

BRAND FOOTPRINT

2024

Decoding brand
choices across the world

Bringing you the most comprehensive
global shopper understanding in collaboration with

The difference that makes a difference

Brands grow by being meaningfully
different to more people



The difference that makes a difference



Guillaume
Bacuvier
CEO
Worldpanel Division, Kantar

Pivot to prosper

In the commerce of daily life, change can be the friend or foe of brands. A brand stands still, and the world moves on; a brand adapts, and opportunity unfolds. There is no room for complacency when the measure of success is drawn by those who embrace recalibration. This year's Brand Footprint report delves into the world of adaptation and explores how successful brands understand the power of the pivot. They connect the 'why' to the 'what' with precise monitoring of shifts in consumer motivations, intentions, circumstances, and behaviour. The result? They recruit more shoppers by being meaningfully different to more people and being more present.

So how have they achieved this in an environment where less costs more, private labels are gaining share, and the discounter channel wins more baskets? Put simply, they have found ways to be meaningfully different even when the average household brand repertoire holds steady at 62. That's right, the topline number of 62 brands hasn't budged, yet we've witnessed significant shifts within these choices. This is where the magic happens.

It's what happens when brands create strong functional and emotive connections — predisposing more people and earning a path to the winner's circle. It's about making your brand more present — mentally available and physically unavoidable — integrating seamlessly across all consumer touchpoints.

And it is doing so as pressure on household expenses persists as a stubborn undercurrent in the



5
Continents



55
Markets



76%
Global
population



86%
GDP coverage



42,800
Brands

global economy. Yes, inflation is easing for many, but that doesn't mean prices are going down. Value-hunting is a clear and present demand from consumers. However, somewhat paradoxically, we also see brands using their pricing power to ramp up their offer of premium product variants — everything from ice cream to shampoo — for enjoyment in the home.

Locally informed, globally aware

At Worldpanel, we're fortunate to have both a global and local view. Indeed, we've added even more markets to our coverage for this report, including big developing markets in Africa. Why is this important? Because 64% of global consumer choices take place in emerging markets. These growth environments, which can only get

bigger with the tailwinds of population and investments, are important to recognise. In this report, we dig into the stories of emerging market giants and local rocket ship brands, including an eye-opening interview with Mayank Shah from Parle, India's largest food company that continues to find ways to grow its footprint.

The winners are also those who transcend competition by finding new space. In this year's report, we shed light on how and where brands found new space through the lenses of 55 markets and a spread of over 42,800 brands. We also bring analysis underscoring the reality that brands doubling down on innovation to discover the most incremental spaces — whether through new occasions, targets, or needs — are those redefining their trajectory.

By stretching into uncharted territories, these brands find pathways to new shoppers, and more shoppers. In fact, our data reveals a compelling narrative: brands that expanded their use cases by just 10% witnessed a striking 17% growth. This is a clarion call for brands to carve out

new avenues for consumer connection through astute product development, judicious category management, and resonant purpose.

To illustrate such cleverness, we spotlight the remarkable story of Red Bull, a beacon of growth in



what many might have assumed was the saturated category of energy drinks. Alongside Red Bull, Sunsilk's strategy to win more shoppers than any other brand exemplifies how understanding and leveraging consumer desires can lead to remarkable gains. We offer example after example of others who cracked the code to find more shoppers.

As you'll see, these case studies are practical blueprints for leveraging what we believe are critical growth accelerators: predisposing more people to your brand, being more present, and finding new space for engagement.

We believe the insights from Brand Footprint can directly inform brand success because, ultimately, every strategy, campaign, and marketing investment converge at a pivotal moment — the shopper's final choice. Our rankings, showcased in this

report, distinctly capture this moment of truth, confirming the ultimate expression of shopper conversion. We extend our deepest gratitude to our global partners, whose collaboration is essential in bringing this to life.

Welcome to **Brand Footprint 2024**, where data meets decision, insight meets action, and challenges pave the way for opportunities.



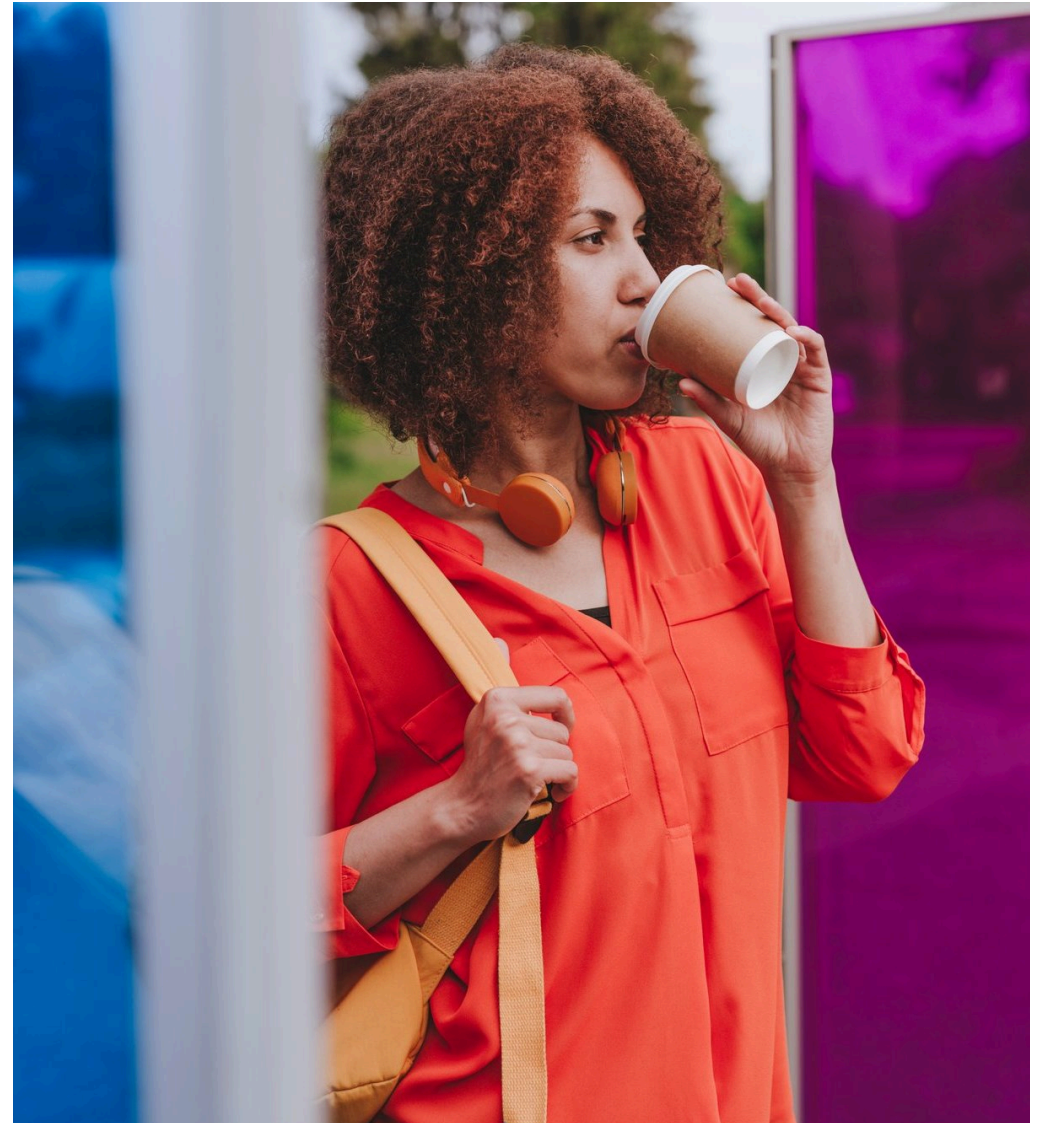
Access the most meaningful shopper and consumer data



