effectively manage the category and drive innovation in our portfolio across the globe.

We are looking at how we best operate in multiple markets in a manner that is still fast, entrepreneurial, yet enjoys all the advantages of scale. That requires some innovation in the way we structure ourselves, a lot of internal trust, and a culture which encourages cooperation.

Critical to this is intelligence, innovation and talent. Talent in the end is the main ingredient to build a brand footprint across the world: global expertise has to come from people.

History

Marico was founded in 1990 as a personal care and food group to enter categories where multi-nationals had no Indian presence, such as hair oils. In 1996 Marico listed on Indian stock exchanges and in 2013, Marico demerged and floated its Kaya skincare brand.

Key Brands

Hair care: Parachute and Nihar Natural
Food: Saffola
Health: Mediker, a lice-removal range

Geographical Markets

India, South Africa, Egypt, Middle East, Malaysia, Vietnam and Bangladesh

Total Income

$737 million

Country Focus: Mexico and Brazil

Mexico

Calorie tax has an adverse effect on the FMCG market

Mexico has a weight problem: 33% of adults are now classified as obese. Last year, to tackle this, a new tax was introduced on high-calorie food and sweetened drinks, aimed at nudging consumers towards healthier options. The FMCG market has predictably suffered, but not in the way the government may have hoped. Targeted categories experience lower reductions than expected because Mexican consumers reallocate their budgets from health & beauty and home care sectors to subsidise their rising food bill.

Meanwhile, 'How to prepare Dorilocos?' was the country's third most Googled question last year. Heaped with toppings ranging from grated carrots and peanuts, to pickled pork rinds and jellied candies, and lots and lots of chillies, 'Crazy Doritos' built on Mexico's street food culture and are fast becoming a local delicacy.

The brand responded by providing vendors with signs that read "Dorilokos – Mix up your Snack!" and created a series of online tutorial videos. In doing so, it demonstrated the benefits of adapting to local culture and enjoyed a 4% CRP growth in 2014. Doritos are bought by more Mexicans, more often, than any other in the world.

Healthy alternatives are showing some success, however. Pasta brand Yemina entered the Top 50 ranking this year following its high-profile partnership with a nutritionist, joining the national quest to help consumers lose weight.

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Coca-Cola	1,511
Lala	725
Bimbo	651
Nutrileche	408
La Moderna	346

Source: Brand Footprint 2015

TOP 5 RISERS

Brands	CRP Growth
Delsey	82
Emperador	14
Los 19 Hermanos	13
Jumex	11
Carnation Clavel	10

Brazil

Brazil's golden age of growth is over. Still the seventh largest economy by GDP, it has expanded only 2% since 2011

Naturally this has impacted directly on both industrial production and the consumption habits of the population

Throughout the slowdown, however, average family income increased significantly, unemployment reached a decade-long low and access to credit remained high. Indeed, the middle-class dream appeared to live on, despite concerns that it was being propped up by personal debt.

But in 2014 evidence shows Brazilian consumers to be waking up and wising up, adopting a more considered and rational approach to spending.

The FMCG basket was less affected, with volume growth in line with households' population growth. Its value grew above inflation in double digits, due to increased access to premium categories, particularly those that bring benefits such as convenience and health. Overall, consumers are shopping less frequently but buying more per occasion in terms of both volume and average ticket price. Both Procter & Gamble's Gillette and Unilever's Brilhante stood out as rising fast up the Brazilian ranking, increasing their CRPs by 53% and 28% respectively. After high investments in communication and in the point of sale, Brilhante grew in both new and established regions.

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Coca-Cola	569
Ypê	418
Colgate	302
Tang	301
Omo	280

Source: Brand Footprint 2015

TOP 5 RISERS

Brands	CRP Growth
Panco	18
Liza	15
Marilan	14
Toddy	12
Limpol	12

Shopper Trends: Tell me where you live and I'll tell you how you shop

Shopping habits reflect a country's demographics, geography and infrastructures. But local values, lifestyles and culture also play a role

Though the global economy has created global brands, there is no such thing as a global FMCG shopper. The marketer's role is to unravel why consumers around the world consistently differ in where and how they shop.

Brands are creating unique solutions to local challenges (see map, above). Some themes are present in all countries, to varying degrees.

MODERN TRADE ADAPTS TO LOCAL NEEDS

"Modern trade dominates in developed economies, with 85% market share. In emerging economies, traditional trade, local commerce and alternative retail formats still rule," says Luis Simoes, Kantar Worldpanel's Global Strategy Director.

Across Asia the rising cost of land, increasing urbanisation and low car ownership have led modern trade to be dominated by smaller format retailers.

In China, while 56% of FMCG is now modern trade, the share commanded by overseas retailers declined from 20% in 2013 to 19% in 2014. The hypermarket model has stalled and convenience stores such as SPAR and Lotus are booming.

PRIVATE LABEL EXTENDS ITS REACH

Another challenge to the growth of FMCG brands is the steady rise of private label in Europe, from 11.5% market share in 2008 to 13.7% in 2014. "This is not a big jump for private label, but it represents inexorable growth, often providing retailers with higher margins and competition for brands for shelf space," says Alison Martin, director of Kantar Worldpanel. Retailers, particularly in Western Europe, are responding to consumers' search for value and desire for accessible luxury with diversified private label brands that appeal to a broad range of buyers.

Value-driven private label is not the sole domain of modern trade retailers. In markets where there is no modern trade, manufacturers are responding. In Latin America, for example, Quala and Alicorp have become the 'people's brand' with low-cost, essential FMCG ranges.

DISCOUNTER MOMENTUM

The rise of discount grocery retailing is a very European success story: Lidl is predicted to become Western Europe's biggest grocery retailer by 2018. In Eastern Europe discounters grew their market share from 13% in 2007 to just over a fifth of the market (22%) in 2014. Kantar Retail predicts that sales at discount grocers will grow at a rate of 4.8% a year until 2017, compared with 3.1% for modern trade.

In Brazil, modern trade has over 50% market share. With the country's GDP growth more than halving from 5% in 2008 to 2% in 2014, the Atacarejo format (combining wholesale and retail for people to buy in bulk) is thriving, as low-income consumers seek more cost benefits.

DIGITAL'S UNTAPPED POTENTIAL

Ecommerce is now an established retail channel worldwide – Amazon turns a mature 21 in 2015.

But for FMCG, online remains tiny (an average of 3.9% of spend) compared with bricks-and-mortar outlets. Online adoption for FMCG ranges from 0.2% in Brazil to 13.2% in South Korea. Stéphane Roger, Global Shopper and Retail Director at Kantar Worldpanel, calls this "a puzzle of performance".

Kantar Worldpanel believes online could account 10-15% of share of grocery spend in the next 10 years. "It's inevitable the online channel will grow, especially for main shops, but only if the logistics and costs of delivery are sorted," notes Stéphane Roger.

Retailers around the world are working on their local logistical solutions, such as variations on click-and-collect. In emerging markets, 'bancarisation' (extending banking facilities to consumers) will make ecommerce accessible to millions, but poor infrastructure, delivery fees and trust in the refrigeration chain remain the barriers.

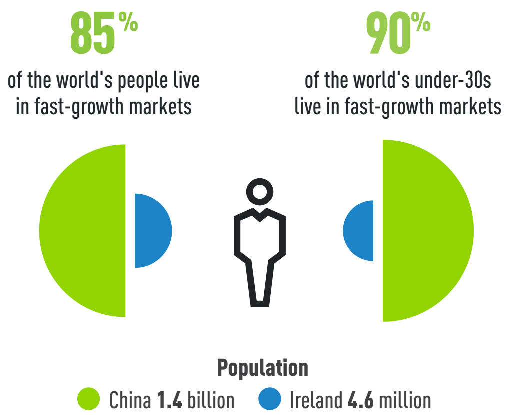
Success in Emerging Markets: A local state of mind

Brand Footprint talks to Harvard Business School's Professor John Quelch about how international and pan-regional brands can succeed in fast growth economies

Selling FMCG products to the billions of consumers in emerging markets is no longer merely an attractive proposition to brand owners. More than three decades after the term 'emerging markets' was coined by economists, such economies have become the lynch-pin in brand growth strategies for manufacturers with global aspirations.

