It is my pleasure to introduce Kantar Worldpanel’s second annual Brand Footprint ranking. This is the most far-reaching and comprehensive study of global FMCG brands, providing the clearest, most detailed and most actionable picture of your brand’s global footprint.

This year, we have enhanced the report and ranking in order to deliver additional benefits to you. We have widened geographical coverage, a greater number of categories and enhanced interactivity on our microsite. We have also introduced the Global Brand Compass: a new brand typology that reveals how the individual footprint of any brand, in any category, is composed. Brand Footprint now covers more brands, across more of the globe, and delivers more intelligence that allows you to compare your brand’s global footprint, as well as richer insights on specific sectors and countries.

THE SHIFTING CENTRE OF GRAVITY

There are opportunities for FMCG brands to grow their footprint in both emerging and developed markets.

The pace of GDP growth across the major emerging markets has slowed, but continues to outstrip that of developed countries. However, the average per capita GDP in developed countries is still significantly ahead of the emerging countries. The countries that are richest per capita today will still be the richest in 2050 – so no brand should focus all of its growth efforts exclusively on the emerging regions.

The manufacturers that know how to take advantage of these opportunities will thrive. Here’s where Brand Footprint’s rich insights come in – helping FMCG companies with international aspirations to develop their roadmap for growth by:

• Providing a vital guide to which regions present the biggest opportunities. Brand Footprint gives you the clearest perspective of your category and brand growth dynamics across the globe, in context with comparable and competing brands.

• Highlighting the cause and effect of the global trends shaping markets. We examine existing and emerging global trends, enabling manufacturers to tap into consumers’ needs.

• Illustrating how brands and manufacturers have anticipated and responded to these trends. This year we’re featuring ‘Brands in Action’: showcasing game-changing local and global brands, and how their often innovative and sometimes unexpected strategies and actions have worked.

BE MEANINGFUL TO BE CHOSEN

Every brand in the Brand Footprint 2014 ranking has been chosen at least 500 million times across the globe in the last year, which is an achievement in itself.

The brands that dominate and grow within the Brand Footprint ranking are the ones that engage most effectively with consumers, forging powerful and long lasting connections with people. They make themselves widely accessible to the market, and wow shoppers with bold campaigns that are talked about. They make consumers’ lives happier, healthier or easier through innovation that is relevant and authentic. In short, these brands make themselves matter to us.

I congratulate each and every brand, and commend the efforts they’ve made to achieve their position in the ranking. These are brands to admire and to learn from.

I invite you to read on, visit the microsite to explore the data in detail and see the full regional and category rankings, and learn more about your global Brand Footprint.
Today’s shoppers across the globe expect many different things from FMCG brands depending on their location and circumstances. Some want affordable basics to help them budget whilst others are looking for premium quality products that provide a little luxury.

Today’s consumers are more connected and digitally savvy, and many like the brands they buy to communicate with them as individuals. Many consumers are looking for products that multi-task, combining benefits and attributes, or indeed that just make their lives simpler. Some require brands to help them live the lives they want, whether it be healthier, greener or with more time for themselves.

The results of this year’s study also highlight the huge opportunities that still exist for brands to grow their footprint.

SHOPPERS ARE NOT YET BUYING MORE FMCG

The total number of Consumer Reach Points achieved by the world’s most-chosen brands has increased by 1.7% year-on-year. This is in line with the growth of the global population over the same period.

The penetration of seven of the Top 10 brands is either flat or declining as their power is being eroded by local competitors.

Many of the brands that have expanded their consumer reach points have shown evidence of connecting with consumers as well as understanding and tapping into their needs, either more quickly or more effectively than their competitors. They made consumers’ lives happier (Oreo, Cheetos, Snickers and Downy), healthier (Yakult, Lifebuoy and Nestlé) or easier (Maggi and Vim), or communicated with them in a way that resonated, such as Dove.

THE MODEL FOR GROWTH

The brands that attracted the highest numbers of new shoppers during the year are mostly found outside the Top 10. Each added more than seven million new households.

Many of the brands that have expanded their consumer reach points have shown evidence of connecting with consumers as well as understanding and tapping into their needs, either more quickly or more effectively than their competitors. They made consumers’ lives happier (Oreo, Cheetos, Snickers and Downy), healthier (Yakult, Lifebuoy and Nestlé) or easier (Maggi and Vim), or communicated with them in a way that resonated, such as Dove.

FOUR GOLDEN RULES

As well as examining the global context around the results of the 2014 Brand Footprint, this report digs deep into the stories behind the numbers, looking at the actions taken by brands and how they led to a growth or decline in Consumer Reach Points.

Four key themes are apparent across all regions and all sectors: four critical success factors that brands must understand and respond to if they are to increase their footprint in the coming year.

1. Focus on building local strength

Local brands are outpacing global players in terms of growth, particularly in the food and beverage categories. Far from copying the strategies of their global rivals, these smart brands are using their proximity to the market to engage consumers and build loyalty. They are able to develop the market by quickly identifying and accurately responding to local requirements, whether with new flavours or marketing campaigns with a local slant.

Brands must not underestimate the ability of these local players to take advantage of an increasingly interconnected world. In the near future we should expect brands from emerging markets to expand into other fast-growth countries: we already see Korean cosmetic brands selling their products in Latin America and Africa, and Russian dairy brands entering Asian markets, for example. Global brands should be ready to respond to local consumer needs, as well as collaborate, where relevant, across borders and categories.

They may need to work with local brands, or indeed local consumers, to co-create tailored solutions that address their requirements.

2. Find creative ways to make it easy for shoppers to buy the brand

Reaching the highest possible number of consumers means giving them access to the brand through effective distribution and making products affordable to all. The strongest brands in the Top 50 have highly effective market access strategies. They use every channel available to them, including door-to-door selling, traditional stores, local retailers and e-commerce. If their products are beyond the budget of most consumers, they put them within reach by developing smaller formats, smarter sizing or developing lower tier ranges or brands.

3. Respond more rapidly to the right trends in the right way

The brands which expanded their footprint in the past year are masters at rejuvenating the market. They have surprised consumers by responding to needs they did not yet realise they had in a highly relevant way. These brands targeted new groups and occasions by adding steps into beauty or cleaning regimes, producing new formats and even creating new segments. There is room for brand innovation in today’s FMCG industry. Even in the least developed markets and staple categories like sugar and toilet tissue, consumers have embraced new launches where brands have offered attributes and propositions that manifest the most suitable response to the needs of a market or target consumer.

4. Create conversations

Many of this year’s fastest-growing brands have executed creative, multi-channel campaigns in which digital played a central role. They developed their brand personality through campaigns that invited consumers to share experiences and have fun. They put the brand right next to consumers, seamlessly blending online and offline marketing, and engaged consumers through crowdsourcing – giving them a say in the development of new variants and allowing them to co-create the brand’s future.

The global brands in the 2014 Brand Footprint Top 50 have lost ground to local brands. The Consumer Reach Points of local brands have increased at twice the rate of global brands, showing that local brands are currently winning the battle for space in consumers’ baskets.
A World of Choices

The 2014 Brand Footprint ranking reveals that the last year has presented a challenging environment for global consumers and brands. Food price inflation has been stubbornly high and levels of unemployment remained constant around the world. Yet in the face of these challenges consumer confidence has been stable.

Year-on-year, Consumer Reach Points have expanded by 1.7% globally, which is in line with the growth of the number of households in the world. Consumer Reach Points are up 2.4% in the emerging markets, with Asia being the fastest-growing region at 2.9% followed by Latin America at 1.2%. As a whole, developed markets are flat in terms of growth (0.3%). Although the US increased its Consumer Reach Points by 0.8%, it was not enough to compensate for a -1% decline across Europe.

GROWING AROUND THE GLOBE

This picture of global growth is not simply a case of emerging markets versus developing. At a country level the fastest growing countries are spread across Latin America, Asia and Europe. Thailand has the fastest Consumer Reach Points growth in the world at +9%. This is primarily driven by beverages which are growing +14%. Bolivia and Peru have both increased +7% as modern trade continues to expand in each country. Beverages are the major contributor to this growth with an increase in Consumer Reach Points of +8% in both markets. A boom in Peruvian consumers focusing on their appearance has also delivered +10% Consumer Reach Points growth in health and beauty.

China, which has grown its Consumer Reach Points +7%, remains amongst the world’s fastest growing countries. However the speed of its growth has dramatically decelerated from last year as China’s economy slows leading consumers to become savvier and more price conscious.

DECLINING WORLDWIDE

The countries where Consumer Reach Points are declining most sharply are also spread across the world, although Eurozone members dominate. In Italy, where price inflation continues across all FMCG categories, Consumer Reach Points have declined by -8%. Ireland (-4%) and Greece (-3%) are fellow Eurozone countries tackling debt crises, sluggish economies and high unemployment.