Discover Kantar's Blueprint for Brand Growth evidence-based framework



Navigate all the Most Chosen FMCG Brands rankings

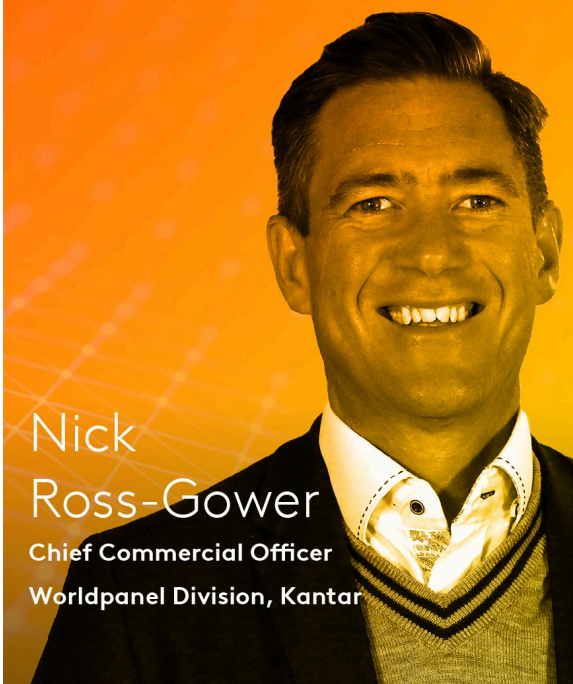


The brand growth paradigm

Navigating the 'constrained customer'



Decoding dollar dilemmas



It is easy to forget that the 8% growth rate of the FMCG industry represents billions in extra consumer spending, from the essential purchases to the personal indulgences that make life worth living. As the grip of inflation weakens across the global economy, FMCG brands face a paradox: customers are paying more yet feel less fulfilled. Indeed, for many consumers, the

value exchange is increasingly broken. This price pressure is a labyrinth for brands to navigate to uncover growth in an era marked by restraint and the rising cost of goods.

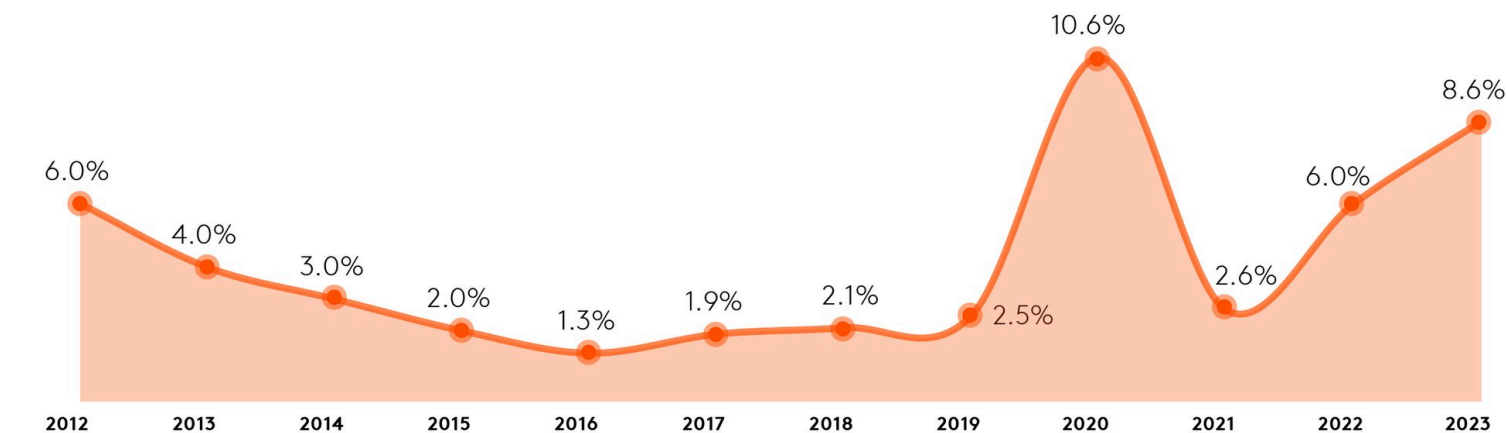
When prices remain stubbornly high, consumers' spending habits are change not out of choice, but by necessity. The \$1,360 that buyers of FMCG products part with

annually, has seen a grim 60% hike over the past decade, whilst their wages have stagnated. How can brands find ways to matter more and sell more in this dynamic?

Frugal futures forecast

The global financial outlook remains sombre. Households continue to manage their budgets tightly in every continent, and

Global FMCG annual value growth (%chg)



Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

brands need to understand the changes across multiple markets and sectors.

Counterintuitively, the current economic squeeze has not shrunk the size of consumer purchases but expanded it in some markets with some consumers bulking up on larger pack sizes, drawn by the lure of volume discounts and trying to manage their consumption as part of their budgeting. This trend has further helped the growth of discounters and wholesalers in markets across Europe and some of Latin America. Discounters alone have notched up growth of 14.1% year-over-year on a global basis.

Private labels are also stepping into the fray, chipping away at the market share of brands. Private label now represents 22.7% of share globally — the highest ever — representing USD\$308 a year per

household. Consequently, amidst the 460 billion brand choices made last year — or 29 brand decisions made by consumers each month — the retail battlefield is fierce. Yet, in this crowded arena, only half the brands available manage to capture and retain consumer interest consistently. Moreover, when we look at the numbers through the lens of local brands versus global brands, there is a clear and growing shift in favour of local players. Shopper choices on local brands now accounts for a record 68.2% of CRPs.

Penetration prowess

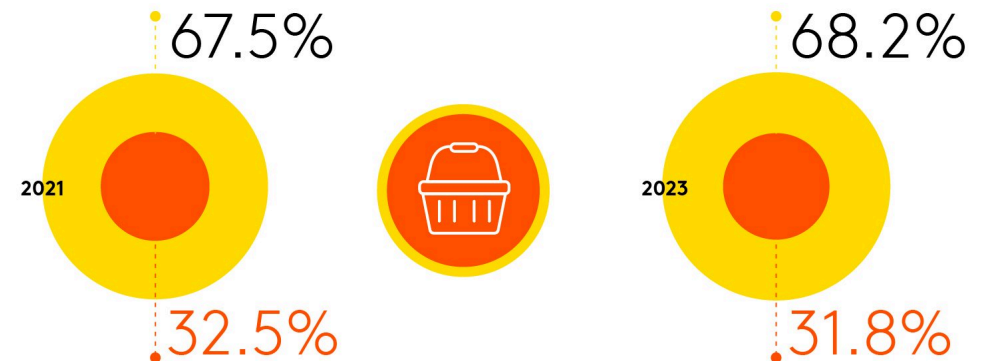
Our latest annual review proves that winning brands, unsurprisingly, secured high levels of penetration to outpace the market. A dominant 86% of brands achieving growth did so through improved penetration.



Homegrown heroes: local brands gaining ground

CRP %

● Global Brands ● Local Brands



Source: Brand Footprint 2024, Worldpanel Division, Kantar, CPS-GfK, Numerator

Penetration — getting more households to buy a brand — is, of course, fundamental to growth. It is straightforward yet powerful: the more households a brand reaches, the larger its potential market base becomes.

86% of brands achieving growth did so through improved penetration

This expansion is critical because it typically sets the stage for more sustainable growth. Brands have not only captured new consumers via penetration but have also successfully navigated the natural churn that all brands face — losing customers to competition or changing preferences.