A quick glance at comparative statistics for developed versus emerging economies reveals the compelling reason why brand owners such as Nestlé, Coca-Cola, Unilever and Mondelez continue to place such great faith and resources in emerging markets, despite a recent slowdown in their growth momentum.

1 FOLLOW THE SHOPPER



Source: World Bank

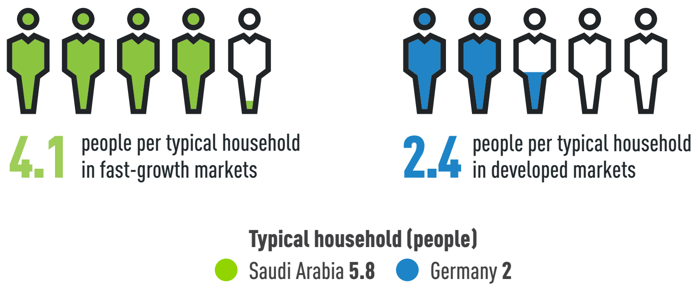
The most striking indicator of opportunity is that emerging markets are home to the vast majority – 85% – of the world's population and possess GDP and FMCG growth rates that dramatically outpace those of developed economies. This gives millions of consumers more spending power, creating new middle classes and markets for FMCG.

CURIOUS CONSUMERS

Small wonder, then, that six of the top 10 brands in Brand Footprint's 2015 Global Ranking Top 50 show significant growth in these markets.

So what are the emerging market characteristics of which brand marketers should be aware? John Quelch, Professor of Business Administration at Harvard Business School, is co-author of All Business Is Local, a book that reminds marketers of the importance of local nuances in a globalised economy.

2 FOLLOW THE SHOPPER'S NEEDS



Source: Kantar Worldpanel 2015

He defines emerging markets as having "high growth potential, where brand loyalty is not entrenched and curiosity and variety-seeking prevalent". While there is relatively high price sensitivity in developing economies, "this is mitigated by a lack of category knowledge and therefore an opportunity for a trusted brand to charge a price premium in order to become established in the market".

LOCAL COMPETITORS GAINING GROUND

While the opportunities in emerging economies seem obvious, the strategies for unlocking this potential are less so. For one thing, global brands have to adapt to the strength of so-called 'South-South' commerce – where local brands are produced in one emerging market to sell into others.

Consider FMCG producer Quala, whose core markets outside its home base of Colombia are Mexico, Brazil, Dominican Republic, Ecuador, Peru and Venezuela. In Colombia, Quala produces Sun Tea, an iced tea drink available in powder, ready to drink and now in carbonated peach, lemon and passion-fruit. Sun Tea is second only to Coca-Cola in terms of CRPs in Colombia and has gained 10% points of penetration in Ecuador in the last year.

BRANDS MADE BY THE PEOPLE FOR THE PEOPLE

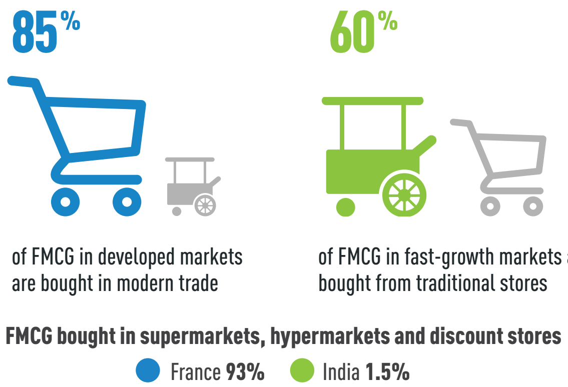
In targeting lower socio-economic groups, both multinationals (MNCs) and local manufacturers focus on what Professor Quelch calls 'good-enough products'.

"These products do not have to carry all the bells and whistles of a developed market, and don't have to differentiate themselves on that basis," he says. "What the mass of consumers is looking for are products that provide basic features and attributes but good quality and at a price that is highly accessible."

With local dynamos such as Indofood, Tata, Mayora, Yili, Monde Nissin, Alicorp, Bombril competing, one market growth strategy for MNCs is to target the local socio-economic elite.

Alternatively, if a brand is looking for further penetration and increased market share, it is necessary to think about brand adaptations "in order to penetrate down to the more localised and culturally distinct parts of the market," Quelch says. He adds: "These populist brand tend to be a reflection of the society in which they are operating as well as their needs."

3 FOLLOW THE TRADE



Source: Kantar Worldpanel 2015

LOCAL FLAVOURS

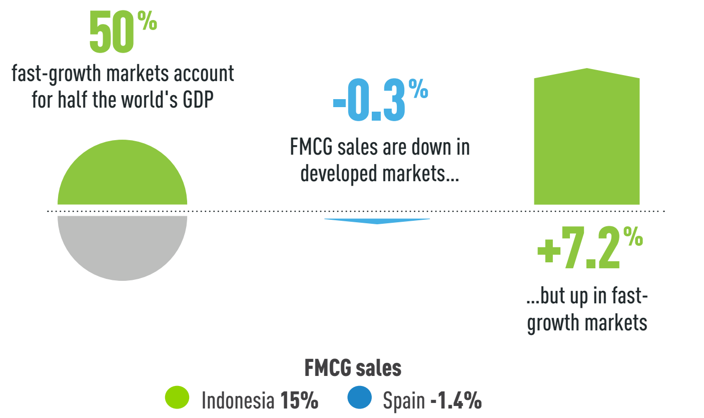
Colgate is a good example of a global FMCG brand that has adapted flavours to local tastes, particularly in India, and its consistent presence in the top three of Brand Footprint's Global Ranking Top 50 is testament to this strategy.

"It doesn't require much extra investment to make these local adaptations relative to the upside in sales and profit potential," says Quelch.

MNCs can also acquire local brands with an established presence in home markets, a lesson that international beer companies have learned.

In 2014 Belgium's Anheuser-Busch InBev, the world's largest beer company, acquired Oriental Brewery (OB), the leading brewer in South Korea, for $5.8 billion. The attraction was OB's own brands – it produces Cass, a best-selling brand in Asia, growing CRP's by 10% in Korea – and as a platform to introduce some of AB InBev's brands to the country, where the market for premium beers is growing.

4 FOLLOW THE GROWTH



Source: Kantar Worldpanel 2015

FAR-FLUNG DISTRIBUTION

Elsewhere in this report, we see the creative ways brands gain distribution in the far-flung corners of developing economies. The challenge remains that even in countries with fast growing infrastructures such as China and Brazil, retail stores have not been built as fast as the economy has grown in outlying areas. In China, with some 21% of the world's population and where modern trade accounts for only 56% of FMCG value, Quelch says ecommerce has become "in many ways the only way to sell brands in remote 'fourth tier' cities where people can only access the variety of goods that their wealth enables them to buy online".

Local solutions are being found for local challenges, such as any resistance to embrace ecommerce. Indian online giant Flipkart, founded in 2007 by former Amazon.com workers in Bangalore, has gone from being a $7,000 start-up to a $1.5bn company, its success rooted in a decision to adapt Amazon's model and accept cash on delivery.

There is no single formula for marketing to regions accommodating 85% of the world's population with diverse incomes, tastes and languages. Winning on the emerging markets battlefield requires a local, agile state of mind, a lesson that many multinationals are learning from their local counterparts as the key to staying competitive globally.

Chinese consumers have increasing disposable income and are willing to buy higher quality products at a higher price

Country Focus: China and Indonesia

China

Though its economy slowed to 7.4% GDP growth in 2014 – the lowest rate since the 1990s – China remains among the top 10 fastest growing economies in the world, with FMCG expanding 5% last year

Chinese consumers have increasing disposable income and are willing to buy higher quality products at a higher price. Local brand Blue Moon, a top CRP riser in China this year, up 19.5% CRP, has attracted new shoppers with a premium handwash series to replace the use of bar soap.

China's increasing affluence is often portrayed as exclusive to its burgeoning middle classes. Jason Yu, General Manager, Kantar Worldpanel /CTR, China says that in reality, "Opportunity is abundant as consumers at both the value and premium ends of the market try new categories and brands." The pursuit of convenience, quality and lifestyle upgrade drove growth for top riser frozen food brand Sanquan, starting to offer premium quick-cooked meals for urban young professionals.

