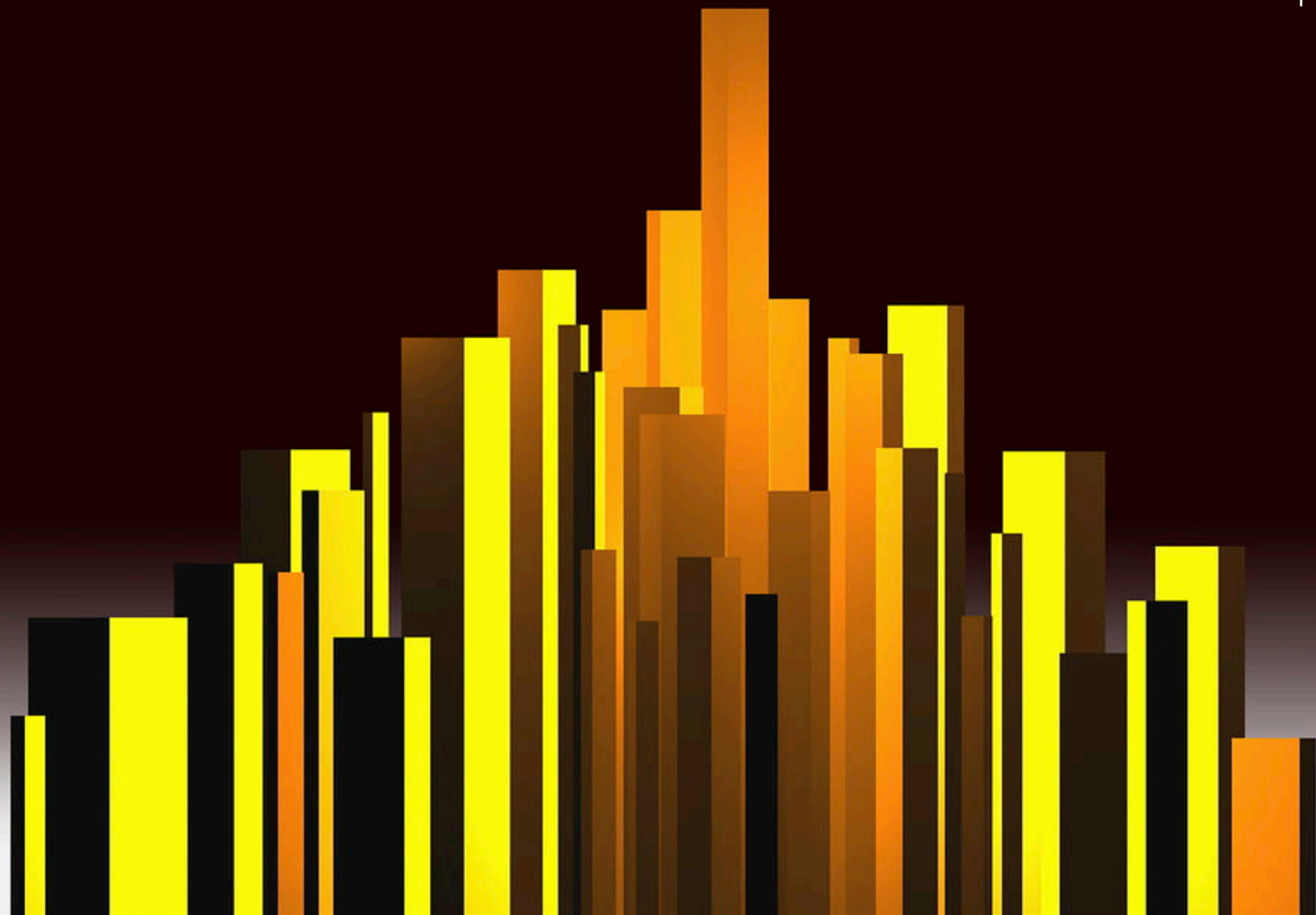


Brand Footprint

A global ranking of the most
chosen consumer brands

Issue 8 | May 2020





Welcome

In eight years of Brand Footprint,
we have never seen such a challenging time



Josep Montserrat
Global CEO
Worldpanel Division

In the eight years we have published Brand Footprint – Kantar’s comprehensive review of the most chosen FMCG brands on the planet – we have never seen such a challenging time. The outbreak of COVID-19 is reshaping businesses and economies the world over. Its effects may still be unclear, but they will certainly be lasting.

Yet FMCG brands are used to sailing in unpredictable waters. Whether through slow overall growth, political turmoil or pandemics, there are brands with tales of success that should be celebrated and learned from. And that’s exactly what we intend to do in this edition.

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

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

This year we have increased our scope of analysis even further. We now review over 22,900 brands in 52 countries—representing 74% of the global population and 85% of gross

domestic product (GDP). We’ve seen the total number of brand choices made increase by 2.7% since 2018—now exceeding 420 billion. Our thanks, as ever, goes to our partners GfK, Intage, IRI and CTR—whose work has helped us achieve this comprehensive market coverage.

I'd also like to thank Dr. Martin Bergmann of Beiersdorf AG, for lending us his time for a fascinating interview. NIVEA is one of the four brands that have grown continuously since we began producing Brand Footprint. It was wonderful to discover what has driven this success and where the brand is seeking out its next opportunities.

The story of this report is a shift in favour to the top 50 global FMCG brands, 31 of which have grown their CRPs. Even more impressively, 20 of the top 25 saw growth.

Amongst these, there are impressive stories to highlight. Coca-Cola, the most chosen brand

on the planet, returned to CRP growth for the first time since 2013. Colgate, the brand with the most shoppers and second most chosen, also returned to growth—with the third largest increase of CRPs within the top 50.

Meanwhile, India has become even more important for global brands. The country was the main contributor to CRP growth in 13 of the top 25 brands. Vim, for instance, gained an extra 15.7 million shoppers in 2019—with most of these coming from India.

We have also seen more brands than ever being chosen over one billion times a year. Joining the club for global brands are Brooke Bond, Head & Shoulders, Kinder, Heinz an

Oreo. But there are also 18 local brands which have been chosen over a billion times—16 from India and two from China (including Yili and Patanjali).

Given these extraordinary circumstances, you will find this years' Brand Footprint a shorter length. But it is still packed full of the highlights you have come to expect: the global ranking, brand success stories and, furthermore, a detailed analysis into how COVID-19 is impacting brand choice.

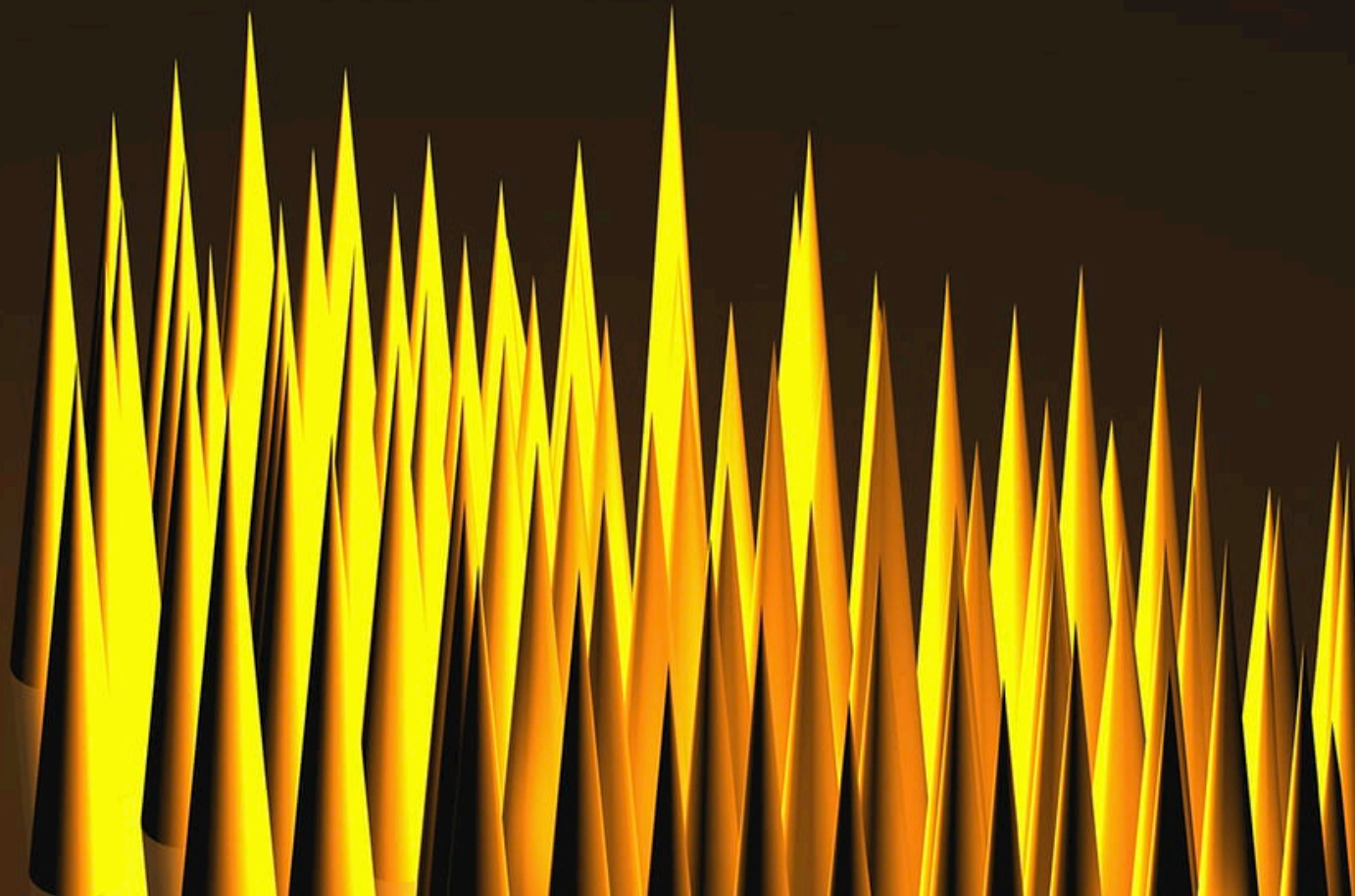
So, read on and enjoy Brand Footprint 2020—the definitive guide to successful FMCG brands.

Consumer reach points (CRPs) explained



What is Brand Footprint?

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



The categories: The complete ranking comprises five global FMCG sectors – Beverages, Food, Dairy, Beauty and Personal Care, and Homecare – tracked by Kantar through Worldpanel FMCG. Fresh Food, Batteries and Pet Food are not included in the global ranking. All data relates to purchases brought into the home to be used or consumed there.