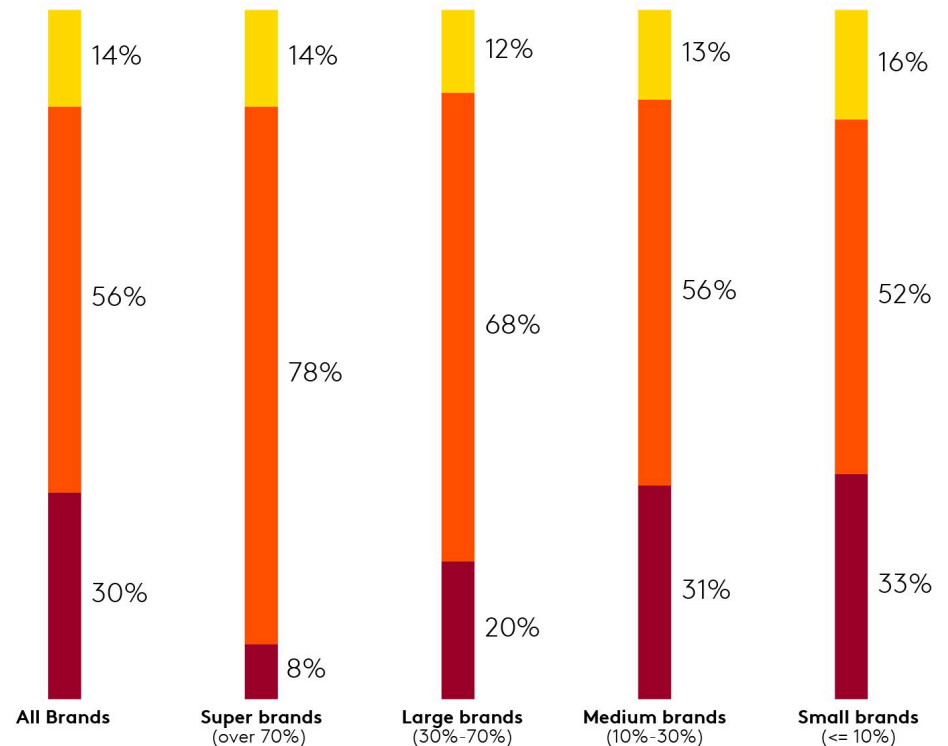
The power of frequency

While penetration builds the foundation, frequency — how often consumers purchase a brand — amplifies the impact. Increasing frequency ensures that once a consumer is brought into the fold, they are engaged and retained. For smaller brands, a third of the growth will primarily come from new buyers; for super brands, getting customers to buy one more product one more time brings in the big numbers.

If you're a small brand (<10% penetration in a market), overperforming means growing your penetration by 0.7 points in a year. Large brands need to triple that target, aiming for a 2.2-point increase to be among top performers. Remembering that only half of FMCG brands manage to grow, it is critical to set the right

Correctly Calibrating Penetration + Frequency

● Penetration only ● Penetration and Frequency ● Frequency only



Source: Brand Footprint 2024, Worldpanel Division, Kantar, CPS-GfK, Numerator.

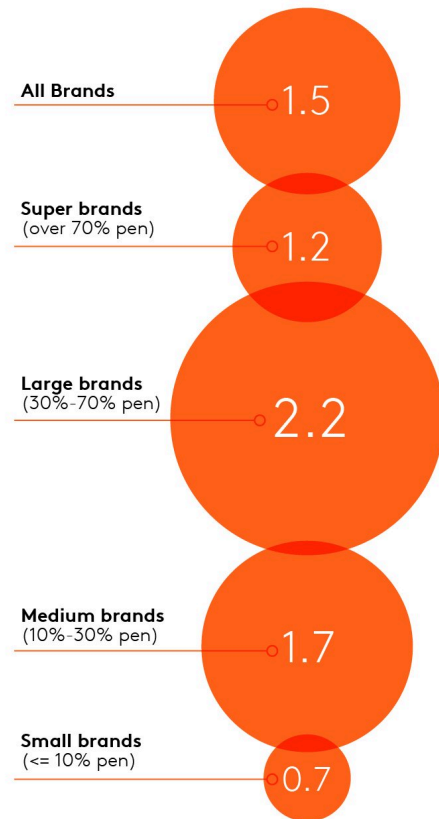
growth targets based on country, category, and competitive situation to achieve success and maximise your chances of success.



Webinar: Omnichannel 2024 -
From pressure to progress:
Decoding FMCG's dynamic shift

Defining Success

Median annual penetration growth per brand size



Source: Brand Footprint 2024, Worldpanel Division, Kantar, CPS-GfK, Numerator.

Blueprint for Brand Growth

In all the winners in our brand rankings, we see that once they identified and created their brand's meaningful difference for more people, Kantar's three growth accelerators come into focus:

1. Predispose more people

It is not just about your brand being preferred; you need to be pertinent. Brands need to resonate deeply with consumer needs and desires, to turn casual browsers into defined customers. The best performers also found scale with global multi-channel campaign platforms with consistent messaging as their foundation and stack the odds in their favour.

2. Be more present

Being seen is as crucial as being relevant. You need to be easy to

find and easy to buy, whenever and wherever shoppers and consumers encounter you. Our case studies in this report demonstrate time and again that exploring everything from foodservice to e-commerce and sari-sari stores in rural communities are presence-led pathways to growth. Presence is a common denominator.

3. Find new space

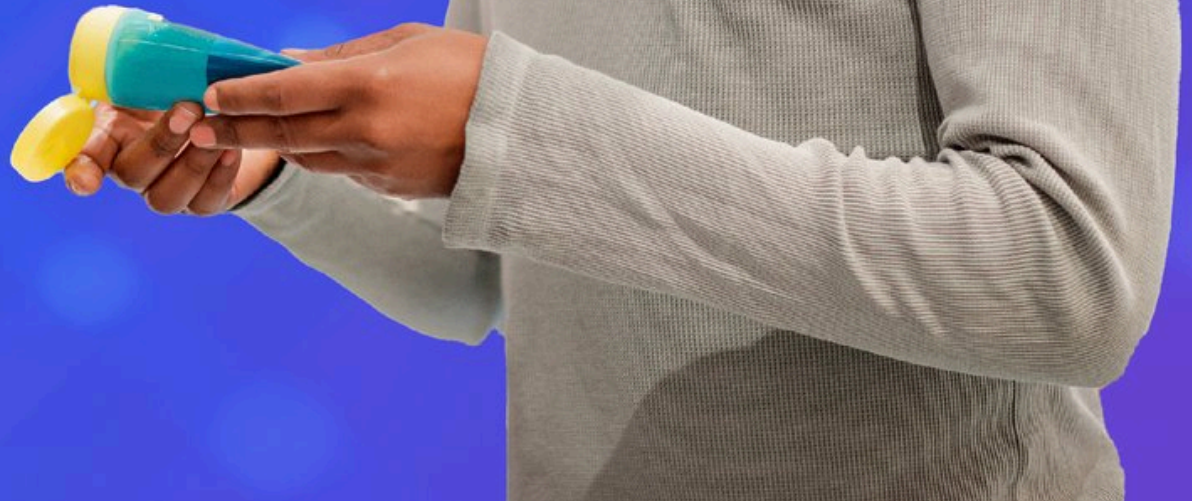
The journey doesn't stop at visibility or relevance; it extends into uncharted territories. Your brand size fundamentally affects the likelihood of success of the way you can identify and exploit new market segments, or how once you know what your customers unmet needs are, how you can serve new consumption occasions and introduce fresh and incremental growth vectors, much like Nescafé entering the ice cream market.



These three growth accelerators don't happen in isolation. FMCG brands must ask and answer pivotal questions: Which consumer needs can we meet more effectively? Who are our most accessible and lucrative target shoppers? How and where do they shop? The answers will define strategies and create pathways to growth.

Brand standings

How winning brands are climbing the ranks



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Brand slam

Consumer winners in the spotlight



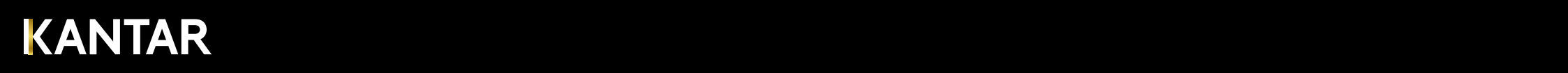
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Scaling up

Growth strategies for smaller brands



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Beyond FMCG

Breaking down barriers
in feet and fashion



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Billionaire Bonanza

Celebrating brands chosen
a billion times or more



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Retail Roadmap

Guiding brands through
the retail revolution



Blueprint to buying



Thomas Smith

Global Insights Director
Worldpanel Division, Kantar

The boundaries in retail are like lines drawn in the water: there one moment and gone the next. As much as brands and retailers might wish otherwise, people don't march through their day with a crystal-clear plan for clicking and carting.