The greatest opportunity remains in the 41% of FMCG categories which are bought by less than half of Chinese households, including cereals, coffee, ketchup and hair colorant.

A key challenge is the rapidly changing market demands, in a country where local brands are generally more adept at filling these needs. Local brands account for 71% of the market. Yu says: "Global brands need to develop a higher level of agility. When they come to introduce a new product, often it has already been launched by a local competitor."

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Master Kong	1,231
Yili	1,052
Mengniu	1,010
Want Want	617
Shuanghui	511

Source: Brand Footprint 2015

TOP 5 RISERS

Brands	CRP Growth
Mizone	21
Bluemoon	19
Junlebao	13
Sanquan	12
Space 7	12

Indonesia

Indonesia is one of the most exciting markets in Asia. It is experiencing the second fastest FMCG growth in the world – expanding 15% in 2014 – and a booming digital landscape. Strikingly, around half of its population is under 30

The top two spots in the CRP ranking belong to local noodles brands Indomie and Mie Sedaap. While both owe their success to sustained penetration growth, their paths to the top varied greatly.

Indomie is 31 years older than Mie Sedaap. In bringing fresh products to newly empowered consumers, Indomie grew steadily through consistent innovation in new flavours and pack sizes. Mie Sedaap, recognising Indomie's dominance in urban areas, marketed instead to rural communities.

Food manufacturer Mayora is the star of the 2015 Indonesian ranking, with several successful brands. In a country renowned for its sweet tooth, there is an interesting brand extension story in Kopiko Candy. "Everyone advised us against it," says Mayora's CEO Andre Sukendra Atmadja. "But my father identified a market in construction workers who needed coffee but found it impractical to make on site."

Digital opportunities are there for the taking as Indonesians love posting and tweeting, positioning them as the 5th largest market in Twitter posts and second largest for Facebook.

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Indomie	1,230
Mie Sedaap	820
Royco	591
So Klin	567
Frisian Flag	567

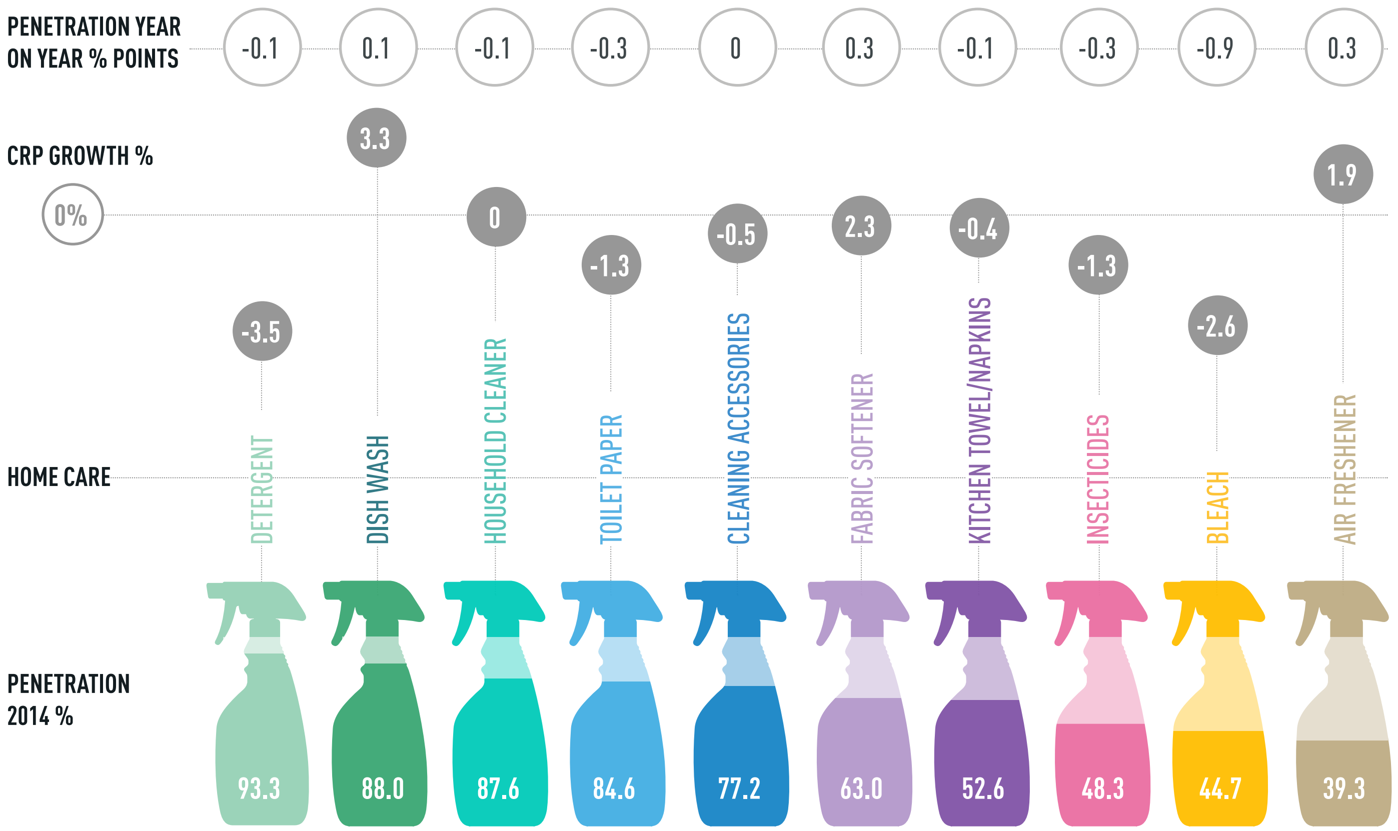
Source: Brand Footprint 2015

TOP 5 RISERS

Brands	CRP Growth
Downy	39
Sun Kara	33
Bango	29
Richeese	26
Teh Gelas-Orang Tua	25

In Focus: Home care

TOP HOME CARE CATEGORIES GLOBALLY BY PENETRATION



Source: Brand Footprint 2015

Consumers the world over want to live in clean, fresh, and fragrant homes

Keeping the kitchen, bathroom and rest of the house comfortable can require a multitude of differently used products each with a highly specific purpose.

At first glance, you might think the basic demand for an effective low-cost product would make homecare a difficult place to overcome consumers' low emotional involvement. Not everyone hates cleaning: 50% of French households claim they like cleaning the home. The challenge for brands is to balance the practical and functional nature of the category while injecting a more emotional and even luxurious tone.

Habits around the house are not set in stone. Trends towards more urban, affluent and smaller homes, and in the West an ageing population, give brands the opportunity to tap in to and shape changing lifestyles.

BEYOND LAUNDRY

Fabric softeners still offer plenty of growth potential, with only 63% (up by 0.6% points this year) of households currently adding a conditioner to their wash. Brands have been working to increase penetration in developing markets, with a focus on fragrance and new formats. Luxurious scents such as Strawberry and Lily have helped Unilever offer a more premium 'super sensorial' Creations line. Interest is maintained with a wide range of fragrances, boosted by shorter availability limited editions.

Format innovation from Downy and Lenor deliver laundry freshness with beads that are placed directly in the washing machine drum with the clothes. Unstopables is an 'in wash scent booster' that promises long-lasting fragrance, giving consumers a reason to add it to the wash along with the detergent and softener. Unilever's softening brand Comfort also moved into the Homecare top 10 for the first time, growing CRPs by 7%.

DID YOU KNOW?

56% of Bolivians wear rubber gloves, compared with 10% of Spaniards

SMELLS LOVELY

Air fresheners increased CRPs by 2% over the year, mainly through penetration gains in Brazil and Indonesia. The proportion of households buying air fresheners varies dramatically – 83% of Chileans but just 5% of Filipinos. A wide number of formats, such as candles, oils, sticks, sprays and powders give consumers options for how they bring fragrance into their houses.

