

BRAND FOOTPRINT 2022

A global ranking of the most
chosen consumer brands

10th Anniversary



Welcome

Find out what to expect in this special edition of Brand Footprint, as we analyse ten years of consumer choices.



Guillaume Bacuvier

Global CEO

Worldpanel Division

Welcome

Ten years ago, we launched our first edition of *Brand Footprint* and it's safe to say that this has been a decade like no other for consumer brands. In this special tenth edition, we have analysed ten years of shopper behaviour to identify the biggest changes whilst also unearthing key consistencies to help brands secure their future in our changing world.

From the outbreak of COVID-19 to digitalisation of shopper habits, there has been a lot of change in the FMCG industry landscape. And with spiralling inflation and a war at the heart of Europe, upheaval and unrest shows little signs of slowing.

Despite this, the biggest brands have remained resilient. For brands at both a local and global level, this is an opportunity to take stock, and review the last decade and take our learnings forward.

This is why, in this edition of *Brand Footprint*, you will find the usual detailed findings of brand success and shopper habits, as you may have

come to expect. You will also, however, gain exclusive access to additional data and analysis covering the past ten years of FMCG progress.

You will discover the huge role that population growth has played in the industry, as the number of households globally has grown by 17%. This amounts to an increase of 180 million households. This means that brands are having to work harder than ever to maintain even constant levels of brand penetration against this expansion.

You will also find that, on average, 25 of the Top 50 global brands have grown on a yearly basis – but just a handful have grown consistently over the decade.

It's not all about change, though: we showcase some consistencies across ten years of data – **namely that the average household buys a portfolio of 55 FMCG brands in a year.** We also share how growing brands achieve success.

For those unfamiliar with this report, we use a unique metric: the Consumer Reach Point (CRP). This measure combines population, penetration, and consumer choice, meaning we're able to see how many times shoppers have chosen any given brand.

From there, we can rank the most successful brands across markets, giving you a micro and macro view of brand success. All the global,

regional, and local market rankings will be available on our dedicated microsite, giving you easy access to the data you need, so you can review your performance across markets and against competitors.

This year, as much as every other year, I would like to thank our partners: Europanel, GfK, IRI, Intage and CTR. Their support makes this report possible and, vitally, it allows us to reach

an unmatched depth and scale to make these findings truly stand out.

Brand Footprint is the undisputed guide to finding success in the FMCG market, uncovering key, actionable insights to power your strategy and drive brand growth. So, read on to find out who the top-performing brands are, and what they have done consistently to achieve growth.

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

10 Years of Consumer Choices

Take a birds-eye view of the decade and
discover what has changed – and what
behaviours have stayed consistent.





Benjamin Cawthray

Global Thought Leadership Director
Worldpanel Division

10 Years of Consumer Choices

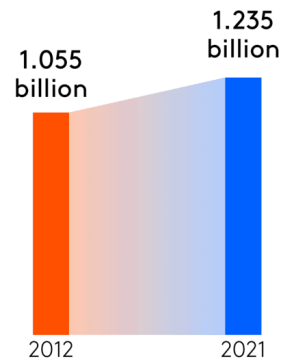
Before looking at any changes in shopping behaviour let's set the scene.

The FMCG industry has shown itself to be incredibly resilient: it has delivered consistent growth over the last decade. From 2012 to 2021 the industry grew by 33% – a \$650 billion increase in value sales.

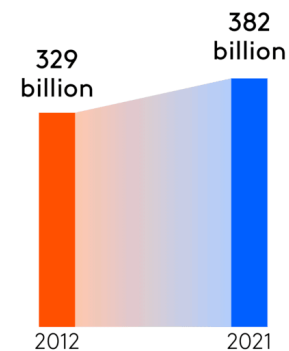
To understand what has driven this growth let's first take a look at what's changed.

Responsible for approximately half of this increase, is population growth. We have seen the number of households grow globally by 17% – an increase of 180 million households.