The lines between the grocery aisles and the digital world are smudged by the lives we lead, each tap on a smartphone resonating as deeply as footsteps across the store floor. Yet, amid this blur, there lurks a risk: the quiet, evolving desires and needs of the consumer might just be drowned out by the roar of retail channel integration.

So, how do you derisk and grow in this environment? Our global omnichannel channel data analysis illuminates potential strategies for navigating the nuances of retail.

Growth gridlock?

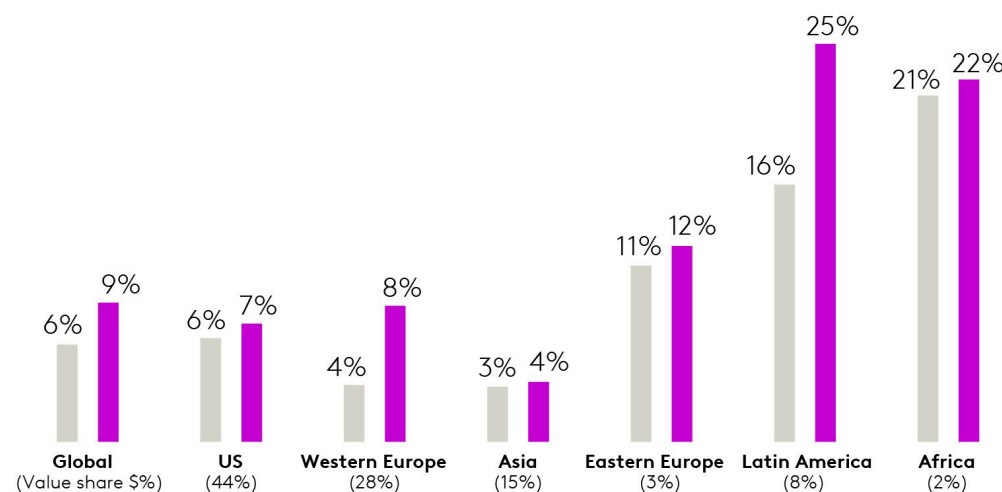
Let's set the scene. In 2023, shoppers expenditure on consumer goods increased by 8.6%, the second-fastest in the past twelve years, behind only the pandemic spike in 2020. This growth was mainly artificial, it wasn't real value

growth at all. It was primarily driven by persistent inflation, a dynamic that insists on pushing its way into consumer spending power in 2024. Prices in most categories remain high.

At the centre of the dynamic, households were compelled to re-

FMCG annual value growth by region (%chg)

● 2022 ● 2023



Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

evaluate their spending priorities, opting to either buy less, move to cheaper stores or alter their product mix by incorporating cheaper products or buying on promotion. Spending priorities continue to be on the move.

Inflation hasn't stopped spending; it has changed how we prioritise it

These varied inflationary settings underline the uneven pressures faced by consumers as brands recalibrate against the resultant shifts in their purchasing patterns. At the centre of the dynamic, households were compelled to re-evaluate their spending priorities, opting for value products or trading away from others in order to treat themselves with premium offerings. Spending priorities continue to be on the move.

Polarising powerplays

Across FMCG, all sectors witnessed value growth of more than 8%, with beverages, and health and beauty products experiencing the highest growth rates. This growth was partly a function of inflation but also reflected the sectors' ability to premiumise their offerings effectively — a nifty trick in tough times. How did they manage it?

Brands in these sectors successfully tapped into emerging consumer needs, such as wellness and indulgence, which have remained resilient in consumer spending priorities despite overall tighter budgets. This ability to align with consumer preferences and introduce value-added products allowed these sectors to sustain momentum and drive higher revenue growth.

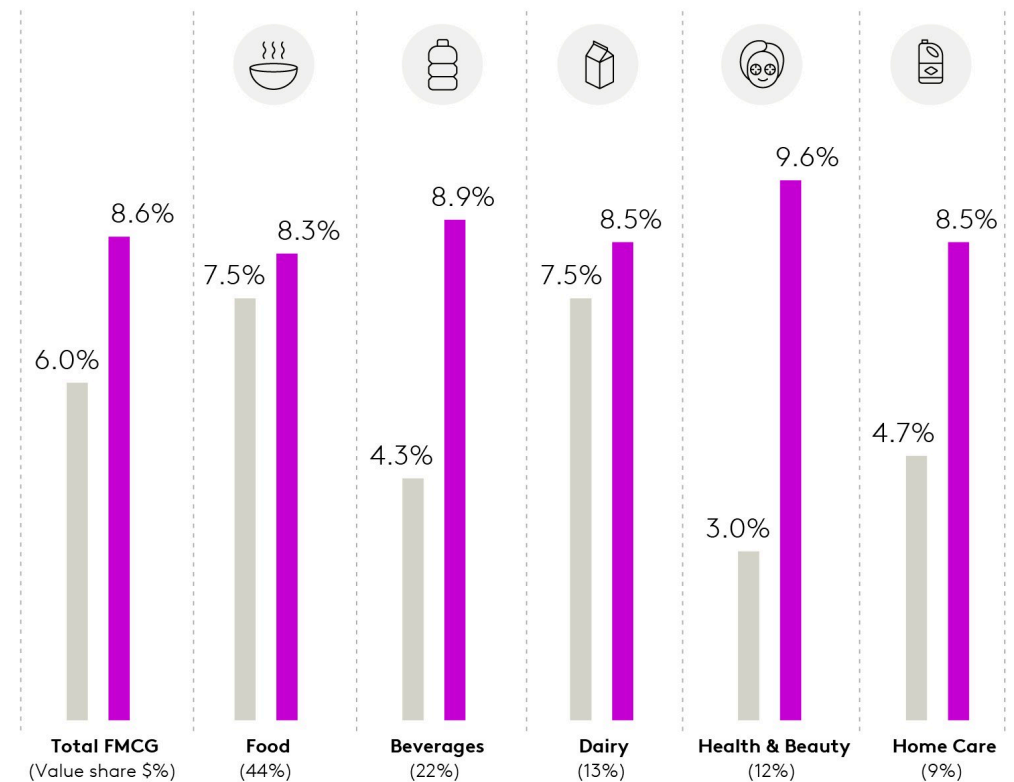
They found ways to convince shoppers to buy from them and

save elsewhere — cleverly redirected spending. Retailers were also quicker to support some

premium offerings, which tend to provide them with better margins.

FMCG annual value growth by sector (%chg)

● 2022 ● 2023



Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

Shopping behaviours

Amidst the wave of rising prices and this polarised spending spread between value and premium, there was also a noticeable increase in shopping frequency and trip spend across regions, driven by consumers searching for the best prices across different channels.

In the United States, consumers bought groceries from an average of 20.7 different stores in the latest year — dividing their grocery shopping across more stores to save money. That's an increase from 16.8 stores in the year prior to the pandemic, a growth of 23%. Shoppers are not only visiting more stores but traveling further to capitalise on discounts and value offers.

Being more present will always be central to winning.

Navigating the omnichannel

The omnipresence of omni-shopping continues to be embedded in shoppers' lives. Brands that maintain a consistent online and offline presence to

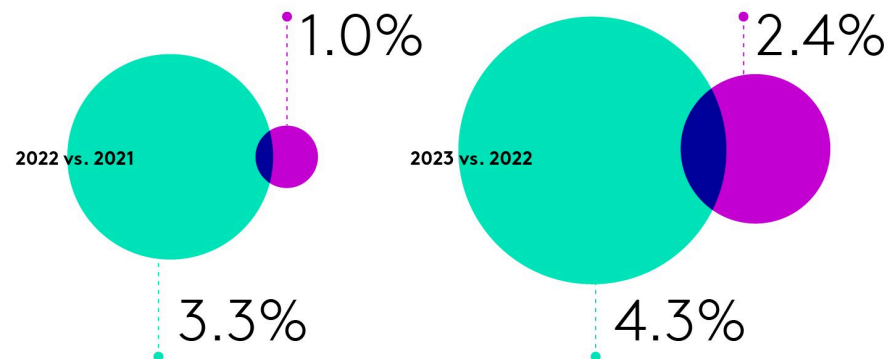
meet consumers at their point of need and accompany them throughout their shopping journey, ensuring visibility at every conceivable touchpoint, are winning. It can be a tough game, but being more present will always be central to winning.