South Korea’s overall Consumer Reach Point decline of -3.2% has been caused by the -5% drop in home care, where a high number of shoppers have left the fabric softener segments, and a -1% fall in beverages. This overall decline reflects the ‘new normal’ for South Korean consumers caused by a post-recession economy in which the country’s GDP growth has stalled.

LOCAL VS. GLOBAL BRANDS

Local brands are growing their Consumer Reach Points almost twice as fast (2%) as global brands (1.2%), and local brands continue to account for the majority of shoppers’ purchase decisions (60%). This is the case across all regions – particularly Asia, where local brands held 69% of the total Consumer Reach Points achieved.

Global brands still perform more strongly in some countries: Bolivia, Central America, Peru, urban Vietnam, Malaysia, Saudi Arabia, Indonesia, India, France and the UK. In the US, 75% of Consumer Reach Points are held by global brands.

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CRP % GROWTH YEAR-ON-YEAR BY COUNTRY

Indonesia, China and Vietnam growth based on urban population
CRP growth based on top FMCG brands in each country.
# Brand Footprint Global Ranking Top 50

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## The Next 20: The brands knocking on the door of the Top 50

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These are the brands most likely to challenge and displace the position of the global leaders.

The strongest growth among the next 20 brands is achieved by Yakult, the Japanese probiotics company, and Orinon, the South Korean bakery brand, which increased its Consumer Reach Points by 11%.

What is particularly exciting about the success of these two brands is that they originate from countries outside of the US and Europe. If and when Yakult and Orinon join the Top 50, they will be the second and third non-western brands, along side from Japan’s Ajinomoto, to have entered the top of the Brand Footprint ranking.

### REVERSAL OF FORTUNE

Yakult is a compelling success story from the 2014 Brand Footprint ranking. Last year Yakult was declining 4%. Yet the brand has successfully revised its fortune; delivering 18% positive growth. It now sits at position 57 and has bucked the trend of decline for probiotics – as demonstrated in Activia’s loss of 5.6 million shoppers globally. Yakult’s principle of delivering health-promoting products at an accessible price was executed across the 33 markets it serves. Its network of 80,000 door-to-door sales people – the ‘Yakult Ladies’ – provided a creative means of making itself available as well as directly educating consumers about the product’s health benefits.

Success in Indonesia, Yakult’s biggest growth market in which 4.5 million new households have been added in the last year, is driven by the growth (in numbers) of its Yakult Ladies, which increased from 760 to 4,600 at the end of 2012.

This year Yakult aims to extend its reach with the launch of new products, including a drink combining the benefits of probiotics and fermented soy milk, while also increasing its footprint in countries including Vietnam, Russia and China, its three biggest markets. Yakult is one of the most popular snacking brands in China, with 62% of Chinese households purchasing the brand’s products.

The brand advertises its famous Orion Choco-Pie as ‘A Good Friend’ for the Chinese market. In Vietnam, Orion has succeeded with localisation and a detailed understanding of the market. This led to Orion’s products establishing a premium positioning and Choco-Pie has become part of ancestral rites in the country. Last year, 1.15 million urban Vietnamese households purchased Orion. Its presence in Russia is a stepping stone to Europe, and in Russia, Orion has tailored its pack sizes to meet retailer needs and consumer demands. Its 24-piece box is sold in large discount stores, the 12-piece in modern trade and the 6-piece available in convenience stores and kiosks. Orion has increased penetration in Russia to 18%.

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Of the 10 fastest-rising brands in the Top 50, it is fabric softener brand Downy that stands out from the crowd with an impressive 26% growth in Consumer Reach Points. Downy has succeeded in becoming a “top riser” by increasing both penetration and frequency. Only three brands in the 10 fastest-rising brands this year were also among the top risers last year: Oreo, Vim and Dove.

DOWNY SUCCESSES WITH A MULTI-SENSORY BRAND EXPERIENCE
Fabric softener is the fourth fastest-growing market globally in terms of Consumer Reach Points, growing by 7%. Downy is by far the strongest rising brand this year, moving from 29 to 17 in the Top 50 ranking. It achieved this impressive increase with strategies that engaged with consumers all over the world, and appealed to multiple senses. These included new products such as Downy Infusions, packaging with other brands – to launch Tide with a touch of Downy, for instance – and innovative marketing campaigns such as a series of live music events in the US and interactive digital marketing including an online drama series in Indonesia.

We have seen some polarisation within the laundry market with growth at both the premium and value ends of the market. As washing machines have become more widespread and product use more sophisticated, we see more households buying the premium liquids. However, we also see more households buying cheaper powder formats as an entry into the market. Omo has driven this trend: present across a range of formats, it has grown its Consumer Reach Points by 7.4%.

The increase in Consumer Reach Points within the laundry segment has largely been driven by China, where Omo’s liquid format is gaining buyers fast – in particular its Total handwashing range. The overall penetration of Omo’s liquid detergents increased 2.5% over the last year, and a new variant called Omo TT is already bought by 11% of Chinese households. Sold at a lower price point, this brand was able to attract new buyers to the category as well as encouraging existing shoppers to purchase it in addition to powder, rather than switching from other brands. Omo has also successfully maintained its lead in powder and bars in China by offering new and relevant mixes.

CHEETOS’ NEW FLAVOURS SPICE UP THE MARKET
Winning 7.8 million more shoppers over the year, Cheetos moved up seven positions in the global ranking to number 38. Its strongest performance was in Indonesia, Thailand, Greece and Brazil. The brand launched six new flavours – including Super Flamin’ Hot which developed a cult following in the US.

In Mexico, an award-winning marketing campaign called ‘Let’s jump together with Cheetos’ effectively connected with families and positioned Cheetos as a fun brand that encourages exercise.

OREO, THE WORLD’S FAVOURITE BISCUIT
Biscuit brand Oreo is the third fastest-growing brand in the Top 50 ranking, having achieved a 10% growth in Consumer Reach Points. One of Oreo’s key strengths is its ability and willingness to localise its products. From blueberry ice-cream flavour in Indonesia to banana and dulce de leche in Argentina, the brand is not afraid of adapting the recipe in order to gain buyers. Perhaps its greatest success story is in China, where the brand has become the number one biscuit and now sits at position 17 in the Chinese FMCG ranking having climbed four places. Research with Chinese consumers led the Mondelēz-owned brand to change its formula to make the product less sweet and introduce Mini Oreo packs to position the biscuit as a more affordable snack. This approach to product innovation has also been reflected in its marketing. Its adaptable and real-time digital campaigns, such as the “You Can Still Dunk In The Dark” tweet executed during the blackout at the 2013 Super Bowl, have helped the cream-filled sandwich biscuit to become an iconic brand around the world.

By looking at the total Consumer Reach Points achieved across a manufacturer’s portfolio, Brand Footprint reveals the combined strength of its brands. Independent of turnover, it exposes the number of times a consumer chooses a brand at point-of-sale, whatever the price of the item. Fifteen global FMCG manufacturers achieved more than one billion Consumer Reach Points each over the last year. If we were to extend our universe and consider all FMCG choices made by consumers, including private label, then these companies account for 17% of consumers’ brand choices around the world. The remainder are in the hands of other global manufacturers, private label brands or local players.

Nestlé occupies the premier position for revenue amongst the global FMCG manufacturers, whilst Unilever leads in terms of Consumer Reach Points. This reflects the fact that Unilever and P&G have more brands in the Brand Footprint Top 200. Nestlé operates in a number of markets outside the Brand Footprint universe, while Unilever is active across a whole host of categories and segments that are covered in Brand Footprint. Furthermore, Unilever and P&G have a series of global brands with consistent names whereas Nestlé has many food brands in different markets that have localised names.

Unilever achieves the highest number of Consumer Reach Points, with its brands being chosen 18 billion times annually – an increase of 2% from last year. This has been driven by the performance of its three rising star brands – TRESemmé, Vim and Sunlight. Unilever brands Omo and Persil/Pond’s have grown too.

In comparison, P&G has four brands which have enjoyed extraordinary growth: Downy, Oral-B, Dawn and Fairy in Europe. After 175 years of standing behind a long list of iconic brands, P&G is now speaking to consumers as the corporate ‘face’ that unites them. P&G is seeking to unite its brands, delivering its mission to “make every day a little better”.

According to their annual reports, P&G and Unilever have very different core markets. Sales from emerging regions account for 58% of Unilever’s global revenue, compared with 38% of P&G’s, yet both are investing to dramatically increase this share. Unilever aims to grow emerging markets to 75% by 2025 and P&G has pledged $1 billion in capital and marketing to expand its share to 50% by 2025.