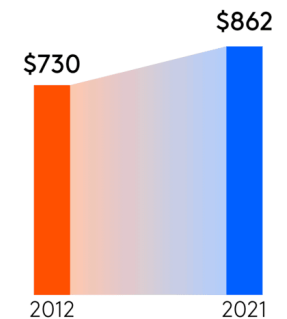
Global Number of Households



Global Number of FMCG Brand Choices Made



FMCG Brand Spend per Household



Source: Kantar, GfK, IRI (Brand Choices & Brand Spend based on the Top 250 brands across every market)

This holds a mixed picture for brands. While there are more shoppers to go after, it also means that 1% penetration globally today is almost 1.8 million more households than it was ten years ago.

And the bigger a brand is, the harder it needs to work to maintain the same level of global penetration. For example, if a brand had 30% penetration in 2012 it meant it had 316 million households buying it. In 2021, to achieve the same penetration, a brand would have had to

attract over 370 million shoppers: an increase of 54 million.

When thinking about the next decade brand owners should factor in long-term population growth when setting penetration targets. (We will discuss the importance of penetration for consistent growth and penetration targets in the next few pages.)

The upside is that this population growth has had an almost one-to-one positive impact on

the number of brand choices made. This metric has risen from 329 billion brand choices to 382 billion – a 16.2% increase.

The other driver of the industry value growth is how much shoppers have spent. When we look at this metric specific to brand spend, we see that, on average, the spend on brands has increased by over \$130 per household.



Behavioural Truths

Generally, when looking at data, we like to analyse change. It's interesting, and it shows us how brands must adapt to shopper behaviour and demand – information that is always useful.

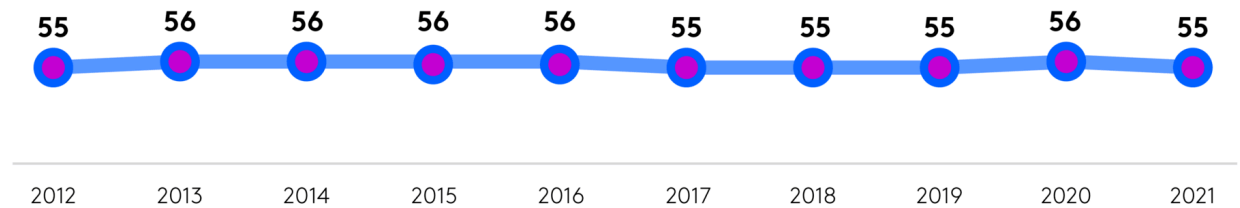
However, with ten years of *Brand Footprint* we also wanted to identify the trends which haven't changed. The data points that are consistent across the decade. This data offers brands confidence, as they can refer to long-term behavioural truths which will last for the next ten years.

The first behavioural truth is that the number of brands that shoppers buy remains the same today as it did ten years ago. The average household buys a portfolio of 55 FMCG brands in a year.

Importantly, this doesn't mean the same 55 brands each year. The challenge for brand owners still remains: how to enter a shopper's portfolio – and then stay there.

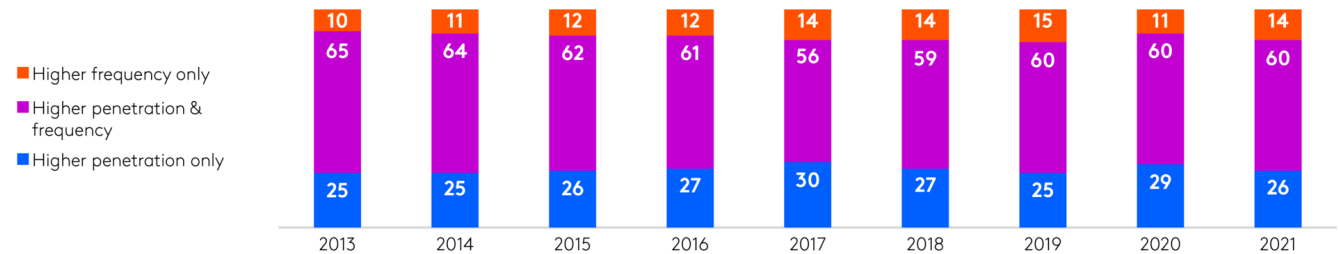
The second behavioural truth is that the only way to grow is through finding more shoppers. Across the decade, 88% of growing brands did this.