Where air freshener brands are succeeding it is by adding emotion to the home, perhaps even making the act of being in the house into a more spa-like experience. Brands offer a menu of scents. Glade, the highest ranked air freshener, and 11th ranked homecare brand, suggest you choose something from their 'Clean, Floral, Fruity or Gourmet' selections. What used to be a category for 'the restroom' has now reached out around the house, from the baby room, to teenagers' fragrance, for smokers and pet owners. In other words, 'a fragrance for every lifestyle', says Fraser McKevitt, Kantar Worldpanel UK.

At their core, air fresheners help to mask unpleasant odours of daily life, a fact humorously played upon by Febreze in Turkey, who enlisted the radio personality Geveze to live in a glass box for two days. Unable to escape from the confined space, he relied upon Febreze to make his accommodation that bit more acceptable as the hours went by and he accumulated the debris and odours from a modern urban lifestyle.

Brand Story

VANISH CLIMBS THE RANKING

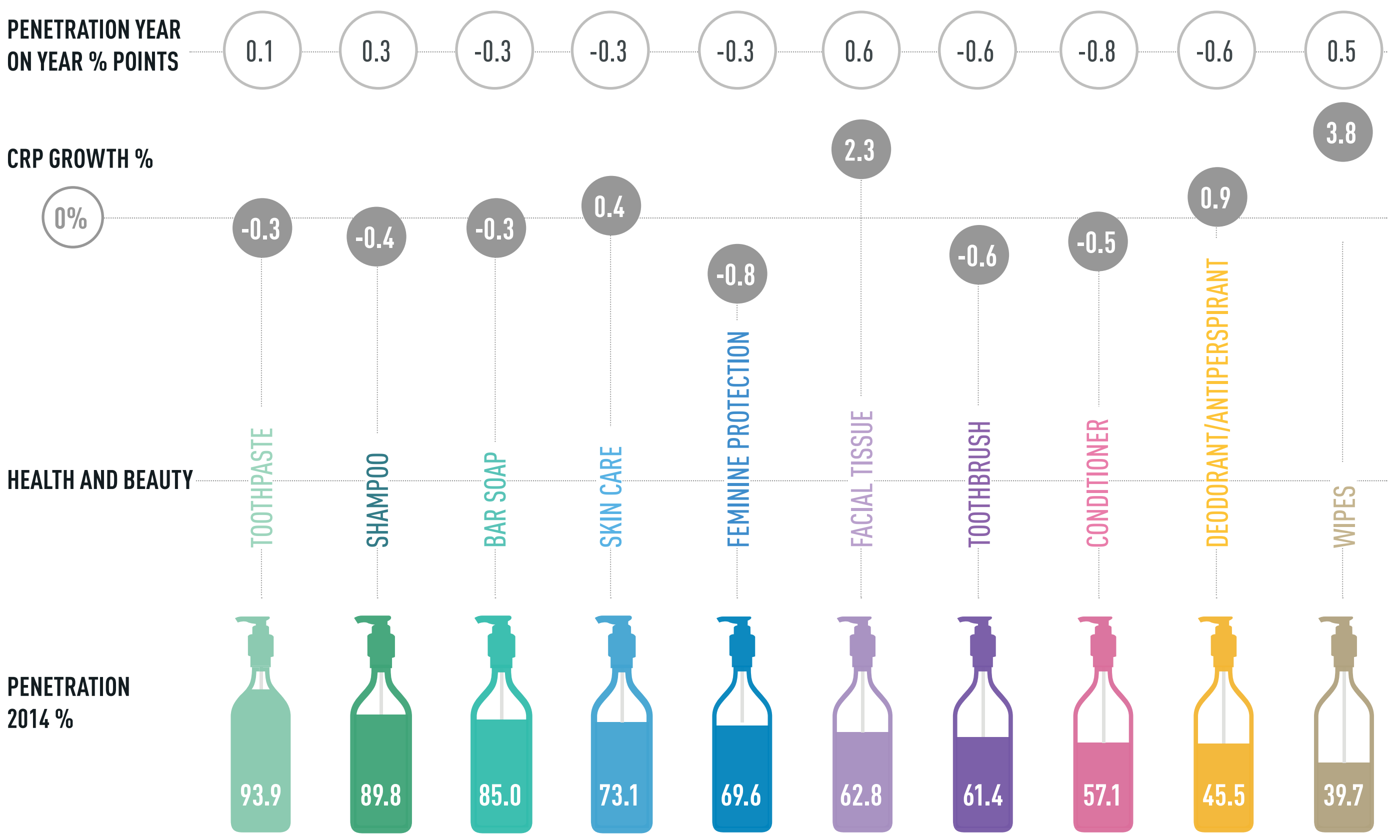
With CRP growth of 16%, Reckitt Benckiser's Vanish stain remover is still relatively small but growing in all the continents where it is sold. Over the last year the brand has moved up four places to number 25 in the global homecare ranking.

Showing that increased penetration leads to brand growth, Vanish has increased its shopper base in eight out of top 10 countries. The brand's most striking penetration increase has been in Brazil, with CRP increasing by 26.4% in what is already one of Vanish's biggest markets. "The launch of the super bar format attracted new, less affluent consumers, and was incremental to shopper's baskets. The product hasn't cannibalised other sales, and has had the welcome effect of expanding the homecare repertoire as the bar is seen as complementary," says Mariah Martins, Kantar Worldpanel Brazil.

See Brands in Action: **www.brandfootprint-ranking.com**

In Focus: Health and beauty

TOP HEALTH AND BEAUTY CATEGORIES GLOBALLY BY PENETRATION



Source: Brand Footprint 2015

Health and beauty is a category that crosses the boundary between what consumers need to be healthy and what they want to improve their lives and appearance

At the simplest level brands can help raise basic hygiene standards and even save lives.

This year has seen notable sector growth in liquid soap (fuelled by the success of Lifebuoy), wipes (rising penetration across Asia and Latin America) and facial masks (due to their huge popularity in China). The rise of liquid soap is illustrative of more complex consumer behaviour, particularly in emerging markets. Once bar soap satisfied all cleaning purposes; now shoppers are encouraged to choose dedicated products for different uses.

Colgate (growing CRPs by 3%) remains the number one health and beauty brand, and is the only brand in any category to be purchased by more than half the world's population. The success of whitening toothpastes is further evidence of the blurring between necessary toiletries and desirable cosmetics.

SOCIAL ROLES

Many leading brands are developing a social or community function, linked to their product and the people using it. Social marketing increases brands' mental availability and is seen to correlate with rising CRPs. The number 2 ranked brand Lifebuoy grew CRPs by 7% in the last year. Unilever speaks of Lifebuoy's success in terms of the higher purpose of saving children's lives. The 'Help kids reach 5' marketing activity in India and south-east Asia encourages frequent and thorough hand washing.

Moving up one place to third is Dove, which bridges haircare, skincare, washing and deodorants. The crusading campaign for real beauty is now in its10th year. Dove's 'Beauty patch' advertisement cleverly reinforced its message of raising women's self-esteem: it showed women's growing confidence in how they looked and felt, only to reveal that the 'pharmaceutical' had no active ingredients. The lesson? Beauty comes from within.

An all-encompassing brand can't ignore the other half of the population. Dove Men+Care showcased heartwarming realities of modern fatherhood.

Just outside the health and beauty top 10, Nivea rose 10 places in Brazil through becoming part of parents' support network. The award-winning campaign helped keep kids safe on the beach. Magazine ads came complete with a tear-out GPS bracelet which connected to a smartphone app and triggered an alarm if children wandered beyond a set distance.

Pampers bought a radio frequency in the Philippines to broadcast static noise 24/7. Pampers was acting on research showing that it soothes restless babies – a godsend for tired parents on a tight budget.

And Colgate is using its packaging as a vehicle for education in Malaysia, promoting oral hygiene to rural communities.

CHANGING BEHAVIOUR

It's hard to change consumers' purchasing behaviour. Instead, when growing a new category, brands should strive to change their consumption behaviour. The fastest growing sector in 2014, facial masks (up 11%), owes its success to this approach.