Unilever has a head start. It owns a number of powerful food brands and has a stronghold in India, which brings it five billion Consumer Reach Points alone. Unilever is present in the household cleaning market with brands Vim, Cif and Domestos earning 700 million Consumer Reach Points between them.

PepsiCo, Mars and L’Oréal are the manufacturers with the highest increase in Consumer Reach Points, each gaining more than 2%.

Most likely to join the Billionaire Club next year are Johnson & Johnson and S.C. Johnson, both of which are currently chosen 900 million times per year.

*Based on each manufacturer’s brands ranked within the Top 200 brands at a global level.
Brand Footprint in Context

This chapter examines overarching global trends and how they affect all FMCG manufacturers to varying degrees. The masterclasses illustrate how brands have successfully addressed them.

The Quest for a Healthy Life

Health continues to be a key aspiration for global consumers. Increased literacy and connectivity have made consumers more aware of what they put in their mouths and on their bodies. They want more control, healthier options and greater transparency around ingredients and labelling. Manufacturers have responded with products with added health benefits and functions, such as gluten and lactose-free, lighter options and the introduction of natural sweeteners.

A Masterclass in Health

- **Consumers will pay for convenience.** For the growing middle classes around the world, convenience and health are both important. They have greater awareness of health matters and more money to spend on their wellbeing. Technology, along with changing working and social patterns, is making their professional and personal lives busier than ever. Brands are succeeding with new format meal solutions and culinary aids such as cooking bags, grey pots and ready-to-eat options – all with a premium price tag. In health and beauty, products are combining attributes to make the personal wash and hygiene routine more efficient and consumers’ lives easier.

A Masterclass in Convenience

- **Unilever developed its Vaseline Spray & Go moisturiser, which applies moisturiser rapidly and evenly without the need to be rubbed in.**
- **A key launch for McCain in the UK in 2013 was McCain Jackets – microwaveable jacket potatoes that give people a home-baked taste without the long cooking time.**

A Masterclass in Affordability

- **In South Korea, Amore Pacific has made luxury affordable and accessible with single-use face treatments in premium packaging.**
- **In Peru, Brand Angel created ready-to-eat cereal ‘bags’ which can be enjoyed as a snack or as part of a packed lunch.**

NEW MODEL FOR AFFORDABILITY

In emerging markets, where private label is underdeveloped, brands need to provide a new kind of affordability. Larger pack sizes are often beyond the average person’s budget. Brands need to deliver products in ways that are financially accessible. Smart sizing – such as small packets or sachets – are essential for brands to succeed in South East Asia and rural Latin America. Innovative approaches to sizing and pricing will also be vital for getting a foothold in Africa.

A Masterclass in Individuality

- **Dove encouraged shoppers to create a ‘personalised’ scent by combining two different Dove products, promoting the idea through a website with a ‘Fortune Smeller’ who revealed consumers’ personal fragrance.**
- **Coke’s ‘Share a Coke’ campaign, which featured the 150 most popular names on bottles from each of the 33 countries it covered, is a showcase example from 2013.**

Digital connectivity, increased internet access and social media are enabling consumers to share information on brands like never before. If a brand’s promises are not aligned with the experience of consumers, then trust will be eroded. This new transparent marketplace has caused brands to transform their communications strategies, becoming more genuine, relevant and timely. The most successful brands are connecting and conversing with consumers in a meaningful way, and creating campaigns which not only engage but get people talking.

A Masterclass in ‘Talkability’

- **Lynx/Axe ran a Space Academy campaign that involved a competition for 23 people to go into space under the tagline ‘Leave a man, come back a hero’. It received more than one million entries worldwide.**
- **Pepsi very recently captured the imagination of consumers with an augmented reality experience at a single bus shelter in central London; the, inbox of people’s reactions has brought in five million YouTube hits and rising.**

INDIVIDUALS EXPECT A PERSONAL BRAND EXPERIENCE

Consumers increasingly want to express themselves through the FMCG choices they make. Brands in turn are seeking deeper and closer relationships with consumers. By finding ways to ‘speak directly and personally to consumers, brands have succeeded in giving their consumers a voice.

A Masterclass in Managing Polarisation

As shoppers redefine what ‘value’ means to them, consumers are moving away from mainstream products towards premium ranges which offer affordable luxury or basic ranges. The trend is also reflected in the retail landscape. In the UK, for instance, growth is coming from both poles with discounters such as Aldi and Lidl at one end and premium retailers like Waitrose at the other.

A Masterclass in Managing Polarisation

- **In Latin America Oral-B is using supermodel Gisele Bündchen and pop-star Shakira to front campaigns for its premium products, as well as a local popular presenter in communications targeted at lower-tier shoppers.**

The Digital Era Ups the Ante on Transparency and ‘Talkability’

In China a new FMCG product enters the market every two minutes. Did you know?

- **In the UK, adult obesity rates have almost quadrupled in the last 25 years, with 23.1% of British people now being obese.**

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Shopper Trends

The FMCG retailing landscape is predominantly local and one that is evolving over time. Traditional trade continues to dominate in the emerging markets, but a number of new channels are emerging as well. In Western Europe and online share in FMCG markets is still less than 4%, despite having been around for over a decade.

The FMCG industry is faced with shopper behaviours that are far from universal and consistent. The global similarities include a demand for greater flexibility in how and when they shop, a focus on value for money and an injection of fun in the retail experience. This requires a significant degree of local adaptation and flexibility within a global strategy that takes into account both the opportunities and challenges that exist across regions.

DIGITAL IS REINVENTING THE WAY PEOPLE SHOP

Technology is shaping new shopper behaviour. With the advent of online shopping, time is changing. It’s a 7 days a week, 24 hours a day, non-stop shopping environment. Online shoppers buy more brands, are more loyal and buy bigger pack sizes.

Online currently has 3.7% share of FMCG spend across the barometer countries of UK, France, US, China, Spain, Taiwan and South Korea. If these markets continue with business as usual and do not innovate their online offering, we predict online will increase to 9.2% by 2016.

South Korea is currently the world’s most developed online retail market with household penetration of 50%. South Korea has created the perfect environment for mobile commerce to thrive: it has the highest penetration of internet and mobile in the world, and its retailers offer free delivery on all purchases.

Another digitally-led retail trend is the ‘Click and Collect’ or ‘Drive’ phenomenon. Shoppers’ online purchases are delivered directly to a store or location for collection at a time convenient to the customer. In France, the ‘Drive’ format is used by 25% of households across 2,600 locations. In the UK, the trend of convenient collection is set to continue as transport companies introduce ‘click and collect’ at rail and underground stations.

Clearly, the online channel cannot be ignored and offers a multitude of opportunities. If and when Amazon Fresh significantly extends its injection of fun in the retail experience. This requires a significant degree of local adaptation and flexibility within a global strategy that takes into account both the opportunities and challenges that exist across regions.

GLOBAL CHAINS FACE LOCAL CHALLENGES

Global retailers such as Walmart, Tesco and Carrefour are struggling to gain traction in many emerging markets where traditional trade is still the dominant channel for FMCG sales. Despite this, modern trade is growing, driven by convenience stores and mini-marts which are growing particularly strongly in Asia. Convenience stores (CVS) are emerging in Asia thanks to local retailers opening new stores in central locations. In countries such as the Philippines and Indonesia, which present specific challenges for global retailers due to their complex geography and poor infrastructure, convenience stores offer a solution to consumers.

In Indonesia, 1.5 million new households shopped in the convenience market last year. It is dominated by Alfamart which offers manufacturers a wide distribution with more than 7,000 outlets across the country. Seven Eleven is also growing and has succeeded by establishing its stores as ‘social destinations’ for young Indonesians to hang-out with an offering of free wifi and live music, cheap food and long opening hours.

OPPORTUNITIES IN EMERGING CHANNELS

Wherever a brand is operating you need a strategy for emerging channels and local retailers.

In the developed markets we are seeing the emergence of partial substitutes to traditional one stop shop. Online shopping, food box deliveries, direct sourcing, on-the-go vending platforms, drive and collect formats to name but a few.

In the developing markets online is also growing. Singles day in China on the 11th of November (11/11) has become the world’s biggest online retail event and, as the name suggests, specifically targets the ‘singles’ market.

In Africa, rapid technology advancements have enabled the region to leapfrog developed nations in the adoption of mobile payment. Leading this trend is Kenya, where access to bank accounts remains low and mobile penetration is 77%. M-pesa, a pay-as-you-go mobile payment method, is now used by 80% of the Kenyan population — compared to just 15% globally. Anyone hoping to enter the African market needs to consider how they can work with these existing and trusted structures.

Growth is also coming from direct selling, popular in personal care categories as well as in those with bulky, heavy items such as beverages and in countries where car ownership is low.

