



ASIA BRAND FOOTPRINT 2020

A RANKING OF THE MOST CHOSEN CONSUMER BRANDS

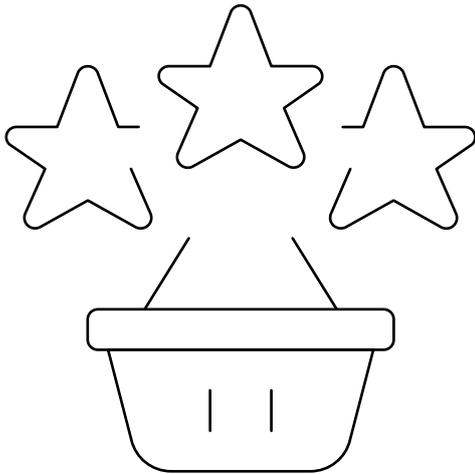
2ND EDITION

KANTAR

JUNE 2020

What is Brand Footprint

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



Consumer reach points

There is a decision point in every FMCG purchase; a point at which the shopper decides to buy one brand instead of another. The Brand Footprint ranking reveals which brands are winning at that moment of truth, using the Consumer Reach Points measure. This measures a brand's strength in terms of the number of times brands are chosen by shoppers.

The Consumer Reach Points of each brand is calculated by multiplying three numbers:

- **Penetration**
- **Population**
- **Consumer Choice**

The measurement is then weighted by actual population to calculate the brand's reach. As well as a clear picture of the size of its global footprint, this reveals where the brand has opportunities to grow its penetration and its frequency.

Consumer Reach Points (CRPs) explained



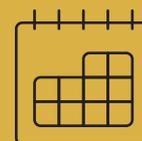
POPULATION

Number of households in a market



PENETRATION

% of households buying your brand



CONSUMER CHOICE

Number of interactions with your brand across categories in a year

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

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

www.kantar.com/brandfootprint

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Marcy Kou

CEO, Asia
Worldpanel Division, Kantar



ASIA CEO FOREWORD

WELCOME TO **THE SECOND ANNUAL EDITION OF OUR ASIA BRAND FOOTPRINT REPORT** WHICH ONCE AGAIN PUTS THE REGION'S MOST CHOSEN CONSUMER BRANDS IN THE SPOTLIGHT.

The brands in our ranking have faced challenges of an unprecedented magnitude. Asia was the epicentre of the COVID-19 outbreak and its effects have disrupted and reshaped most businesses. Fortunately, FMCG brands are masters at innovating swiftly in response to changing consumer needs.

Congratulations must go to each and every brand in the Asia Brand Footprint 2020 ranking. Bearing in mind the sheer size and diversity of our region and the huge number of brands operating here, simply being among the top in the region is an achievement that should never be underestimated.

Despite the turbulent times we are facing, it is important to note that the **5 strategic growth levers** remain unchanged. To reach more shoppers and expand their footprint, brands must still focus on **finding new shoppers, creating new occasions, entering new categories, identifying new needs** and **increasing their presence**. While the long-term effects of the pandemic are unclear, it is certain to be a catalyst for lasting new behaviours. In particular, brands should be aware of and adapt to the following main changes:

- **An uplift in demand for health and hygiene products.** Already an increasing trend across Asia, the COVID-19 pandemic has driven greater awareness and acceptance of the importance of maintaining good health. This has created an opportunity for personal care and household cleaning brands to raise themselves up to the next category level.

- **Reduced mobility has created new purchase habits.** Lockdown has changed the balance of consumers' in-home and out-of-home spend, and this is likely to continue through this year as freedom of movement remains constrained. This has been a plus for some categories and a minus for others. Brands which have lost moments should look for ways they can innovate to adapt the products and experiences they offer for the home environment.

- **Concerns over household finances are rising.** COVID-19 has had a profound impact on shoppers' financial situations, and the outlook remains uncertain. Consumers will be more careful with their expenditure and heightened price sensitivity may lead to more bargain hunting. This might have an impact on the trend for premiumisation which had been growing across Asia. It is possible that we will see a return to polarisation with some consumers shifting spend to value brands, whereas others will decide to treat themselves to 'the best' because they are limited in other areas of their lives. Brands must provide good value, while making products available in a range of pack sizes and price points to reach all buyer groups.

Brands also need to be mindful of changing consumer mindsets and needs and as such they would need to wear two hats. In the short-term they should be agile, helping shoppers' transition to the 'new normal' by meeting their changing needs in an affordable way. They must closely monitor and understand how the situation is progressing at an individual market level – each was uniquely affected and will rebuild at a different rate and in a different way.

Alongside staying relevant to shoppers in the short-term, brands must keep their long-term strategic hat on. This means continuing to follow the long-term build, trust and the relevance to the consumers and focusing on the 5 growth levers. The brands that can do both will not only survive the turbulence – they will position themselves to win in the post-COVID world.

In this report you will find the ranking and overview for the Asia region, detailed profiles for each market and brand success stories. I hope you will find the shared insights impactful and valuable.

LEVERAGING BRAND GROWTH ALONGSIDE ASIA'S EVOLVING CONSUMER BEHAVIOUR



5 TRENDS DRIVING BUYER DECISIONS



5 KEY LEVERS FOR BRAND GROWTH



5 TRENDS DRIVING BUYER DECISIONS

IN 2019, WE WITNESSED FIVE EMERGING CONSUMER TRENDS ACROSS ASIA: **HEALTH, CONVENIENCE, DIGITALIZATION, VALUE FOR MONEY, AND DIVERSIFICATION.**



HEALTH

For Asian consumers, the growing health and wellness trend includes a good diet, exercise, nutrients and supplements, and a strong immune system, among other aspects. The increase in health consciousness has driven consumers to prioritise health in their products across various categories. **Across Asia, the top growing categories related to this trend include those that offer shoppers natural ingredients, additional nutrients, and hygiene.**



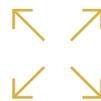
VALUE FOR MONEY

In 2019, we also saw that, depending on the category, consumers are willing to spend more for higher quality. They look for brands that they feel balance the quality of their products or services at a fair price. **Therefore, offering high-quality products at affordable prices is a significant goal for many brands who wish to appeal to more targets and compete with others in the market.**



CONVENIENCE

Convenience is another rising trend that we saw in 2019. With such busy lifestyles, consumers want products and services faster and more conveniently. Those who are money rich and time poor are ideal targets for brands promoting ready-to-use products and services. **Top growing categories that target this trend include meal maker, instant noodles and rice, bottled water, snacks, and canned foods.**



DIVERSIFICATION

And finally, diversification is a trend that has been increasing over the years. There are three major clusters of consumers in Asia: young millennials and centennials, working-age consumers, and aging consumers. Additionally, there are even more types of consumers depending on the market. **This is important for brands to recognise because different demographics have different needs, desires, and behaviours, thereby requiring a different approach.**



DIGITALIZATION

Regarding digitalization, mobile and internet-usage are extremely prominent in Asia, more so than in other parts of the world. For instance, Asian internet users skipped the PC era entirely and began using smartphones. The Asian consumer is the most active and engaged mobile user in the world. And **as a result, Asia is home to a majority of the world's retail e-commerce market, which is continuously expanding.**

NOW THE BIG QUESTION IS,
HOW CAN BRANDS EFFECTIVELY
RESPOND TO EVOLVING CONSUMER
DEMANDS?



5 KEY LEVERS FOR BRAND GROWTH

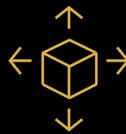
Brands must first understand the emerging consumer trends in order to develop strategies that align with what shoppers seek in a product or service. Based on the five trends in consumer behaviour, there are five key levers that brands can wield to help ensure growth.



NEW NEEDS



MORE MOMENTS



MORE CATEGORIES



MORE TARGETS



MORE PRESENCE

NEW NEEDS

The ultimate lever for brand growth is recognising new consumer needs and then establishing a new category. Brands that identify the new emerging consumer needs and create effective and efficient ways to meet them will be equipped to dominate that space for years to come. Vita is a great example of a brand that has addressed new consumer needs. The brand owners knew that low sugar was an emerging trend in the market and, therefore, decided to promote its sugar-free products to reach its target audience. Vita achieved a CRP growth rate of 13.4% CRP in 2019.

MORE MOMENTS

Another lever is for brands to create more moments or shopping occasions. Consumers purchase from a range of brands, which means that at every category occasion, there is a chance that a person might purchase yours. To increase this chance, brands must ensure that they are available and relevant in as many moments of consumption as possible. For example, Chinese brand Nongfu Spring executed this lever by promoting a wider range of occasions of consumption. This allowed the brand to reach a CRP growth of +10% in 2019. Brands can also use this lever by creating new formats or flavours that are consumable in a broader range of occasions.

MORE CATEGORIES

Brands can stretch across different categories to attract buyers whose needs are not currently met by the existing brands' functions. In China Mainland, fast growing soy sauce brand Chu Bang has continuously expanded into other meal-related categories, such as cooking oil, ketchup, and bouillon. The brand achieved a CRP growth rate of 10.2% last year.

MORE TARGETS

Brands can also attract new buyers who do not currently purchase the brand or the category by creating new variants that they know will appeal to a broader range of individual requirements. Cadbury Dairy Milk in Malaysia, for instance, achieved 24% CRP growth in part by leveraging more targets. While not the brand's main source of growth, Cadbury Dairy Milk launched many product variants to tap into a range of consumer preferences. Without a doubt, this played an important role in driving the brand's success in 2019.

MORE PRESENCE

The final lever for brand growth is more presence. Many brands are increasing the number of geographical locations in which a shopper can both see and choose their brand. This often requires adapting product ranges to suit local tastes. In health and beauty categories, leading fragrance brand Adolph increased its presence in upper-tier cities in hyper and large markets. This has helped the brand to acquire more shoppers and to achieve a CRP growth rate of 73.4% in 2019.

ASIA MARKET FEATURES

CHINA MAINLAND
INDONESIA
KOREA
MALAYSIA
PHILIPPINES
TAIWAN
THAILAND
VIETNAM

CHINA MAINLAND

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Yili	1297.3	91.6	7.9
2	Mengniu	1081.3	89.1	6.7
3	Master Kong	825.5	81.0	5.7
4	Haday	566.3	75.7	4.2
5	Shuanghui	429.9	60.7	3.9
6	Want Want	426.2	64.1	3.7
7	Nongfu Spring	408.3	63.2	3.6
8	Liby	382.5	65.6	3.2
9	Bright	367.3	37.4	5.4
10	Hearttex	362.1	59.7	3.4

In 2019, Chinese brands continued to dominate the top 10 most chosen brands list, with Yili as China's most chosen brand for the fifth year running. Yili, together with Mengniu, as two of the largest dairy brands, were chosen over 1 billion times by Chinese consumers in 2019. Within the top 10 brands list, Haday and Nongfu Spring saw the fastest growth on consumer reach point. Xinxiangyin was the only new brand in this year's top 10.



Haday:

Haday won over Chinese shoppers' stomachs within a highly competitive soy sauce market. The brand is riding on the healthy trend in seasoning categories. Its Premium Golden Label Light Soy Sauce uses an advanced technology to enhance its product flavour and nutritional value. As a result, Haday managed to attract 7 million additional Chinese urban households in 2019.



Nongfu Spring:

Nongfu Spring was expanding toward a wider range of usage and occasions of consumption, allowing the brand to reach a CRP growth of +10% in 2019. Nongfu Spring's 5L packaged bottle was very successful, with consumers increasing their use of packaged water as they upgrade from tap water to packaged water for home cooking and tea making occasions. Recently, packaged water in large format also observed an uplift in sales during COVID-19, as shoppers have remained at home. Brands that quickly react to this need and adapt to post COVID-19 "new normal" behaviour will reach more shoppers.

TOP 10 GROWING BRANDS IN CRP

TOTAL FMCG

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
33	C&S	157.4	11.4	32.9	2.7
25	Bluemoon	217.5	10.7	48.4	2.5
47	Jin Mailang	133.8	10.4	25.9	2.9
17	Taoli	257.1	10.2	30.3	4.7
50	Chu Bang	131.3	10.2	27.8	2.6
7	Nongfu Spring	408.3	9.9	63.2	3.6
49	Omo	131.9	8.6	34.8	2.1
4	Haday	566.3	8.1	75.7	4.2
24	Luhua	220.2	8.1	43.4	2.8
42	Pepsi	141.5	6.7	32.5	2.4

Homecare brand C&S was the fastest-growing among the top 50 brands – with 11% growth in consumer reach points, rising nine places in rankings. Through continuous premiumization, product innovation, and omni-channel strategy, C&S successfully attracted 5.73 million additional Chinese urban households in 2019. In addition, Bluemoon, Jin Mailang, Taoli, and Bang Chu made the top 5 fastest growing brands.

This year, only two international brands were within the top 50 risers: Pepsi, who successfully deployed its strategy to attract more buyers in lower tiers, and Omo, who reached more consumers through its dish wash products.



Vita:

Low sugar is the growing trend in Ready-to-drink (RTD) tea in recent years, as most of the key players launched low-sugar or sugar-free products to meet evolving consumer needs. Vita successfully promotes its sugar-free products to reach high-income females who are looking for healthy alternatives when drinking beverages. Vita also attracts more shoppers for meal occasions through its 1 liter pack.

TOTAL BEVERAGE

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 30 CHOSEN BRANDS IN BEVERAGE SECTOR

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
26	Jin Mailang	44.8	21.3	11.1	2.2
23	Vita	52.6	13.4	11.9	2.4
1	Nongfu Spring	408.3	9.9	63.2	3.6
20	Scream	57.5	8.1	17	1.9
10	Nescafé	122.1	7.5	27.7	2.4

TOTAL DAIRY

BASED ON CRP GROWTH PERCENTAGE WITHIN
TOP 30 CHOSEN BRANDS IN DAIRY SECTOR

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
29	New Hope	21.7	24.9	4.2	2.8
14	Nestlé	43.2	10.3	11.3	2.1
12	Classy Kiss	50.5	6.2	8.7	3.2
22	Xiangpiaopiao	29.1	6.1	10.4	1.5
17	Vitasoy	36.0	5.7	8.0	2.5



New Hope:

New Hope is a regional dairy manufacturer that focuses on chilled milk and yogurt and is riding on the trend of increasing needs for freshness in dairy. Additionally, as a brand historically based in the South West of China, New Hope quickly expanded to other regions and won more geographies, especially in the East and North regions. With a CRP of 22 million, there is still plenty of room for New Hope to grow.