The data period: The Brand Footprint ranking is based on data collected over the 52-week period between November 2018 to the end of October 2019.

Criteria of eligibility for a brand to appear in the Global ranking: Only global brands are analysed to create the global Top 50 Ranking. To be considered as global, a brand must be available in at least two continents. Data collected from Cote d'Ivoire, Egypt, Ghana, Japan, Nigeria and UAE is not included in the global ranking.

The 'universe': The data collected covers 74% of the global population across 52 countries, and 85% of global GDP.

Data source: Brand Footprint is a Kantar initiative.

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

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

Data for the USA was provided by IRI

Data for Japan was provided by Intage

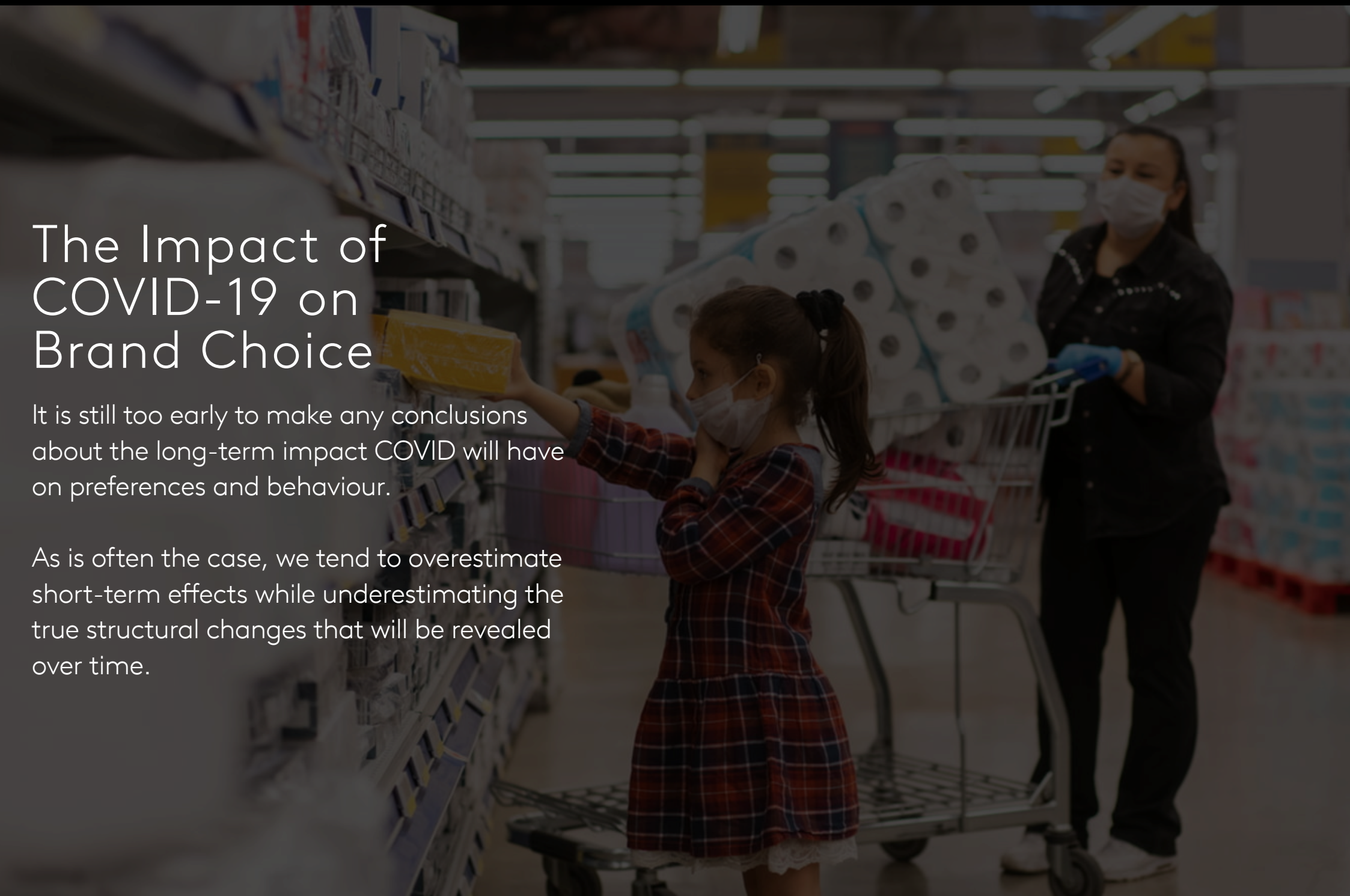
Kantar in collaboration with CTR in China



The Impact of COVID-19 on Brand Choice

It is still too early to make any conclusions about the long-term impact COVID will have on preferences and behaviour.

As is often the case, we tend to overestimate short-term effects while underestimating the true structural changes that will be revealed over time.



Currently, we are observing three behaviours in almost every country in the world:



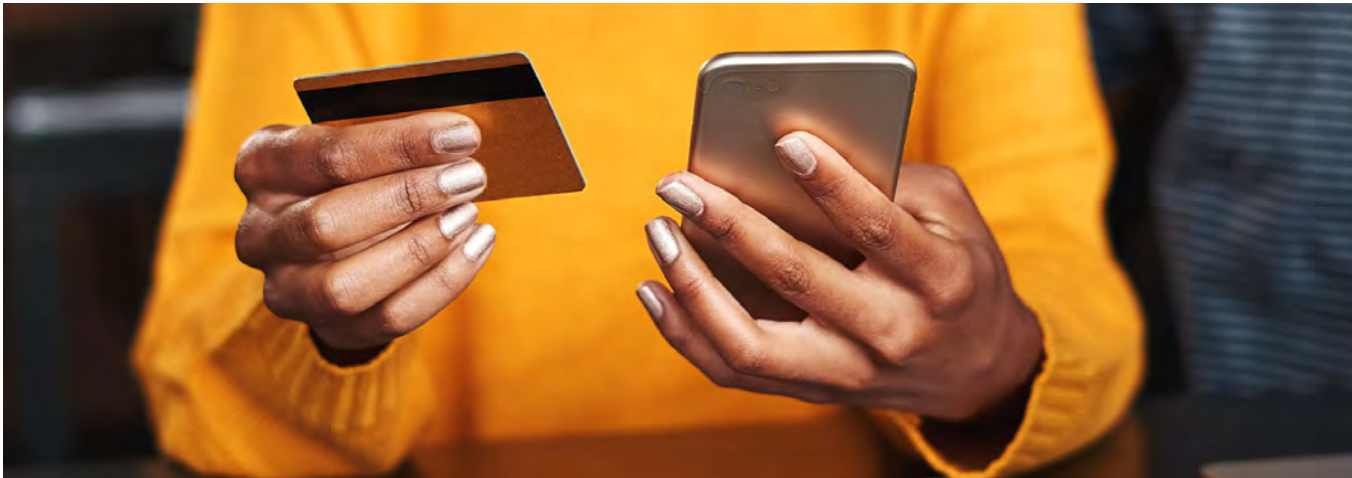
People are shopping less often, whilst buying more per visit.



Consumers' personal care routines have changed – or been “paused” – driven by fewer social interactions.



Digital has accelerated, with e-commerce competing with big store formats and home delivery replacing the out-of-home consumption occasion.



These shifts are further complicated by changes in disposable income, but we know that FMCG is resilient.

When we adopt the brand lens, we learned that the potential for performance is highly dependent on the category performance. Brands are five times more likely to be growing if the category in which they play is growing. This truth is as important as ever.

Weekly category performance

FMCG categories have broadly fallen into four ways of performing while a market is in lockdown:

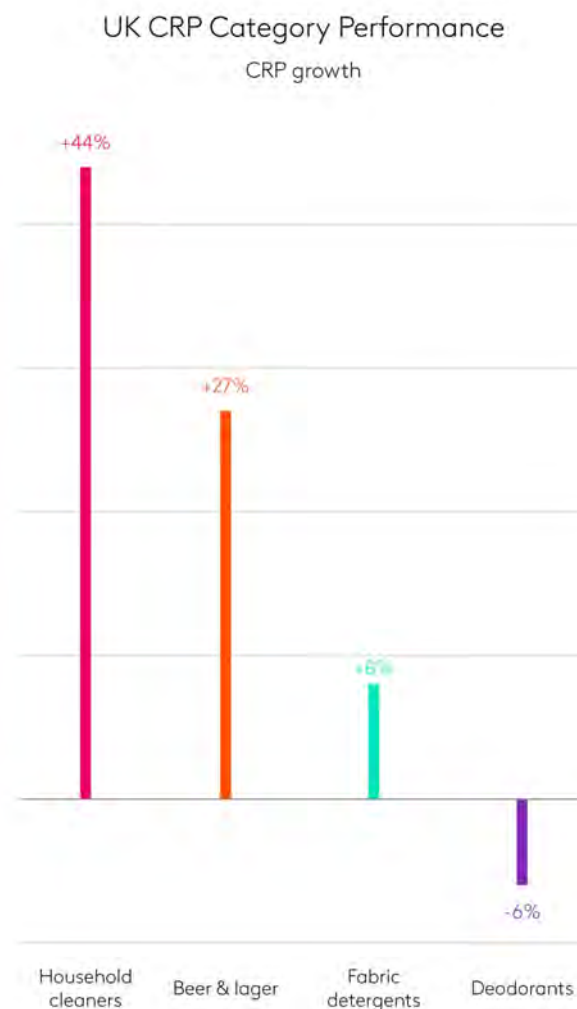
1. **COVID-related increase in demand**
these are categories that have grown through a true increase in demand, and are likely to be linked to hygiene, such as **Household Cleaners**.
2. **In-home occasions increase in demand**
these are categories that have benefitted from occasions transferring from out-of-home to in-home, predominantly food and drink, such as **Beer & Lager**.
3. **Short-term stockpiling**
categories where the products tend to have a long-shelf and remain essential, such as **Fabric Detergents**.
4. **Reduced at-home consumption**
these are categories which have seen a pause or reduction in usage, Beauty and personal care categories are the most likely to feature here, such as **Deodorants**.