Door to door also provides a solution for FMCG brands to educate consumers about products and reach rural consumers. The main challenge for FMCG brands is how to manage multiple networks of locally-focused direct sellers alongside existing trade partners.

THE PRIVATE LABEL CHALLENGE

Continued focus on price in many developed countries will mean FMCG brands face further pressure from private label. Private label sales in many developed countries are moving FMCG brands face further pressure from private label. Private label levels will continue to increase in many of the developed markets where there is trading down, focus on price and an increased share of hard discounters.

In Spain there is further pressure on manufacturers from Mercadona, with a strategy of increasing their range of categories and pre-selecting a limited number of brands it considers to be the best value. As it continues to grow its market share, getting on Mercadona’s privileged list could be make or break for FMCG brands in Spain.

Did you know?

Taiwan has the highest density of convenience stores in the world: one CVS in every 3km2.

To find out more about ‘The Future of Global e-commerce’, read Kantar Worldpanel’s report ‘Opportunities in Emerging Channels’ launching June 2014.

FMCG ONLINE VALUE SHARE AND GROWTH

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% OF FMCG SALES VIA MODERN TRADE

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% SALES THROUGH PRIVATE LABEL

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Beverages continue to dominate the national rankings, with milk, coffee and carbonated soft drinks retaining their popularity. Two countries have a new number one brand this year: Russia and the Philippines.

In Russia, Danone’s dairy brand Prostokvashino has overtaken cheese brand Rossiyskiy to gain number one position thanks to significantly enlarging its shopper base.

THE PHILIPPINES: A STORY OF COFFEE
Noodle brand Lucky Me! is now the most purchased brand in the Philippines. It reaches 98% of households and is bought by the average household every week. Yet Lucky Me! has experienced only modest growth in the last year. It has benefited from Nescafé’s decline, caused by Filipino shoppers moving to other local coffee brands.

Great Taste, one local challenger, has added three million households this year. It moved 12 positions up the country ranking and is one of the Philippines’ top three risers. The brand has attracted consumers with its coffee mixes – the three-in-one sachet which includes milk, coffee and sugar – which have replaced the traditional black ‘pure coffee’.

LOCAL TRUST IN FAMILY BRANDS
Across the 35 countries, 15 have a home grown local brand in the number one position and all sit in either the food or milk category.

In Germany, Dr Oetker has retained its position as the most popular FMCG brand, being purchased by eight out of 10 German households. Its broad product offering combined with a trusted family-brand image has ensured its local success has continued alongside global expansion.

In Italy, Mulino Bianco from Barilla retains its place as the country’s most chosen. The brand positions itself as creator of Italy’s tastiest treats and biscuits, supported by TV commercials featuring Antonio Banderas as the ‘Man of the Mill’ revealing the brand’s laboratory. Mulino Bianco claims that its “sweetness” has entered the home of every Italian – a statement that rings true as it was purchased by 96% of Italian households in 2013.

THE ‘MILKY WAY’
Milk has the highest global penetration of all beverages, except tap water, and is chosen by 82% of the world’s households. The number one brand in 12 out of 35 of the 2014 Brand Footprint countries is a dairy brand. Far from being concentrated in one particular region these countries are dispersed across the globe and include South Korea, Saudi Arabia, Ireland and Portugal. The five countries with the highest penetration of liquid milk are all in Latin America. Consumption here is driven by the region’s sizeable population of children – 51% of households have at least one child under the age of 12. Dairy products are also popular snacks in Latin America: of the 63% who snack between meals, 59% choose yogurt, milk or milkshakes.

In addition to milk’s broad reach it is also bought very frequently: on average every two weeks. In Ecuador, where dairy brand Vita is number one, households purchase milk 163 times per year. This is due to fresh milk being almost half of the price of the UHT alternative.

A NEW TASTE FOR SUCCESS
Milk variants, including beverages flavoured with chocolate, strawberry and even Mars chocolate bars are already part of manufacturers’ portfolios. This year, goats’ milk and variants using ingredients such as soy, rice and almond have risen in popularity. This is particularly seen in developed markets, such as the US and UK, where consumers have embraced the trend for lactose-free diets.
Regional Review: Asia

Asian consumers are proud of their traditions, and devoted to their families. Extremely tech-savvy, they embrace innovation, and love when products are given a ‘premium touch’ with packaging and quality. They care about both inner balance and outer beauty, and when it comes to food they have a discerning palate. The ability to offer products that recognize and answer these priorities is what sets Asia’s most-chosen and fastest rising brands apart.

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Regional Review: Latin America

Pepsi is the only Top 10 brand to improve its position in this year’s Latin American ranking. In contrast, there has been a great deal of movement among the brands in the rest of the Top 50. These changes include four new entries: Ruffles, Kotes, Suarez and Nivea.

Local brands are growing much faster in the region at 1.5% than global brands, at 0.7%.

Panco (bakery products) and Limpol (home care in Brazil), Stella Gusta (Botanical) and Angel in Peru, Maruchan (instant noodles) in Central America, Mexico and Bolivia, Nosotras (feminine protection) in Ecuador, Colombia and Argentina and Alpura in Mexico are all among the local heroes to put in a strong performance.

PREMIUM FOR ME, VALUE FOR MY HOME

In the health and beauty sectors, premium brands like Dove, Oral-B and Nivea have climbed positions in the ranking. One global star that shone was Oral-B, which sits in position 52 and is likely to join the Top 50 next year after a major investment in new launches and campaigns featuring local celebrities like Shakira that are recognized globally.

On the other hand, local brands - often lower priced - control home care in Latin America. Home care brand leaders include: Ype in Brazil, Bovril in Peru, Nora in Chile, Las Llaves in Venezuela and AS in Colombia.

A TALE OF TWO FAMILY FAVOURITES: FIZZY DRINKS AND SNACKS

Beverages is the fastest growing category across the Latam region. It is also the only FMCG category households buy more from traditional trade channels than modern channels.

Coca-Cola is the most-chosen brand in Latin America, with 90% market penetration. The average consumer purchases the drink 32 times per year – the highest frequency of any region in the world. Core market Mexico is still the main contributor to the brand’s sustained growth.

However, Pepsi grew its Latin American footprint further than any other Top 10 brand, with an 11% increase in Consumer Reach Points making it the region’s second fastest riser overall. Fanta climbed one position, propelled by its iconic ‘Play Fanta’ campaign.

Potato chip brand Ruffles is Latin America’s overall top riser, with an incredible 21% expansion in its footprint.

Doritos is one of the 10 fastest-rising brands in the world. Particularly popular in Brazil and Argentina, it aimed to connect fans across the world with its first ever global campaign in 2013 – ‘For the Bold’, climbing 6 positions in Latin America.

Cheetos rose four places in the Latin American Top 50. Its success in Mexico was supported by an award-winning marketing campaign called ‘Let’s jump together with Chester Cheetos’, which effectively connected with families and positioned Cheetos as a fun and responsible brand.

RELATIONSHIPS MATTER TO LATINOS

There are two central pillars of Latin American life – family and friends – and they have the greatest influence on FMCG purchase decisions. When it comes to deciding which channel to buy from, a relationship with the salesperson is a key factor for 42% of shoppers. This is why traditional channels remain so important.

Do-it-yourself is still popular, with 70% of households buying at least one product this way each year; they appreciate the salesperson’s knowledge and the bond of trust that develops.

RISING STARS ARE REGIONAL AS WELL AS GLOBAL

Colgate is the brand with the biggest footprint in Asia, although its rival Pepsi is gaining on it for the No. 1 position. Colgate is the brand with the biggest footprint in Asia, although its rival Pepsi is gaining on it for the No. 1 position.

The ability to offer products that recognize and answer these priorities is what sets Asia’s most-chosen and fastest rising brands apart.

RISING STARS ARE REGIONAL AS WELL AS GLOBAL

Asia is already growing. Premium chocolate, demand for premium FMCG products is already growing. Premium chocolate, and devoted to their families. Extremely tech-savvy, they embrace innovation, and love when products are given a ‘premium touch’ with packaging and quality. They care about both inner balance and outer beauty, and when it comes to food they have a discerning palate. The ability to offer products that recognize and answer these priorities is what sets Asia’s most-chosen and fastest rising brands apart.
Regional Review: Europe

Europe’s 10 most-chosen brands remain stable in their positions. Of the five that grew their Consumer Reach Points this year Colgate, Heinz and Coca-Cola performed most strongly.

Outside the Top 10, Lay’s, McVitie’s and Milka showed particularly vigorous growth. McVitie’s expanded its range to take advantage of new trends in the biscuit and snacks category with healthy breakfast biscuits and more or b Tibetine versions of its most popular brands. Milka’s successful co-branding efforts have been popular with consumers in Europe, especially in France.