FMCG Brands Chosen per Household

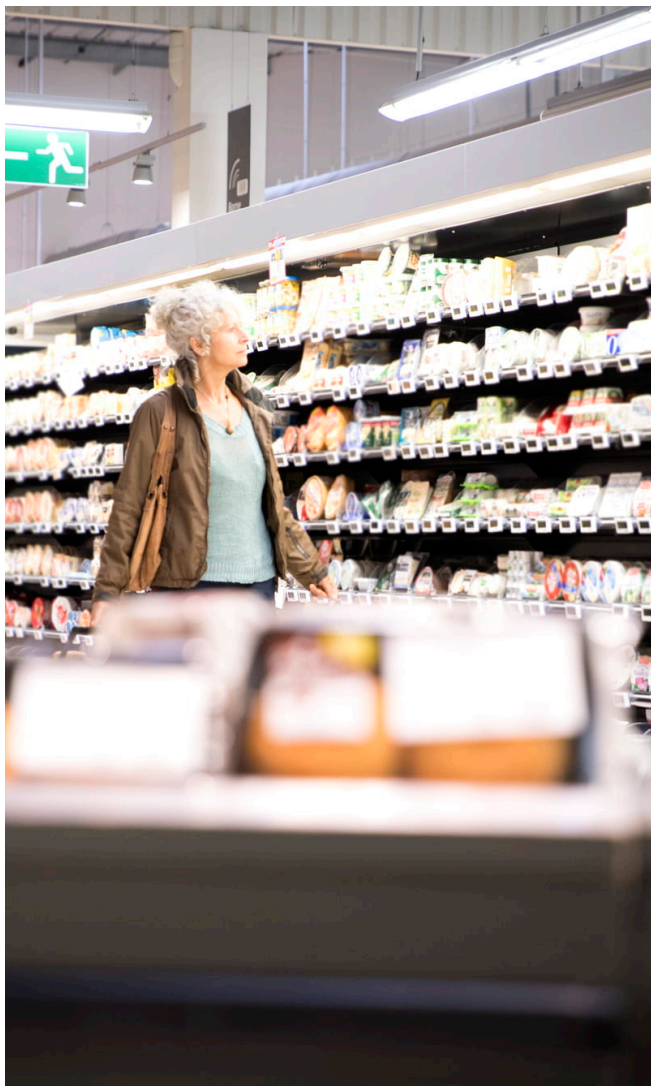


Source: Kantar, GfK, IRI (based on the Top 250 brands across every market)

Drivers of Brand Growth



Source: Kantar, GfK, IRI (based on the Top 250 brands across every market, growth defined as CRP +2.5%)



As a brand owner, increasing your number of shoppers should be your primary goal year after year. Once this is in place, frequency and loyalty follow suit.

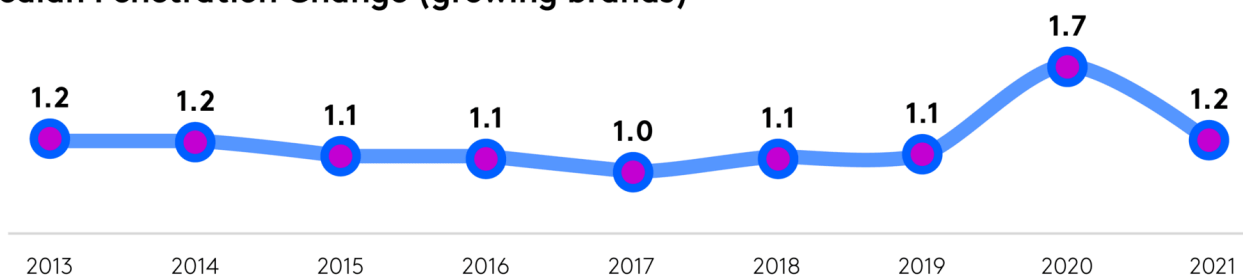
The third consistent behavioural truth is that growing brands gain 1.1% penetration points within a market.