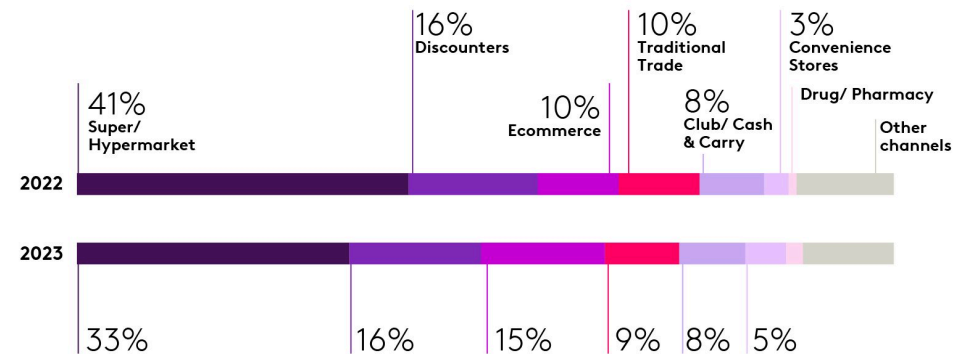
Watch our latest global omnichannel webinar

Global FMCG drivers of annual value growth (%chg)

● Spend per trip ● Purchase Frequency



FMCG annual value contribution to growth by channel



Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

Private labels and product plays

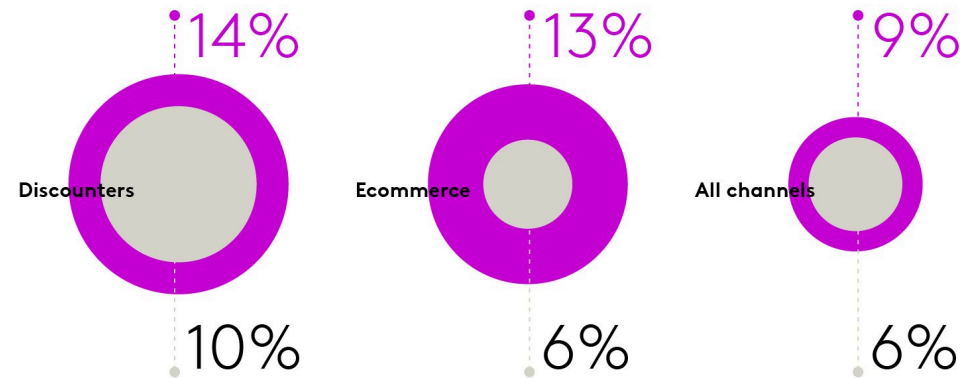
Private label products have increasingly become a staple in consumers' shopping habits, particularly in Europe, where they have carved out significant market shares. In 2023, private label products grew globally at a rate of 11.2%, surpassing the growth of branded products, which stood at 7.9%. This growth was not isolated but rather part of a broader consumer shift towards products that balance quality and affordability.

The rise of discounters

Discount stores have emerged as one of the fastest-growing retail channels globally, particularly in Europe, where they have even more firmly entrenched themselves in the consumer shopping routine.

FMCG annual value growth by channel (%chg)

● 2022 ● 2023



Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

In 2023, discounters saw their market share increase by significant margins. Indeed, discounters proved to be a helpful coping mechanism for those chasing price relief at the height of inflation in Europe, where we saw meaningful increases in trips to discounters and spending led by food and dairy.

While the growth of discounters is most pronounced in Europe, there is a noticeable expansion in other markets, including the United States and Latin America. The adaptability of discount stores and their focus on cost-effective logistics and store operations makes them a formidable force in the retail sector. Their growth is a

reflection of changing consumer preferences but also of the economic pressures that drive shopping habits. However, in the US, they still sit behind most other channels, including the club store behemoths. In Latin America, super and hypermarkets, along with traditional trade, still hold the biggest share of the market.



Read the report: State of Grocery Retail 2024 in Europe



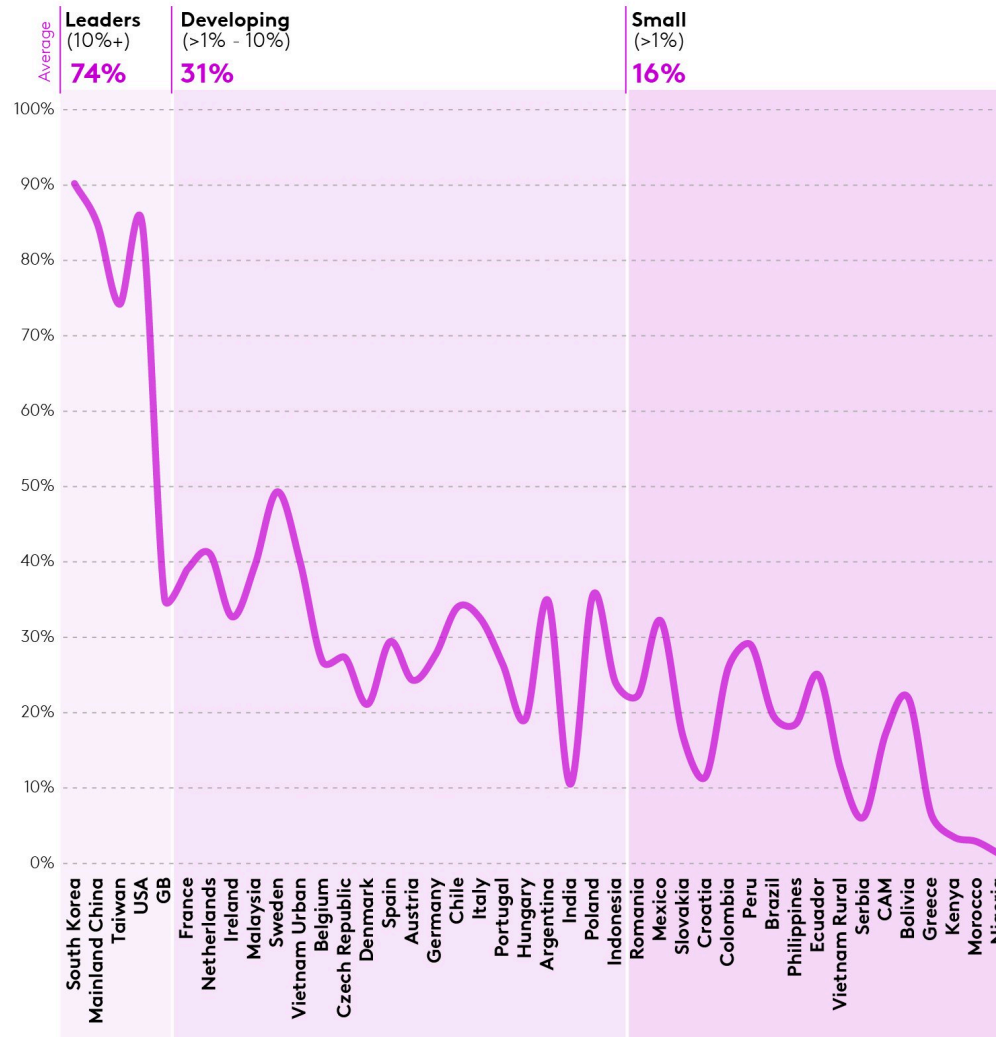
Access the European ranking of the Most FMCG Chosen Brands

Ecommerce evolution

Ecommerce has continued to adapt and evolve. In 2023, ecommerce experienced a notable resurgence, after a much slower growth rate in 2022 – growth was particularly visible in the US. This growth was facilitated by the channel's convenience and the continued emergence of new models, such as social commerce.