Fairy, which was historically a dishwashing brand, has expanded into other home markets, most notably laundry and it sits alongside Lenor as the biggest riser in home care.

Drăil-B and Elvire/Elsene shine in the health and beauty category. Oral-B’s growth is partly due to its premium toothpaste launches of 3D White Luxe and Pro Expert 3D Gum Protection. Its performance is strong in France, supported by these recent launches.

2. Discounters are outperforming other retailers

Discounters such as Lidl, Aldi, Kaufland and Netto have been growing their store numbers across Europe, enabling them to attract more shoppers with their value for money offer. As well as this, they have been working to improve their brand perception through advertising, enhanced product ranges and a move into fresh food. While helping consumers to better manage their budgets, this trend has the potential to affect overall sales growth in the market.

Discounters (and Mercadona in Spain) came out ahead and increased their presence in many markets in the last year. In Italy, where 80% of shoppers state they are more price aware, discounters are the only channel that is growing. The UK, Ireland, Spain and Russia where growth was higher than the European average at +1.9%, +1.4% and +0.7% respectively, perhaps surprising for the UK which already has the highest private label share in Europe. France is one of the main countries which bucks this trend, as retailers and consumers there have placed a greater emphasis on brands.

The growth of discounter retailers is also aiding private label development due to greater private label shares in these stores.

“Despite the tough market conditions that US consumers face, trading down to cheaper products is widespread. Brands looking to increase their footprint in the US should consider developing innovative products that enhance consumers’ wellbeing across all aspects of their lives. They should create true value for money through effective functions or simplicity of use. Rapid and long lasting results, or completely new flavours, are likely to attract new shoppers.”

Susan Viamari, Editor, Thought Leadership

Regional Review: The US

Half of the Top 10 US brands have moved position since last year. Lay’s is one of three brands to improve their ranking position, taking Pepsi’s place at number four.

Local sweet bakery brand Little Debbie is the fastest-growing US brand within the Top 10, largely influenced by the bankruptcy of Hostess Twinkies in 2012. However, after a dramatic recovery, Twinkies returned to the shelves in July 2013, so this year may not be such a smooth ride for Little Debbie.

Outside of the food brands, category winners include Colgate which takes the number one position in the health and beauty ranking after driving growth through strong product innovation. Kleenex drops back to number two, while Glade climbs four positions to enter the home care Top 10 following successful launches of products including the Glade Expressions Oil Diffuser. In the beverages category only Mountain Dew has managed to move up a position – over taking Gatorade for third – with the launch of its ‘Kickstart’ breakfast drink, as the rest of the Top 10 brands retain their dominant positions in terms of consumer reach.

“Did you know?”

Of the more than 9,500 new brands launched in the US in 2013 only seven went on to earn more than $100m in their first year. (Source: IRI)

Colombia’s CRP remains the number one market leader. Colgate’s strength in the personal care category is shown by its penetration of 80% in the mouthwash category. IRI has identified that product innovation is key to driving growth in this category.

According to our European ‘barometer’, the average European share of private label grew from 26% in 2012 to 27% in 2013. This trend was particularly apparent in the UK, Ireland, Spain and Russia where growth was higher than the European average at +1.9%, +1.4% and +0.7% respectively, perhaps surprising for the UK which already has the highest private label share in Europe. France is one of the main countries which bucks this trend, as retailers and consumers there have placed a greater emphasis on brands.

The growth of discounter retailers is also aiding private label development due to greater private label shares in these stores.

“Did you know?”

Around 29% of Russians who consume baby juices and purées are over 18.
Regional Review: Africa – the next and final frontier

In five years’ time Africa will be the fastest-growing economy in the world. With seven of the world’s 10 most rapidly growing countries, its remarkable demographics, modernisation programmes and rising consumer market, Africa will eclipse Asia as the region with the greatest potential to contribute to FMCG growth.

As developed markets stagnate, the rush for a place in Africa’s brand landscape is gathering momentum. Brands which enter early and establish themselves will have the opportunity to build long-standing relationships with consumers. In Nigeria, Close-Up has 87% penetration – and is the number one toothpaste brand – after entering the market in 1975.

why Africa’s time is now

• The size of the market and consumer base: Africa’s territory is larger than the US, India, China, Japan and all of Europe combined. It contains 15% of the world’s population – more than one billion people in total – and its population is growing faster than any other market, even India. It will comprise 1.75 billion people by 2060.

• The demographics: The region includes the highest proportion of young people in the world. By 2060, 1.1 billion people will be of working age. Africa’s population is increasingly urbanised: 40% of people in Africa live in cities and by 2030 that number will have risen to 50%.

• The rising middle class: Today, 35% of Africa’s population – 365 million people – is middle class. Africa’s spending power is set to double; the number of households with discretionary incomes is expected to rise by 53%, from 85 million to 130 million, by 2020.

• The emergence of modern trade: Street markets still represent over 60% of trade in Africa, but shopping in supermarkets and hypermarkets is expanding. Kenya is one of the most developed modern trade markets in Africa; supermarkets account for 30% of urban food sales.

• The connected consumer: Household PC and laptop ownership is only 12%, but mobile penetration has reached 80% across Africa, with countries such as Cote D’Ivoire (93%), Senegal (88%) and Ghana (88%) exceeding the global average. In Kenya the pioneering mobile payment platform M-Pesa is used by 80% of the population and accounts for 60% of all transactions.

“Africa is a complex market. It is made up of 61 countries and several regions, each with its own distinct shopping and usage habits – for example, bar soap is bought by 97% of Nigerians but only 50% of Kenyans, who tend to use laundry soap in their baths as well as to wash clothes. A ‘blanket approach’ to building a brand will not be effective; these differences need to be explored and understood.”

Tina Ummuna, Business Development Director, Kantar Worldpanel Nigeria

Did you know?

Food seasonings can be found in 99% of Nigerian kitchens. Consumers there buy seasoning products 59 times a year – that’s more than once a week.
The Global Brand Compass

Introducing the 2014 Global Brand Compass, which defines a brand’s global typology based on its penetration and frequency to deliver an understanding of its global footprint and where it should focus in order to grow.

WHAT ARE THE ATTRIBUTES OF A NORTH BRAND?

• High penetration: it reaches at least one in five of the world’s households.
• High frequency: it is purchased by shoppers at least six times a year – once every two months.
• It is present in a high number of territories (like Coca-Cola) or in populous markets (like Lifebuoy).
• It is a market leader in terms of share.
• It keeps successfully enlarging its consumer base – Maggi and Lay’s are both masters in this area.

HOW TO BECOME A NORTH BRAND

These four golden rules for growing brand reach were introduced in last years Brand Footprint report. While the market is continually developing, these rules are still valid for brands with international aspirations.

• Be global: Have one name around the world, with relevant translations, to maintain strength of global identity. Support this with globally-led marketing campaigns that are adapted locally. This consistency brings economies of scale in production and marketing.
• Be available: Make access easier with affordable packs and smart sizing tailored to the needs of different global consumers. By embracing traditional and innovative retail channels, a brand can ensure it is present everywhere its consumers are shopping.
• Be agile: Not only embracing local cultures and festivities, from Chinese New Year to Halloween, but developing knowledge of local preferences and tailoring products and positioning accordingly.
• Be across categories: Exploiting strong brand equity can aid in entering new markets whenever relevant – for example, Lifebuoy has built on its health and hygiene profile to penetrate the haircare, hand and body wash categories.

Through analysing those brands that exhibit strong growth, additional guidelines for brands aiming to move North have come to light.

• Have a social mission: Brands driving actions that tackle important issues have the opportunity to make stronger connections with consumers. Obesity, dental care for children and education about hand-washing are all examples where brands are leading the conversation.
• Don’t ignore digital: Global, transparent and interactive communication should be at the heart of any FMCG brand strategy. The forward-thinking brands are using social media to connect with and better understand their consumers.
• Build a smart portfolio: manufacturers should look at all brands in their portfolio, complementing existing ones with newer brands that solve the needs of consumers who are not yet being reached. This can mean adding brands in complementary or competing categories, and looking out for opportunities to acquire strong local brands.