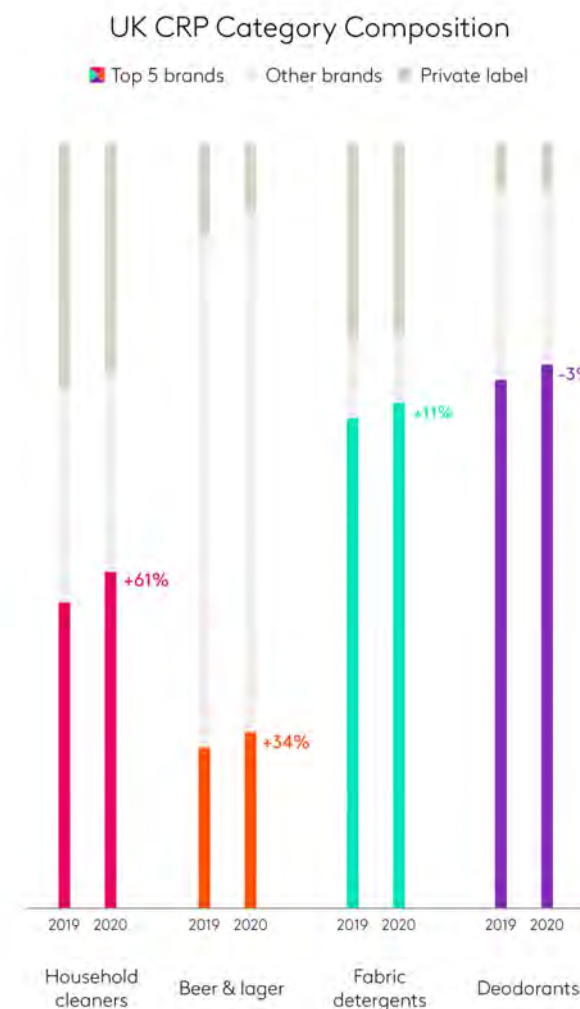
Source: Kantar, UK FMCG Purchase Panel Weekly data

Big Brands Winning

We've closely analysed the weekly spend within the above four categories in the UK. In each, we have seen that the biggest brands have disproportionately won, with the top five brands being chosen at a faster rate than the category. Even in Deodorants, the top five fell at a slower rate than the category's overall decline.



Source: Kantar, UK FMCG Purchase Panel 8 we Apr 20 vs 8 we Apr 19



Source: Kantar, UK FMCG Purchase Panel 8 we Apr 20 vs 8 we Apr 19

However, within each category there is a different story to tell for the individual brands.



Household Cleaners

All the top five brands in the category saw strong growth, but it is Dettol which saw the biggest step-change—doubling its CRPs in the last eight weeks. Dettol, a brand known for its antibacterial qualities, is now the clear number one in the category and will remain so for the foreseeable future. This is an example of both a category and brand which we believe will see a long-term shift in sales.

Beer & Lager

With slightly slower category performance (vs. Household Cleaners), only four of the top five brands are growing CRPs faster than the average. What makes this category so interesting is the long tail of sizeable brands. It displays that when a category is winning, if there are lots of brands there will be lots of winners—with twelve of the top fifteen growing faster than the category.

Fabric Detergents

This category has a very different look, with two-thirds of brand choices made within the top five brands, and with a much slower CRP performance (+8%), we only see two of these outperforming the category.

Given the shape of the category curve, it could be expected that brands won or lost at the stockpiling stage. And yet this actually happened in the lockdown period.

The number one brand, Persil, was selling at a similar level of promotions during lockdown as before, whilst others appear to have pulled back, showcasing the importance of short-term marketing levers during a period of less demand.



Deodorants

This last category, with a -6% CRP decline, has also seen declines for three of the top five brands. Each brand in this category is bought by specific demographics for specific purposes, so it is easy to understand the different performances. Market leader Sure (or Rexona as it is known in most markets outside the UK) is known for its efficacy.

But with a combination of less people going to the workplace and less exercise generally, short-term demand for the brand has fallen. The brand has reacted well to the lockdown in the only way possible currently, trying to create demand through more usage occasions with its campaign #MoveMoreAtHome.

Is it the same elsewhere?



If we look to the market which has been through the full lockdown and is now on the other side, do we see a different picture of brand choice?

We know that during the Chinese lockdown period, FMCG moved into decline—and pre-lockdown there was not as intense stockpiling. But despite the different overall picture, at a category level there were still winners and

losers with most falling into one of the four shapes already described.

All the big brands in Household Cleaners saw strong CRP growth during Q1 2020.

But again, it was the brands offering immediate protection which doubled how often they were chosen—Aitefu, Walch and

Dettol all growing by over 100%.

At the opposite end of the spectrum, Shampoo, a category which saw reduced at-home consumption. Like with Deodorants in the UK, the top brands have suffered (in-line with the category), but there is still hope with one of the top five managing to find growth.

Conclusions

There are two key conclusions to take from behaviour during this lockdown stage:

1. It is the biggest brands who are currently winning, particularly within the growing categories which have seen a surge in demand.
2. Traditional marketing levers are as important as ever to ignite demand in certain categories. It is still possible to win if your category is performing slower than others, or is even in decline.

It's important to remember that the category patterns displayed here are strictly related to lockdown. New patterns will arise as long-term changes are revealed.

We have probably never seen so many people trying something new, whether it's a new retail channel, new routines (whether in cooking, eating or personal care), or new brands. What we need to do is observe and understand how many, if any, of these behaviours will stick as restrictions are lifted.





Global top 25

Which brands were the biggest winners of 2019?



Top 25 most chosen brands in the world

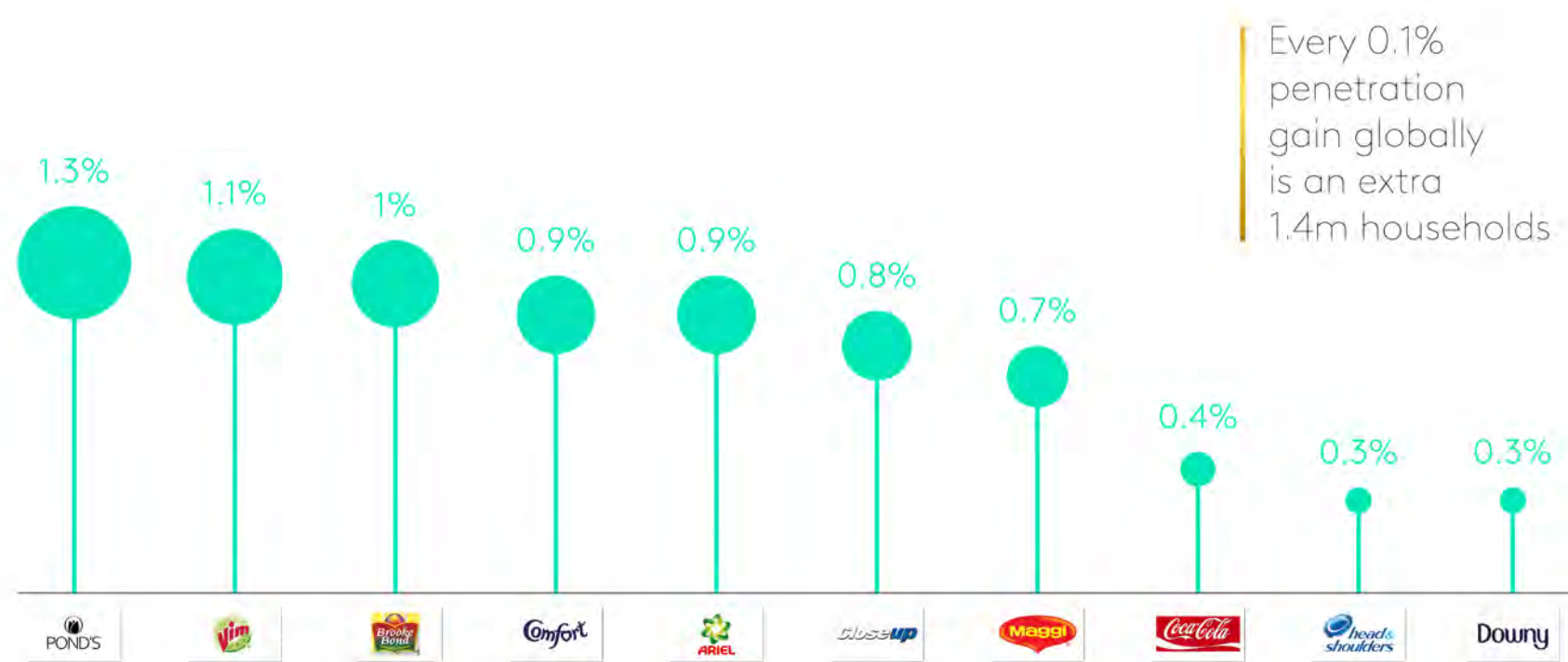
| 2019 Rank | Change vs. 2018* | Brand | CRP (m) | CRP Growth | Penetration | Consumer choice |
|-----------|------------------|---|---------|------------|-------------|-----------------|
| 1 | = |  | 6,094 | +0.4% | 42.1% | 12.3 |
| 2 | = |  | 4,157 | +7% | 59.7% | 5.9 |
| 3 | = |  | 3,117 | +12% | 32.3% | 8.2 |
| 4 | = |  | 2,608 | +8% | 30.4% | 7.3 |
| 5 | = |  | 2,450 | +8% | 25.0% | 8.3 |
| 6 | = |  | 2,156 | +2% | 22.8% | 8.0 |
| 7 | 2 |  | 1,981 | +8% | 23.3% | 7.2 |
| 8 | -1 |  | 1,962 | +5% | 36.8% | 4.5 |
| 9 | 1 |  | 1,907 | +7% | 4.9% | 32.9 |
| 10 | -2 |  | 1,834 | -2% | 22.6% | 6.9 |
| 11 | = |  | 1,641 | -5% | 25.7% | 5.4 |
| 12 | = |  | 1,478 | +5% | 29.4% | 4.3 |
| 13 | 5 |  | 1,423 | +38% | 17.8% | 6.8 |
| 14 | = |  | 1,395 | +9% | 14.0% | 8.5 |
| 15 | = |  | 1,330 | +9% | 9.9% | 11.4 |
| 16 | -3 |  | 1,298 | -0.5% | 24.5% | 4.5 |
| 17 | 15 |  | 1,116 | +26% | 11.6% | 8.2 |
| 18 | 2 |  | 1,090 | +7% | 22.8% | 4.1 |
| 19 | -3 |  | 1,063 | +1% | 15.0% | 6.0 |
| 20 | -3 |  | 1,054 | +1% | 24.9% | 3.6 |
| 21 | -2 |  | 1,053 | +3% | 19.7% | 4.5 |
| 22 | 1 |  | 1,014 | +4% | 25.2% | 3.4 |
| 23 | 1 |  | 976 | +0.2% | 24.5% | 3.4 |
| 24 | -2 |  | 962 | -2% | 14.0% | 5.8 |
| 25 | -4 |  | 955 | -4% | 15.4% | 5.3 |

Source: Kantar, GfK, IRI

*We rework the 2018 ranking based on any country scope changes. [Click here for further details.](#)

To explore the other most chosen brands in the world visit our [microsite](#)

Top 10 biggest penetration gains



Source: Kantar, GfK, IRI

Spotlight on Nivea

Last year, we identified four brands that have grown their CRPs in every year since the launch of the Brand Footprint Top 50 ranking. In this, our eighth edition, all four have continued to increase how often they are chosen across the globe—including NIVEA.