The significant drivers of ecommerce growth include increased shopping frequency and the broadening of consumer bases, which now cuts more clearly across generational lines, with both younger and older consumers appreciating the convenience of shopping from homes and phones. But there is clearly significant room to expand penetration in most markets.

Ecommerce penetration by market (%)



Source: Omnichannel 2024, Worldpanel Division, Kantar, Numerator, CPS-GfK

Future trends

Platforms like Douyin and Kuaishou in Mainland China have reimagined ecommerce by integrating social elements. Looking forward, the continued integration of technology and personalised shopping experiences will keep ecommerce and social commerce at the forefront of retail growth in most markets.

Grocery.com will still be crucial to future ecommerce growth; in the US we've seen Walmart increase its trips per household by 55% in just one year. Driven by new site and app design, increased delivery time slots, integration of AI to enhance the 'try before you buy' experience along with a big market place push. Pure players, quick commerce and community buy groups will also continue to play a big role in ecommerce's continued evolution.

Brandstorm Europe's brands battle the budget blitz



Lenneke Schils
Global Insights Director



YouGov

Europe, often seen as a bellwether for global economic trends, has been grappling, like all regions, with a cost-of-living crisis that has forced many households into tight corners. As families struggle to balance their budgets, a shift in purchasing patterns has emerged, creating a landscape ripe for analysis.

The story begins with the rise of private labels. In a bid to stretch wallets, shoppers have increasingly turned to store brands — private label — which have seen their value share climb to a remarkable 42% across the continent in 2023. This trend underscores a broader movement (discussed elsewhere in this report) towards downtrading, where consumers opt for more affordable alternatives to their usual branded goods. The

ramifications have been profound, with discounters, led by Aldi and Lidl, taking a larger piece of the market. Over just two years, the number of shopping occasions at these low-cost retailers has surged by 15%.



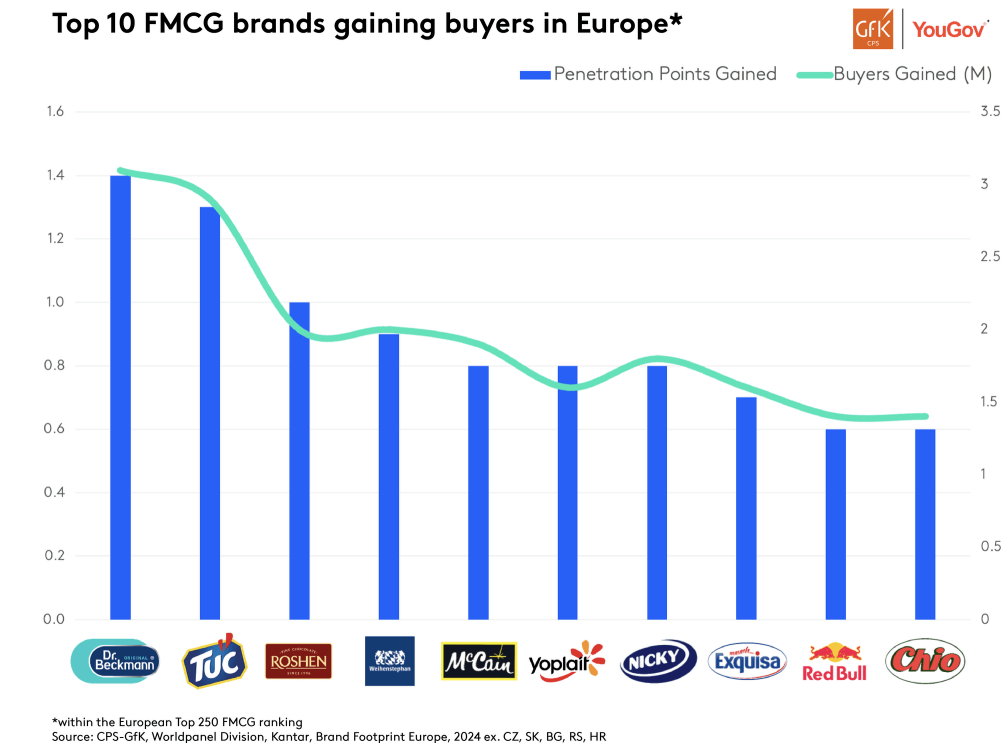
Access the European
ranking of the Most
Chosen Brands



Beating the odds

This shift has inevitably impacted overall brand performance across Europe. The total brand Consumer Reach Points (CRP) dropped from 77 billion to 71 billion. Globally, brands have experienced a roughly equal chance of winning or losing CRP, but in Europe, the odds have been less favourable, with 56% of brands witnessing a decline. Despite these challenging conditions, a glimmer of hope persists: four out of ten brands grew primarily by expanding their customer base.

Among the top performers, a few brands have defied the odds. Kinder and Haribo, with CRP growths of 4% and 2%, respectively, have managed to outshine their competitors. But it's not just the giants that are making waves. Many smaller and mid-sized brands, with their unique European



footprints, have also shown remarkable resilience. Dairy brands like Mlekovita and Yoplait, energy drink producers such as Red Bull and Hell, and beloved Italian staples like Mutti and Divella, have all had stellar years. Notably, German

laundry care brand Dr. Beckmann attracted 3 million new buyers, leading the charge in consumer acquisition. The rise of discounters has also brought fertile ground for some brands. Coca-Cola, Kinder, and Dr.

Oetker (the top 3 brands in Europe's discounters) lead the pack, dominating customer choice and expanding their penetration in this competitive space. Mlekovita and Müller, both top 10 players in the discount segment, have also enjoyed significant gains, with Müller achieving an impressive 21.5% increase in CRP.

Looking ahead, as inflation eases, there are signs of relief for some shoppers that may open the product consideration set. Within that dynamic, the mission for brands remains clear: they must be present wherever the shopper is.

The coming months offer a critical window of opportunity. As market confidence slowly returns, brands must seize the moment to deliver on their promises of convenience and comfort being demanded of them.

Five ways not to fail at sales



Fraser
McKevitt
Head of Retail
and Consumer Insight
Worldpanel Division, Kantar

Success isn't just about awareness — it's about being available at the point a shopper makes the crucial decision to choose a product. In other words, once the work of predisposing your target consumer has been done correctly, it's about ensuring presence in the right spaces. Let's explore five steps to successfully selling your brand.

1. Maximising availability

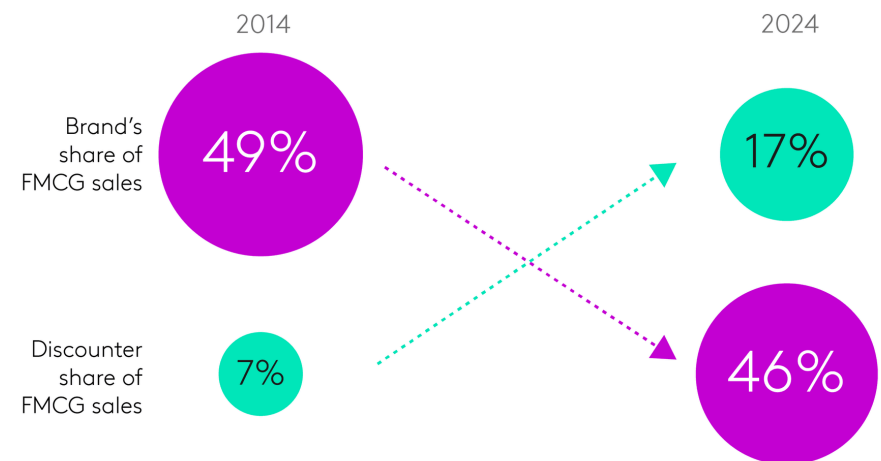
A critical factor in sales success is your brand's omnipresence across consumer touchpoints. Our research indicates that increasing distribution points is understandably the most potent lever for growing smaller brands. The question to ask is how many times your brand was present out of all the times the category was bought in whichever store or channel you're targeting. Our findings show that only 10% of FMCG brands achieve over 80%

category presence, highlighting the vast room for improvement and growth in distribution strategies. By enhancing presence, particularly in underserved channels, brands can dramatically increase their penetration and reach more buyers. For grocery brands, finding new presence is a constant, or you will

go backwards. Why? Well, if we look back over the last decade in the UK, more than £3 billion annually has been taken from branded sales by private label products. And not independently from that, there has been a rolling rise of retailers that sell only a handful of brands — discounters.