THE GLOBAL BRAND COMPASS: THE TOP 50 FMCG BRANDS

<table>
<thead>
<tr>
<th>NORTH BRANDS</th>
<th>EAST BRANDS</th>
<th>SOUTH BRANDS</th>
<th>WEST BRANDS</th>
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<td>North is not the only way up. These brands reach a high number of consumers, but their products are not purchased very often. While Gillette is present in many countries across the globe, the consumer if currently aims to engage is primarily men of shaving age. The brand also specialises in a category which is typically not bought very often – Gillette is purchased just three times per year on average. Opportunities exist for Gillette to expand its reach by attracting more consumer groups through new categories and innovations.</td>
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<td>More targeted than North Brands, these brands are not bought by as many people nor as often. Pampers, despite being the world’s biggest baby brand, remains a South brand due to the niche appeal of its products – only purchased for babies and for a limited period of time. The opportunity for Pampers to extend its penetration and frequency are limited.</td>
<td>They do not reach as many consumers as North Brands, but those buying their products do so on many occasions. Bimbo is an exceptionally strong player in bakery products – a very frequently-bought category. The brand’s focus on specific markets such as Latin America, China, the US and Spain give it an average penetration of 6%. But Bimbo’s lack of presence in most of Europe, and large markets including Indonesia, limits the number of consumers it can reach.</td>
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THE ONLY WAY UP

The north quadrant is occupied by an exclusive list of brands that are both bought often and by many. Some brands will simply never sit at the North point of the Brand Compass. This can be due to the nature of the categories in which they operate, the result of a tightly defined target consumer or occasion, or it can simply be a strategic choice.

Dove case study: P&G’s Dove agenda is primarily men of shaving age. The brand also specialises in a category which is typically not bought very often – Gillette is purchased just three times per year on average. Opportunities exist for Gillette to expand its reach by attracting more consumer groups through new categories and innovations.

Mobile users have increased from one billion to seven billion in the last decade, while internet users have increased from 350 million to three billion in the same period.
Game Changer: P&G’s ‘supersavvyme’ website

P&G’s supersavvyme website is a best practice example of building an engaged community and positioning home care brands firmly at the heart of shoppers’ lives. Designed to help consumers across the world to tackle life’s everyday challenges – from getting chewing gum out of a school uniform to sprucing up a living room – it includes expert tips and articles, money-off coupons and a ‘savvy circle’ forum for members to review products and share experiences. Through the site, P&G has found a way to showcase its family of brands, reinforce its relevance to shoppers and gather authentic insights on consumer experience.

A NEW ERA FOR FAIRY

Fairy dominates the home care market across Europe. It is the most chosen home care brand in Spain, the UK and Ireland. Fairy has expanded beyond its traditional dishwashing products into other segments – most notably laundry detergent, successfully introduced in the UK and People’s Capsule formats. It has also launched a new eco-friendly, convenient ‘all in one’ dishwebber tablet giving powerful cleaning in short wash cycles.

Did you know? Chinese consumers were the first to use toilet paper – a habit that was widely adopted in Western culture.

Did you know? 65% of women in China use a conditioner at least once a week, compared with 32% of women in France.

Brands in Action: TRESemmé

TRESemmé has gained nine million new shoppers since 2012 – a rise of 18%. It is now bought by more than a quarter of all households in the US and UK, and one in 10 across Ireland, Brazil, Mexico and Argentina. Unilever acquired the brand in 2010 and leveraged its decades of experience to launch TRESemmé in emerging countries, including India and Indonesia. It used the same strategy that helped TRESemmé boost P&G’s Pantene into second place in Brazil less than a year after its launch: forging relationships with retailers, distributing free samples and engaging consumers through social media. The approach paid off; TRESemmé’s strongest growth last year was in India and Indonesia.

The brand’s global power was boosted by focused, high-profile marketing tactics. It sponsored the TV show Asia’s Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia. This is the first time the brand has pitched itself globally. Futhermore, its fashion credentials, TRESemmé sponsored America’s Next Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia. This is the first time the brand has pitched itself globally. Futhermore, its fashion credentials, TRESemmé sponsored America’s Next Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia. This is the first time the brand has pitched itself globally. Futhermore, its fashion credentials, TRESemmé sponsored America’s Next Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia. This is the first time the brand has pitched itself globally. Futhermore, its fashion credentials, TRESemmé sponsored America’s Next Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia. This is the first time the brand has pitched itself globally. Futhermore, its fashion credentials, TRESemmé sponsored America’s Next Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia. This is the first time the brand has pitched itself globally. Futhermore, its fashion credentials, TRESemmé sponsored America’s Next Top Model, a partnership first launched in the UK in 2011, then extended to the US, Australia, Africa, Latin America and Asia.
Four ways to win

- **Be a pioneer**
  - **Add a new step to a regime.** Brands offering affordable, salon-quality experiences at home have successfully extended personal care regimes. Haircare has expanded its reach beyond the classic shampoo and conditioning steps to include hair treatments, masks, oils and even fragrances. Garnier’s recent launch of Ultimate Blends targeted UK audiences with the promise to deliver smooth hair even in damp British weather. Washable hair chalks are now being positioned as an accessory in the hair colourant segment.
  - **Create a new format.** Vim took a pioneering accessory in the hair colourant segment. Hair chalks are now being positioned as an accessory in the hair colourant segment. "Vim’s whitening toothpaste for sensitive teeth, are second multi-tasking examples. B’s whitening toothpaste for sensitive teeth, are the need to dry-off before applying, and Oral-B’s whitening toothpaste for sensitive teeth, are two multi-tasking examples."
  - **Help consumers multitask.** The snack category delivers one of the most impressive performances in the 2014 Brand Footprint food ranking. The category has grown its Consumer Reach Points by 2.7%. As Oreo, the 10 fastest risers in the food Top 20 include Cheetos, Lay’s and Doritos. These brands are succeeding through new product development, localised flavours and innovative communications which generate excitement and engagement.

- **Make home care personal.**
  - **Premium fragrance positioning proved a winner for Downy, which launched its Infusions range in the US and Latin America in late 2012. The unique, luxurious fragrances – which include Honey Flower, Sage Jasmine and Sweet Dreams as well as locally tailored scents such as Downy Parfum Mystique in Thailand – were targeted at women to be used in the laundry which dispersed in wardrobes. An interactive website enabled consumers to personalise their own scents by combining Downy’s fabric softeners with its Unstopables in-wash scent boosters. To build on their ‘fragrance equity’ home care brands including Febreze, Glade and Fairy are using the same fragrances across their entire product portfolio and encouraging shoppers to purchase in different categories.
  - **Make life easier.** Help consumers multitask. Busy lifestyles are leading consumers to demand more from their personal care products. Brands which meet multiple needs and speed-up essential processes – such as getting ready for work – have proven successful across the world. Nevia’s in-shower moisturiser, which removed the need to dry-off before applying, and Oral-B’s whitening toothpaste for sensitive teeth, are two multi-tasking examples.
  - **Make products immediately accessible and dispensable.** The wipe format has been embraced by the beauty sector to deliver on a wealth of personal needs. Now wipes have evolved across home and personal care, from multi-surface cleaning to intimate wash, nail polish removal and washable wet toilet tissue. One opportunity not yet captured in India’s metal polish market: 60% of Indian households buy metal polishes to make jewels, plates and cups shine but as yet no wipe format exists.

- **Transfer successful benefits to other categories.** Anti-ageing properties were once only found in skincare products. Haircare brands have recently incorporated age-defying attributes alongside the traditional shampoo and hair treatment properties. Sun protection has been incorporated into make-up and hair care as well as skin creams, lotions and sprays. Disinfectant and anti-germ ingredients, typically used in household cleansers, can now also be seen in hand soaps, dishwashing products, hand sanitisers and oral care, as Pepsodent’s Germcheck toothpaste in India illustrates. We have also seen ‘gluten free’ move from bread to toothpaste with Oral-B’s Aquafresh and Crest.

- **Times are changing at the top.**
  - **Food**
    - **YOGURT**
      - Penetration year on year: 0.5%
    - **COOKING OIL**
      - Penetration year on year: 0.8%
    - **SUGAR & SWEETENERS**
      - Penetration year on year: 0.5%
    - **BREAD**
      - Penetration year on year: 0.2%
  - **SALTED SNACKS**
    - **Oreo**
      - Penetration year on year: 1.7%
    - **SLICED BREAD**
      - Penetration year on year: 0.8%
  - **CRISPS & CHIPS**
    - **Lay’s**
      - Penetration year on year: 1.7%
    - **Doritos**
      - Penetration year on year: 0.8%

**Category focus: Food**

**Brands in Action:**

**Doritos brings fans closer together**

With 3.8 million new shoppers around the world, Doritos climbed four positions in the global ranking. Doritos achieved this with consistently bold brand positioning, a focus on its "extreme" flavours and brave, youth focused communications. Doritos recently launched its first ever global campaign – ‘For the Bold’ – alongside revamped packaging and logos consistent across all markets. The brand’s greatest successes were seen in Argentina, Thailand, Brazil, Spain and Korea.

In Argentina the brand embraced its bold, irreverent positioning with the ‘La Actitud Garpa’, which encouraged brand fans to submit selfies to earn points in order to win a trip to Las Vegas. In Thailand, the Doritos Extreme Action photography app let consumers add ‘extreme action’ frames and sounds to their images, and encouraged sharing on Facebook to win delicious weekly prizes.