NIVEA

The brand – from multinational German manufacturer, Beiersdorf AG – has risen more than 20 places in eight years, becoming the 23rd most chosen FMCG brand in the world. It is now the seventh most chosen Health and Beauty brand. Looking solely at how many shoppers buy the brand, it has the joint-11th highest penetration of any global brand.

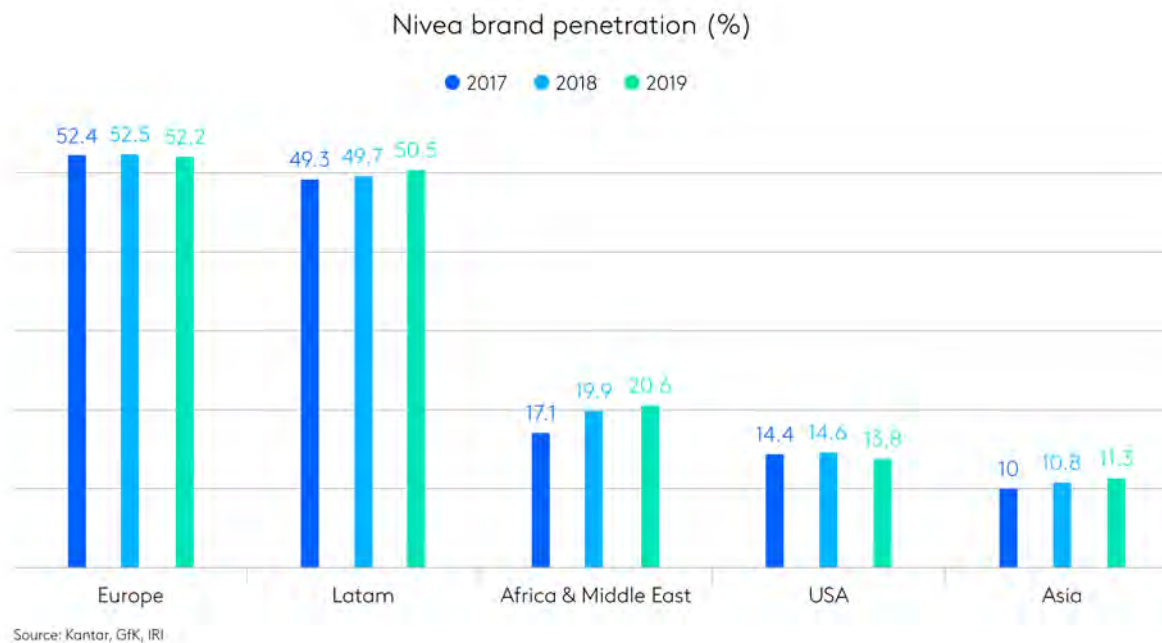
Including all six markets from the African and Middle Eastern region, it reaches 24.4% of households across the world.

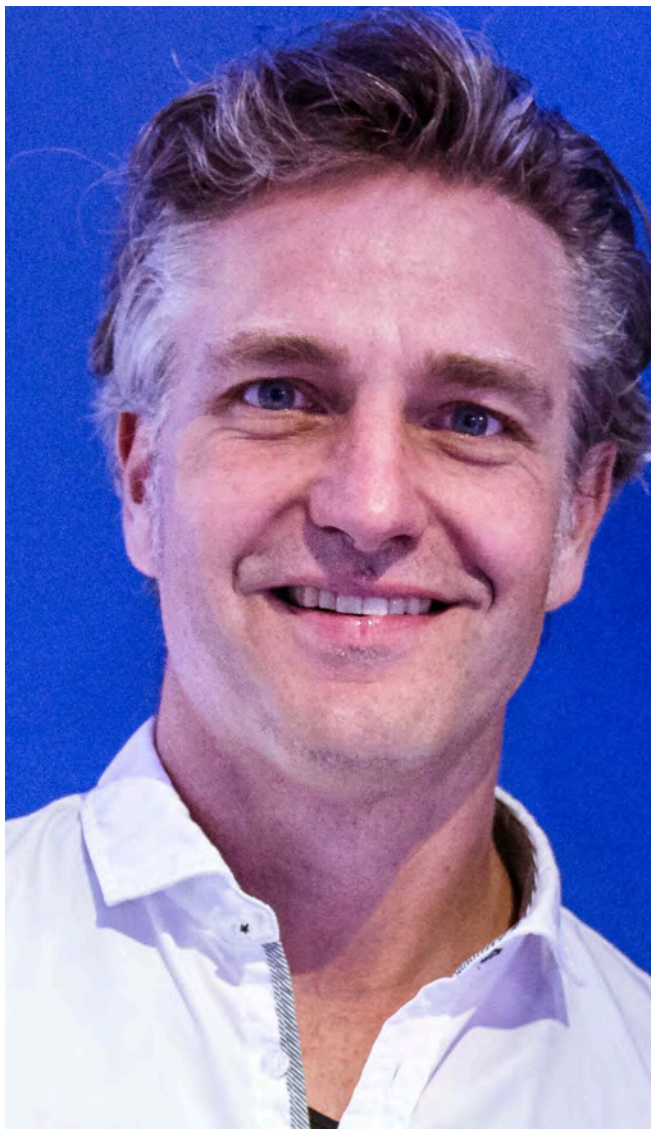
In Europe, NIVEA reaches the second-highest number of shoppers—one of only two brands which more than half of the

Stefan De Loecker, Beiersdorf CEO, spoke last year of “plans to invest €80 million a year to open up new markets”. A glance at where the brand has gained new shoppers shows this has been successful. There were shopper wins for the brand in Latin America, driven by Brazil and Argentina; in Asia, driven by Indonesia and India; and in Africa and the Middle East, driven by Egypt and Nigeria.

However, there are a few watch outs for the brand. Despite growing CRPs again, its 2019 growth slowed to just 0.2%, down from 2.5% in 2018. In Europe, the brand lost shoppers and CRP in the UK and France—negating gains made in Germany. The brand’s biggest global loss was in the US.

Finding the right balance between winning in established markets and gaining traction in new territories is always a difficult task. Despite this slowdown, NIVEA’s repeated growth should be celebrated as a remarkable achievement.





We were lucky enough to speak to Dr. Martin Bergmann, Head of Global NIVEA Brand Health Tracking, to understand more about the brand success.

What makes Nivea unique?

NIVEA was the inventor of contemporary skin care, more than 110 years ago. The brand has shaped the entire skin and personal care category ever since, establishing new categories and innovations in line with consumers' changing needs. Today, we are a highly trusted, democratic skin care brand, offering products that fit the needs of women, men and families all around the globe. Since the early days, NIVEA's success is rooted in an in-depth understanding of the skin and its care.

In your opinion how should global beauty brands win against the rise of smaller 'indie' brands?

A global brand must offer a clear and unique emotional reward: a purpose. In this sense, global brands should take more of a stance on social responsibility. Due to their size, they can have a significant positive impact on consumers' life.

Where is your biggest opportunity for growth?

Growth opportunities can be found in all countries around the world. Even in saturated markets like Europe, NIVEA can grow by attracting new buyers or increasing frequency with great consumer insight and compelling innovations.

What are your plans for Africa and India, who will disproportionately contribute to FMCG growth in the next years?

Over the last few years in India, the brand has already developed very well. We gained buyers and loyalty, but there is still significant potential to win additional buyers. Distribution plays a major role here.

NIVEA has had great success in South Africa, with the brand growing strongly in the past few years. We also see an opportunity in other African markets, where NIVEA is already well known but has lower penetration and distribution.

“

It is hard to predict how society will change, but I personally believe that values such as caring for others and solidarity will become more important.

”

What's been the key for NIVEA's consistent success over the past few years?

The brand's success is built on two strategic pillars: consistency and innovation. We have a very strong core in skin care, which originates from our NIVEA Crème product. Based on this strong fundament, we've been able to extend into new categories and innovate in existing categories. With an in-depth understanding of the skin and compelling consumer insight, NIVEA has the ability to develop disruptive innovations.

We are seeing lots of change in the way we behave due the Covid-19 lockdown. Which changes in behaviour do you think will be long-term?

It is hard to predict how society will change, but I personally believe that values such as caring for



others and solidarity will become more important. We've already seen how people are helping each other out, even in very difficult situations. I hope that society develops a new consciousness about the things that really matter: less egoism, more community.

What is your view on how FMCG brands grow?

Brands grow by increasing their penetration and, with it, their loyalty. That's what internal and external data tells us.

The key levers to grow are increasing awareness, improving brand image and enlarging physical availability.

Additionally, brands need to be in line with the zeitgeist and innovate accordingly. The needs of consumers are evolving and only the brands that fully understand consumers' needs can earn their trust.

How do beauty and personal care brands differ from other FMCG sectors?

The beauty and personal care category is highly emotional. It's of personal importance to everyone, involving our biggest organ: the skin. This makes the category very complex.

In the end, the entire category is about feeling good. To reach this feeling, one must balance out social obligations and individual wishes.

“The rise of indie brands in many categories is remarkable—we've seen them rise in coffee, beer, fashion and many more.”

”

Over the past five years, what changes have you seen in FMCG and beauty that have surprised you the most?

The rise of indie brands in many categories is remarkable—we've seen them rise in coffee, beer, fashion and many more. Over the last few years indie brands have consistently gained share in the beauty and personal care category, too.

These brands are often on trend, offering benefits consumers can relate to: local production, sustainable ingredients, craftsmanship, being run by “real” people, etc. The trade has accelerated this movement by offering shelf space to these brands to differentiate from competitors. It's a very interesting development which will most likely continue.

“The trend towards sustainable products will continue. Personalised products that are tailor made to consumers' needs will most likely be the “next big thing”.”

”

What do you think will change in the next five years?

The trend towards sustainable products will continue. Personalised products that are tailor made to consumers' needs will most likely be the “next big thing”. The individual consumer will be in the focus and products will be designed to perfectly meet their unique needs.

Local brand stories

For any brand, the best way to drive CRP is to pull on as many of our strategic levers for growth as possible. Before we look at growth success stories from across the world, here's a refresher. The associated icons are used throughout the next few pages, as we indicate which levers the most successful brands have pulled.