TOTAL FOOD

BASED ON CRP GROWTH PERCENTAGE WITHIN
TOP 30 CHOSEN BRANDS IN FOOD SECTOR

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
7	Taoli	257.1	10.2	30.3	4.7
20	Chu Bang	131.3	10.2	27.8	2.6
1	Haday	566.2	8.1	75.7	4.2
10	Luhua	220.2	8.1	43.4	2.8
28	Jin Mailang	89.1	5.7	19.6	2.5



Chu Bang:

As one of the leading brands in soy sauce, Chu Bang continuously strengthens its position through its core SKU, and is actively expanding to other meal-related categories, such as cooking oil, ketchup, and bouillon. It offers products that provide convenient solutions for cooking. For example, its chili sauce and mushroom sauce could be added as extra flavour on dishes or directly mixed with rice and noodles.

TOTAL HOME CARE

BASED ON CRP GROWTH PERCENTAGE WITHIN
TOP 30 CHOSEN BRANDS IN HOME CARE SECTOR

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
24	Botare	26.2	76.2	8.5	1.7
29	Vewin	20.5	19.2	7.5	1.5
21	Maryya	31.1	18.8	10.3	1.7
16	Babo	41.4	15.9	12.6	1.8
26	Green Way	23.9	14.4	7.3	1.8



Botare:

Botare offers a wide range of homecare products, with its core products in paper. It has a very clear value positioning: good value for money products with heavy promotion on multi-pack offers to attract new consumers. Botare puts a great amount of resources into e-commerce and cooperates closely with Pinduoduo, a fast growing online social e-commerce platform where shoppers can enjoy large discount through group purchase. Therefore, Botare is able to reach more low-tier city consumers compared to other brands in the homecare sector.



Adolph:

Adolph is the leader of the fragrance segment in the Chinese haircare market, achieving an astonishing +73% CRP growth and ranked the #1 rising brand in the health and beauty sector in 2019. This brand started from lower tier cities, offering relatively premium products with a main distribution in personal care stores. In recent years, it increased its presence in upper tier cities in hyper and large super, helping the brand to gain more shoppers.

TOTAL HEALTH & BEAUTY

BASED ON CRP GROWTH PERCENTAGE WITHIN
TOP 30 CHOSEN BRANDS IN HEALTH & BEAUTY SECTOR

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
25	Adolph	54.2	73.4	16.1	1.9
28	VS	45.2	12.6	14.1	1.8
20	Dove	61.5	9.4	17.9	1.9
11	Saky	99.4	8.1	27.3	2.0
21	Kotex	61.3	8.0	16.1	2.1

JINMAILANG

ENTERING A NEW MARKET SEGMENT IN PACKAGED WATER,
INTRODUCING BIGGER PORTION IN INSTANT NOODLES MARKET.



HOUSEHOLDS

25.9%

CRPs

133.8 MILLION TIMES

RANK

#1 TOP GROWING BRAND
IN BEVERAGE SECTOR

KEY RECIPE FOR GROWTH

 NEW NEEDS

 MORE MOMENTS

Jinmailang packaged water (contributed 93% of total Jinmailang Beverage CRP incremental) has adopted the “diversified competition” strategy, which has helped beverages reach nearly 45 million households. With an objective of fitting the drinking habits of Chinese people, Jinmailang has innovatively launched cold spoiled-water (accounted for only 35% of the overall Jinmailang packaged water CRP, but contributed 60% of the CRP increase), entering a new market segment to compete with the existing packaged water brands.

Over the past two years, Jinmailang revolutionized the instant noodles market by introducing “Yidaiban” and “Yitongban” – products with a bigger portion than usual in this market. With this product line, Jinmailang tapped into consumers’ new needs and rapidly expanded its market share, reaching as many as 35 million households last year.

EXECUTIVE INTERVIEW

C&S Paper Co., Ltd.

**Kantar: What makes C&S unique as a brand?**

As the first domestic household paper company listed on the A-share market, C&S has its own unique corporate culture and business management, which is committed to providing high-value life experiences to the consumers.

High quality products and R&D innovation are the two cores that we consistently adhere to, since our establishment in 1979.

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

Riding on the dynamic market trend, C&S continuously digs for the potential growth fields and finds the best solutions through three strategic levels.

From the brand level, C&S and Sun are our core brands. To meet consumers' needs and let them choose the right products for them, C&S continuously meets high-premium level standards. Our Sun brand pursues high quality with valued-price. Besides household paper products, C&S also launched unbleached cotton tissue Xinmian Chubai and female sanitary product Duo Leilei, which is focused on young female consumers.

From channel strategy, in addition to traditional channels (hypermarkets, supermarkets, and dealers), C&S also invests in new channels, such as e-commerce, new retail, and mother and child retail to provide faster and more convenient shopping experience.

For talents, C&S believes that people are the first productivity of the business. We focus greatly on staff development and continue to attract talents in various fields, which ensures the sustainable development and innovation of C&S.

Kantar: How are you taking action in COVID-19?

In order to solve the problem of insufficient masks and respond to the government's call, C&S actively fulfilled its corporate social responsibilities and donated 10.8 million RMB to the Hubei Province since the COVID-19 outbreak. We immediately invested production equipment of 2 million pieces of masks and donated more than one million pieces of surgical masks to medical staff in different cities across the country.

Personal care and households cleaning habits have undergone major changes due to the impact of COVID-19. Consumers have paid more attention to product quality and purchasing behaviour has also changed significantly. C&S actively deployed in the health industry, quickly helping to develop masks and various antibacterial products. During the outbreak, companies quickly launched online office operations, promoted online sales of various channels, and seized the opportunity of foreign market, creating rising performance and profits.

Kantar: What are your thoughts about the market development and consumer behaviours in the next five years?

Consumer purchasing behaviour will be fundamentally impacted by the rapid development of the internet, the integration of online and offline channels, the emerging 5G era, and, especially, the COVID-19 pandemic. If the rapid growth of e-commerce was boosted by SARS in 2003, COVID-19 in 2020 will push all industries to digital transformation. New retail models such as community group buy and live-streaming selling are likely to break through the existing barriers of online and offline channels and become a trend for the whole nation and overall industries.



The FMCG market in China remained fiercely competitive in 2019, as more new entrants joined the market to challenge the incumbents. Disruptive growth was witnessed across all categories. Chinese consumers continue to desire high quality products, and consumers in lower tier cities remain critical to incremental growth. The entry of new brands, either from abroad via cross-border e-commerce platforms or other with rising fast through local social media platforms, resulted in intensified competition among the established players, but also brought new dynamics to the market.

In such a rapidly changing market, winners in FMCG, whether big or small, grow by excelling in at least three brand building practices:

- Identifying and fulfilling emerging and highly individualized consumer needs
- Optimizing marketing investment with the most effective content, social media, and livestreaming-based ecommerce
- Integrating online and offline channels with a coherent omni-channel strategy

A post COVID-19 China presents opportunities for all players – brands will have to demonstrate full agility and relevance, tailor their offer to new occasions, and build their marketing message closely around new media and sales channels.



Jason Yu
Managing Director, Greater China
Worldpanel Division, Kantar



INDONESIA

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG – INDONESIA URBAN



2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Indomie	1,315	98.6	43.7
2	So Klin	876	95.3	30.1
3	Kapal Api	693	81.7	27.8
4	Royco	612	85.7	23.4
5	Mie Sedaap	588	88.8	21.7
6	Indofood	501	87.1	18.9
7	Frisian Flag	485	88.4	18.0
8	Lifebuoy	428	91	15.4
9	Downy	427	81.4	17.2
10	Sunlight	421	92.5	14.9

The Brand Footprint ranking shows that most of the growing brands enlarged their shopper base. Strategies that aim to get new consumers are consistently more successful than those aiming to increase loyalty. The commonality of these top 10 brands is that they are high shopper-based, with more than 80% of Indonesian urban households having purchased from these top 10 brands. High Consumer Reach Points reflect the brands popularity and how close it is to the heart of the Indonesian shopper. It is important to increase buyers for any brand to improve its ranking, as penetration is the ultimate key to drive growth.

Several highlights of Brand Footprint in Urban Indonesia:

- The study shows that local brands manage to establish a stronger presence, where 4 of the top 5 brands are coming from local manufacturers. Local players' ability to adapt quickly to the latest consumer trends enable them to be more productive in launching new innovations to the local market.
- Food category dominates the top 10 ranking, whilst top players from household products, beverage, personal care, and dairy also manage to secure several positions as well.

- Playing in several categories is one of the key levers that many players do.
 - So Klin, the runner up, reaches its consumer through floor cleaner, detergent, fabric conditioner, and bleach. Its performance is driven by a strong buyer base and continuous innovations. So Klin also become the most chosen homecare brand in Indonesia Urban.
 - Indofood also climbed to 6th rank. Playing in seasonings, sauces, and cooking stock helped them establish a strong brand awareness.
 - Other top brands that are playing in several categories and secured positions within the top 10 include Frisian Flag (7th) and Lifebuoy (8th).
- Kapal Api retained its 3rd spot in the Brand Footprint. Kapal Api continues to establish its dominance to stay ahead of the market and be number one in the beverage sector by having continuous communication to maintain a large buyer base.
- Food additives is still popular and one of the most chosen categories, as it supports practicality in cooking. Royco secured the 4th position within the top 10 brands, through its large buyer base, making it the most chosen food additive brand in Indonesia Urban.
- Instant noodle has become a significant part of the Indonesian community's daily life. Aside from the familiar taste, affordable price and vast nationwide distribution also make Instant Noodle an all-Indonesian favourite. Another instant noodle brand, Mie Sedaap, secured the 5th position.
- Downy successfully entered the ranking this year in 9th position, with 19% CPR growth. In addition to increasing the buyer base, Downy can outperform the competitors by increasing the consumer frequency of consumption. Downy boosted its performance by launching new products with new benefits that offer anti-malodour and maintaining freshness. It evoked a brand experience by highlighting the relevant tension using localized jargon (which is apek).

TOP 10 GROWING BRANDS IN CRP

TOTAL FMCG – INDONESIA URBAN

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
9	Downy	427	19	81.4	17.2
2	So Klin	876	15	95.3	30.1
33	Dancow	174	14	58.4	9.8
47	Giv	119	12	49.2	7.9
17	Bango	342	9	81.2	13.8
24	Sun Kara	244	9	71.9	11.1
43	Nuvo	128	8	53.3	7.8
1	Indomie	1315	7	98.6	43.7
39	Ultra Milk	142	7	54.1	8.6
25	ABC Heinz	238	6	80.2	9.7

- The key to brand growth is increasing buyer base by attracting non-buyers and encouraging shoppers to purchase more frequently. Accessibility to all buyer segments through availability and affordability play an important role in pushing brands to perform well in the market. Some top gainers optimize their sachet and small pack to increase penetration among mid to low affluent consumers:

1.

Giv successfully maintained its performance despite the slowdown in the category. Giv down-sized and offers small size products (60ml) to maintain its affordability and to target lower SES. This has helped them continue to increase penetration in secondary urban cities and rural areas, whereas competitors are stagnant or tend to decline.

2.

Bango is one of the foods brands that is growing faster this year, growing by 9% of CRP Growth. Affordability is one of the key levers to reach lower SES. Bango is applying packsize strategy and offer more affordable price in order to make themselves part to the shopping basket of the lower SES.

DANCOW



HOUSEHOLDS

58.4%

CRPs

174 MILLION TIMES

RANK

#2 IN DAIRY

KEY RECIPE FOR GROWTH



MORE TARGETS



MORE MOMENTS

As one of the market leaders in the dairy sector, Dancow reported stellar growth driven by stronger buyer recruitment and consumption, continuing its leadership in the category.

Leveraging the consumer dairy journey, Dancow became one of the top brands for school-aged children when entering the market for children's milk powder.

The availability of all pack sizes and price ranges ensured that Dancow could reach all buyer groups. Dancow also emphasized the benefits of high calcium and fish oil in its products, which strengthened their brand value. Campaigns that focused on how to be the best mother to children helped Dancow build a strong customer relationship with mothers.

In addition to such strong buyer' recruitment, Dancow tried to further excite the market to increase buyer consumption by offering "more moments" via their Shaker campaign.

Altogether, the agility to recruit buyers from adjacent categories, such as condensed milk and GUM, became a success key for Dancow to grow as a brand collectively.

EXECUTIVE INTERVIEW

SPOKESPERSON:

Ricky Afrianto

Global Marketing Head

**Kantar: What makes Roma unique as a brand?**

Roma is the biggest brand in Indonesia when it comes to biscuits. Across all markets, biscuit categories usually have one iconic brand that is part of everyone's life. In Indonesia, Roma has that stature.

Dipping Roma in a cup of tea or coffee is how Indonesians begin their day. Roma is part of great family moments. Since its launch, the brand purpose has been to "Serve Goodness and Happiness." This philosophy guides us all the way. This guiding principle is the one that drives our business growth, innovation, and sustainability.

Kantar: Where is your biggest opportunity for growth (this could be a region, category, or strategy)?

At Mayora, our vision is to be the best food and beverage company in Asia. We are always looking for opportunities to delight consumers. We believe that every category has a potential to grow through purposeful offering, great communication, insight, and innovation. As for the region, Asia, India, Middle East, and Africa are the regions that are growing and promising.

Kantar: What was your biggest success in 2019? Why?

As of 2019, Mayora is one of the highest FMCG growth in Indonesia amongst top 10 FMCGs companies. This is a remarkable achievement in Mayora's successful track record, which shows a CAGR > 15% in the last 10 years.

Kantar: What are your concerns for your brand, category, or industry as a whole?