The availability challenge for UK FMCG brands

Aldi+Lidl Till Roll share, 12w/e 18 Feb 2024 vs 2014.
Branded share 52w/e Dec 2023 vs Dec 2014



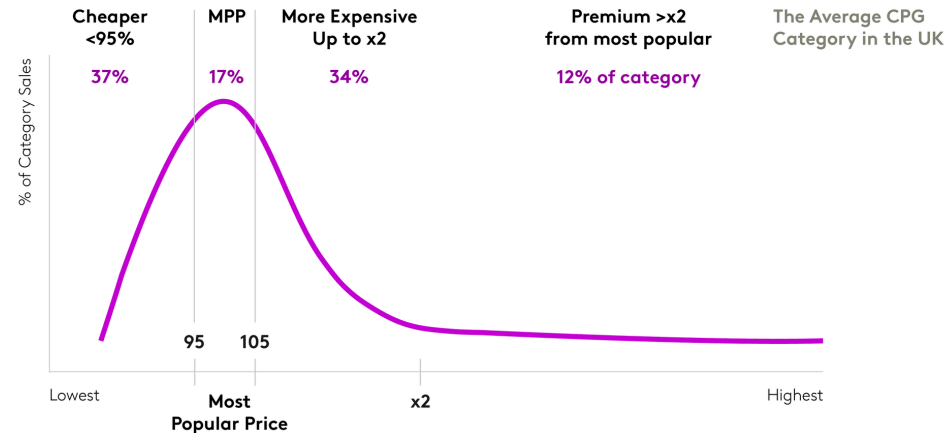
Aldi+Lidl Till Roll share, 12w/e 18 Feb 2024 vs 2014. Branded share 52w/e Dec 2023 vs Dec 2014

2. Price it right

Effective pricing strategies strike a balance between affordability and perceived value. Worldpanel's data reveals that the biggest brands often hover around the median market price point. For example, within the FMCG sector, brands that align their pricing within $\pm 5\%$ of the most popular price point tend to capture a larger share of the market. This strategic pricing appeals to a broader consumer base and positions the brand as a value-for-money option, which is crucial in maintaining competitiveness. Marketers might often be tempted to aim for the more premium end of a category, and that can be a justified and successful strategy, but it must come with the awareness that it will limit the potential buyer pool.

Usual FMCG price distributions

The "normal" category price distribution



3. Understanding and meeting consumer needs

The ability to anticipate and meet consumer needs before they become explicit demands is a significant advantage. Utilising insights from consumer panel data and understanding the occasions in which products are used, brands can tailor their offerings to match distinct and evolving behaviours. A diverse product range can meet a wider range of consumer needs and increase the brand's market footprint. Brands with a broader range of SKUs are more visible and engage consumers more effectively. To be a bigger brand usually, but not always, means to have more SKUs. In three-quarters of cases, the number one brand in a category has more products in its range than the number two brand.

4.

Managing the mission

Consumption is not the only thing to consider for sales – obviously, it is also the mindset at the point of shopping. In the grocery world, the simplest example is to consider whether you are on the big weekly shop – or are you dashing in to pick up a few items. The shelf needs to be mapped to the shopping mission. For instance, our data shows significant differences in purchasing behaviour between quick top-up trips and extensive stock-up visits. Brands that adapt their product strategies to these nuances — such as offering bulk options for stock-up scenarios or convenient sizes for quick trips — enhance their relevance and appeal in specific shopping contexts.

Buying carbonated soft drinks on a top up mission vs a trolley shop

Brands become more important

+7%

more spending on brands

Pack size shrinks

-14%

less volume per trip

£ per volume price increases

+17%

higher price per litre

Proportion on deal goes down

-13%

less on a promotion

Shoppers are younger and older

+34%

More from pre-family

+15%

More from empty nesters + retired

% of spend on each metric for top up vs trolley
Kantar take-home FMCG, 52w/e 31 Oct 2023. Brand Footprint category definitions

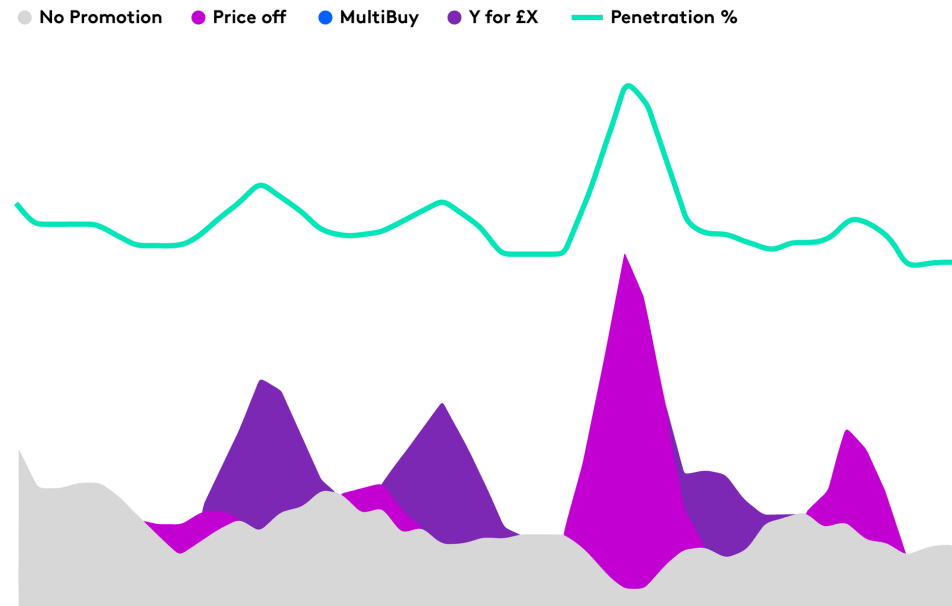


5. Managing promotions effectively

The most important thing to remember about grocery promotions is that they have no long-term effect. While promotions will spike sales temporarily, the absence of a promotion sees a return to normal buying levels without residual benefits. This doesn't mean promotions shouldn't be part of your strategy, but they must be used wisely. Promotions can make a brand price competitive, increase volumes, and help maintain or grow shelf space. Tying promotions with advertising campaigns during periods of heightened consumer predisposition can also make the brand more available for purchase, thus leveraging short-term gains for long-term positioning.

It is a truth, that should be universally acknowledged, that promotions only have a short term volume impact

It is a truth, that should be universally acknowledged, that promotions only have a short term volume impact



Charting the future

Strategies that set brands apart



Decoding brand success

Even when the world feels turned upside down, some brands manage to find their footing and reach for the stars. Think of Oreo, a cookie that has delighted for over a century, and Red Bull, the drink that gives you wings. They've reinvented themselves, staying true to their roots while carving out new paths to growth.

This isn't a simple feat. Marketers are, apparently, getting savvier every year, executing bold strategies and daring to be different with innovations such as Goodknight's paper-based and affordable mosquito repellent or Crocs' fashion-forward platform range. They're uncovering the sweet spot between brand, product, and experience. In this year's report, our analysis demonstrated that innovative thinking ran deep, but so too did alignment with a brand's essence — the new products and campaigns held true to the brand promise.