More targets

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



More presence

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



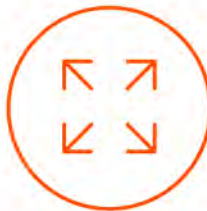
More categories

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



New needs

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



More moments

People buy a repertoire of brands, and at every category occasion there's a chance they might purchase yours. Brands must be relevant to as many moments of consumption as possible, creating new formats or flavours

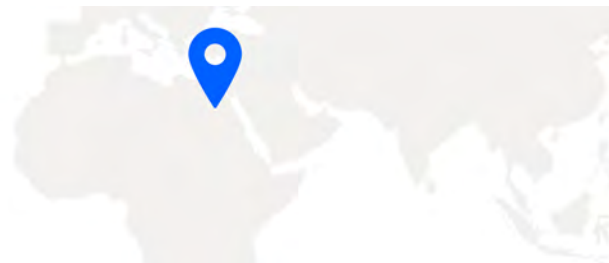
Africa & Middle East

The region managed stronger FMCG growth in 2019 versus 2018, but is still a long way from the performance of previous years.



With six out of the top 10 countries for population growth over the next 30 years coming from Africa (Nigeria, Democratic Republic of Congo, Tanzania, Kenya, Egypt and Ethiopia), the region remains a good bet for future FMCG growth.

To tap into this potential, brands need to understand the way that people shop in this region is very different. In most African markets, shoppers buy FMCG twice as often as other regions. Whilst the number of potential occasions is high, the amount spent on each trip is low. So brands need to have an offering which cater to this type of behaviour.



Tiger, Egypt

Tiger is a well-established salty snacks brand in Egypt. It is owned by Egypt Foods and competes with the top players in the category, Chipsy and Crunchy. In 2019, the brand saw extraordinary CRP growth to enter the top 10 most chosen Egyptian brands.

To achieve this growth, Tiger focused on innovation. Tapping into the trend for spicy flavours, the brand introduced a chili pepper flavour that helped grow its penetration and frequency. It also stretched its target by launching the 1 EGP SKU in order to target lower income households in rural areas.



Tasty Tom, Ghana

Tasty Tom, manufactured by Olam International Limited, is now the number one Tomato Paste brand in Ghana—accounting for nearly one-third of sales in the category.

Riding the wave of its improved and enriched Tomato Mix variant, it gained an additional 254,000 households in 2019. Now reaching 92% of Ghanaian households, Tasty Tom managed to plug demographic gaps by improving penetration of its key pack sizes. The 70g pack was successful across all demographics, with faster traction among low-income families.





Nittol, Nigeria

Nittol was launched during the 2014 Ebola outbreak in Nigeria, benefitting from the first-mover advantage into the antibacterial fabric detergent category.

The brand gained over 3% penetration points in both 2018 and 2019 and is now bought by over 40% of Nigerian households.

Its CRP growth makes it one of the top 50 most chosen FMCG brands in Nigeria, further cementing its place in the top 10 most chosen homecare brands.

Nittol provides consumers with options to disinfect their homes beyond clothing—incorporating floors, toilets and other areas. The brand has been successful due to its affordability, quality, fragrance, packaging, and its effective distribution chain. In addition, it offered low volume packs in the form of sachets, making it accessible across all demographics.



Popco, Kenya

PWANI launched Popco Laundry Bar with a single white variant in 2014, never reaching 10% penetration in its first few years in market. However, by the end of 2018, the brand had introduced 1Kg Citrus Fresh, Lavender Dew and Aloe Drops variants, which helped the brand grow from 8% penetration to 25% by the end of 2019.

Popco successfully leveraged its position as a value for money brand by reaching lower income households with a lower price point than its competition—with the new variants being the key driver for growth.

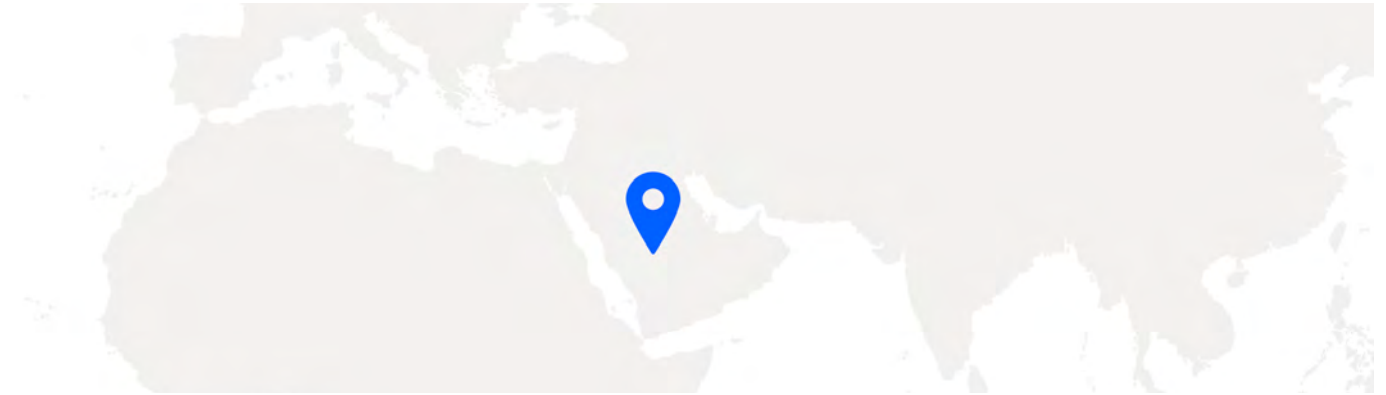




Nutella – Saudi Arabia

With FMCG starting to recover in Saudi Arabia, Nutella from Ferrero was one of the fastest-growing brands in the market. Nutella rebounded from a weak performance in 2018 – with a CRP growth of 9% in 2019 – making Chocolate Spread the fastest recovering category in the Saudi market.

Nutella's growth can be attributed to its strong performance overall working on all the marketing levers. It saw growth in all regions and demographics, with spend on the brand rebounding to levels even higher than in 2017.



It capitalised on seasonality in the local market, with campaigns and special edition packs for Ramadan and 'back to school' seasons.

With targeted communication around specific occasions – such as 'breakfast' and 'cooking' – supported with TV and digital campaigns, it was successful in driving consumption.

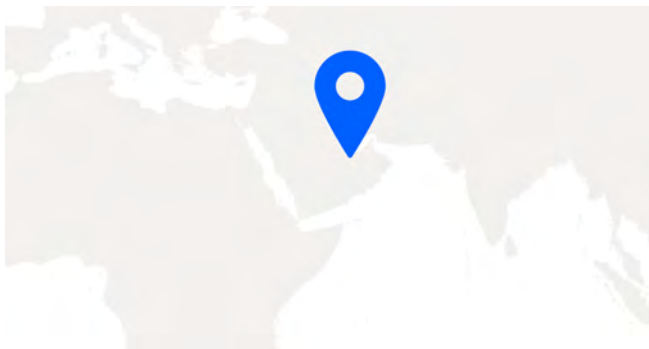




In a diverse market like UAE, the brand has a portfolio which helps cater to the ethnic population with targeted flavours for the South Asian community in the Laban category. In 2019, Marmum also sponsored an ethnic event on its farms in UAE, targeting the same South Asian community.

At a broader level, it ran a mother brand campaign with emotional messaging of 'Made with love'.

It was supported with continuous digital engagement throughout the year, in-store activations and promotions for the different categories it operates in.



Marmum – United Arab Emirates

Marmum, one the top Dairy manufacturers in United Arab Emirates (UAE), had a very successful 2019. CRP growth of 48% helped move it up nine places in the ranking and break into the top five brands in the market. It operates in key dairy categories including Milk, Yoghurt, Laban (Drinking Yoghurt) and Juices.





Fanico, Ivory Coast

Fanico from Unilever was the fastest growing brand in 2019.

After a long period of stability, it gained over 450,000 new shoppers (+27% penetration growth and +150% volume growth).

The laundry bar category is one of the biggest, being highly saturated with 99.5% penetration and Fanico achieving 78.9%.

The success the brand saw over the past few years was linked to two adjustments

1. New format: Downsizing from 275g to 255g and 420g to 400g, which offered an opportunity to reduce the price.
2. More presence: With the open market and street vendors being sources of growth for the category, Fanico expanded across these channels—bringing more occasions to the brand



More targets



More presence



More categories



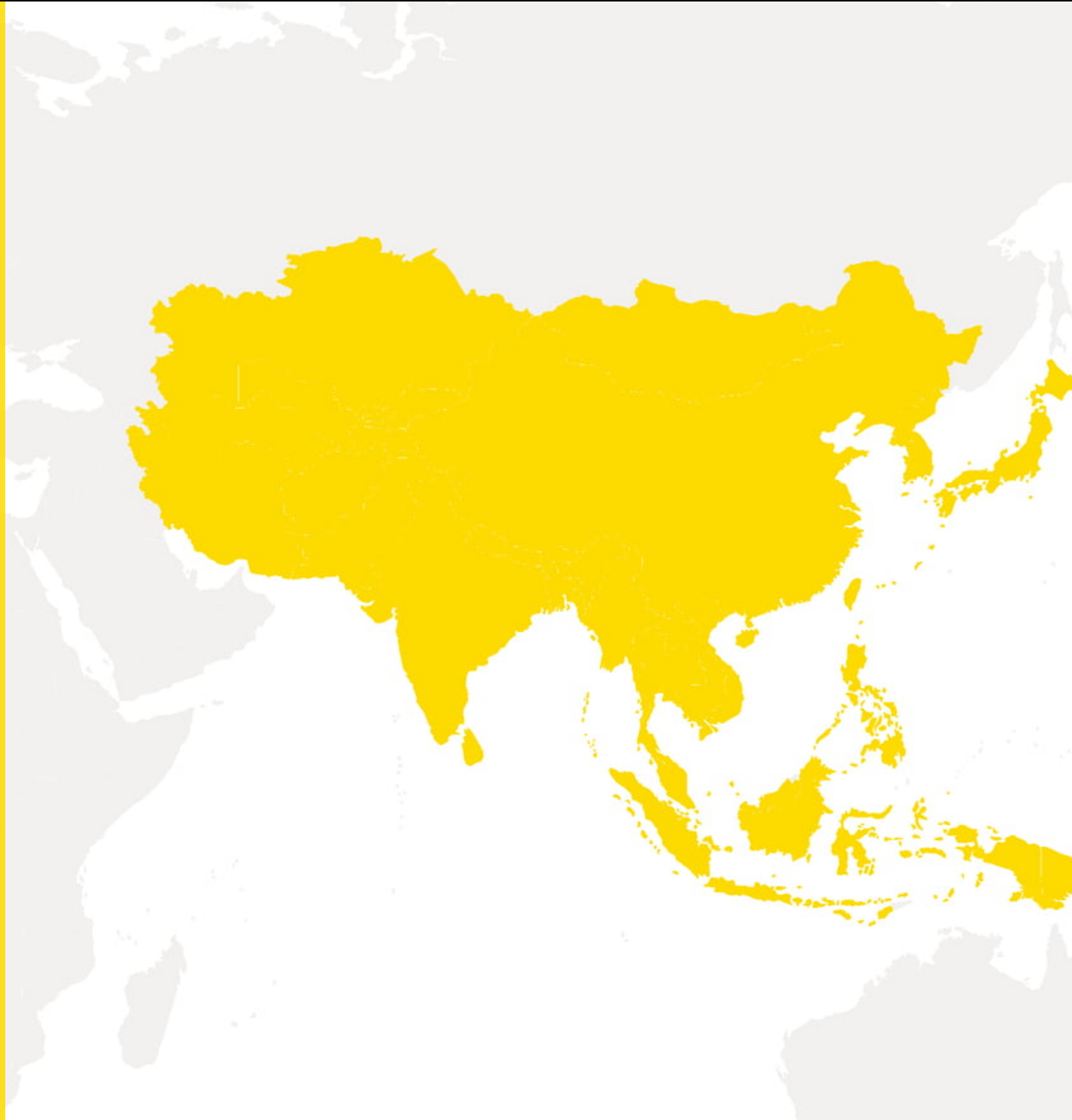
New needs



More moments

Asia

Total FMCG growth across Asia remains fairly stable, showing a slight year-on-year increase of +4.6% in Q4 2019 compared with +4.1% at the same point in 2018.