Its annual ‘Crash the Superbowl’ competition – which invites amateur filmmakers to create an ad for Doritos to be shown during the Superbowl Final – continues to engage US consumers with 111.5 million people tuning in to watch, and contributing to the 4% growth in US. Also in the US, Doritos extended its presence at the South by Southwest (SXSW) festival with The Doritos Bold Stage – a 62-foot tall, functional Doritos vending machine powered by Tweets from consumers able to submit ideas via Instagram and Twitter for the first time in 2013.

**Crowdsourcing works for Lay’s**

When it comes to localising flavours Lay’s is a veteran and has involved consumers in deciding new variants since 2008. The continued strength of the ‘Do us a Flavor’ campaign in the US has helped the brand climb the ranking and deliver a 7% growth in Consumer Reach Points. The latest campaign uses social media to broaden its reach with consumers able to submit ideas via Instagram and Twitter for the first time in 2013.

**Activate’s drops out of the Top 10 after being affected by multiple challenges:** Reduced spending in the Eurozone, increased milk prices in late 2013, questions regarding its health claims and a boom in Greek-style yoghurt led by Chobani in the US. In response to these challenges Activia is moving its marketing away from a focus on digestive health. It has signed global celebrity Shakira for a new “feeling-good from the inside” campaign launching in 55 markets.

**Scan the QR code to read the Barilla story in France.**

**Scan the QR code to read the Oreo case study on our microsite.**

**Scan the QR code to read the Do us a Flavor campaign on our microsite.**

**You should consider the Penetration Year On Year**

- **FOOD**
  - **YOGURT**
    - Penetration year on year: 0.5%
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    - Penetration year on year: 0.8%
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  - **Oreo**
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- **CRISPS & CHIPS**
  - **Lay’s**
    - Penetration year on year: 1.7%
  - **Doritos**
    - Penetration year on year: 0.8%
In Asia, health benefits are considered as important as safety within food. Both attributes are especially valued by women: 72% of urban Vietnamese housewives want products with additional ‘active’ ingredients such as vitamins, ginseng and calcium. Convenience is also a growing priority with more than half of rural Vietnamese housewives now preferring food that doesn’t require much preparation. One global brand responding to these needs is Maggi which positions itself as ‘the friend of consumers’ with a strategy to make its products indispensable in the kitchens of every Vietnamese family.

In Spain, where the penetration of ready-to-eat food peaked in 2011, home-made dishes returned to popularity with households using healthier methods such as boiling, steaming and grilling. This trend has boosted the growth of brands including Knorr which created new convenient home-cooking solutions. Despite their concern for healthy eating, consumers in some countries, such as the UK and US, have increased the average sugar and saturated fat content in the food they buy. This is partly influenced by the trend for ‘natural’ products – butter is higher in saturated fat than ‘light’ margarine – but also due to a move towards more convenient processed foods.

In Asia, health benefits are considered as important as safety within food. Both attributes are especially valued by women: 72% of urban Vietnamese housewives want products with additional ‘active’ ingredients such as vitamins, ginseng and calcium. Convenience is also a growing priority with more than half of rural Vietnamese housewives now preferring food that doesn’t require much preparation. One global brand responding to these needs is Maggi which positions itself as ‘the friend of consumers’ with a strategy to make its products indispensable in the kitchens of every Vietnamese family.

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BELVITA: REDEFINING BREAKFAST IN THE UK
Belvita was first launched in France more than 10 years ago. The ‘breakfast biscuit’ was created to address a gap in the French market for ready-to-eat breakfast foods that could be consumed on the go. Following its success in France, Belvita brought its products to the UK – which is a nation keen on biscuits, with 70% of the population eating the product in a typical week.

Monsdiez, the owner of Belvita, combined this local preference for biscuits with the need of UK consumers for a convenient and nutritious breakfast food. Monsdiez spent $12.7m on marketing in the UK emphasising the product’s benefits: it’s easy to eat on the move, both tasty and satisfying, with energy that is released slowly.

Following the success of the sub-segment in the UK, Belvita has exported the idea of eating healthy biscuits for breakfast to three continents. Belvita grew its Consumer Reach Points by 13% in the last year and jumped two positions in the global ranking. Growth was driven by Colombia and Saudi Arabia as well as the UK, where penetration increased 5%. It has been less successful in Portugal and France where it has been challenged by local competitors such as Olltín and National.

So far the brand has protected its market-leading position in the UK with aggressive promotions, however the breakfast biscuit sub-segment is becoming more crowded with competitors such as Hovis, Quaker, Westlabix and McVitie’s all with their own breakfast biscuit variants. How long will Belvita’s lead be sustained?

MOVING NORTH IN FOOD
WHAT WILL SHOPPERS WANT NEXT?
Innovation in food is shaped by changing, often local, consumer requirements. In response, food brands are seeking more engagement with consumers – particularly through social media – to put themselves at the forefront of understanding what they will want next and how they can respond.

CONVENIENCE AND NUTRITION PROVE A WINNING COMBINATION
The 2014 Brand Footprint food ranking reveals two key trends: consumers say they want health, but they often choose convenience. Health is an important consideration for consumers worldwide when making food choices. Rising obesity, higher levels of education and food contamination scares are all motivating factors for the focus on health. Alongside this is a demand for food brands to offer convenience. The needs of time-poor consumers, changing social habits and on-the-go eating are creating the desire for food options which are easy to prepare and to eat. Manufacturers have responded with healthy options and ‘better for you’ variants that replace high-sugar, sodium and fat products, and convenient solutions which meet new consumption occasions or consumer needs such as breakfast biscuits which offer slow release energy.
**Category focus: Beverages**

**TOP BEVERAGE CATEGORIES GLOBALLY BY PENETRATION**

Did you know?

**Category focus: Beverages**

**HEALTHY HYDRATION AND FRESH FLAVOURS**
Health is the key brand for beverages. Last year all the healthier beverage options grew their Consumer Reach Points.

Ready-to-drink (RTD) tea is the fastest growing beverage segment. Its positioning as a natural, low-sugar and antioxidant rich refreshment has delivered 15 million new households. Bottled tea has increased its popularity of in-home consumption globally and added over 14 million households. Energy, iced and isotonic drinks gained 10 million new shoppers.

The emerging strength of these healthier categories reflects new global purchase patterns. The greatest impact of which has been on instant tea, which declined -8% in Consumer Reach Points.

**LEADING THE GLOBAL BEVERAGE PLAYERS**
When it comes to attracting new consumers there is one clear winner: Fanta. The brand increased its Consumer Reach Points by 6.4% globally and is the fastest grower in the 2014 Brand Footprint Beverage Top 10.

Consumers in developed markets continue to move away from carbonated soft drinks (CSDs) and opt for beverages that are perceived to be healthier – as shown in Fanta’s loss of 3.5 million shoppers in these countries. But Fanta has concentrated its effort in emerging regions, where consumers are embracing CSDs, and has added 9.1 million new households in emerging markets last year.

The Coca-Cola owned brand has also benefited from continued investment in its profile. Global marketing campaigns have positioned Fanta as a socially cool beverage choice for teenagers under the tagline ‘More Fanta, Less Serious.’

**Brands in Action: Fanta**
Central to the brand’s success in the last year is Play Fanta, an integrated marketing campaign which targets teenagers in 190 countries. The campaign encourages young people to rediscover play through an online/grafic novel game featuring the ‘Fanta Crew’ characters – the characters are used across the brand’s TV, outdoor and digital advertising – which has helped to engage its 13 million Facebook fans. Fanta’s global campaign is supported by local websites with digital games, brand stories and activations tailored for local audiences.

Play Fanta cemented Fanta’s position as the drink of choice among teenagers, especially in Latin America. In Bolivia 83% of households purchase Fanta, while in Chile it is bought by 76% of households. Fanta has served an award-winning lesson in how to engage a target audience in the digital world.

**BUILDING BEVERAGE GROWTH**
Beverage brands hold three of the top four places in the 2014 Brand Footprint ranking. The average penetration of the Top 10 beverage brands is just 20% and only Coca-Cola reaches over 40% of households worldwide. It is clear that there is still enormous potential for growth.

For global beverage brands the challenge is two-fold: they need to convert more households into customers while also addressing the growing challenge of emerging local brands.

**FOUR WAYS TO WIN**

- **Ensure products are available:** Strong local distribution networks are essential to ensure availability to global consumers. As beverage brands attempt to expand global penetration they should look to new solutions which address accessibility. In emerging markets beverages underperform in modern trade due to lower car ownership as shoppers cannot transport heavy purchases. As a result door-to-door distribution of water, and now Coca-Cola, is on the increase in India and across Latin America – where home delivery is often viewed as a standard requirement from retailers.