We are concerned about brands, categories, and industries losing relevancy and creativity in driving the growth and building meaningful brands for consumers around the world.

As more and more media fragments and digital platforms penetrate, the industry is changing in the way brands get built. Digital's aggressive price off/ promo advertising model is making brand building tougher and tougher and sensitizing consumers to excessive promo buying. Our challenge would be to build power brands in this new normal.

Kantar: How do you think 2019 in FMCG will be remembered?

People will remember that in 2019, FMCG volume growth was negative, while its value growth in single digits rose. And this has been happening for the last 3 years already.

Having said that, there are companies and brands that can survive and maintain double digit growth, and one of them is Mayora. We believe that purposeful brands with great campaigns and innovation will always win the consumer's heart, and this is the secret to achieve double digit growth again.

Kantar: Which other brands did you admire in 2019? Why?

At Mayora, we do not see a specific or particular brand or company as a benchmark. Rather, we see that each company has its own strengths.

A couple of brands/companies that we admire include:

- In Indonesia, we do see how the local company Emtek Group moved from traditional TV stations to embrace technology and become a company that offers integrated solutions in media.
- Ferrero is a brand that consistently offers high quality, premium products.
- We are impressed by the way Mars manages the distribution and visibility around the world.
- We admire Huawei's infrastructure and how it has become an innovative company that offers premium products and competes with global players.

Kantar: What about consumer behaviour has surprised you the most over the past five years?

When we realize that consumers who we view as older actually behave similar to the youth regarding technology. They embrace digital/technology like chatting, video calling, and e-payment.

The adoption of e-commerce from FMCG perspective in Indonesia is not as high as in China. And we do see two key barriers: delivery cost and the behaviour.

Our experiences tell that, in FMCG perspective, consumers don't respond to advertising messages via digital platforms as good as when it is all promo or discount.

Kantar: And what do you think the next five years will hold?

Technology will disrupt distribution in FMCG. This will shake the industry. Only those players who prepare for this will survive and win.

Changing consumer behaviours, the increasingly cluttered nature of the media and new technologies will continue to disrupt the way we do our business and the way we market our brands.

Business can go up and down, including start-ups, but there is always a better solution for consumers. No more instructions in apps or digital are needed because these platforms intuitively understand people better.

We will no longer discuss the importance of offline VS online or omni-channel or the rise of AI, IoT, and ML, but rather the competition from each player to bring value to consumers and humanize digital/technology.

Kantar: What did you do differently during COVID-19 to still reach your consumers?

We are working hard to always stay relevant:

- Adapt your communication to reflect the current situation and offer the solution.
- Strengthen your brand purpose to drive equity campaign.
- Focus on the right brand/category, geography, and investment.

EXECUTIVE INTERVIEW

SPOKESPERSON:
Arvind Rayappa
Commercial Leader,
Indonesia Fabric
and Homecare



Kantar: What makes Downy unique as a brand?

Downy has been relentlessly focusing on providing consumers with a superior laundry experience. Downy has managed to become synonymous with the key category need of long-lasting freshness for clothes. We pioneered the sensorial category, with winning claims such as “like wearing perfume every day” and “even better than expensive perfumes.”

Kantar: Where is your biggest opportunity for growth (this could be a region, category, or strategy)?

The biggest opportunity for Downy will be to stay close to consumers’ evolving needs in the new normal and design our products, benefits and communication that best addresses these needs.

Kantar: What was your biggest success in 2019? Why?

In 2019, Downy made a move to own Malodor removal, another core category need, leveraging insights which other brands had not tapped into. The new products launched were supported by communication that was relevant and resonated with the Indonesian consumer, resulting in spectacular in-market success and the #1 position in Indonesia Fabric Enhancer market.

Kantar: What do you think the next five years will hold?

Moving forward, the brand’s mission is to become a true love mark for the Indonesian consumer, delighting them at the first and second moments of truth.



FMCG market has bounced back in 2019, as the Indonesian economy has demonstrated a stable performance over the past year. The bounce back has been driven by a volume uptick which is a good sign for the manufacturers. While there are opportunities abound for brands to continue growing, brands cannot afford to become complacent and expect growth to happen organically. Brands will still need to ensure that they remain relevant to the consumer and earn their growth.

The longer-term trends remain relevant - going digital, seeking convenience, experience-led consumer behaviour. Additionally, the trend of the shift in trade channels pushed on by minimarkets and growing e-commerce means that consumers today are spoilt for choices in their shopping.

I am happy to see that most of the top chosen brands continue to be among the most chosen brands in Indonesia and, at the same time, there are some new brands breaking into the top brands list. I am sure there are many learnings from the levers to growth that the marketer can apply to their brands.



Venu Madhav

General Manager, Indonesia
Worldpanel Division, Kantar



TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG



2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Ottogi	92.5	90.2
2	Seoul Milk	76.9	55.7
3	Dongwon	71.9	85
4	Masinnen Milk	71.3	50.8
5	Chungjungone	65.4	83.7
6	Baekseol	62.6	83.5
7	Will	58.3	9.4
8	Bibigo	54.7	70.4
9	Ottogi ramen	49.7	70.7
10	Jinramen	45.5	61.9

In Korea, many consumers have already experienced market paradigm evolution due to the exceptionally digitalized environment, demographic changes, and rapidly changing social and cultural environment. And we expect that COVID-19 will accelerate this paradigm evolution.

Rapid changes in retail landscape, target expansion, product concepts, OTT, and the new “homeconomy” (home+economy) are happening in diverse aspects. The importance of the online market in FMCG is steadily increasing while its target has expanded from young targets to seniors. Furthermore, in-home consumption behaviour centred on families of one to two people is expanding into overall household consumption behaviours.

“Accelerated E-commerce Growth in FMCG Market”

“Active Senior” refers to those in their 50s and 60s with ample wealth and income, a term that has already emerged in Korea three to four years ago. Unlike the typical elderly in the past, they spare no investment or consumption on themselves, especially in the online market.

Right now, the expression “target expansion within the channel” may be correct, but in the near future, categories targeting younger age groups will be able to expand their targets to the senior group. In other words, the target group biased toward specific age groups will be able to expand their consumer touchpoint, thanks to e-commerce. Thus, the reverse situation, “target expansion through the channel” will become common.

For example, the main target of Home Meal Replacement (HMR) products was households with teenagers. However, we are now living in the era in which seniors also purchase HMR to ease their cooking and purchase ready-made kimchi instead of making it themselves. In fact, based on our household panel data, HMR was among the top 3 categories purchased online in adult family and senior households.

Changes brought about by digitalization are not confined to Generation Z. Even seniors in their 60s and older use Coupang and SSG via mobile, and the hurdles of digital consumption activities are collapsing fast. Now, the time when brands shall check their online market target group has once again arrived.

“Increased consumption based on individual consumer's subjective rationality”

The buzzword "untact" refers to contactless service without face-to-face encounters, and "homeconomy" refers to consumers who spend leisure time at home. These two trends represent the recent consumer purchase behaviours and will be a medium for "subjective rational consumption style," which will be a major shopping behaviour as an extension of past "value consumption" trend. This new style of shopping behaviour will reflect the changes of consumption propensity varying from person to person or from time to time.

Everyone pursues rational spending from time to time and sometimes spends on luxury. Reasonable expenditure through online shopping is rudimentary and consumers don't spare money when it comes to health, regardless of age. On the other hand, others of the same age invest in themselves by spending in slightly more fancy categories.

While there are people who mostly stay at home and don't spare money for home wear, there are people who sometimes buy expensive luxury bags even if they only go out rarely. Meanwhile, during the coronavirus quarantine, consumers drank Dalgona coffee, which is made by combining instant coffee, granulated sugar, and water and stirring the mixture 400 times (Dalgona coffee went viral online recently, with people showing interest in the drink both in and outside South Korea). Isn't it ironic? There is no fixed consumption behaviour among consumers even within similar age groups or similar lifestyle patterns. Ultimately, "subjective rational consumption style," or so-called value consumption, has become a new type of lifestyle.

Now, we should take note of consumer's "multi-persona." It is time for an understanding of consumption trends based on subjective rationality, in which more and more individuals are the main consumers due to increased interest in "me."

“NEW NORMAL:” Market After the Time of Coronavirus

Because of the COVID-19, we often hear the buzzword "new normal." The post-pandemic era will most likely be a new opportunity to bring about another "new normal" era.

In fact, this new normal has already begun. Now is the time to start considering surpassing ever-evolving consumers, not just grasping targets, product attributes, consumption behaviour, and cultural activities that weren't previously known or recognized until yesterday.

MOST CHOSEN BRANDS BY SECTORS

TOTAL FOOD

2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Ottogi	92.1	90.1
2	Chungjungone	65.4	83.7
3	Beksul	62.6	83.5
4	Dongwon	57.4	79.8
5	Bibigo	54.7	70.4

Demand for those convenient, quality, but price-competitive, products has been on the sharp rise for many years, with many options increasing and consumer tastes also evolving. Increasing single-person households and co-parenting trends among couples are boosting the local HMR market.

While the food industry has been aggressively launching a new HMR portfolio, Chungjungone (ranked #2) has successfully pioneered snacks for the drink HMR market, and is now currently widening the range of its portfolio. CJ also grew significantly, taking a large share of the growing HMR market with its brand Bibigo (ranked #5).

TOTAL BEVERAGE (EXCLUDING BEER)

2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Maxim	31.3	56.5
2	Coca-Cola	28.7	36.9
3	Chilsung Cider	23.4	39.5
4	Haru Yachae	19.7	3.7
5	Delmonte	16.6	35.9

Dongsuh's Maxim, which has an unrivalled share of the shrinking instant coffee market, has been trying to expand its buyer pool by bringing various types of products into the market. But CRP slightly dropped as the buyers from the coffee mix market shifted to others, such as RTD coffee.

In the meantime, Haru Yachae, which was outside the 2018 rankings, recently moved up to 4th ranking, with a significant increase in CRP due to winning more from regular delivery and diversified online channel distribution.

TOTAL DAIRY

2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Seoul Milk	76.9	55.7
2	Masinnen Milk	71.3	50.8
3	Will	58.3	9.4
4	Sowanamoo	44.0	58
5	Denmark	34.3	46

TOTAL HOMECARE (EXCLUDING HAIR/BODY)

2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Perio	11.4	38.2
2	2080	9.0	30.3
3	Saffron	8.5	26.1
4	Downy	7.7	22.3
5	Yuhan Lax	5.4	19.9

In the homecare market, where the importance of online channels continues to expand, the CRP of LG Household & Health Care brands Perio (ranked #1) and Saffron (ranked #3),

which had been difficult to actively play on main online channels (social commerce, etc.) has decreased overall. On the contrary, Aekyung 2080 that focused on online channels moved up to second place.

MOST CHOSEN BRANDS FOR BEAUTY MARKET

In 2019, the total cosmetics market showed signs of recovery, thanks to skincare. Although the market's recovery has slowed due to the COVID-19 blow in the first half of 2020, masstige brands have maintained solid performances based on online and H&B stores. The colour cosmetics market is expected to slow down, as people don't go out much due to coronavirus. Prestige brands sales will be the most negatively impacted.

Furthermore, as prestige brands, which have a high proportion of offline customer contact points compared to masstige brands, begin shifting to online, competition is expected to intensify. Therefore, brands need customized strategies depending on changes in consumer purchase behaviour by major online platforms.

TOTAL SKIN CARE (BEAUTY PANEL DATA)

2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Innisfree	10.2	25.4
2	Dr.G	5.1	20.7
3	The Face Shop	5.0	13.9
4	Sulwhasoo	4.7	13.7
5	Atomy	4.7	9.2

- Korean consumers equip multiple skin care products in diverse format and functions and prescribe the usage subject to daily skin condition. This trend has become vivid in Y2019, resulting in notable growth of functional serum and soothing cream.

- Masstige brands with reasonable price such as Atomy continued to excel while prestige brand Sulwhasoo struggled in CRP.

- Dr.G climbed up to 2nd place based on its successful line extension from hero cream (Red Blemish) to toner and milky lotion.

- Fierce competition amongst derma skincare brands claiming anti-acne and skin-soothing benefits are expected.

TOTAL COLOR COSMETICS (BEAUTY PANEL DATA)

2019 Rank	Brand	CRP (M)	Penetration% 2019
1	Etude	6.2	16.9
2	Innisfree	6.0	18.8
3	Missha	5.8	19.4
4	The Face Shop	3.8	14.5
5	Clio	3.5	13.9

- In Y2019, luminant and dewy look on both face and lip makeup has been a trend, which is led to a success of liptint category.

- Roadshop brands Etude and Innisfree maintain top CRP based on their hero products with positive consumer reviews. However, limited consumer traffic in offline stores led to CRP contraction.

- Top ranked Etude tries to improve consumer reach points to their young targets by expanding distribution to H&B stores and diverse online platforms.

- Clio showed notable growth in CRP along with success of H&B stores amongst young target. With the lead of cushion, both liptint & eye makeup also contributes to gain additional traffic.

MISSHA

NO.2 BRAND IN KOREA COSMETICS MARKET
 ARTEMISIA FRANCHISE CONSISTING OF INTENSE CARE (SERUM & CREAM)
 – HERO FRANCHISE



Missha is a twenty-year-old cosmetics brand that specializes in both skin care and make-up. Missha ranks as the #2 brand in the Korea cosmetics market in CRP, reaching 27.3% of Korean female consumers. Missha is a pioneer brand that opened low priced, single-branded, free standing stores (FSS) in Korea.

Recent years have proven challenging for single-branded FSS, as consumer traffic in offline mass cosmetics is focused on H&B stores with a wide range of brand options. However, Missha survived through the struggles by posting +9.7% CRP growth in Y2019. Missha's proactive reaction to market change regarding product and distribution recruited buyers into the brand amid unfavourable market environment.

Missha skin care records +10.9% CRP growth by intensifying hero franchises consisting of intense care (serum & cream). The **Artemisia franchise, in particular, contributed to recruiting additional millennial buyers to the brand by satisfying consumer demands of watery essence for skin soothing** (Missha age 15-34 skin care CRP YoY GR% =+16.5%). Furthermore, Missha sustains its reputation in make-up thanks to continuous new product launches in its hero category, BB Cream, as well as Glow Skin franchise development.