Homecare has seen the most stable growth across all quarters, propelled by improved living standards and increased hygiene awareness.

Asian markets – especially the East and Southeast – continue to lead the way in e-commerce. The channel now accounts for 11.2% of FMCG spend, with Chinese Mainland's online sales growing faster than any other developed country in 2019.



La Vie, Vietnam

La Vie entered the Vietnamese market in 1994 and quickly became the market leader within bottled water. Health and convenience are increasingly important to Vietnamese consumers and bottled water has performed strongly, with double-digit growth in urban and rural areas.

The brand's growth is attributable to three key drivers.

It has offered variety through innovation, with launches meeting different needs e.g. La Vie Kid. Marketing and communication are further

drivers, with TV advertising and sponsorship playing a large role.

Finally, the brand has developed a strong Corporate Social Responsibility programme. La Vie helped launch the country's Packaging Recycling Organisation (PRO Vietnam) and has stopped using plastic caps on its bottles. As a result, the brand has added more than 78,000 new households into its consumer base.



More targets



More presence



More categories



New needs



More moments



Botare, Chinese Mainland

Botare is a local Chinese Personal Care brand, playing across Tissues, Femcare and Babycare. Its low-cost business model has helped boost sales in the past three years. In 2019, Botare reached 9.3% penetration, an increase of 4.2% penetration points.

With price being a key driver of its success, Botare joined the New Brand Project launched by Pinduoduo to co-manufacture Diapers. This has certainly helped drive further penetration. The brand has also focused on e-commerce. As Chinese online sales are growing faster than anywhere else in the world, it has been able to ride the wave.



Paldo, South Korea

Consumers in Korea enjoy modifying recipes, matching different food together, and sharing these experiences on social media. Paldo proactively connected with these young consumers, a break from the traditional image of manufacturers.

Altering its traditional marketing campaign schedules has also yielded growth. Paldo's main product is a spicy Bibimmyeon, served as a cool noodle. Traditionally, more purchase occasions and marketing activities were planned for summer than any other season.

Paldo moved its marketing campaign much earlier (beginning in March) and expanded its KPI in peak season as well as off-season. As a result, Paldo now ranks second in Non-Soup-Based Noodles.





Goodday, Malaysia

Dairy has been in decline in Malaysia, but shoppers are remaining in Liquid Milk. Goodday used this opportunity to bring shoppers into its brand, now reaching 20% of Peninsular Malaysian households. It is the fastest growing brand in terms of CRP within dairy—growing by +56%.

Goodday trades on its longevity with the tagline: “Nourishing Malaysians, since 1968”. Known for its Plain and Chocolate Milk flavours, it launched new flavours such as Charge, Honey, Green Tea and Kurma. Most recently, it has moved into Plant-based Milk. Goodday has created excitement in the category and attracted 476,000 households in 2019.



C-vitt, Thailand

C-vitt is a leading beverage brand positioned for health and emphasising the benefits of vitamin C. In 2019, the brand had a high number of new launches, which helped it maintain its position as the fastest growing brand in the beverage sector.

C-vitt saw an increase of 11 million CRPs—more than double in 2018.

C-vitt created new needs for consumers. It provides liquid alternative for vitamin C consumption, which helps the body absorb the vitamin faster. Each bottle contains the recommended daily dosage. The “less sugar” formula on all its variants has also appealed to consumers concerned about their sugar intake.

The brand has encouraged consumption by

creating a variety of ideal moments to drink C-vitt. These include waking up, breakfast, feeling stressed, feeling sick, working outdoors, during exercise, nourishing skin, and boosting maternal & child health.





Dabur, India

Dabur is a famous beauty and personal care brand in India, known for its Ayurvedic and Natural products. The brand operates in Oralcare and Haircare predominantly and saw success in the Shampoo and Hair Oil categories in 2019.

Dabur renamed its shampoo product Dabur Vatika to Dabur Vatika Health with 7 Herb Properties. Dabur also changed its packaging to give it a more premium look, and shifted its audience focus to the larger Hindi-speaking diaspora.

For Hair Oils, Dabur adopted a defensive strategy to counter the success of its competitor, Shanti Amla. It launched two new brands – Dabur Sarson Amla and Dabur Brahmi Amla. This helped Dabur fight price aggression and opened up a new segment, Unbranded Mustard Oil—popular in parts of northern India.

Thanks to these strategies, Dabur's penetration grew by +4%.



Boss, Japan

Boss is the leading ready-to-drink Coffee brand in Japan, established in 1992 by Suntory Beverage and Food. In 2019, Boss remained the most chosen Coffee brand, growing CRPs by +5%.

The brand initially targeted blue-collar male workers with 190ml cans, slightly smaller than the most popular size at the time. This allowed consumers to drink the Coffee within their short breaks. As ways of work change, the brand has expanded to target all workers and occasions. Boss now has a 500ml PET bottle for at-desk consumption. To cater for women working at home, they released a large-sized premium offer in supermarkets.





Birch Tree, Philippines

Birch Tree is a Powdered Milk brand that saw more than 50% CRP growth in 2019. It has shot up the rankings into the Top 20 FMCG brands in the Philippines and the third-most-chosen Dairy brand. Growth has arisen through the gain of 10% penetration over two consecutive years. Almost 40% of households now purchase the brand.

By introducing a smaller 33g sachet, Birch Tree gave households a new option away from larger packs. Its attractive price point and “Sustansyafordable” (Nutritious + Affordable) messaging has helped reach lower income



homes who shop in provision stores, where the majority of shoppers are.

With a strong consumer following, their newly launched Chocolate flavour has already gained 14% penetration. Birch Tree successfully climbed to become the number two brand in

the Powdered Milk category, even gaining share from the number one brand as it continually recruits new buyers.





So Klin, Indonesia

So-Klin, has been one of Indonesia's leading Homecare providers for more than 35 years. The brand is part of the Wings group, a local manufacturer. Playing in several categories is one of the key levers that So-Klin uses, with varieties in Floor Cleaner, Detergent, Fabric Conditioner and Bleach. The brand has successfully built the image as a specialist in affordable Homecare products.

The key to its longevity has been innovation.

Recent success has come from new Fabric Conditioner and Detergent lines, So-Klin Royale and So-Klin White & Bright. So Klin Royale rides on the fragrance trend in laundry, while So Klin

White & Bright offers a way to keep both whites and colours clean with just one product.

Being both innovative and affordable has made So-Klin a success in 2019, with +15% CRP growth in Urban Indonesia.



Vitalon Ochaen, Taiwan

Vitalon Ochaen is a local Taiwanese ready-to-drink Tea brand. Its penetration has increased from 35.5% in 2018 to 38.4% in 2019, driving +19% CRP growth.

This year, the brand launched a sugar-free Japanese Raw Tea, which had a different shopper profile from its usual buyers. It used famous Asian actors as celebrity endorsers, which built brand awareness among young consumers.

Vitalon Ochaen also expanded its product range to use different types of product packaging, such as Tetra Pak. This gave the brand more opportunities to display products and granted more shelf presence in retailers.



Latin America

GDP and FMCG remained flat in 2019, with strong declines in Chile and Argentina—the countries impacted most by protests and political uncertainty in the last three months of the year.



Colombia, Bolivia and Central America also saw poor growth, stemming the strong growth from the two biggest economies in the region – Brazil and Mexico – which saw +6.5% and +4.1% growth respectively.

Although still early, the acceleration of e-commerce is now confirmed, whilst the 'Cash & Carry' and 'Drug & Pharma' channels carried on growing at double-digit rates. It is important not to overlook hypermarkets, which are regaining importance to shoppers and, furthermore, allowing manufacturers to give visibility to innovations.



Oral B, Brazil

Oral B, the oral care giant from P&G, saw a strong 2019 performance and is now part of the top 10 most chosen Beauty & Personal care brands in Brazil. The brand grew its CRPs by 18% and added 4.1% penetration points—more than 2.2 million new buyers, to reach 58.4% penetration.

The brand developed a broader portfolio, launching new products and also focusing on its lower priced smaller SKUs. It also increased its presence in the media through TV

campaigns and the creation of a Facebook page dedicated to specialists and partnerships with digital influencers such as the YouTube channel “Manual do Mundo”.

The brand also ran “Take More, Pay Less” and “Try it Free” promotions, the latter encouraging trial with a money back guarantee.





Pepsi, Mexico

Pepsi is now the seventh most chosen FMCG brand in Mexico—up from ninth in 2018. It did this by gaining 0.4 penetration points and increasing trips per household by 2.4—equating to a growth of 29 million CRPs in the latest year.

This growth through more shopping trips per household is contrary to what is happening within the category. Despite the popularity of

Carbonated Soft Drinks and cola in Mexico, frequency of purchase has been falling in recent years. However, Pepsi is the only brand which has seen real growth over the last three years.

Pepsi's growth has been achieved through its original flavour variant, the traditional trade channel and multi-serve formats.

To drive frequency, the brand used “fun times together” and “family meals” messaging in order to associate the brand with food and socialising.





Brand leaders speak:

Antonio Novoa, Head of Distribution and Brand Equity, Buen Día

Buen Día, Ecuador

In 2019, Buen Día instant coffee grew 74% in term of CRPs—gaining 6% penetration points and adding 156k new shoppers to the brand. It is now the 15th most chosen brand in Ecuador.