The trailblazer is China's Magic, acquired by L'Oreal in 2014. By selling per piece instead of in multipacks, it attracts a lower-earning demographic and becomes more portable and therefore more convenient. Capitalising on this, Magic focused its marketing on encouraging new usage norms, such as applying a mask during your lunch hour, or as a car passenger. Both men and women are using facial masks, encouraged by variants offering benefits from whitening to moisturising, anti-acne to peeling.

CULTURE CAPITAL

Attuning to local culture has proved extremely profitable for some brands. South Korea is challenging for France's crown as the beauty capital of the world. The average South Korean woman, for example, uses five skin care products on her face daily, each for specific uses. Indonesian cosmetics brand Wardah increased CRP by 46%. Marketed as a Halal product in the world's largest Muslim country, it deftly taps into the associated Jilbaber style – chic, fashionable and beauty conscious.

Hair matters in Brazil, home to many ethnicities and diverse hair types. Brands can have a lot of fun here, with new, more sophisticated products designed for every occasion and hair type. Leading the way in premium product development, the hair care market is valued at approximately $1.7bn and growing.

DID YOU KNOW?

55% of men aged 18-34 in the US now have facial hair

Brand Story

GILLETTE – BATTLING THE BEARD

Over the past five years, 6.2 million European men stopped shaving on a weekly basis. Logically, this should present a problem for razor brands. And yet, as beards grow in Europe, so does the razor blade category worldwide. Top brands, it seems, are fighting back.

Gillette leads the pack, investing heavily in new product development and canny behaviour-changing marketing. The launch of Gillette Body in Latin America is one such innovation. Designed exclusively for use on the male body, the product has successfully expanded the brand's usage occasions. It sponsors a Brazilian news portal for men: you can now find helpful tips such as "How to shave the neck beard" and "How to shave in 5 minutes" in the male grooming section (owned by Gillette) beside headlines on football, cars, technology, and career advice.

With a global CRP growth of 4.1%, Gillette sits comfortably as the 13th most chosen brand in health and beauty.

See Brands in Action: **www.brandfootprint-ranking.com**

In Focus: Food

Successful brands in the ranking have carved themselves a relevant and crucial role for each of the markets in which they operate

On a global level, the star categories are spices, seasoning and snacks, increasing their CRPs by 4% and 3% respectively. Each comprise brands which have grown in penetration either by entering new markets or appealing to new demographics. Winners will zig where others zag, adapting to suit actual shopper behaviours and fulfil needs on a local, personal and cultural level.

FUSSY EATERS

Never have food brands been more at the mercy of an ever more demanding consumer. Tastes are transient, particularly in emerging markets, and people are increasingly aware of the quality and nutritional value of their food.

Universally more considered about their choices, shoppers will vote with their feet if products take back up to standard. Empowered by social media and even legislative recourse in some countries, they will often go further than abstinence and lead a march against the culpable brand.

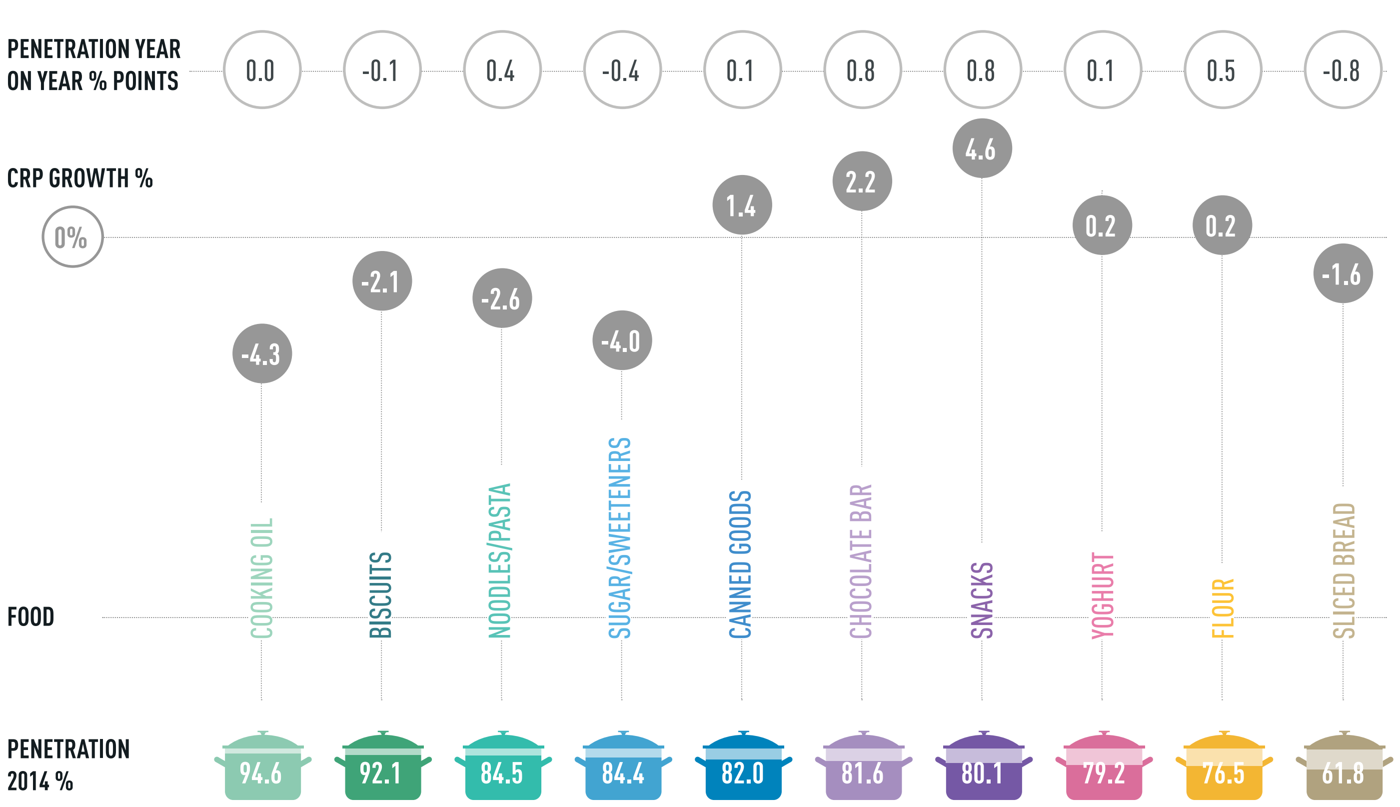
DO-IT-YOURSELF MEALS

Many households have returned to cooking from scratch, both in countries which have lost confidence in pre-prepared food, and those where home cooking is simply ingrained in local culture.

Embedded in many food brands is a promise to improve the convenience, taste or experience of cooking at home. Spices and seasoning solutions appeal to the rising middle classes, the more adventurous and well travelled, looking for convenience and innovation. No-one knows this better than number one food brand, Maggi. Purchased by one in three households globally, it ventured into the premium segment with the launch of its Maggi Royale series in South Korea.

In Latin America, Ajinomoto brands Dona Gusta and Sazon are rising up the rankings, and driving the format shift from cubes and grains to liquids and cooking bags.

TOP FOOD CATEGORIES GLOBALLY BY PENETRATION



Source: Brand Footprint 2015

DID YOU KNOW?

39% of French households are producing their own vegetables

GRAZING ON THE GO

Consumers are increasingly turning to FMCG brands to satisfy their hunger between meals. Appealing to all age demographics, the trend towards eating on the go and grazing gathers pace. This category showed the strongest value growth in snacks at 3% as 20 million more households globally bought them in 2014.

Indeed, three of the top 10 rising global brands this year are in the snack sector. PepsiCo dominates the ranking with Lay's growing CRPs by 6%, Doritos by 9%, and Cheetos by 7%. More locally, we see more variants reflect regional gastronomy. From beef flavours to suit the Argentinian palate, to seafood and fish variants in Vietnam and Indonesia, savoury snacks continue to thrive.

But, despite the ongoing backlash against sugar, consumers still have a sweet tooth and are looking for treats. Kinder enjoyed a strong performance in the UK and Ireland with the introduction of its pink and blue eggs targeted at girls and boys.

Doubling penetration in South Korea to 11% of households, the brand is going from strength to strength. Its award-winning CSR project in China, Kinder + Sport, earns it 49% CRP growth in the country; Kinder rises by two positions in the global ranking, growing CRPs by 5%.