Distribution-wise, **its FSS's conversion from single-brand shops to multi-brand shops further intensifies Missha's channel traffic-driving power.** Moreover, Missha's entrance to TV Home shopping and revitalizing online brand mall contributed to CRP growth across all age groups.

Distribution expansion beyond traditional single-branded FSS will enhance access convenience to potential customers. In the mass cosmetics sector, where hero products play a crucial role, Missha's strategic movement to intensify hero franchises is also expected to help raise brand competitiveness.

HOUSEHOLDS

27.3%

CRPs

5.8 MILLION TIMES

RANK

#2 IN COSMETICS

KEY RECIPE FOR GROWTH

 MORE PRESENCE

 MORE MOMENTS

//

This year, COVID-19 has introduced an unprecedented and powerful impact on the general environments surrounding us.

Therefore, to face the changes in the business environment that COVID-19 will bring about, it is crucial that we take this time to check our own brands from various angles such as consumer behaviour, distribution environment, products, as well as communication aspects.

By dealing with these drastic changes in the market wisely, we can expect a better market position than before the COVID-19 outbreak.

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Francis Oh

General Manager, Korea
Worldpanel Division, Kantar



MALAYSIA

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Maggi	44	85.4	8.7
2	Milo	33	81.6	6.9
3	Marigold	21	62.8	5.7
4	Dutch Lady	21	60.2	5.9
5	Adabi	20	55	6.3
6	Ayam	19	58.9	5.4
7	Babas	15	44.6	5.8
8	Nestlé	15	60.9	4.1
9	Munchy's	15	61.6	4.1
10	F&N	14	54.3	4.5

Continued dominance of big players (Maggi and Milo) with the emergence of local and regional players (Adabi, Ayam, and Babas) are the key themes in the 2019 Malaysia market!

Over the past few years, Malaysia has been observing mainly flat FMCG growth, and 2019 was no exception. FMCG showed a flat growth, despite a moderate growth of 4.3% for total GDP. This could be driven by a continued declining trend of consumer sentiment index after the general election in 2018. This year, shoppers did purchase FMCG items more frequently, but the basket size declined, which negated the growth of frequency rebound. Shoppers also downgraded to cheaper options, especially in dairy, which resulted in a negative impact on consumer spending.

With the major impact of COVID-19, the growth will be even more challenging for some FMCG categories moving forward, hence, a deep understanding of the consumer mind set and a tailored strategy across channels and segments will be key to success. Understanding who your shoppers are, as well as how and when they shop and use your products, is more important now than ever, as this behaviour forms the basis of new-norm post COVID-19.

Kantar's recommendation would be:

1. **Right Channel Focus** – with the change in shopper purchase habits, priority should be given to the winning channels.
2. **Strengthen Value Proposition** – key messages and media channels are even more critical.
3. **Ensure Repeat Purchase** – trial generation will be key for all brands, but it will be important to know how to retain your shoppers.



Maggi:

Maggi sustained its #1 position in latest year thanks to a great performance on both Instant Noodles and Culinary Aids! The brand reinforced its presence on Goreng Noodles with the second year of success of “Maggi Pedas Giler” range and managed to strengthen Maggi Cukup Rasa’s shopper base.



Milo:

Malaysian’s favourite chocolate malt beverage, Milo sustained its 2nd position in consumer reach points for 2019. Milo continued to spend on both conventional and online media as well as create more touch points through events and other activations to sustain shoppers in the market.

TOP 10 GROWING BRANDS IN CRP

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
43	Goodday	6	56	34.8	3.1
41	Prego	6	27	35.6	3.1
12	Saji	14	19	48.3	5.0
23	Mr. Potato	9	19	43.1	3.7
5	Adabi	20	17	55.0	6.3
34	Kotex	7	12	38.7	3.1
31	Daia	8	9	39.5	3.4
18	Jalen	11	8	40.9	4.5
29	Surf/Sunlight	9	8	41.7	3.5
8	Nestlé	15	7	60.9	4.1

TOTAL BEVERAGE

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
15	Drinho	2	24	11.8	2.4
8	Tropicana	3	20	21.0	2.8
13	Spritzer	2	19	11.6	2.7
10	Super	3	17	15.8	2.7
16	Cactus	2	17	7.8	3.7



Tropicana:

A top brand in the juice market, Tropicana has not only ventured into different flavours to attract more shoppers, but it also launched 100% fruit juices to tap into health trends. Additionally, the push for bundle pack promotions help generate more purchases.

TOTAL DAIRY

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
10	Goodday	6	56	34.8	3.1
32	Oki	2	44	8.0	3.3
12	Farm Fresh	5	31	23.3	3.4
28	Carnation	2	24	12.4	2.3
11	Saji	5	22	24.8	3.5

TOTAL FOOD

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
18	Prego	6	27	35.6	3.1
29	Cadbury's Dairy Milk	5	24	30.3	2.9
12	Mr. Potato	9	19	43.1	3.7
51	Indomie	2	19	18.1	2.1
54	Marina	2	19	16.9	2.2

TOTAL HOME CARE

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
12	Downy	3	12	19.3	3.0
8	Labour	5	10	27.9	2.9
4	Daia	8	9	39.5	3.4
3	Surf	9	8	41.7	3.5
9	Kuat Harimau	4	8	28.2	2.7

TOTAL HEALTH & BEAUTY

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
12	Antabax	3	26	21.2	2.3
4	Kotex	7	12	38.7	3.1
10	Nivea	4	10	27.4	2.6
7	Drypers	5	9	14.5	5.6
6	Lifebuoy	5	8	30.4	2.7



Farm Fresh:

Farm Fresh has been riding on the trend of fresh milk produced locally in Malaysia. It also used unconventional channels of home delivery to reach to target shoppers. Furthermore, its innovative Kurma flavour is the fastest growing flavour amongst the mass Malay shoppers.



Cadbury Dairy Milk:

A favourite Malaysian chocolate brand – riding on mostly day to day consumption. They have launched many variants to tap into different consumer preference however the main growth is driven by their core pure chocolate formats.



Daia:

With the launch of its 2in1 product Daia Softergent, which combines the function of detergent and softener, Daia has ramped up its gains from other laundry players in the Malaysian market.



Antabax:

Antabax's growth is riding on the growing trend of medicated soaps in Malaysia. With aggressive promotions and stronger recruitment, Antabax has garnered more shoppers and more occasions over the year.



Nivea:

Nivea has key dominance across the categories where it has presence, whether be it deodorant, skin care, or baby soap/lotions.

PREGO

LEADER OF FOOD IN CONSUMER CHOICES
PASTA SAUCE AND DRY PASTA TO DEVELOP NEW CULINARY HABITS

Prego®

HOUSEHOLDS

36%

CRPs

6 MILLION TIMES

RANK

#1 TOP GROWING BRAND
WITHIN BIG FOOD
BRANDS

KEY RECIPE FOR GROWTH



Prego has successfully managed to become the fastest-growing brand within the Food sector in 2019 vs. last year. The brand has managed to not only grow its' shopper base by an incremental 211,000 new households but also increased the rate of purchase for each shopper.

The brand has capitalized on consumers' increasing needs for:

1. **Convenience**
2. **New dish experiences and experimentations**

The brand also managed to penetrate in adjacent categories such as Dry Pasta. The key pillars of Prego's growth continued to be its innovation into different flavors such as Mac & Cheese etc. and effective 360° communication plans.

With today's changing lifestyles of consumers, especially given the Covid-19 pandemic, we expect to see an increase in home-cooking coupled with attempts and desires for a broader, more varied meal repertoire. This behavioral change definitely unlocks more opportunities for food brands like Prego to win more purchases especially if it offers speed, ease, and variety in cooking.

EXECUTIVE INTERVIEW

SPOKESPERSON:
Imun Lim
 Marketing Director

Vanessa Lim
 Marketing Manager
 – Pasta Meals

Prego®

Kantar: What makes Prego unique as a brand?

Prego is a well-known brand for pasta meals. It is unique to Malaysians because it offers a good range of products and variants that suit local taste buds and preferences. The brand remains top of mind within the category.

Kantar: Where is your biggest opportunity for growth (this could be a region, category, or strategy)?

Food and lifestyle trends will continue to be the biggest opportunity to drive penetration and consumption frequency. Food trends are constantly evolving, given the influence of culture infusions and consumer openness to explore new, exciting tastes. With lifestyle changes that demand for greater convenience and a new level of creativity regarding “how we live today,” there will be higher food expectations and, hence, a bigger opportunity for a growing category like pasta.

Kantar: What was your biggest success in 2019? Why?

Our innovation pillar. We had a successful and impactful launch for our Prego Mac & Cheese. The success factors were driven by:

- Tapping into the popularity of the cheese flavour trend, which is widely accepted and familiar among Malaysians.
- Embedding a compelling and effective communication plan that strongly leveraged on kids’ pester power to encourage offtake and consumption.

Kantar: What are your concerns for your brand, category, or industry as a whole?

Given the current economic situation that is uncertain and volatile, consumers will be more careful with their expenditure, which will potentially accelerate the “habit/ trend” of bargain hunting, as consumer price sensitivity may heighten. It is important for brands to embrace this change in providing product value and be nimble in meeting these changes.

Kantar: How do you think 2019 in FMCG will be remembered?

The year where the industry had low growth in many categories due to multiple economic and social factors; one in which success was driven by multiple innovations and entrance into new categories. It will also be the year remembered as the one before “the big change” in 2020.

Kantar: What about consumer behaviour has surprised you the most over the past five years?

The experimental nature of consumers of fusing flavours in food and beverages. For example, Nasi Lemak burgers and Hainanese chicken rice potato chips. The other one which surprised me was how quickly K-influence went mass, be it in food, drinks, language adoption, music, or entertainment, across the globe, but especially in Malaysia.

Kantar: And what do you think the next five years will hold?

With the current pandemic, we can only expect volatility and uncertainty. As guardians and builders of brands, we need to focus on our purpose to our consumers, deliver what meets their needs, and be agile in our journey.

Kantar: What did you do differently during COVID-19 pandemic?

Pasta meal was a category that had a large surge during the pandemic. Prego was able to help families and moms have delicious, convenient, and affordable pasta meals when they were facing the lockdown at home.

We shared simple recipes under our campaign “Prego Semudah 1-2-3” to assist moms and relieve their pain points on what to cook for each meal. We also reviewed and changed our Ramadhan/Raya plans to focus on Malaysia’s B-40 group and front liners who needed our support in these times.

Additionally, when the pandemic started and Malaysia imposed the movement control order (MCO), Prego leveraged on the need for convenience to encourage Malaysians to consume pasta meals at home.

Riding on the insights that consumers were largely concerned about stock availability both at home and in-market, plus having the ability to prepare a meal at home, our content largely advocated the message of “#stayhome, #staysafe as Prego is a quick and easy solution to your meal preparation and can deliver overall recipe convenience.”

EXECUTIVE INTERVIEW

SPOKESPERSON:
Shammim Azad Kamruzaman
 Chief Executive Officer



Kantar: What makes Saji unique as a brand?

Saji shares a lot of local values with our consumers. Being part of the FGV group, our supply chain is fully integrated from farm to table. The brand is seen as a local champion that helps build the community and gives back to society. It is a brand that's close to their hearts, resulting in high brand loyalty.

Kantar: Where is your biggest opportunity for growth (this could be region, category, or strategy)?

Locally, the biggest opportunity for growth now is to fulfil essential needs. Our best sellers have always been palm-based downstream products, but we are moving beyond oils and fats. Our goal is to offer high quality food products at affordable prices, which are easily accessible to the masses.

Internationally, we are building our footprint in emerging markets such as Southeast Asia, Middle East, North Africa, and West Africa with the same goal in mind.

Kantar: What was your biggest success in 2019 and why?

In 2019, the brand grew exponentially in Malaysia. Each product category within Saji's brand portfolio grew beyond market average. Consumers were starting to recognise the brand beyond the cooking oil category.

Kantar: What are your concerns for your brand, category, or industry as a whole?

We are always concerned about delivering the best to our consumers and in any case, that we are not able to fulfil that promise, we go out of our way to make it up to them. Customer service is an area that is crucial to the overall brand experience. On that front, we are constantly improving.

Kantar: How do you think 2019 in FMCG will be remembered?

FMCG in 2019 will be remembered as a year of the rise of the underdogs. Many local brands emerged as unexpected winners, as consumers shift their support towards locally produced goods, a trend that may be seen across the globe.

Kantar: What about consumer behaviour has surprised you the most over the past 5 years?

Health and environmental awareness have been picking up over the past 5 years but have yet to reach mass adoption. Brands that focus on these two factors have seen an uptrend over the years but are still considered niche. Growth in e-commerce, especially in FMCG, has seen slower adoption rates compared to other categories. What's surprising is that these are seen as temporary trends, rather than permanent changes.

Kantar: What do you think the next 5 years will hold?

As previously mentioned, the next 5 years will shift the masses to embrace healthy and environmentally conscious lifestyles, and e-commerce will achieve much higher adoption rates. The pandemic is seen as the catalyst towards new and lasting behaviours. Companies will also adopt digital solutions faster, making operations more efficient, which in turn will benefit end users.

Kantar: What did you do differently during COVID-19 pandemic to still reach your consumers?

In terms of communication, we shifted our focus on digital platforms and sent messages that were relevant to their interests, such as #StayAtHome, #KitaJagaKita, and so on. Consumers found the brand to be updated and relatable to their current situation and, therefore, felt connected.

At the same time, we put in a lot of effort to immediately help those in need. Starting with supporting healthcare front-liners, we then prepared over 16,000 bags filled with essential goods to be distributed across the country.

We continued these charitable efforts through our Ramadan campaign called "Kongsi Rezeki Seikhlas Hati" where we invited our consumers to take part in helping those in need just by purchasing our products. For any FGV products purchased, send us a proof of purchase and we'll match the value of your purchase to be given to charity under your name. It fits the spirit of giving in Ramadan and is relevant to the current situation. This helped position the brand and company as caring, honest, and community-driven.