What was the key to driving growth?

We positioned Buen Día in Mom-and-Pop shops with our 10g aluminium SKU. This product appeals to shoppers who want a premium, great tasting coffee that's affordable—at the magic price of \$0.50USD. We've seen the purchase frequency of this 10g bag rise from three times a year in 2018, to a whopping seven times a year in 2019. It's a reflection of our shift in strategy to position the 10g as our main SKU.

Where did the brand see the most growth?

Small Mom-and-Pops stores accounted for five of the 6% penetration growth. Some of our rivals, such as Sí Café and Press2, have experienced decreases due to Buen Día's strong performance. Constant activity in smaller cities on the coast and in the highlands – coupled with our cross-category push into Mom and Pops – has been the key to our success.



More targets



More presence



More categories



New needs



More moments



Vivo, Chile

Vivo is an important brand for Carozzi—one of the largest Chilean manufacturers. It plays in over 14 categories, with powdered juices being its core.

Promoting healthier lifestyles, Vivo continues to grow and is now present in 80% of Chilean households. It has continued innovating in 2019, mainly through launches in oats and jams—which added 440,000 new shoppers.

The brand is positioned to mainly attract higher income households, but its development in oats and jams categories helped attract a wider spectrum of shoppers.



More targets



More presence



More categories



New needs



More moments



Ina, Central America

INA is a brand of pasta recognised for its quality and variety. It operates in El Salvador, Honduras and Nicaragua, and is the leader in Guatemala. Ina won more than 100,000 buyers, which is 3% penetration points more than the previous year.

Manufacturer Molinos Modernos (a division of Corporación Multi Inversiones) is dedicated to the production and marketing of cereal products in Central America and the Dominican Republic.

Growth has come through the "INA with Guate flavour" campaign, encouraging the use of pasta in local dishes that are usually accompanied with rice.



More targets



More presence



More categories



New needs



More moments



Nosotras, Bolivia

Nosotras grew its CRPs by 13%, with more than 60% market share in the Femcare category. It gained 3.8% penetration points—remarkable considering it already had over 70% penetration. Known for its feminine pads, growth has also come from daily protectors, feminine wipes and intimate soap.

Nosotras remains close to its users across social networks and has a detailed website with a help centre for gynaecologists and psychologists. The brand has benefited from the quality of its product and its diverse portfolio through constant innovation.



Ramo, Colombia

Ramo is a traditional Colombian brand in Cakes, Snacks & Cookies. Despite being one of the best-known brands in Colombia, it was losing shoppers to new value and private label brands.

To combat this, Ramo focussed on new product launches in 2019—with more than 60 new SKUs and entering new segments such as Potato Chips, Cake with Filling ('Cohete'), plus a range of healthier products. This helped Ramo win more than 322k incremental buyers. Alongside this innovation, the brand gained additional distribution through more affordable pack sizes.





San Fernando, Peru

Peruvian meat brand San Fernando has been present for over 70 years. In 2019, it was chosen 62 million times by urban Peruvian households—the 13th most chosen FMCG brand in Peru.

It gained 1.7% penetration points, reaching 84.4% of households—an impressive feat given only two other brands in the top 20 saw an increase in shoppers.

The product line where San Fernando gained the most was sausages. It focussed on the



traditional channel, gaining traction with middle income households, whilst also growing in modern trade through higher income households.

The brand continued to be the market leader in most categories in which it participates and consolidated this position in 2019.





Argentina: flexibility and fundamentals

2019 was another year of decline in FMCG for Argentina (-6% vs. 2018) where high inflation rates have eroded consumers purchasing power and real income for at least three years in a row. In this scenario, it is local brands in basic categories that have found white space to thrive.

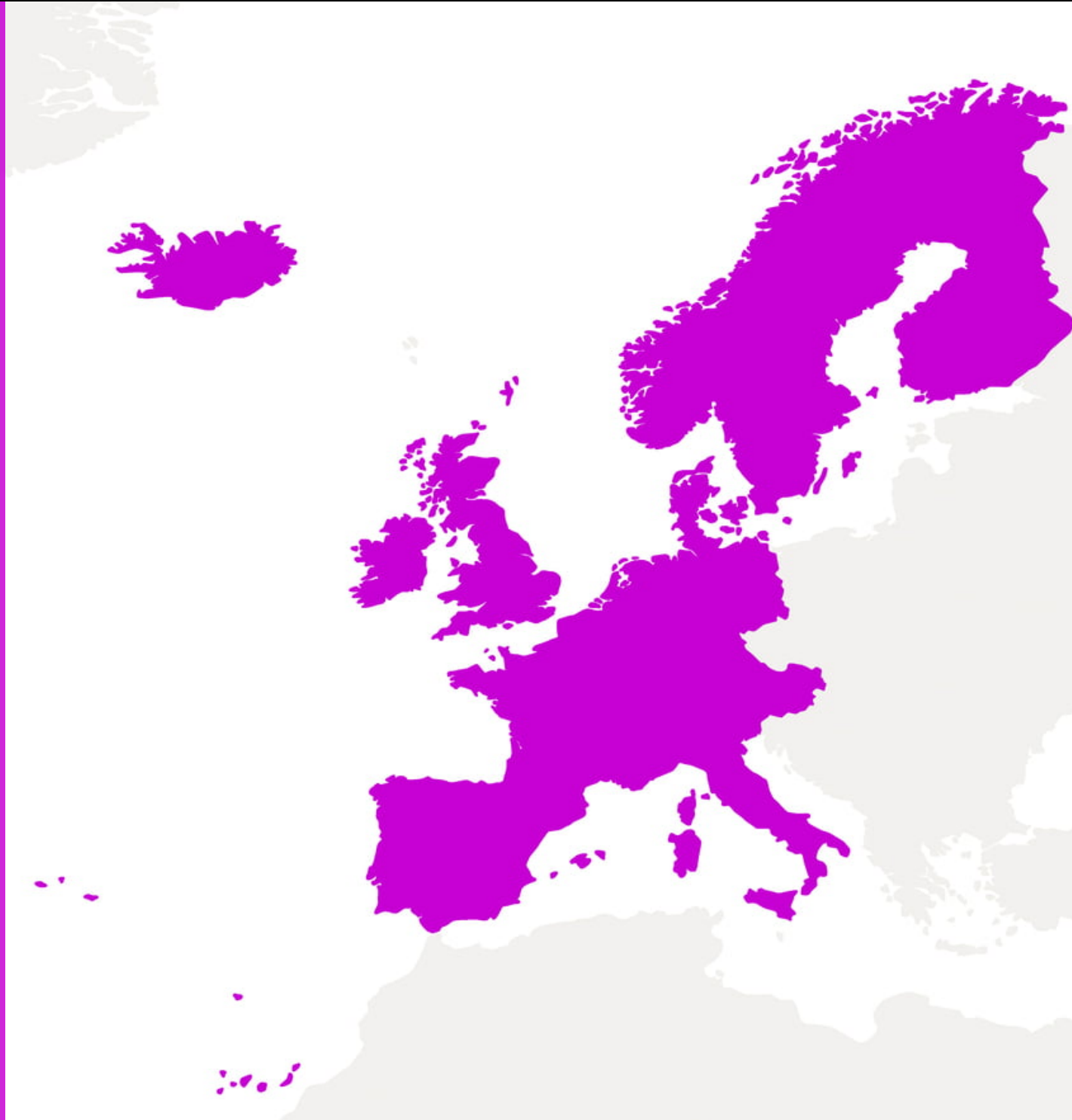
That is the case of Arcor (Masterbrand), which now ranks as the fourth most chosen FMCG brand, as well as Ilolay which has reached new households and increased penetration. In this same trend, La Serenísima, a traditional local dairy brand, continues to lead the market and now reaches 84.1% of households.

Consumers have constantly shifted channel, brand and category mixes, getting the most out of their eroding disposable income in less purchase trips.

Local brands have found the flexibility and speed to adapt their portfolio and pricing strategies to continue to connect with consumers. Using different channels to attract different shoppers – traditional and proximity trade for the less well off, convenience and modern trade for those with more income – has led to success.

Western Europe

Western Europe's slowing performance of FMCG continued in 2019—declining from +2.2% growth in 2017 to just +1.2% in 2019.



Germany grew by just +0.7%, France and Italy experienced +0.8% growth each, and the UK grew by +1.4%.

This slowdown is driven in part by where we shop, with e-commerce growth much slower than the US or Asia, whilst discounters are still performing strongly in the UK and France.

This has caused the continued ascent of private labels which account for 37.6% of value share in the region (vs. 14.7% share globally).



La Boulangerie, France

La Boulangerie is an industrial Bread and Pastries brand among the top 100 FMCG brands in France. It saw a +12% increase in CRPs in 2019. With an additional 1.1% penetration point increase, achieved mainly through strong performance in the hypermarket and Online channels, the brand reaches 30% of French households.

Growth came through its Organic 2.0 range, which integrates CSR—a key consumption trend in France. This range sources locally, guaranteeing good pay for producers and an ecological position. La Boulangerie has increased its media investment to communicate local fair-trade engagement.



More targets



More presence



More categories



New needs



More misprints



Central Lechera Asturiana – Spain

Central Lechera Asturiana is the leading Dairy brand in Spain.

It increased CRPs by +5% in 2019, with growth driven by an increase in new buyers. The brand added 380,000 new shoppers, reaching more than 10 million households.

Key to its success has been growth through its “Classic Milk” product across all demographics, but especially family households.

The brand has also extended its range into Functional Milk, launching the first Bifidus Milk product in the market.

Central Lechera Asturiana invested in TV campaigns, using famous journalists to highlight the natural properties of its products. It also supports local farmers with the tagline: “Mi prado es tu casa” (My meadow is your home).



More targets



More presence



More categories



New needs



More moments



Dove, Portugal

In 2019, Dove bet strongly on reaching more men. From campaigns aimed at Father's Day, as well as other debates that promote the extension of paternity leave worldwide, Dove has taken several actions to bring the brand closer to their male targets—but without ever forgetting the importance of their key female audience.