- **Focus on specific groups and new consumption occasions**

  - **Man appeal:** Coca-Cola Zero was Coca-Cola’s biggest launch in 22 years and its first product targeted at men. Rather than being a ‘diet’ beverage, Coca-Cola Zero is positioned as ‘calorie-free.’ Its masculine focus is supported through celebrity endorsements, advertising and sponsorships, including the James Bond franchise.

  - **Indulgent refreshment:** Twinings identified a gap in the market, and supported its premium brand positioning, by establishing itself as an indulgent treat for European consumers. Its Signature Blends range, with flavours including After Dinner Mint and Garden Party, created new refreshment occasions. The result was 2.6 million new households choosing the brand last year.

  - **Get specific:** Pocari Sweat, the isotonic drink brand, repositioned itself from a sports-only beverage to a rehydration and recovery drink. It tailored its communication to provide a solution for Indonesian consumers after Ramadan fasting. This rapidly increased its leadership in both urban and rural Indonesia.

  - **Localise flavours and campaigns**

**GLOBAL BRAND COMPASS: BEVERAGES**

**LOW PENETRATION & LOW FREQUENCY**
- Delivered a personal touch: Coca-Cola’s ‘Share a Coke’ campaign took personalisation to 32 countries. It produced 800 million bottles with the most popular 150 names from each market.
- Join the celebration: Fanta capitalised on the growing popularity of Halloween in the UK with themed packs including ghostly jokes and gruesome recipes.

**BUILDING IN-HOME CONSUMPTION WITH OUT-OF-HOME MARKETING**
Beverage brands have maintained awareness by connecting with out-of-home drinking occasions and by optimising all consumer touchpoints. Bubble tea could be the next beverage battleground. It is currently only available for out-of-home consumption. Which manufacturer will capture this potentially lucrative opportunity?
Brands in Action: Kopi Luwak

Indonesia is one of the world’s biggest coffee-drinking nations. With over 300 coffee brands available in the market it is difficult to make an impact. Yet Kopi Luwak has entered the Top 50 Indonesian brands ranking this year as a result of its low-acid white coffee.

Kopi Luwak has positioned itself as an affordable drink which is “healthy for the stomach and the heart”. Its advertising has drawn public attention by using local celebrities. Since launching in 2011 it has gone from just 1% volume share of the coffee market to 10% in 2013, and has risen 14 positions in the Indonesia ranking. Other brands have followed Kopi Luwak’s lead and introduced their own versions of white coffee.

Indonesia’s white coffee-drinking is predicted to spread. With a strong coffee culture in Vietnam and the Philippines this innovative coffee is likely to become a popular drink.

Brands in Action: Ichitan Tea

Thai brand Ichitan is reaping the rewards of entering the ready-to-drink (RTD) tea market at a time when sales are booming. RTD tea – or iced tea – is the fastest growing beverage in the world. It expanded its global reach by 12% in the last year and is purchased by 40% of households worldwide.

While the success of Ichitan mirrors that of the overall segment, the Thai population has embraced the availability of iced tea within the country with consumer spend increasing by almost 100% in two years.

As well as being Thailand’s number one iced tea brand, Ichitan is the country’s fastest-growing brand. In Thailand, Ichitan has as many Consumer Reach Points as Coca-Cola and 53% of Thai shoppers have purchased its products. Ichitan has gained 49 places in the country’s Brand Footprint FMCG ranking since last year to become number 16.

At the heart of Ichitan’s success is the brand’s charismatic founder, Tan Passakornnatee. Tan fronts Ichitan’s advertising and in 2013 he launched a promotion to give away one million bath to 60 individuals over 60 days. Tan amplified the promotion by showcasing the personal stories of the winners on his Facebook page – which now has more than 2.7 million fans.

Ichitan has also concentrated on building a powerful supply chain which combines traditional retail with distribution through Tan Passakornnatee’s nationwide network of restaurants.

Winning at the Moment of Truth

What does it take to make it into the global ranking of the most chosen FMCG brands and what of the future?

The rising middle classes bring a multitude of opportunities, but brands must recognise that each country’s “middle class” is unique. This is why Omo offers a premium liquid laundry detergent in Europe, alongside a more accessible handwashing formula in China.

Brands that win at the moment of truth, that pivotal point at which the shopper makes their purchase decision, are:

BRANDS WITH MEANING
They connect with consumers, and many – like Lay’s – give them a say in the future of the brand. Their ideas make people’s lives happier, healthier or easier, with innovations and communications tailored to what’s important in different markets.

Health, for instance, has different meanings around the world. In India, where ‘healthy’ means ‘hygienic’, Lifebuoy printed messages on chapatis at the 2013 Kumbh Mela asking “Have you washed your hands with Lifebuoy?”. In Mexico, where obesity is rising, Cheestrks launched a campaign encouraging the whole family to exercise together.

Brands that understand their shoppers

These brands do not treat consumers as broad targets or demographics; they talk to them as individuals. The ultimate example of this in 2013 was Coke’s ‘Share a Coke’ campaign.

BRANDS WITHOUT BOUNDARIES
They make themselves accessible to the highest number of shoppers, and both online and offline distribution is vital: the proliferation of ‘Yakult Ladies’ is likely to make Yakult a Top 50 brand next year.

Their campaigns create a multi-channel experience that is as seamless as the way people consume digital media, such as Fanta’s ‘I Play Fanta’ campaign. They focus on building a community around a brand – something P&G achieved with its supersavvy.me website.

Brands that ruthlessly pursue growth

They know where to focus their growth and how to command attention in any market.

There are opportunities in both emerging and developed markets. Coca-Cola, for instance, is growing in both Germany and Mexico. However, the biggest scope for increasing Consumer Reach Points is in emerging countries.

With increasing populations, middle classes and GDP, the countries making the key contribution to growth for global FMCG brands were China, India and Indonesia.

What’s next? Four trends shaping the future of FMCG

1) Emerging regions will continue to grow ahead of developed markets. Watch out for Indonesia and Africa, which will be the rising stars.

2) Online FMCG sales will grow at a steady pace, reaching 5.2% global share by 2016. Watch out for Amazon Fresh, and Taobao in China, which could disrupt the landscape and escalate the growth of online’s share.

3) Convenience, health, affordability, individuality and talkability will all remain important to consumers. Watch out for the resurgence of sustainability, provenance and the environment as priorities. Consumers will expect products to be more natural, while delivering the same benefits.

4) Local players will keep expanding their boundaries. Watch out for the ‘gateway strategies’ of brands including Orion, which expanded into Russia to help it enter Western Europe, and into Vietnam as a route into Asia.

The brands that win at the moment of truth

WINNING AT THE MOMENT OF TRUTH
Every one of the global brands in the 2014 Brand Footprint ranking was chosen at least 300 million times in the last year. This means consumers chose to buy it over another brand on multiples – and for 16 brands – billions of occasions.

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Brand Footprint is Kantar Worldpanel’s global ranking of the most chosen FMCG brands in the world.

The Methodology

Brand Definitions

- To be considered a global a brand must be available in at least two continents, while regional rankings require a brand to be present in at least two countries in the region. Local brands can be seen in country rankings at www.brandfootprint-ranking.com. Brand Footprint only covers consumer brands; retailers’ private label brands are not included.

- Brands listed include all variants, categories and formats that sit within them – for instance Pantene includes all of its shampoos, conditioner, hair treatment, hair spray, hair oil and mask products.

- For brands with names that have been directly translated into a local language, for example Mr. Muscle and Mr. Músculo, both are counted as the same brand. However, brands sold under different names in different countries are considered as individual brands – for instance Tide and Ace.

- If a ‘master’ brand features the manufacturer’s endorsement in the packaging, we consider the ‘vaughter’ brands separately as their branding is most prominent. For instance, Special K from Kellogg’s would be counted separately whereas Kellogg’s Corn Flakes would be reported as part of the Kellogg’s overall brand. Similarly for Cadbury’s, Dairy Milk is reported individually but Cadbury’s Creme Eggs are part of the master brand. However, where a manufacturer also has a brand of the same name such as Kraft (e.g. mayonnaise), Danone (e.g. yoghurts) or Nestlé (e.g. ice creams) the individual brand has been included in the ranking.

THE UNIVERSE

The 35 countries included in the report comprise 156 million households. This means that penetration of 1% equals reaching approximately 9.6 million households.

THE DATA PERIOD

Brand Footprint data was collected over the 52-week period between October 2012 and October 2013. All data relates to purchases that are brought into the home.

FOOTNOTE

If your brand or company would like to use Brand Footprint or Consumer Reach Points data in advertising, promotion or publicity, please contact brandfootprint@kantarworldpanel.com

Brandfootprint@kantarworldpanel.com

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