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Household FMCG spend in Malaysia has been stagnant for the past several years. In 2019, there was only 1% more CRP compared with a year ago. About half of the brands in Malaysia gained more consumer decisions, while the remaining half got less. The top 10 brands in Malaysia have a slight leading edge to win more consumer choices; however, we also see an example of a smaller brand that could gain almost 60% CRP and moved up 25 in the Brand Footprint ranking. We featured their success stories in hope to identify insights that we can all learn from.

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Howard Chang

Managing Director, Malaysia and Thailand
Worldpanel Division, Kantar



PHILIPPINES

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG



2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Lucky Me	837	97.2	35.2
2	Nescafé	520	82.9	25.6
3	Silver Swan	500	79.5	25.7
4	Kopiko	472	71.2	27.1
5	Surf	470	85.6	22.4
6	Bear Brand	444	84.7	21.4
7	Palmolive	424	77.4	22.3
8	Sunsilk	414	71.7	23.5
9	Coca-Cola	394	73.5	21.9
10	Creamsilk	389	74.3	21.4

Staple household brands make up the Top 10 most chosen brands in the Philippines

The commonality among the top brands is their high reach, purchased by more than 70% of Filipino households.

Lucky Me, a local noodle brand, remains the most chosen consumer brand in the Philippines, maintaining this title over the past 5 years. It has reached almost all Filipino homes and is bought 36x a year. Lucky Me continues to improve its existing products, through improved recipes and adding new formats.

Coca-Cola climbs to the 9th spot, with a previous ranking of 16. The soft drink brand was able to bounce back from the effects of the Sugar Tax implementation enacted last 2018. By reformulating and executing an effective SKU strategy, it was able to regain buyers and increase more frequent purchase in 2019.

Nescafe held its 2nd ranking, as Filipinos continue to be a coffee-loving nation. Kopiko also moved up to 4th ranking, as it was able to expand its reach to higher SECs.

Although 6 out of the 10 brands are from food and beverage sectors, there are also brands from the beauty and personal care sector, as well as the homecare sector. Hair care brands like Palmolive, Sunsilk, and Creamsilk are among the top choices for Filipino shoppers and are able to retain their rankings from last year. Surf continues to be the only detergent brand in the top 10.

TOP 10 GROWING BRANDS IN CRP

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 70 CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
27	Birch Tree	137	54	39.5	14.1
38	Wings	104	35	32.0	13.3
67	Bioderm	54	26	28.1	7.9
9	Coca-Cola	394	20	73.5	21.9
63	Calla	60	20	26.7	9.2
60	Gardenia	61	19	33.8	7.4
49	Pride	77	18	33.0	9.5
55	EQ	64	13	20.4	12.8
59	Happy (Fiberline Ind.)	62	13	15.7	16.0
57	Royal Tru Orange	63	12	43.0	6.0

The growth of the top 10 fastest rising brands is driven by their ability to recruit more shoppers and encourage more frequent purchase. They are able to attract new buyers year on year, raising their popularity among consumers.

Wings, a detergent brand, continues to grow very fast, but is topped by Birch Tree, a local dairy brand. This milk powder brand was able to gain over 4 million homes in two years. A combination of price, promotions and strong messaging was able to push Birch Tree to be the number two milk powder brand in the country.

Bioderm, a local soap brand, also moves up through the rankings for fastest growing brands. For the past three years it was able to continuously gain new buyers and see an increase in shopper purchase frequency, now averaging 8x a year. The brand is strongly promoting its message in social media, that Bioderm fights against germs and is suitable for the whole family.

BIRCH TREE

"EVERYBODY'S MILK"



HOUSEHOLDS

40%

CRPs

137 MILLION TIMES

RANK

#27

KEY RECIPE FOR GROWTH

 MORE NEEDS

 MORE MOMENTS

Birch Tree shot up in rankings and is considered the fastest rising brand in the Philippines. In just two years, almost 40% of Filipino homes already purchase this brand. It is the third most chosen dairy brand, following category giants Bear Brand and Milo.

In a market dominated by bigger packs, the introduction of Birch Tree's 33g sachet has propelled the brand's exponential growth. Its attractive price point and "Sustansyafordable" (Nutritious + Affordable) messaging helped the brand to reach lower-income homes, where consumers shop in provision stores. Sari-sari stores became the main channel for the brand, which works well with its low price and sachet format.

Birch Tree's buyer base growth cuts across all regions, socio-economic classes, and ages, truly embodying their message: "It's Everybody's Milk." Other marketing activities and endorsers also greatly aided the offtake of the brand. With a strong buyer base, the brand's newly introduced chocolate flavour has already gained 14% penetration within its first year of launch.

Birch Tree has successfully become the #2 brand in the powdered milk category, as it continually recruits new buyers.

WINGS

THE REGIONAL PLAYER



HOUSEHOLDS

32%

CRPs

104 MILLION TIMES

RANK

#38

KEY RECIPE FOR GROWTH



MORE PRESENCE

Unlike most manufacturers who tend to launch their products in capital regions first, Wings chose to seed first in the Mindanao region, followed by Visayas. This proved to be a good strategy, as their distribution strength in both regions continues to drive growth. More than 40% of Filipino homes purchase Wings in Visayas, and almost 70% of homes from Mindanao choose Wings as their laundry detergent. These two regions remain the brand's stronghold. Wings has established itself as a regional player, able to compete with the bigger brands in the market, and is steadily gaining reach in other parts of the country.

With an average price 27% lower than the others in the category, Wings leverages on a strong value positioning. It demonstrates the ability to deliver the basics well, at an affordable price.

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Our ranking continues to demonstrate the importance of staple household brands in Filipino homes. Those brands sustain their leadership by constantly adapting their portfolio to new consumer needs and conveying this through inspiring communication. Price, however, remains an important factor for Filipino shoppers and several of the fastest growing brands have used this lever to gain more shoppers. Hence, a brand's ability to demonstrate excellent value for money remains essential to further grow and remain relevant in our market.

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Marie-Anne Lezoraine

General Manager, Philippines
Worldpanel Division, Kantar



TAIWAN

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG



2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	I MEI	86	88.9	10.1
2	Kuang Chuan	61	76.9	8.4
3	Fresh Delight	46	67.6	7.4
4	Wei Chuan Lin Feng Yin	34	42.5	9.2
5	Uni-President	33	72.9	5.0
6	Uni-President Chui Sui	27	48.6	6.4
7	Kirkland Signature	22	39.3	5.6
8	Quaker	21	60.9	3.8
9	Uni-President Ch'un Chi Cha	18	27.2	7.8
10	Laurel	17	56.4	3.5

HEALTH, INNOVATION, AND CONVENIENCE

ARE THE KEY THEMES FOR SUCCESS
IN THE 2019 TAIWAN MARKET.

#LocalPower

The top 5 ranking remained occupied by local brands, and those leading brands stand to create the growth in CRP. In Taiwan, 1% penetration represents around 86,500 households. I MEI, for example, reported 8,650,000 Taiwan households in 2019.

#TrustForUse

The top 6 out of 10 brands remain the same as the previous year, demonstrating consumer trust in brand quality and loyalty. These six brands are in dairy, and take the lead due to higher in-home penetration and repeat purchase frequency.

MOST CHOSEN BRANDS BY SECTORS

TOTAL FOOD

2019 Rank	Brand	CRP (M)	CRP Growth %
1	I MEI	35	-4
2	Uni-President	20	5
3	Laurel	17	0
4	Lay's	15	1
5	Tai Sun	11	0



Uni-President:

As one of main manufacturers in Taiwan, Uni-President continues expanding its portfolio towards offering, for example, frozen and chilled food, to gain 5% growth in CRP.

TOTAL DAIRY

2019 Rank	Brand	CRP (M)	CRP Growth %
1	Kuang Chuan	55	4
2	I MEI	44	20
3	Fresh Delight	44	1
4	Wei Chuan Lin Feng Yin	34	8
5	Uni-President Chui Sui	27	-2



I MEI:

As the top Brand Footprint ranking in Taiwan, I MEI continuously wins CRP consumer reach in dairy categories. Plant-based dairy or fresh milk, for example, generate 20% growth.

TOTAL BEVERAGE

2019 Rank	Brand	CRP (M)	CRP Growth %
1	Uni-President Ch'un Chi Cha	18	15
2	Super Supau	15	-6
3	Hey Song	15	-6
4	Vitalon Ochaen	13	19
5	Uni-President Mai Hsiang	12	8



Vitalon Ochaen:

Both new product offering flavours and new product pack types contributed to Vitalon Ochaen's 19% CRP growth.

TOTAL HOME CARE

2019 Rank	Brand	CRP (M)	CRP Growth %
1	Kleenex	9	-14
2	DE YI (YFY)	6	9
3	May Flower	5	-15
4	Andante	5	-12
5	Bai Lan (Unilever)	5	-7



DE YI:

In 2019, DE YI launched new product lines, fabric detergent and dish wash, to leverage its homecare brand image for new recruits, achieving 9% CRP growth.

TOTAL PERSONAL CARE

2019 Rank	Brand	CRP (M)	CRP Growth %
1	Sofy	12	-8
2	Kotex	11	3
3	Carnation (KNH)	8	-9
4	Darlie	7	-8
5	Colgate	6	-5

**Kotex:**

Through aggressive marketing communication in the femcare category, Kotex achieved 3% CRP growth, acquiring new shoppers via brand innovation, offering products like pads, liners, and tampons.

TOP 10 GROWING BRANDS IN CRP

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
44	Cadina	7	45	33.5	2.4
41	Carrefour	7	27	27.5	2.6
7	Kirkland Signature	22	24	39.3	5.6
32	Bifido	9	20	35.8	3.0
16	Vitalon Ochaen	13	19	38.4	3.9
43	Koikeya	7	17	31.0	2.6
9	Uni-President Ch'un Chi Cha	18	15	27.2	7.8
40	Lipton	7	15	28.5	3.0
5	Uni-President	33	9	72.9	5.0
4	Wei Chuan Lin Feng Yin	34	8	42.5	9.2

#CreativeInNPD

In top rising, impulse categories for food and beverage grow fast, especially snack brands like Cadina. This is due to the launch of worldwide flavour taste NPDs. Vitalon Ochaen is another example, having launched its new sugar-free tea and a sugary tea series, expanding into new packaging type.

#RetailerPower

Retailers push to create the growth of consumer choices to expand new recruiting and repeat. Both Costco Kirkland and Carrefour demonstrated that private labels are also able to fulfil consumer expectations of balancing quality and price.

VITALON OCHAEN

RISING LEADER OF BEVERAGE IN CONSUMER CHOICES

御茶園®

HOUSEHOLDS

38.4%

CRPs

13 MILLION TIMES

RANK

#5 IN TOP GROWING

KEY RECIPE FOR GROWTH



MORE TARGET



MORE PRESENCE

Vitalon Ochaen is a local Taiwan tea brand that manufactures RTD teas as its main market position. Its penetration has increased from 35.5% in 2018 to 38.4% in 2019, driving 19% CRP growth. It continued launching new flavours, with its sugar-free Japanese raw tea leading the momentum, while product line extension into chilled packaging served as another driver.

Vitalon Ochaen launched a sugar-free Japanese raw tea that portrayed a different profile than what buyers were accustomed to. It used famous Asian actors as celebrity endorsers in 2019, thereby rebuilding brand awareness in young buyers. It also expanded its product line to include a more sugary tea series, using different types of product packaging such as tetra pak, not only PET bottles. Thus, this brand had more opportunities to display products to the buyers in the retail channel so that it made more shelf presence, which was also the reason for increased sales in two consecutive years.

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In 2019, FMCG brands in Taiwan strived to achieve growth, as leading brands suffered from severe competitive challenges. The latest Brand Footprint ranking shows that winning brands are TrustForUse, CreativeInNPD, and benefit from RetailerPower.

Due to the COVID-19 impact, 2020 would be a turning point for agile players that are able to adapt to the new normal and uncover future growth opportunities.

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Jason Yu

Managing Director, Greater China
Worldpanel Division, Kantar



THAILAND

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Dutch Mill	186	72.1	10.0
2	Mama	170	81.1	8.2
3	Lay's	146	59.9	9.5
4	Nescafé	139	55.4	9.8
5	Rosdee	136	66.8	7.9
6	Colgate	128	81.4	5.8
7	Ajinomoto	118	61.1	7.6
8	Hygiene	116	64.7	6.8
9	Pepsi	102	46.8	8.5
10	Lactasoy	97	50.9	7.5

INNOVATION, HEALTH, AND CONVENIENCE

2019 was another challenging year for FMCG spend in Thailand with a flat growth. Among 571 established FMCG brands, 50% of them were able to gain more consumer decisions (CRP) compared to a year ago. There are three key success themes behind these brands winning more consumer choices: innovation, health and convenience.

What shoppers look for evolves over time as their lifestyle and needs change. Especially, COVID-19 impacts how consumer behave and how they shop. Growth is becoming harder to come by, and together with the new norm of post-COVID19, it's more crucial than ever for every brand to better understand what matters to shopper and their needs.

Recession?

Expect weaker consumer spending as the unemployment rate increases and various movement control introduces disruption to many businesses. Learnings from the previous financial crisis show that shoppers would always find different ways to manage their expenses. Is your category a necessity? Are there alternative substitutions? Would private labels make a comeback? Will shoppers be more price sensitive or even willing to down trade?

Strengthen Value Proposition

Key messages and media channels are even more critical.

**Hygiene:**

Hygiene made our top chosen list with an astonishing CRP growth of 11%. This growth is largely credited to its launch of Life Nature®, with natural extracts that are less harmful to the environment and the body. Hygiene was chosen more than 116 million times throughout 2019.

**Pepsi:**

No Sugar beverage mixed together with a new flavor like Pepsi Max Raspberry captured a significant shoppers' Decisions in 2019. The variant is refreshing, innovative, and fun. Six months after launch, Pepsi Max Raspberry had achieved 540k CRPs, representing 1 in 5 transactions for Total PepsiMax.