In 2019, Dove reached 41.0% penetration, an increase of +2.3% penetration points due to its good performance in Deodorants and in Hand

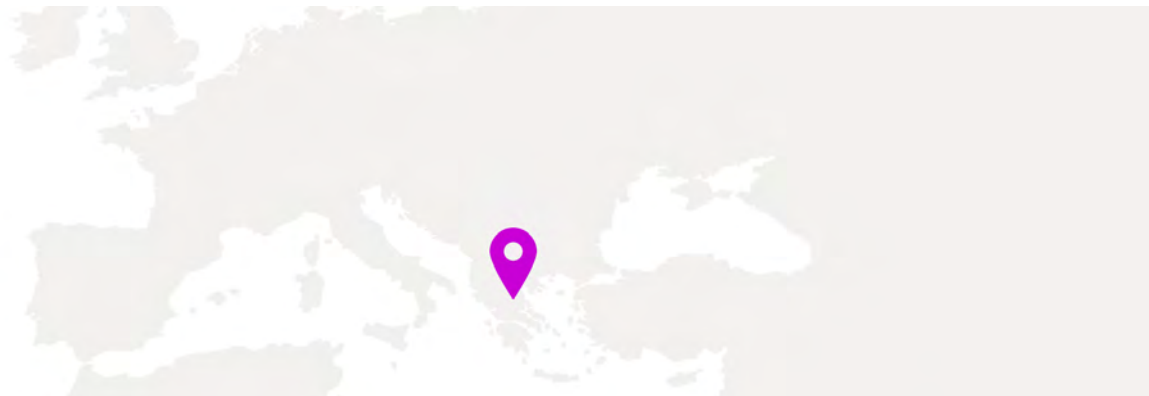


& Body Wash. In Deodorants, Dove is reaching a greater variety of targets and increasingly gaining traction with younger men.

The brand also managed to increase purchase occasions, with an increase of +11% amongst male shoppers and +6% with women.

Dove is also increasing its presence in the different regions of Portugal, especially recruiting buyers in the south.





MAKVEL, Greece

MAKVEL is a traditional pasta brand from Greece, dating back to 1939. For several years the production of MAKVEL pasta had stopped, but in 2017 the brand was re-launched and has followed a very positive growth path since then. "Greekness" is highlighted on the packaging and this, combined with the brand's lower price, has worked very well for the brand.

Over the past couple of years, the number of households that purchased MAKVEL pasta has doubled and the brand reached 19% penetration in 2019.

Apart from shopper base expansion, the brand also built its loyalty, as purchase frequency increased by +7%. Consequently, MAKVEL achieved a +60% CRP growth.

In recent years, the brand has invested in the growing health and wellness trend. In October 2018, the brand launched a new line of Wholegrain Pasta called MAKVEL 5 Cereals that further developed penetration.



More targets



More presence



More categories



New needs



More moments





Denny, Ireland

Denny is a traditional Irish brand, dating as far back as 1820. It remains a household name for Breakfast and Sliced Cooked Meats. The founder, Henry Denny, is the inventor of the rasher, bringing bacon curing methods from Co. Waterford in Ireland to the rest of the world.

Denny has seen strong CRP growth of +6% this year, maintaining its spot as the fourth most chosen brand in Ireland. This was achieved through both penetration growth – gaining



+0.6 penetration points and now purchased by 64.7% of the Irish population – as well as strong frequency growth of +4.2%.

Launching a new craft-style range has helped Denny stand apart from competitors and attract new shoppers to the brand.

Product ranges in the Master Craft Selections include Butcher's Style Sausages, Heritage Cure Rashers & Dry Cure Sliced Cooked Meats – offering a twist on the traditional while attracting a more premium shopper.





Pringles, UK

Global snack brand Pringles, grew its CRPs by +9.7% in 2019.

The brand was bought by 54.4% of UK households, an increase of +2.4% penetration points.

This represented one of the strongest gains in UK FMCG, and certainly the biggest gain for a brand already bought by over half of UK shoppers.

Last year, Pringles launched Rice Fusions. It was worth over £10 million—placing Rice Fusions at fourth in the [Kantar UK FMCG Innovation ranking](#). The product offered a healthier option for the snack occasion—a key need of British consumers. Available in four versions, and inspired by Asian meal concepts, it played into the trend for strong authentic flavours.



More targets



More presence



More categories

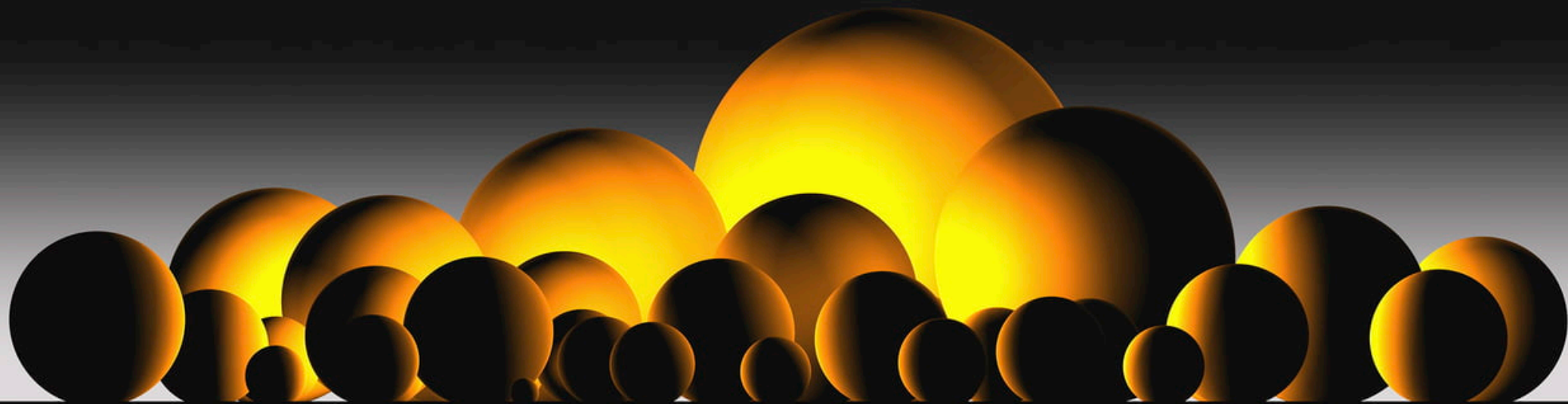


New needs



More moments

About this report



The 2019 rankings include more countries than ever before. Two new countries – Romania and the Netherlands have been added for our most complete view ever of Europe. However, data for South Africa is no longer included in the ranking.

There may also be small changes in the data reported for Russia, Italy, Peru, Mexico and Argentina, due to ongoing panel enhancements and data restatements.

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

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

Explore the data

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

About Kantar

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

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

Find out more

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

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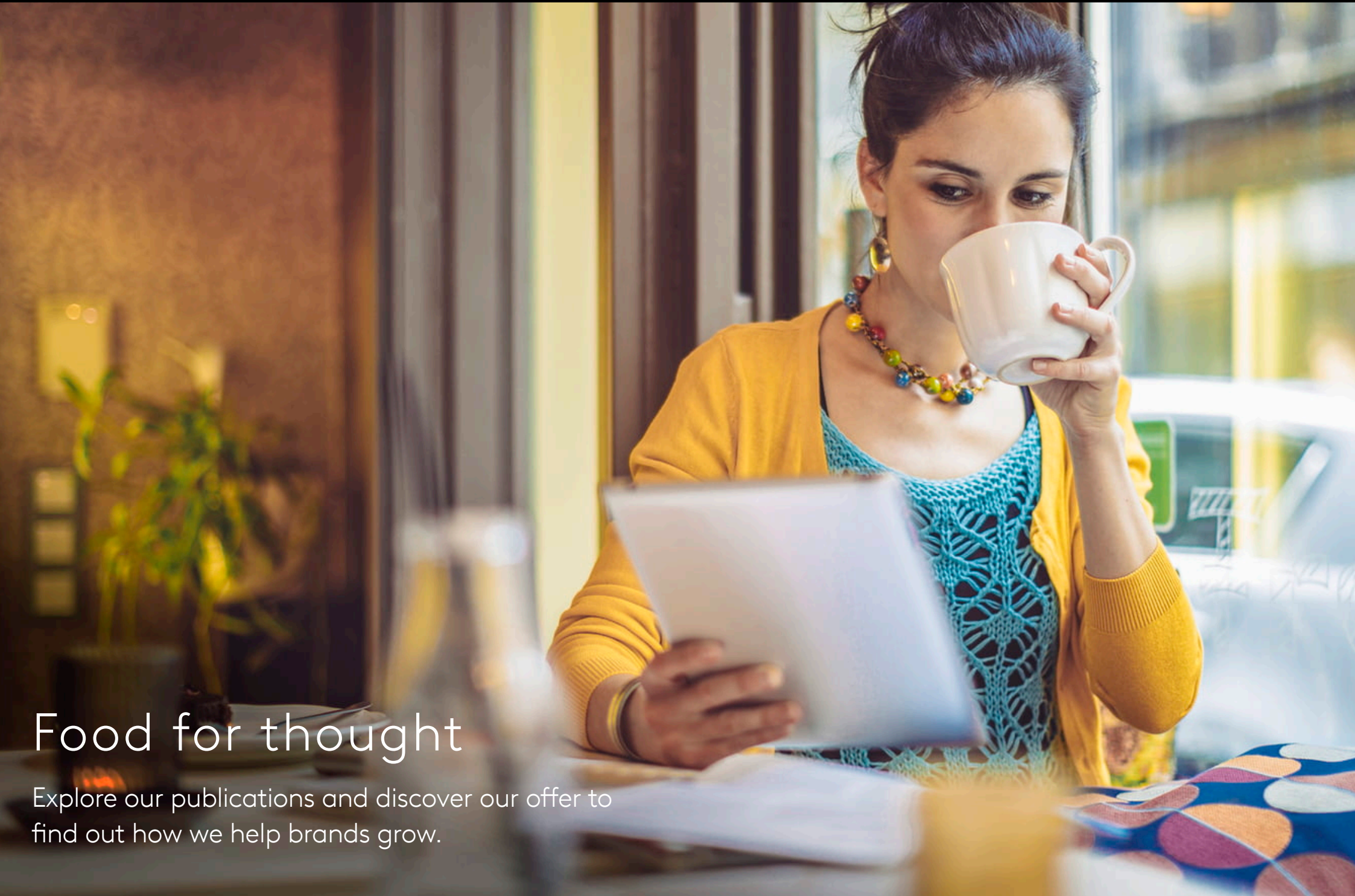
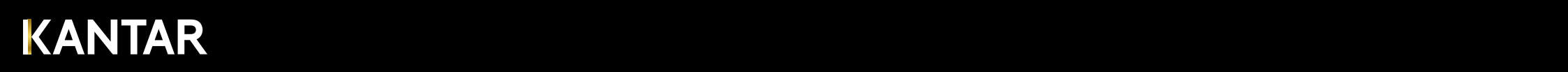
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Food for thought

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



Brand Footprint 2019



Winning Omnichannel: Finding growth in reinvented retail



Eat, drink & be healthy: How at-home consumption is changing

Thank you for reading

Brand Footprint: A global ranking of the most chosen consumer brands