One to watch is Germany's venerable chocolate brand Trumpf. Undergoing a radical rebrand in 2014 to appeal to a younger demographic, it is already beginning to bear the fruits of its labour, rising three places in Germany's local food ranking.

Brand Story

PROVEN WAYS TO WIN

What we can see among food brands generally is two diverging strategies. The first focuses on geographical expansion, whetting the appetite of new markets via new variants and culturally attuned flavours. The second seeks to increase penetration within its existing markets, mining all available usage occasions and extending appeal to all demographics.

Maggi is a geographical trailblazer. Its newest innovations include So Tender and So Stir Fry in the UK, Shawarama Mix in Saudi Arabia and Magic Cubes in India. Providing new products to new consumers has rewarded it a CRP growth of 5% in 2014. It sits comfortably at the top of the global food ranking.

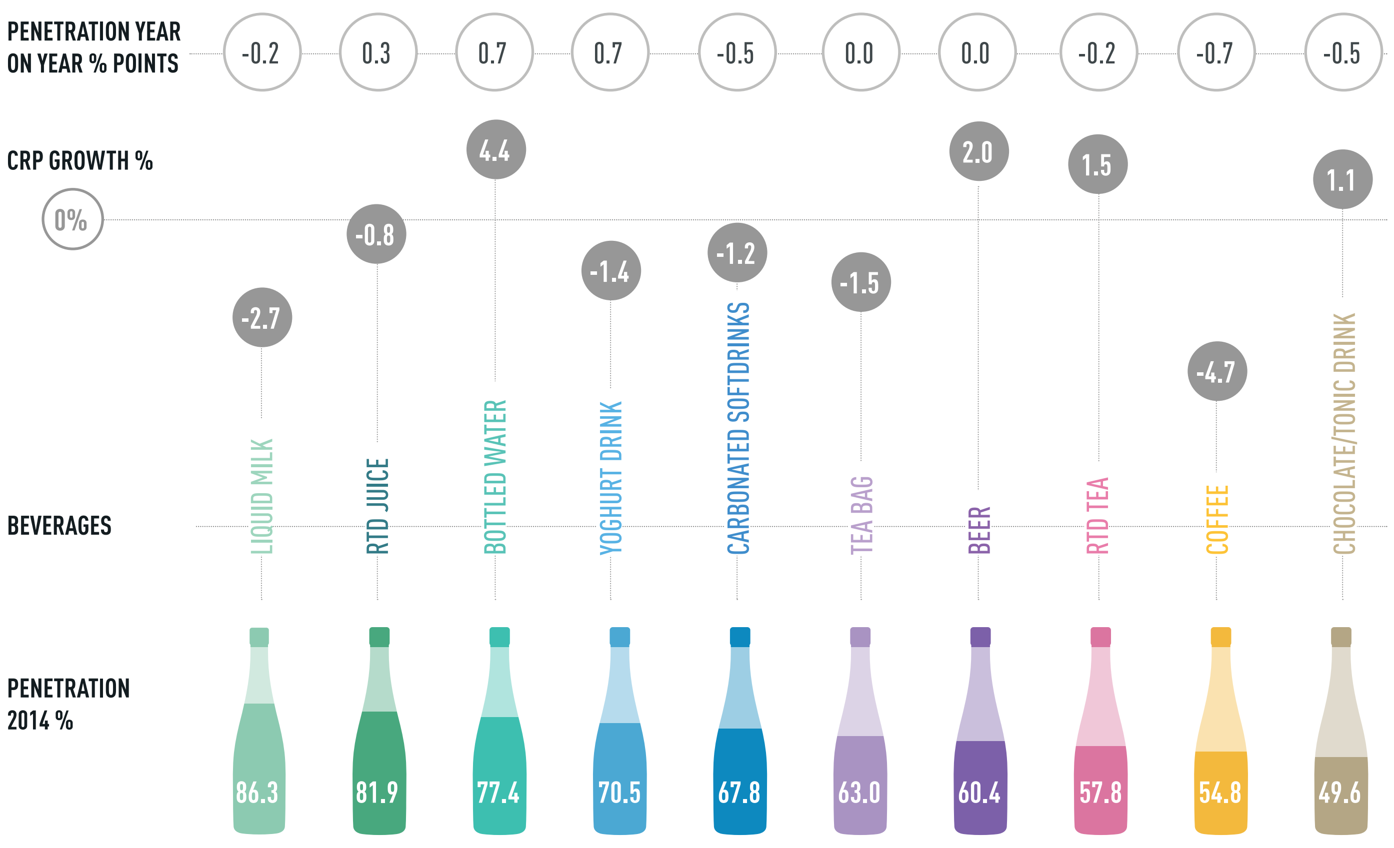
Another example is Hershey's, which has adapted both the packaging and recipe of its signature product – Hershey's Kisses – to suit Chinese tastes. Smoother and significantly less sweet than its US equivalent, the brand has even switched its traditional silver wrapping to appeal to the Chinese penchant for gold.

While not ignoring geographical expansion, PepsiCo strategy is leveraging its portfolio to grow its brand in core markets. New variants, packaging innovation and brand extension ensure its brands are available to all age groups, life stages, tastes and snacking occasions.

See Brands in Action: **www.brandfootprint-ranking.com**

In Focus: Beverages

TOP BEVERAGES CATEGORIES GLOBALLY BY PENETRATION



Source: Brand Footprint 2015

A clear trend toward both health and convenience is something the fastest growing beverage brand understands well

Climbing seven places to join the top 20, Yakult combines a unique nutritional benefit with a groundbreaking distribution method: the famous Yakult Ladies.

Showing strong performances this year are Schweppes (16% CRP growth) and Red Bull (+8%), the latter bucking the category-level decline in energy drinks to become the 15th most chosen beverage in 2014.

Elsewhere, the Top 10 incumbents are leveraging their global heritage appeal to stay ahead. Coca-Cola's recent decision to market its cola portfolio under a single umbrella brand has this objective at its heart. PepsiCo's Mountain Dew meanwhile revived the iconic slogan 'Do the DEW' to launch its inaugural global brand campaign, earning it a 7.1% CRP growth.

THE MILK SHAKE UP

While liquid milk remains on the shopping list for almost two thirds of households this year, consumption frequency is in decline, causing a 3% drop in global CRPs.

Dairy companies need not despair. Where tastes evolve, brands innovate, and the increasing popularity of yogurt drinks gained the industry four million more shoppers in 2014. New flavours, smart packaging and healthier ingredients enhanced the category appeal, and the invention of ambient yogurt – which can be stored and eaten at room temperature – revolutionised distribution possibilities across emerging markets.

Of note particularly is Alquería which, through a landmark partnership with Danone, took most chosen brand in Colombia this year. Bringing a revolution in package design to the Latin American consumer, it stood out on the shelf as both convenient and eco-friendly.

SUGAR LOWS

Emerging and developed markets are at very different stages in their quest for a healthier lifestyle, though both are following a similar path. Ready-to-drink juices enjoyed double digit growth in Brazil (+18%) and Colombia (+14%), where consumers look for perceived healthier alternatives to carbonated soft drinks.

In developed markets, fruit juices are no longer regarded as the panacea they once were, as the sugar backlash rages on. In response, Tropicana has launched its Farmstead range which balances fruit with vegetables such as pumpkin, beetroot and kale. Coca-Cola meanwhile is exploring natural sweetener Stevia in its newest product Coke Life and remains atop the ranking by a large margin.

Scaling the category ranking also are brands which offer a supplementary health benefit. Local Chinese drink Six Walnut leverages traditional beliefs in the power of the walnut to boost brain activity, and boasts a 34% CRP rise across 2014. Similar functional drinks such as Yakult continue to rise, gaining a 18% increase in CRPs in China.

PACKAGING: THE NEW FRONTIER

Of the FMCG market overall, it is beverage brands benefiting most from advancements in packaging. Aside from the aesthetic advantages of standing out on the shelf, new innovations such as the Ecolean pack – a stand up pouch with the shape of a jar – bring ease and convenience to the consumer.