TOP 10 GROWING BRANDS IN CRP

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

TOTAL FMCG

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
46	Singha	39	31	21.6	7.0
36	Sponsor	49	14	28.5	6.8
8	Hygiene	116	11	64.7	6.8
34	Mitr Phol	52	10	55.0	3.7
49	Brand's	38	10	24.4	6.0
47	Chang (Thai Bev)	39	8	15.4	9.7
11	Coca-Cola	97	6	51.6	7.4
23	Omo	64	5	56.2	4.5
33	M-150	53	5	21.0	9.9
9	Pepsi	102	4	46.8	8.5

TOTAL BEVERAGE

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
26	C-Vitt	11	108	9.5	4.6
28	Namthip	10	81	9.6	3.9
42	Shark	4	68	2.3	7.4
8	Singha	39	31	21.6	7.0
16	Deedo	26	30	23.3	4.4

**C-Vitt:**

A brand that builds an image of being healthy, improving the immune system, and helping consumers meet the daily recommended vitamin C, C-Vitt also promotes several usage occasions, such as feeling ill. This makes it relevant in the Thai market, where shoppers are looking for a healthier beverage option.

TOTAL DAIRY

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
38	Ensure	1	241	1.8	1.9
43	Ship	1	211	0.6	5.0
36	Sesame Soy	1	143	2.3	2.0
45	Deedo	1	101	1.0	2.5
32	Richesse	2	84	4.1	2.1



Sesame Soy:

With constant promotions and communications regarding value-added soy milk with high calcium and high Vitamin E, Sesame Soy reached the top 3 fast riser in dairy.



Nissin:

A brand with a price premium over market average, Nissin has proven its popularity with a consumer base of 5.5 million households and CRP growth of 44%. This shows that shoppers are willing to pay more for benefits like unique taste and flavour.

TOTAL FOOD

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
37	Nissin	14	44.0	22.1	2.6
30	Wang Kanai	17	24.0	25.3	2.6
21	O-Lean	24	22.0	33.3	2.8
17	Roza	28	18.0	38.9	2.8
33	Amphawa	16	13.0	17.7	3.6



Roza:

Roza demonstrates effective communication on online platform, as well as a strong brand image. It has a wide variety of products, suitable for family settings, promoting warmth and a familiar feeling around the product.

TOTAL HOME CARE

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
31	Vivy	5	66	6.8	2.8
48	Goldeer	2	50	2.7	3.0
37	Kleenex	3	48	6.4	2.0
16	D-Nee	17	36	11.3	4.9
25	Wow	7	29	8.1	3.4

**D-Nee:**

With its quality product, smart communication through various social media platforms, and strong distribution, D-Nee ranks 4th on our homecare list. With communications promoting safety for kids, parents have put their trust in D-Nee.

**Elis:**

A new entrant into the competitive femcare market, Elis captured about 10% of category spend within the three years since its launch. The brand's frequent mentions in social media led to its popularity among urban and younger females. It delivered an impressive result in 2019, with 7 million consumer decisions.

TOTAL HEALTH & BEAUTY

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
44	Elis	7	96	10.0	2.6
35	Tepthai	10	71	16.1	2.5
41	L'Oreal	8	34	11.9	2.5
38	Benice	9	29	14.7	2.3
48	Raw Ra	6	19	6.0	3.9

**Tepthai:**

A new comer in the toothpaste category, Tepthai's herbal ingredients offer multiple oral care benefits to users, providing consumers with the ability to achieve effective oral care hygiene in a single product. The brand price per kg is about 160% to market average; however, consumers found the product value for money, due to its tactical pack size and "green bean size usage - where a tube can be used for 350 times."

MAMA

LEADER OF FOOD IN CONSUMER CHOICES
SALTED EGG FLAVOUR BRIGHT NEW EXCITEMENT



HOUSEHOLDS

81%

CRPs

170 MILLION TIMES

RANK

#1 IN FOOD

KEY RECIPE FOR GROWTH



MORE PRESENCE



MORE MOMENTS

Despite being the market leader in Thailand's instant noodles market, Mama continues to be relentless in finding new ways to grow and innovate. Even within their already successful premium Mama OK (Oriental Kitchen) product line, they have not fallen prey to complacency. The breakthrough new product release that had propelled the brand's growth in the previous year is none other than Mama OK Salted Egg.

By jumping on the "Salted Egg" bandwagon at the perfect time, combined with a spicy mélange of flavour and a unique egg-yolk texture, this was the most successful NPD in Thailand during 2019, with more than 3.6m choices. In fact, it out-performed all previous instant noodle NPDs since 2017 in terms of trial. Like the rest of the Mama OK product line, the value proposition is offering **import-level tastes at a much more affordable price-point.**

Now, the question on everyone's mind is "**will it last?**" While we've seen many salted egg flavoured products fade from the spotlight, our data suggests that this flavour is here to stay and will continue as a vital part of Mama's portfolio.

EXECUTIVE INTERVIEW

SPOKESPERSON:
Chailada Tantivejakul
 Vice President



Kantar: What makes MAMA unique as a brand?

The value of Saha Group is built on the principle of honesty by selling good quality products at fair prices. We have always been focused on maintaining quality standards and developing new innovations to serve the continuously changing consumer needs, behaviours, lifestyles, and beliefs. For over 40 years, MAMA has adhered to this principle by staying true to the classic slogan of "MAMA AROI." The brand continues to offer various delicious tastes in different forms of instant foods that consistently excite consumers while strengthening relationships with customers through communication campaigns and activities.

Kantar: What was your biggest success in 2019? Why?

We consider the relaunch of our "Mama OK" line to be our 2019 success. The line was originally launched 20 years back as "Mama Oriental Kitchen" and positioned itself as the premium instant noodle product, with authentic oriental flavours. In early 2019, we decided to capture younger consumers by simply calling the line "Mama OK," and we launched new stir-fried salted egg flavour noodles to the market by capitalizing on the upward trend of salted-egg popularity. With our distinctive taste, outstanding packaging design, as well as communication campaign, we received overwhelming feedback from the consumers from all over the country.

Shortly after, we launched the "OK Generation" brand campaign, featuring superstar JJ (Kritsanapoom Pibulsonggram) as the presenter, which strengthened our position of instant noodle brands for new generations.

We also emphasize using data, research, and marketing intelligence in every phase of product life cycle.

Kantar: What do you think the challenge in FMCG was in 2019?

The 2019 Instant noodles market was full of new variety and flavours. Many of them were imported brands with a lot higher price. While instant noodles consumption experienced only slight growth and the shelf space in retail remained the same or less, every brand had to struggle to stay present in the market and in the mind of consumers.

Kantar: Where do you see the FMCG market going in the next five years?

While most consumers still continue to buy FMCG offline, more and more consumers will buy them online after they become familiar with online purchases and cashless society during the COVID-19 pandemic. Innovative packaging and pack size variety will be necessary to serve consumers on different platforms.

Kantar: What did you do differently during the COVID-19 pandemic, to still reach your consumers?

As one of the stock-up and donation items, MAMA faced panic demand from retailers and end consumers during the pandemic. We responded to the sharp demand increase by increasing production plan, adjusting the number of production SKUs, instilling a new system to allocate our limited supply to all retailers appropriately and fairly, offering direct-to-retailer shipping, increasing stock replenishment, and offering the goods direct-to-consumer via online platforms.

EXECUTIVE INTERVIEW

SPOKESPERSON:
Thiti Thanesvorakul
 Vice President



Kantar: What makes Hygiene unique as a brand?

For the better part of our 36-year journey, Hygiene has aimed to be a world class hassle-free laundry system that serves both domestic and global markets through our commitment to making a meaningful difference to people's lives. With this mission in mind, we uphold four traits as our mantra to set us apart from our competitors.

The first is "being insightful." We are consumer-centric and insightful enough to innovate and best serve our consumers' needs. Next, "innovation." We continuously innovate for the future of better living with an "in love" attitude, in which our team is passionate about improving the quality of people's lives. Last but not least, "integrity." We never compromise quality when developing a new product. Product quality is always first priority.

These have helped us to continuously redefine the new frontier and set new standards as to how we work. Hygiene now means much more than a well-known fabric care brand in Thailand. We believe we have become a household necessity that every home must have to ensure the hygiene of their loved ones. We are proud to have made an impact in people's lives through our quality product, and this is what truly makes us "unique."

Kantar: What was your biggest success in 2019? Why?

2019 was one of the biggest milestones in Hygiene's history. We reached our highest sales and become #1 most chosen brand in household category. But that's not all. Our metric of success goes beyond sales. We also like to measure our success through our consumers' admiration. It is important that consumers love and truly appreciate our products, because that means we truly know our consumers.

However, one of the key important elements to our success is innovation. This not only applies to new products, but all the processes and services needed to create new products. We believe innovation will unlock growth for us as a brand and a company. We know that a brand with purpose will grow, a brand that knows its consumers' purpose will grow, and a brand that constantly innovates will also grow.

In 2019, Hygiene launched new products "Hygiene Expert Care Life Nature," which propelled us to the #1 position in that segment within just three months of its launch. As we embrace the new culture of working we can learn from the start-up world to help unlock our creativity and innovation so as to better serve consumers and the constantly changing world today.



Before the COVID-19 impact, Thailand's FMCG market spend growth was already showing an "L" shape from its peak in 2011. Since then, it's been rather flat, particularly in the past 3 years, with growth only between -0.4% and 0.9%.

Despite the flat consumer spending in grocery, there are brands that continue to win more consumer choices during this challenging time. Learning from their success would help us to understand the drivers and, hopefully, create ideas to replicate their success.

Thai shoppers are willing to pay for premium products if they are relevant and if the benefits out-weight the cost. The common winning formula in food and beverage is health, nutrition added, and exotic flavour.

To win more consumer choices, the rule of thumb is that you need to be relevant, either by solving an existing problem or creating new usage occasions. Effective communication and utilizing the right media channel for the right target audience are crucial.



Howard Chang

Managing Director, Malaysia and Thailand
Worldpanel Division, Kantar



VIETNAM

TOP 10 MOST CHOSEN BRANDS

TOTAL FMCG - URBAN 4 KEY CITIES



2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Vinamilk	48	91.5	18.7
2	Hao Hao	18	74.9	8.3
3	Nam Ngu	13	67.3	7.1
4	Th True	11	51.9	7.7
5	Ngoi Sao Phuong Nam	11	46.4	8.2
6	Milo	11	51.4	7.3
7	Ajinomoto	10	75.0	4.7
8	Chin Su	10	62.4	5.7
9	Coca-Cola	10	68.9	5.0
10	Sunlight	10	72.7	4.6

TOTAL FMCG - RURAL

2019 Rank	Brand	CRP (M)	Penetration% 2019	Consumer Choice 2019
1	Vinamilk	136	72.8	10.9
2	Nam Ngu	121	77.0	9.2
3	3 Mien (Uniben)	102	65.3	9.1
4	Hao Hao	79	59.9	7.7
5	Gau Do (Asia Foods)	78	57.4	7.9
6	Fami	65	49.2	7.7
7	Ajinomoto	62	66.3	5.5
8	Chin Su	62	70.9	5.1
9	PJS	59	81.6	4.3
10	Kokomi	56	46.6	7.0

MOST CHOSEN BRAND OWNERS

URBAN 4 CITIES			RURAL	
BRAND OWNER	CRP(M)	2019 RANK	BRAND OWNER	CRP(M)
Vinamilk	66	1	Unilever	310
Unilever	50	2	Masan Consumer	297
Masan Consumer	37	3	Vinamilk	218
Nestlé	28	4	Calofic	108
Acecook	24	5	Acecook	103

It is no surprise that food and beverage brands maintain their stronghold in the ranking of the most chosen FMCG brands in Vietnam, with such a high usage frequency significantly increasing their CRPs per year.

Marketing activities and strong advertising campaigns have also helped with their non-stop effort in driving high brand awareness and purchasing.

Vinamilk, the well-known local dairy manufacturer is still being chosen the most in both urban (4 cities) and rural Vietnam. This is in part due to its huge coverage regarding consumer base, especially in urban where its penetration is much higher than others on the list. Additionally, its eponymous brand attracted nearly 120,000 new households in rural areas by continuously emphasizing its core fresh image. And the launch of organic products further enhanced the brand's image.

Combining the marked success of Vinamilk and Ngoi Sao Phuong Nam (another Vinamilk brand among the top 10 FMCG ranking), Vinamilk upholds its #1 standing and is chosen more than 65 million times per year by urban (4 cities) households.

Impressively Sunlight and P/S, both owned by the global giant FMCG manufacturer Unilever, retained their positions in the top 10 most chosen brands as the unique non-food brands in urban (4 cities) and rural, respectively. This positive performance helped Unilever retain its title as the most chosen brand owner in rural Vietnam, while also creating a safe gap between other competitors in urban ranking in terms of CRPs.