Our deep dive into 42,800 brands and the choices of billions of consumers revealed not just who's leading the pack, but how they got

The goal was to pave the way to the future by uncovering the strategies behind successful brands. We aim to inspire and educate with insights from high-performing brands of all sizes. Indeed, small and local brands provided many examples for us this year.

Identifying trends before they become commonplace can often seem as daunting as finding a needle in a haystack. Brand Footprint provides a faster way forward — a fast-track, if you will — to strategies that work. That's why you'll have seen us proactively point to leading indicators, hints of change among consumers and their behaviour — everything from emerging category demand or nascent retail channels, to how consumers behave.

We also very intentionally spotlighted the practices of brands that have mastered the art (and science) of being meaningfully different. In doing so, we provide practical illustrations of how predisposing more people, amplifying presence, and finding new space drives significant growth.





Seamless shopping

We also delved deep into the power of omnichannel strategies — an essential facet of modern retail that intertwines digital, physical, and away-from-home shopping experiences. As the boundaries between online and offline shopping blur, brands that successfully manage this integration see remarkable gains in both reach and resonance.

But the omnichannel approach extends beyond building a mere presence. It encompasses a strategic deployment of resources to ensure that every consumer encounter — be it online, in-store, on-premise, or via social media — reinforces brand values and drives engagement.

Future forward

As we look to the future, the insights from the Brand Footprint report are designed to guide your strategic decisions and operational adaptations. The lessons from the report also illustrate that the key to sustained growth lies in anticipating future shifts. We saw many examples of how the circumstances in which consumption occurs,

particularly for food, beverage, and beauty categories, add another dimension to decoding brand growth opportunities.

The growth potential is immense, with average brand penetration at just 29% and the typical brand bought just four times a year.

This means most people still haven't bought your product, and that there are still numerous opportunities to engage in new moments and reach new buyers.

We hope the insights from this report inspire you to recalibrate, innovate, and propel your brand to new heights.

Measure up your rivals

Ready to uncover the secrets of your category and size up the competition? Order your category-level ranking for every country we measure.

Stay ahead of the game!



Get a quotation

What is Brand Footprint



Understanding Brand Footprint

The Brand Footprint report is Kantar's Worldpanel annual ranking of the most chosen Fast-Moving Consumer Goods (FMCG) brands worldwide. It employs a unique metric known as Consumer Reach Points (CRP) to measure and compare the success of brands across different markets and regions. One CRP represents a single instance of a shopper choosing a brand, integrating data on population, penetration, and consumer choice to provide a holistic view of brand performance.

Defining brand categories

Brands are categorised based on their geographical presence:

- **Local Brands:** Present in only one market.
- **Regional Brands:** Available in at least two markets within a single continent.
- **Global Brands:** Have a presence across at least three continents.

Brand size classification

The size of a brand is quantified using its penetration percentage, which reflects the proportion of households purchasing the brand across the year:

- **Small Brand:** Penetration $\leq 10\%$
- **Medium Brand:** Penetration between $>10\%$ and $\leq 30\%$
- **Large Brand:** Penetration between $>30\%$ and $\leq 70\%$
- **Super Brand:** Penetration $>70\%$

This classification helps understand the scale of a brand's reach.

Additionally, in response to industry feedback, we now group brands that are the same but operate under different names or translations of a name for the global rankings. These brands will count as their own entity in local rankings but will be consolidated for the global rank. For instance, Pepsico's Lays and Walkers brands, known as Lays in most regions and Walkers in the UK, will be treated as a single brand in the global rankings. This approach ensures a transparent representation of a product's complete global presence and reach.

CRP metric: A deep dive

Consumer Reach Points (CRPs) explained



Population
Number of households in a country

X



Penetration
% of households buying your brand

X



Consumer choice
Number of interactions with your brand across categories in a year

The CRP metric is a cornerstone of the Brand Footprint methodology. It combines:

- **Population:** The scale of the market where the brand is available.
- **Penetration:** The percentage of households that purchase the brand.
- **Consumer Choice:** The frequency of the brand being chosen by consumers.

These factors together enable the Brand Footprint ranking to reflect consumers' preferences for a brand in the 2023 calendar year.

Collaboration and data sources

In addition to data from across Kantar's Worldpanel division, the Brand Footprint report is made possible through collaboration with global partners:

- [CPS-GfK](#) for additional consumer purchase insights.
- [Intage](#) in Japan and [CTR](#) in China for local market insights.
- [Numerator](#) provides critical data on the US market.

These partnerships enhance the breadth and accuracy of the data, ensuring a comprehensive global analysis.

Endless Interactive Insights

Explore our exclusive
brand data hub



Ignite your imagination explore our data in depth



Interactive media not supported

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Get ready to unlock a wealth of knowledge that will empower you to make data-driven decisions for your brand's growth. Start your exploration now.

Curious about how your brand stacks up against the competition in the fast-moving consumer goods (FMCG) landscape? Dive into our comprehensive data hub to uncover insights, rankings, and trends that will help you navigate the ever-changing FMCG universe. With just a click, you'll gain access to:

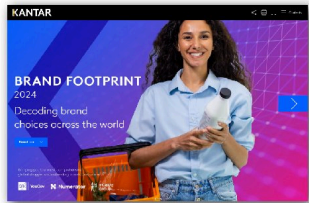
- Brand rankings: See how your brand ranks among the most chosen FMCG brands across different markets.
- Changes in ranks: Keep tabs on your brand's performance and track changes in rankings over time.
- Compare brands: Put your brand head-to-head with competitors and identify key strengths and areas for improvement.
- Brand deep dives: Explore detailed insights and analysis of your brand's performance across various sectors and markets.
- Online and out-of-home rankings: Uncover the top brands in the digital and out-of-home spaces for beverages and snacks.
- Customised data slicing: Tailor your data analysis to better understand your brand's position in the FMCG landscape.

Food for thought

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



Access all Brands Footprint reports



Brand Footprint 2024
Webinar



Brand Footprint 2024
Brazil



Brand Footprint 2024
CariCam



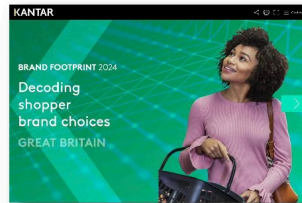
Brand Footprint 2024
Colombia



Brand Footprint 2024
Europe



Brand Footprint 2024
France



Brand Footprint 2024
Great Britain



Brand Footprint 2024
Indonesia



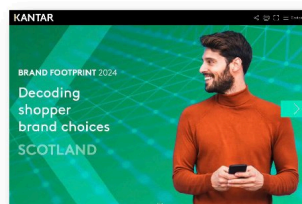
Brand Footprint 2024
Ireland



Brand Footprint 2024
Latam



Brand Footprint 2024
Malaysia



Brand Footprint 2024
Scotland

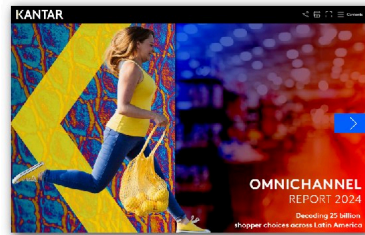


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Food for Thought



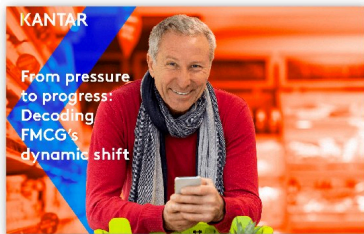
Blueprint for Brand Growth



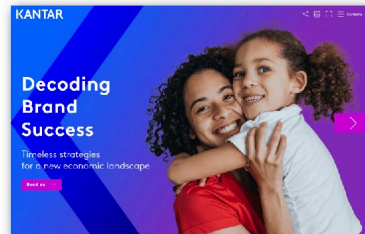
Omnichannel Latam



Appetite for Growth



Global Omnichannel



Decoding Brand Success



State of Grocery Retail 2024 – Europe

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Thank you for reading

Brand Footprint 2024

**For additional information,
please contact**

Virginia Garavaglia
Global Marketing Director
Worldpanel Division, Kantar