At the heart of this revolution lies Swedish company Ecolean. Popular with dairy and juice brands, the packaging is easy to both open and close – reducing waste – and represents a 'lighter approach to packaging'.

Anna Anneràs, Marketing Director of Ecolean explains: "Brand awareness and loyalty provide no guarantee that you will be chosen when the shopper is standing in front of the shelf. New, innovative and convenient packaging formats are proven to break the habits of the consumers' autopilot and ultimately increase sales."

Elsewhere, brands are exploiting their packaging as an asset; exploring previously untapped possibilities in sustainability and marketing. Coca-Cola's 2nd Lives campaign in Southeast Asia is another straw in that wind. To discourage the 'use and toss' mentality, and drive its sustainability agenda, the brand developed 16 bottle tops which turn its used plastic bottles into tools such as paintbrushes and pencil sharpeners.

Brand Story

SCHWEPPES: THE REBEL BRAND

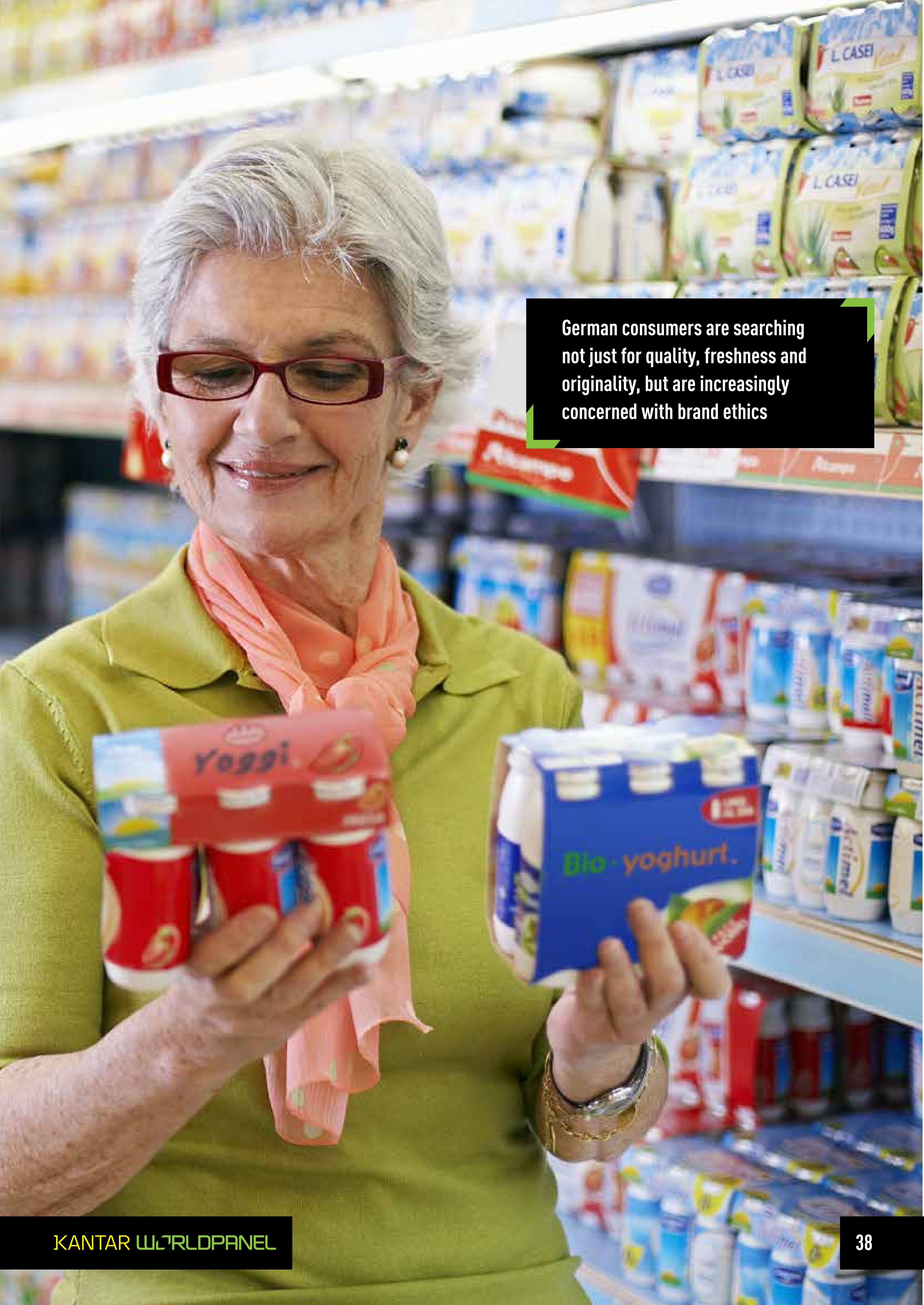
In September 2014, Ahmet Bozer, executive vice president at Coca-Cola International declared the company "had to be willing to be a little riskier".

As the fastest growing brand in its portfolio, Schweppes is proving an effective platform to pilot this approach. While its 'adults only' positioning is global, the execution is brilliantly local, tailored to usage norms in different countries.

In Europe, it finds a mischievous ally in gin, focusing on 'Gin & Tonic Time'. In China it is particularly popular with women and produces variants enriched with vitamins, quenching the country's growing thirst for nutrition.

Two years of strong, impactful campaigns like Celebration in Spain, +C launch in China and its long-running partnership with rock star Iggy Pop, saw it move up three positions in the global ranking, increase its CRPs by 15.7% and add 10 million new consumers to its shopper base.

See Brands in Action: **www.brandfootprint-ranking.com**



German consumers are searching not just for quality, freshness and originality, but are increasingly concerned with brand ethics

Country Focus: France and Germany

France

With food confidence at a historical low, French consumers are willing to pay for quality and provenance

Origin and place of production are reliable indicators of brand growth, particularly if both point to France.

Paysan Breton, France's top rising brand, climbed four places in 2014. The dairy brand joins Bonduelle, Lustucru and Petit Navire in the list of provenance brands with a fast-growing CRP.

Julia Burtin, strategic insight manager at Kantar Worldpanel, explains: "Food scandals, such as Horsegate, had a more dramatic effect on the French than on our European neighbours. Transparent, local brands will succeed as shoppers demand to know where their food comes from."

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Herta	231
Fleury Michon	210
President	186
Coca-Cola	186
Panzani	155

Source: Brand Footprint 2015

TOP 5 RISERS

Brands	CRP Growth
Paysan Breton	16
Cristaline	13
Entremont	12
Lustucru	10
Bonduelle	10

Need for speed
Home to the hypermarket, France's biggest challenger channel is still the Click & Drive. It continued to gain market share in 2014, but growth has slowed despite an increasing number of outlets. Burtin says: "On the one hand you have the pioneers, such as Auchan and E.Leclerc, who sell directly from dedicated warehouses. Aimed specifically at time-poor young families, they continue to enjoy growth." Followers like Carrefour and U, which introduced similar collect-from-store for-mats. Rapid growth in outlets drove penetration at first, however the system has faltered.

"Many of these new customers were ultimately unconvinced of its benefits to their lifestyle," Burtin explains, "and 1.1 million households returned to traditional retail in 2014."

Germany

The power of brand has reached a new high in Germany

In 2014, FMCG volume continued to decline, falling 0.7% on 2013. Kantar Worldpanel data shows 51% of consumers looking for quality above all else, up from 41% in 2003. But, unlike France, consumers are searching not just for quality, freshness and originality, but are increasingly concerned with brand ethics. Out of the rising brands in the Top 50, Zott stands out as fusing the two. Promising GM-free produce across its portfolio, it regularly partners with charity fundraisers and uses a wood-chip fuelled power station to supply energy to its factory

TOP 5 MOST CHOSEN BRANDS

Brands	CRP (M)
Dr Oetker	283
Maggi	259
Knorr	255
Mueller	226
Haribo	208

Source: Brand Footprint 2015

TOP 5 RISERS

Brands	CRP Growth
Barilla	10
Pepsi	9
Alnatura	8
Weihenstephan	8
Felix	8

Premiumisation (but not as we know it)
Supermarkets are capitalising on this demand for added value, says Dr Wolfgang Adlwarth, manager of strategic customer development at GfK. "Where volume is down, the industry compensates by new variants which complement the shoppers' mood." Recent private label NPD reflects this with both premium quality and fair trade lines.