MOST CHOSEN BRANDS BY SECTORS

URBAN 4 CITIES

RURAL

TOTAL HEALTH & BEAUTY

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	PJS	7	71.1	3.7
2	Diana	7	60.2	4.3
3	Lifebuoy	6	61.0	3.5
4	Sunsilk	5	33.3	5.6
5	Colgate	5	55.8	3.0

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	PJS	59	81.6	4.3
2	Sunsilk	43	43.0	5.8
3	Clear	40	48.0	4.9
4	Lifebuoy	26	43.7	3.4
5	Dove	24	30.8	4.6

TOTAL HOME CARE

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Sunlight	10	72.7	4.6
2	Omo	7	61.7	4.3
3	Comfort	5	47.2	4.1
4	Downy	4	39.8	3.7
5	Lix	3	37.4	3.1

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Sunlight	50	68.2	4.3
2	Omo	41	62.0	3.9
3	Comfort	35	49.7	4.1
4	Lix	27	29.8	5.4
5	Aba	23	36.1	3.7

TOTAL FOOD

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Hao Hao	18	74.9	8.3
2	Nam Ngu	13	67.3	7.1
3	Ajinomoto	10	75.0	4.7
4	Chin Su	10	62.4	5.7
5	Bien Hoa	8	62.2	4.6

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Nam Ngu	121	77.0	9.2
2	3 Mien	102	65.3	9.1
3	Hao Hao	79	59.9	7.7
4	Gau Do	78	57.4	7.9
5	Ajinomoto	62	66.3	5.5

URBAN 4 CITIES

RURAL

TOTAL BEVERAGES

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Coca-Cola	10	68.9	5.0
2	Tiger	8	40.9	6.8
3	Nescafé	6	36.6	6.2
4	Sting	6	27.5	7.9
5	G7	5	35.9	4.8

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Saigon (Beer)	52	45.4	6.7
2	Nescafé	27	29.0	5.5
3	Ha Noi (Beer)	26	29.0	5.2
4	Coca-Cola	21	43.1	2.8
5	Red Bull	18	28.9	3.6

TOTAL DAIRY AND DAIRY SUBSTITUTES

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Vinamilk	48	91.5	18.7
2	Th True	11	51.8	7.7
3	Ngoi Sao Phuong Nam	11	46.4	8.2
4	Milo	10	50.8	7.3
5	Ong Tho	9	55.6	5.7

2019 Rank	Brand	CRP (M)	Penetration % 2019	Consumer Choice 2019
1	Vinamilk	136	72.8	10.9
2	Fami	65	49.2	7.7
3	Ong Tho	45	48.6	5.4
4	Milo	36	35.4	6.0
5	Moc Chau	23	21.5	6.4

TOP 10 GROWING BRANDS IN CRP

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

TOTAL FMCG - URBAN 4 CITIES

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
48	Vinacafe	3	20	13.9	8.2
47	Lix	3	19	37.4	3.1
8	Chin Su	10	15	62.4	5.7
4	Th True	11	11	51.9	7.7
31	Omachi	5	11	45.6	4.0
43	Aquafina	4	8	25.5	5.4
39	La Vie	4	6	32.0	4.7
40	Downy	4	5	39.8	3.7
19	Diana	7	4	60.2	4.3
32	Cai Lan	5	4	36.2	5.0

TOP 10 GROWING BRANDS IN CRP

BASED ON CRP GROWTH PERCENTAGE WITHIN TOP 50 CHOSEN BRANDS

TOTAL FMCG - RURAL

2019 Rank	Brand	CRP (M)	CRP Growth %	Penetration % 2019	Consumer Choice 2019
34	Th True	21	20	27.4	4.5
21	Milo	36	16	35.5	6.0
44	Neptune	17	15	32.5	3.1
48	G7	14	14	25.6	3.3
39	Tuong An	18	12	29.1	3.6
15	Simply (Cai Lan)	44	11	48.8	5.3
11	Saigon (Beer)	52	10	45.4	6.7
3	3 Mien (Uniben)	102	9	65.3	9.1
8	Chin Su	62	9	70.9	5.1
18	Omo	41	9	62.0	3.9

The expansion in consumer base is the key growth driver among top 10 risers, with lots of new buyers acquired throughout the year.

Achieving a robust growth of 20% in terms of CRPs in rural Vietnam, Th True is recognised as the fastest growing brand. This is thanks to its product portfolio expansion, with products like Th True Juice, Th True Yogurt, and Th True Rice, which meets different consumer needs.

Riding on the health and convenience trend, as well as offering a variety of product lines, Lavie, the bottled water brand owned by Nestle, reported an impressive performance by recruiting more than 81,000 new buyers in urban (4 cities) last year.

Despite being a well-established brand, Milo progressively increased its footprint in rural areas with the double-digit CRP growth of 16% and over 420,000 new households acquired. This Nestle brand continues its focus on the nutrition trend and strengthens its brand awareness through several advertising campaigns.

YAKULT

A MARKET LEADER IN FUNCTIONAL DRINKING YOGURT



Yakult, a drinking yogurt brand owned by a Japanese manufacturer, entered the Vietnam market in 2007 and has progressively become a market leader within the functional drinking yogurt segment.

Due to the heightened health and convenience trends among Vietnamese consumers in recent years, drinking yogurt has demonstrated an optimistic performance in both Vietnam urban (4 key cities) and rural areas.

Capturing that huge opportunity, Yakult has strongly invested in social media, as well as branding activities to raise its brand awareness and emphasize the nutritional benefit it can bring. Yakult tapped into prevailing trends and expanded the distribution from offline to online, which partly helped to increase its shopper base. Noticeably, Yakult launched "Yakult Lady," its creative format, to not only help simplify and fasten purchases, but also to directly engage with consumers.

Moreover, the brand increasingly invests in marketing and communication with a couple of yearly TV campaigns. These campaigns highlight "Japanese origin" and air during family holiday occasions to create a symbol of health and connection to family.

Due to these factors, the brand attracted more than 120,000 new urban households within a year and achieved an impressive growth of 23% in terms of CRPs. Overall, Yakult has jumped three spots in urban (4 cities) ranking, entering the top 10 most chosen brands among dairy and dairy substitutes for the first time.

HOUSEHOLDS

23%

CRPs

3 MILLION TIMES

RANK

TOP 10 IN DAIRY & DAIRY
SUBSTITUTES RANKING

KEY RECIPE FOR GROWTH



MORE PRESENCE



MORE MOMENTS



MORE TARGETS

Data in Urban Vietnam 4 key cities



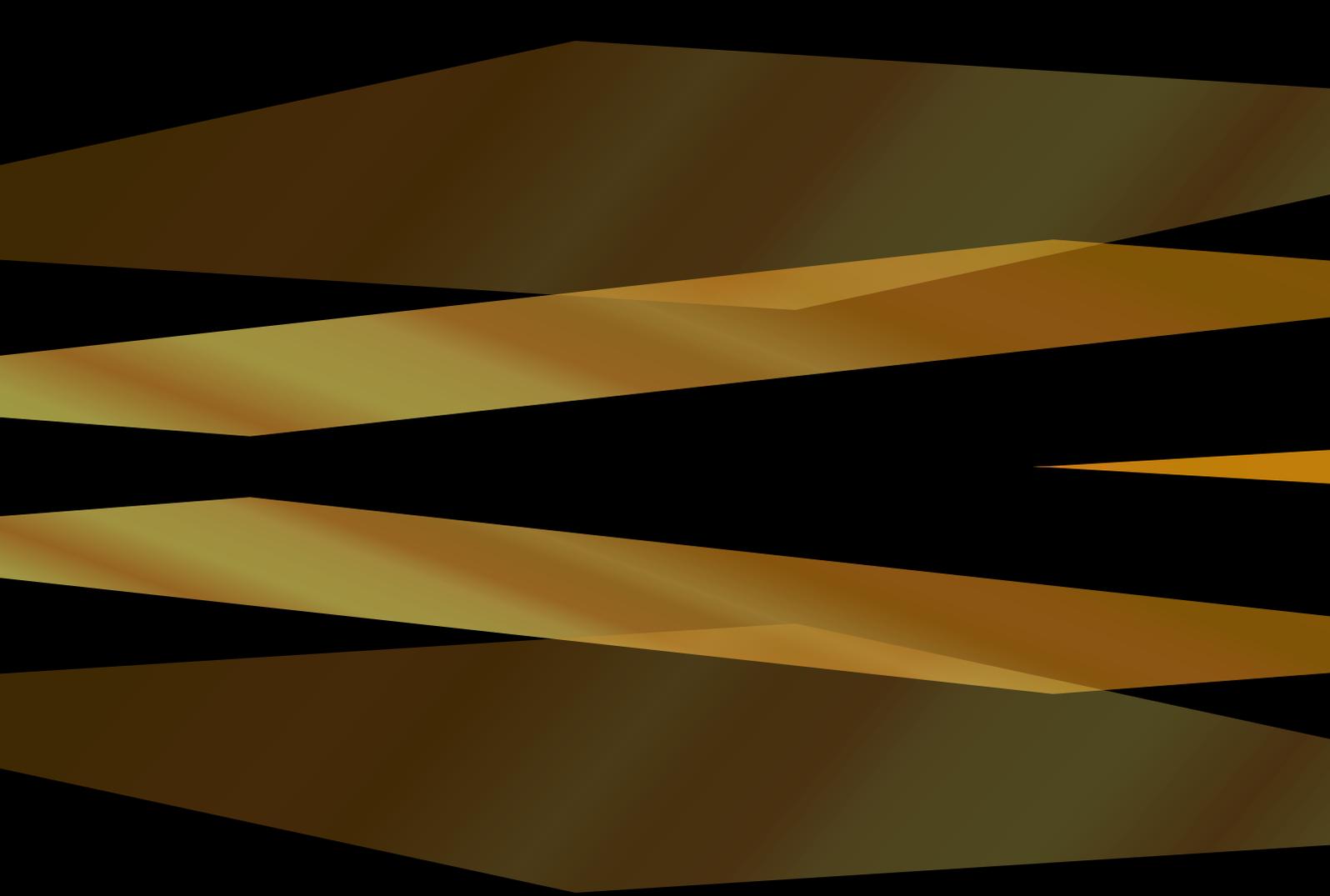
2019 was a strong year for FMCG consumption in Vietnam for both urban and rural areas, surpassing the growth of 2017 and 2018. This was partly a result of brands' efforts to push the boundaries and discover more new consumer demand spaces, as well as smart investments in advertising and promotion campaigns from manufacturers. There are plenty of successful cases of brands expanding in terms of CRPs, which brands can examine and learn from to help drive growth. The retail landscape also continues to develop with impressive contribution from emerging channels like online and mini-stores, as well as big formats like hyper and super, which present new and different avenues for brands to explore and reach new shoppers.



Fabrice Carrasco

Managing Director, Vietnam & Philippines
Strategic Project Director, Asia
Worldpanel Division, Kantar





BRAND NAVIGATION THROUGH THE COVID-19 PANDEMIC

Global markets and economies are shuttering at the hands of COVID-19. Brands are now called to understand the pandemic's impact on different industries, as well as the evolving consumer behaviour.

Understanding how shoppers' needs are changing is a vital first step for brand owners to effectively adapt their management strategy. Only then, can brands align with consumer demands and expectations during this time of crisis and, later, recovery.

THE SHIFT IN SHOPPER BEHAVIOUR

Throughout the pandemic in Asia, we have identified six factors that broadly impact how FMCG performs by market. These factors have and will continue to influence how consumers shop.



Mobility

The first factor is related to mobility, specifically, the length of time in which people are in lockdown. The longer the lockdown is enforced, the more significant the impact is to FMCG expenditure. The second factor is the restriction level of the lockdown regarding how flexible versus how strict the mandates are. The level of flexibility imposed equally impacts the frequency and number of categories consumers shop, as well as their spending.



Spending Power

The next factor we have discovered is household income and SEC contribution. Lower income households who live on daily or weekly wages are generally more impacted, in that they are often obligated to choose between essentials versus non-essentials. The fourth factor is festivities. Major festivities like Lunar New Year, Ramadan, and Eid al-Fitr not only impact the shopper purchase cycle, but also the categories in which they purchase.



Availability

Ease of access to stores is another factor influencing consumer activity. The availability of “proximity” channels and the product ranges stocked are essential. And finally, e-commerce and O2O development are also factors.

The pandemic has inevitably accelerated the adoption of e-commerce and O2O across markets due to social distancing. Whilst this has helped in driving reach for the channel, it is critically important that manufacturers continue to leverage the use of the channel as an “incremental” lever to both categories and brands. This will help brands avoid potentially cannibalizing on sales in their existing brick and mortar channels.

Where e-commerce and O2O is still in its infancy and developing stage, proximity channels such as minimarkets, supermarkets, and others will be a clear default channel.

It's important for brands to ensure the right SKUs and products offer in both online and offline platforms, with clear differentiating features to serve various occasions and needs.

PRE- VERSUS POST-LOCKDOWN SHOPPING: FOUR CLUSTERS ACROSS ASIA

We have observed four clusters across Asia based on how consumers shop before the lockdown mandates versus after. The first cluster is “overly cautious,” meaning that shoppers react by making big purchases ahead of and during the lockdown. This growth trend continues during lockdown. The second cluster is “challenged,” in which shoppers decrease their spending both before and after the lockdown, with no strong signs of recovery in sight.

Next, there is the “undeterred” cluster, which illustrates minimal impact to overall FMCG spend due to lower restrictions on mobility. The question regarding this cluster is, can we expect to continue business as usual? And the fourth cluster is “road to recovery,” which refers to countries in a state of “sudden shock,” where consumers have little time to react. This cluster does show signs of recovery post-lockdown.

BRAND NAVIGATION THROUGH THE COVID-19 PANDEMIC

Analysing based on these four clusters, it is evident that some countries have experienced a drastic shift in shopping patterns, while the reactions of some are muted.

Vietnam, for example, experienced an “overly cautious” cluster of spending. While they have had the lowest number of cases, they were quick to react to the crisis. On the other hand, Indonesia has the highest number of cases in Southeast Asia (SEA), yet experienced very little impact (“undeterred”).

The Philippines represents a “challenged” cluster, with a prolonged lockdown that is taking a heavy toll on its overall FMCG market. Both China and South Korea fall under “road to recovery,” as they began witnessing a rebound around six weeks after the lockdown.

BIG BRANDS ARE WINNING

In line with the global picture, the biggest brands are the ones winning across Asia. Nearly all leading brands are being chosen at a faster rate than the average category growth rate. And in the event that a leading brand did not grow faster than the category, it still achieved double digit growth, and even triple digit growth. One example of this is with hand wash products.

Overall, we see that Asian consumer purchases reflect their growing needs for hygiene products, cooking aids and essentials, convenient foods, and nutritional and immune-boosting products.



HYGIENE PRODUCTS

In line with the global picture, the biggest brands are the ones winning across Asia. Nearly all leading brands are being chosen at a faster rate than the average category growth rate. And in the event that a leading brand did not grow faster than the category, it still achieved double digit growth, and even triple digit growth. One example of this is with hand wash products.