Edeka's 'upmarket' range focuses on unique recipes, conscientious production methods, and premium products which offer exceptional quality. "Watch out for a battle between added-value private label and the brands of the industry," says Adlwarth.

GROW YOUR BRAND ONLINE

Stéphane Roger, Global Shopper and Retail Director, Kantar Worldpanel

"The digital revolution that has caused such disruption in music, media, non-food retail and payment services, has only just started to have an impact on FMCG. Online sales are growing quickly – they grew +28% in 2014 – but currently online represents a mere 3.9% of FMCG sales in the markets we track globally.

We have identified four main accelerators. The first is geographic coverage. Only four countries exceed a 3.9% share: UK, France, Korea, and key cities in China. Many countries are still under 1.5%.

Next, shopper traffic: one in four shoppers around the world purchases online. There are many ways to increase traffic such as better website navigation, comprehensive product assortments, and offering free delivery.

Third, we have category advantages: there is a more obvious online consumer convenience and demand in categories that are bulky, prestige or provide for young children.

And finally brands: international big brands win in a model where range is smaller compared to offline. Retailers prefer to list strong brands, often resulting in higher online versus offline shares."

FMCG 3.0: What's next?

The FMCG sector is in flux, challenged by tighter margins, new shopping behaviours and the multi-channel environment. It's boosted both by growth in emerging markets and the rise of savvy local manufacturers and retailers, at a time when regulators and consumers are demanding innovation and change

We are entering the third age of FMCG: a shift of power towards the socially-conscious consumer, who is more informed, more discerning and influential. So the brand and the retailer must be more agile in chasing their shifting daily needs. When so much depends on human behaviour, the future can seem unpredictable. We asked senior Kantar Worldpanel executives around the world to identify the trends set to re-orientate the FMCG world.

MOBILE MONEY BECOMES THE NORM

Tina Umunna, Country Manager for Kenya, Nigeria and Ghana, Kantar Worldpanel

"Africa lacks legacy technology infrastructures – so it has the freedom to pioneer. The continent is going through a mobile revolution, where the mobile phone is fast becoming the portal to savings, credit and money transfers.

Back in 2007, Kenya and Tanzania launched M-Pesa, a mobile-phone based money transfer service from Vodafone and Kenyan company Safaricom ('Pesa' means money in Swahili). M-Pesa is now used by more than half of Kenyan adults for all kinds of purchases.

In Nigeria, Africa's biggest economy, mobile money has become widely accepted and used, Banks are introducing financial services through this channel, and this is expected to foster financial inclusion of unbanked consumers.

Eventually, cash could become obsolete in certain parts of Africa. What about the rest of the world? We can expect governments, banks and businesses to encourage cashless payments, once security and trust issues are tackled. Payment using biometric authentication (fingerprints not PIN numbers) arrived with Apple Pay's US unveiling in late 2014, and Mastercard launching its biometric cards in the UK this year.

The trend is building. M-Pesa has expanded to South Africa, India and Eastern Europe, while the UK is promised the first cashless grocer."

FMCG GETS MORE PERSONAL

Alison Martin, Director, Kantar Worldpanel UK

"We know FMCG brand management is becoming more regionalised and localised. Could the next big thing be true personalisation?

Let me be clear – we're not talking about bespoke FMCG products, partly because unit margins are too thin to justify it. But as consumer expectations for a more personal experience grow, there's an assumption that tailoring to the individual should be possible in FMCG.

Coca-Cola rose to the challenge in 2014 with personalised bottles and cans of Coke, Diet Coke and Coke Zero, generating a 2% spike in US sales. We also saw Nutella offering personalised jars in Europe – a great stocking filler for parents.

Far trickier, but potentially more lucrative in grocers' battle to keep customers, is personalised pricing using customer shopping data. This already happens through loyalty schemes, but the next step – real-time customised prices through mobile apps – is already reaping dividends for US retailers like Kroger.

Modern trade and e-retailers are best placed to innovate on personalised pricing, a big incentive being the heat it takes out of price wars with rivals."

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How can brands help generate more online growth? #BrandFootprint

Should governments incentivise good practice in FMCG or regulate it? #BrandFootprint

Will mobile money be a good or bad thing for FMCG? #BrandFootprint

How far can and should personalisation go? #BrandFootprint

INCREASING GOVERNMENT INTERVENTION

Sonia Bueno, CEO of Latin America, Kantar Worldpanel

"FMCG faces a tsunami of laws, regulations, codes of practice, guidance, you name it. Will this change? Yes, there'll be more of the same.

Take health, environment and social issues. In Mexico and across Latin America, governments are rightly concerned with the health of their citizens: 56% of Latin American adults are overweight or obese, compared to a global average of 34%.

So Mexico, where 100% of consumers buy carbonated soft drinks, adopted a new tax on sugar-heavy products food and beverages in 2014. The result? This is one of the few places where Coca-Cola has seen declining sales. The new tax represents an increase of 12 per cent – three times the annual inflation in Mexico. The tax had an impact across FMCG products where consumers rebalanced their repertoire of products and brands in order to subsidise the new tax.

If your brand has health or environmental implications, you need to get ahead of the concerns and government action.

Nestlé, Unilever and Mars are among those brand owners voluntarily embracing calorie and saturated fat labelling. Local manufacturers in emerging markets, so savvy in learning from global players, need to make reducing saturated fat, salt and calories a priority too, and be seen to do so."

Beyond the Printed Page

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Some brands have added a statement on their packaging, advertising or corporate websites. We encourage you to use Kantar Worldpanel's Brand Footprint data source. Just contact us.

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Photographs: Aniko Villalba, travel photographer, http://www.anikovillalba.com

Kantar Worldpanel in collaboration with IMRB in India

Data for Germany, Russia and Italy was supplied by GfK

Purchase data for the US was supplied by IRI

Kantar Worldpanel in collaboration with CTR in China

Glossary of Brands

Manufacturer	Brand	Ranking	Category
Ajinomoto	Ajinomoto	22	Food
Barilla Group	Barilla	47	Food
Beiersdorf	Nivea	35	Health and Beauty
Bimbo	Bimbo	23	Food
Colgate-Palmolive Company	Colgate	2	Health and Beauty
	Palmolive	17	Health and Beauty, Homecare
Danone	Danone	18	Food
	Activia	29	Food
Del Monte Foods, Inc.	Del Monte	43	Food, Beverages
Ferrero	Kinder	37	Food
General Mills	Yoplait	42	Food
H.J. Heinz Company	Heinz	25	Food
Mc Cormick & Company	Mc Cormick	33	Food
Mondelez	Kraft	16	Food
	Oreo	21	Food
	Tang	26	Beverages
Nestlé	Maggi	3	Food
	Nescafé	5	Beverages
	Nestlé	12	Food, Beverages
	Milo	24	Beverages
Procter & Gamble	Tide	10	Homecare
	Pantene	11	Health and Beauty
	Downy	14	Homecare
	Head & Shoulders	27	Health and Beauty
	Safeguard	32	Health and Beauty
	Gillette	45	Health and Beauty
	Ariel	48	Homecare
PepsiCo	Pepsi	6	Beverages
	Lay's	7	Food
	Cheetos	34	Food
	Quaker	38	Food
	Doritos	44	Food
	Mountain Dew	50	Beverages
The Coca-Cola Company	Coca-Cola	1	Beverages
	Sprite	20	Beverages
	Fanta	28	Beverages
The Hershey Company	Hershey's	31	Food
Unilever	Lifebuoy	4	Health and Beauty
	Knorr	8	Food
	Dove	9	Health and Beauty
	Lux	13	Health and Beauty
	Sunsilk (Sedal)	15	Health and Beauty
	Pepsodent	19	Health and Beauty
	Surf	30	Homecare
	Rexona	36	Health and Beauty
	Omo	39	Homecare
	Vim	40	Homecare
	Lipton	41	Food, Beverages
	Close-Up	49	Health and Beauty
Yakult	Yakult	46	Food