% VALUE GROWTH (COVID period* vs YA)

Hand wash	Average Category	Leading brand
Malaysia	+179%	+110%
Vietnam (Urban 4 cities)	+599%	+372%
Philippines	+151%	+102%

Wet tissue/Wipes	Average Category	Leading brand
China Mainland	+65%	+98%
Taiwan	+49%	+81%

Paper products	Average Category	Leading brand
Thailand	+12%	+19%
Taiwan	+34%	+30%
Philippines (Toilet tissue)	+54%	+67%

Household cleaners	Average Category	Leading brand
Philippines (Toilet cleaner)	+66%	+39%
Vietnam (Bathroom & Toilet cleaner-Urban 4 cities)	+33%	+64%



COOKING AIDS & ESSENTIALS

With lockdown mandates in place, consumers across Asia have spent significantly more time at home. Therefore, at-home cooking and in-house dining have become more popular than ever before, yielding an increased need for cooking products and essentials.

Asian consumers demonstrated more spending on cooking aids and essentials, evident by the value growth of dish wash liquid, seasoning, and sauces. Vietnam, for example, shows a +17% value growth and a +24% growth from leading brands. For seasoning products, Indonesia had a +19% average category growth, and for sauces, specifically fish sauce, value growth in Vietnam spiked by +35%.

% VALUE GROWTH (COVID period* vs YA)

Dishwash liquid	Average Category	Leading brand
Thailand	+11%	+11%
Vietnam (Urban 4 cities)	+17%	+24%

Seasoning	Average Category	Leading brand
Indonesia (Urban)	+19%	+16%
Thailand	+9%	+21%

Sauces	Average Category	Leading brand
China Mainland (Soy + Oyster sauce)	+14%	+19%
Malaysia (Salad dressing)	+43%	+41%
Vietnam (Fish sauce - Urban 4 cities)	+35%	+22%



CONVENIENT FOODS

Convenience is another major buyer trend that we saw emerge in 2019. And as such, convenience foods even play a more important role during quarantine time. Products in this category, like instant noodles, snacks, and cakes and cereals, have all witnessed a surge in demand. For instant noodles, China Mainland takes the lead with +101% average category value growth. Vietnam shows +21% growth in snacks, as well as +50% in cakes/cereals.

% VALUE GROWTH (COVID period* vs YA)

Instant Noodle	Average Category	Leading brand
China Mainland	+101%	+112%
Malaysia	+60%	+59%
Vietnam (Urban 4 cities)	+112%	+82%

Snacks	Average Category	Leading brand
China Mainland	+19%	+59%
Taiwan	+11%	+11%
Vietnam (Urban 4 cities)	+21%	+33%

BRAND NAVIGATION THROUGH THE COVID-19 PANDEMIC

% VALUE GROWTH (COVID period* vs YA)

Cakes/Cereals	Average Category	Leading brand
Malaysia (cereals)	+38%	+46%
Thailand (sweet biscuits/cakes)	+7%	+16%
Vietnam (Cakes -Urban 4 cities)	+50%	+49%

Canned Fish	Average Category	Leading brand
Indonesia (Urban)	+36%	+33%
Philippines	+25%	+45%
Thailand	+54%	+66%



NUTRITION & IMMUNE-BOOSTING PRODUCTS

Even before the virus outbreak occurred, health and wellness was a prominent trend in Asian consumer behaviour. Shoppers are prioritising their health and purchasing items that they know can help boost their immune system during COVID-19. Products like milk and immune-boosting drinks have been in-demand commodities.

In Malaysia, liquid milk demonstrates an average category growth of +55%, while powder milk increased by +12% in Indonesia. And regarding immune-boosting drinks, ready-to-drink (RTD) fruit juice increase by +10% in Indonesia, while functional drinks spiked by +92% in Thailand.

% VALUE GROWTH (COVID period* vs YA)

Milk for Adult/Family	Average Category	Leading brand
Malaysia (Liquid)	+55%	+63%
Indonesia (Powder - Urban)	+12%	+16%
Vietnam (Powder - Urban 4 cities)	+21%	+41%

Immune-boosting drink	Average Category	Leading brand
Indonesia (RTD Fruit Juice - Urban)	+10%	+88%
Thailand (Functional drink)	+92%	+75%
Philippines (RTD Juice)	+11%	+16%

Cheese/Margarine	Average Category	Leading brand
Malaysia (Margarine)	+72%	+63%
Philippines (Cheese)	+12%	+24%

THE BIG QUESTION: HOW ARE BIG BRANDS ADAPTING AND THRIVING?

As mentioned in the report, there are also five key levers for brand growth during these times: new needs, more moments, more categories, more targets, and more presence.

Big brands across Asia, in various categories, have proven that by riding on one or more of these levers, businesses can achieve sustainable growth, even during challenging times.

CHINA MAINLAND

Instant Noodle: Support the fight against COVID-19 and secure supply

Instant noodles were out of stock during the COVID-19 outbreak, due to stockpiling. To secure supply, Master Kong rapidly resumed production during the Spring Festival holidays. At the same time, the brand actively communicated on social platforms to show different ways of cooking instant noodles, thereby engaging and comforting people during the lockdown.



Sold out instant noodle shelves during the outbreak

Employees busy loading up at a Master Kong factory to support the front line

Master Kong communicates interesting ways to eat instant noodles on TikTok

Snacks: Trendy innovations in NPD

Salty snack is a promising category to create a taste that instils joy and a sense of relief during hard times. Lay's outperforms the market with 60% sales growth. Its media strategy is skewed to social media to engage consumers individually and show a sense of caring and being with "you." The creative NPD in the spring is an important growth engine to continuously bring joy to consumers. In addition, riding on the emerging channel for a contactless, safe shopping experience has also accelerated its growth during COVID-19.



Show caring via social media



Successful sparkling NPD in the romantic season to deliver love & joy; cross-border cooperation with Lux to create buzz



Leverage growing O2O delivery during Covid-19

INDONESIA

Milk: Stay active with the kids

With schools closed, households with kids feel that COVID-19 is highly impacting their usual routines. This led formula milk brands, like Dancom and SGM, to increase their engagement and remain present among their targets by encouraging moms to continue stimulating children’s creativity at home during this period. By leveraging more presence, these brands achieved success during the most trying times.



Seasoning: Guide and support consumers via inspiration

With #stay@home trending during the pandemic, Royco created a platform to inspire consumers to cook, upload photos, and donate to the needy.



BRAND NAVIGATION THROUGH THE COVID-19 PANDEMIC

MALAYSIA

Margarine: Stay creative in baking

Planta Malaysia grew by a significant 63% during lockdown and Raya periods. The brand leveraged in-home baking occasions while families stayed at home, and during the Raya period, which is a key season festivity for baking.



Stay at Home message & tips



Raya Campaign & Contest

THE PHILIPPINES

Canned food: One with the community

Mega Sardines engaged consumers by encouraging them to share their quarantine cooking recipes, promoting safety reminders, and being available in online stores. The company also led efforts to help the community through donations and the Malasakit Kitchen.



Donations, Tribute to Front Liners



Online Channels



#MEGAgalinganchallenge



Safety Reminders



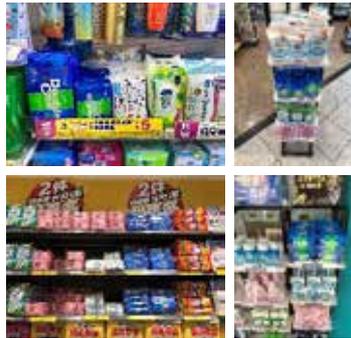
Creative Cooking

BRAND NAVIGATION THROUGH THE COVID-19 PANDEMIC

TAIWAN

Wet Tissue: Stand with consumers in the fight against COVID-19

KNH's anti-bacterial wipes have been highly accessible in every channel throughout the pandemic. And in addition to its strong presence in surgical mask manufacturing, KNH maintains its standing as a trusted brand in sanitary products, achieving a growth of 81% in 2020's Q1 versus last year.



High in-store visibility



Display with hygiene products



Collaboration with major CVS/EC platforms to launch limited edition of package design



Media exposure as top surgical mask manufacturer in Taiwan

THAILAND

Immune-boosting drink: Embrace relevance

C-Vitt might be the brand to have benefited most during the outbreak, as its category is more relevant. The functional drink category is growing 91% YTD April 2020, with C-Vitt's growth reaching a high 75%.



Free Premium of Face Mask



Even you might be scared with COVID, do not worry if you are with C-Vitt

VIETNAM

Hand wash: Be ready, be positive

The brand Lifebuoy successfully engaged with the current situation via COVID-related ads and communications, like the “Tram rua tay da chien” campaign. This campaign provided hand sink and hand wash across Vietnam by inviting consumers to participate in donating through dance competition “Ghen Co Vy.” The brand also had new launches, such as antibacterial wet tissues and hand sanitizer, to capture the rising consumer need for hygiene and health prevention.

In short, Lifebuoy embraced digital channels and leveraged its partnership with retailers in both online and offline stores.



Keep engaged by creating digital contents with positive messages



Fast response to emerging consumer needs with new launches: hand sanitizer, wet tissue



Stand with communities and embrace corporate social responsibility

Snacks: Stay home, have fun

Oishi is another example of a brand that engaged with the current situation. Using COVID-related communications, the brand captured more in-home occasions through a series of creative ways to make homemade treats by using its products and mini games, making stay@home moments more excited.



Innovation with new products and new flavors



Inspire creative ways of treats at home, create new consumption occasions



Keep consumers engaged through mini games

PERSEVERANCE IN TIMES OF UNCERTAINTY

As brands trek onward through the pandemic, it is critical that they understand the shift in consumer behaviours and adapt their brand management strategy accordingly.

Given the rise of online shopping, we have seen that some brands are leveraging the momentum by increasing their digital presence through online touchpoints and social platforms. Even more so, some brands are providing their own home delivery service to expand their reach and meet the consumer need for less human contact.

Brands are also getting creative with their communications to better engage and emphasize with the current situation. We can see many that are promoting positive messages and meaningful activities to support and engage with consumers. And while digitalization is massive, brands cannot forego offline stores. It's important that brands and products are available, accessible, and visible across channels both online and offline, to reach as many shoppers as possible.

Moving forward, it is important that brands ask themselves where their category fits in today's market. They must analyse how the profile of their consumers has changed, as well as the occasions and needs available to drive more relevancy to their category.

As we enter the economic recession post pandemic, we must recognize and adapt our brands and offers to continue serving the greater population. In markets where the lower SEC/SES population is significant, an understanding on how to better reach these potentially "displaced" consumers will be vital.

We must keep in mind that big brands remain big due to penetration and reach. Hence, brands will need to consider if there are any new calibrations that will need to be adopted in the areas of pack and pricing strategy to meet new consumer realities.

Despite the many challenges that COVID-19 has presented across all industries, we know that there are many opportunities for brands to ensure growth. As long as brands can remain innovative and agile, they have a great chance to create future success in post-lockdown and beyond.

4 THINGS TO THINK ABOUT:



**EMBRACING
ONLINE**



**OPTIMIZING
PRODUCT
DELIVERY**



**ENGAGING
WITH CURRENT
SITUATION**



**LEVERAGING
RETAIL
PARTNERSHIP**

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**.

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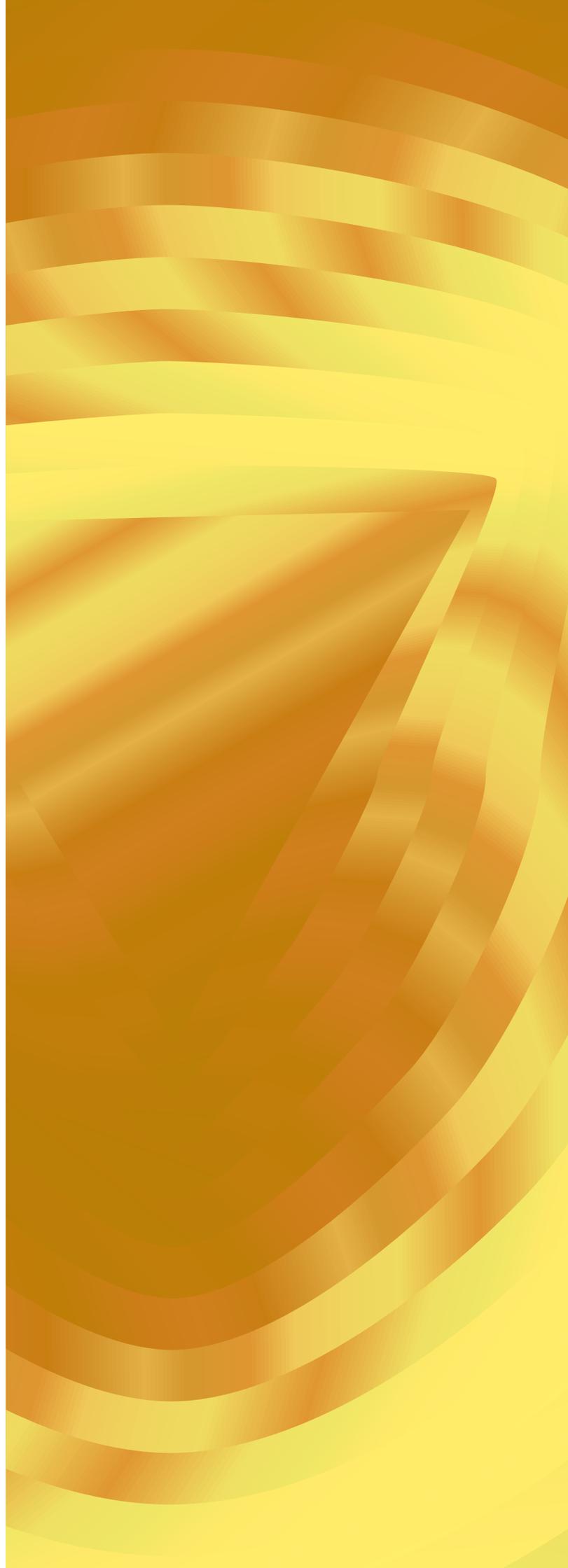
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