This is a benchmark for success: if your brand gains 1.1% penetration points, then it will have had a good year.

It's certainly true that plenty of brands will have gained more than this, but far more will lie below this benchmark, including, of course those brands which saw no growth.

Other considerations for setting sensible penetration targets include your current size. If you are small (<10% penetration) aim for just under 0.5% growth and if you are bigger you can be more ambitious and aim for 1.5%.

Median Penetration Change (growing brands)



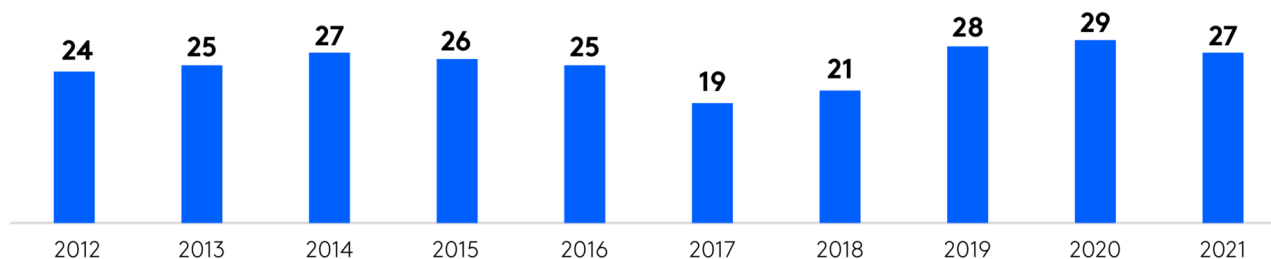
Source: Kantar, GfK, IRI (based on the Top 250 brands across every market, growth defined as CRP +2.5%)

The Power of Consistency

The rules for growth appear simple, but we know it's not always as black-and-white as the data shows. If we next look at the 50 most chosen FMCG brands globally, and how many of these brands have grown, we see that it's like flipping a coin: it's a 50/50 game.

Over the last ten years, on average 25 of the Top 50 global brands have grown.

Number of Global Top 50 Brands Growing



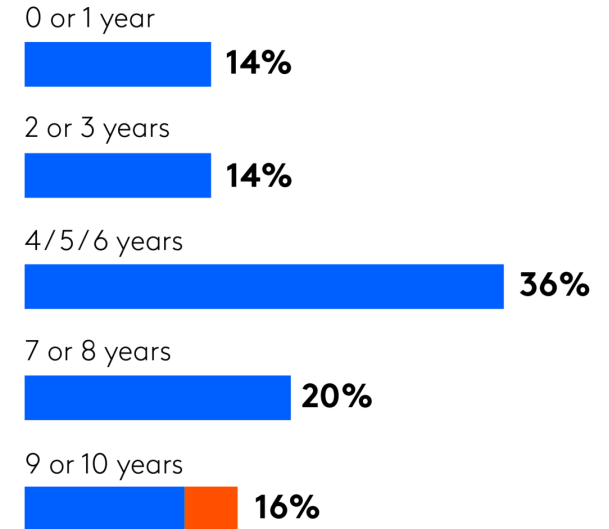
Source: Kantar, GfK, IRI

An important distinction in this, is that we are not seeing the same brands growing year on year. In fact, only two brands have grown in each of the last 10 years, with only six more growing 9 of the 10 years.

This highlights just how hard consistent growth is. But these brands should be held up as best-in-class examples – and celebrated. A big congratulations to both Dove and Vim, from Unilever, for achieving this remarkable feat.

So, what can we learn from them? What have these brands done consistently?

Number of Global Top 50 Brands Growing



Top 50 Brands which have grown 10/10 years



Source: Kantar, GfK, IRI

Well, both consistently gained more shoppers. Year after year, they reached more households and in turn, they saw an increase in number of times each household bought them.

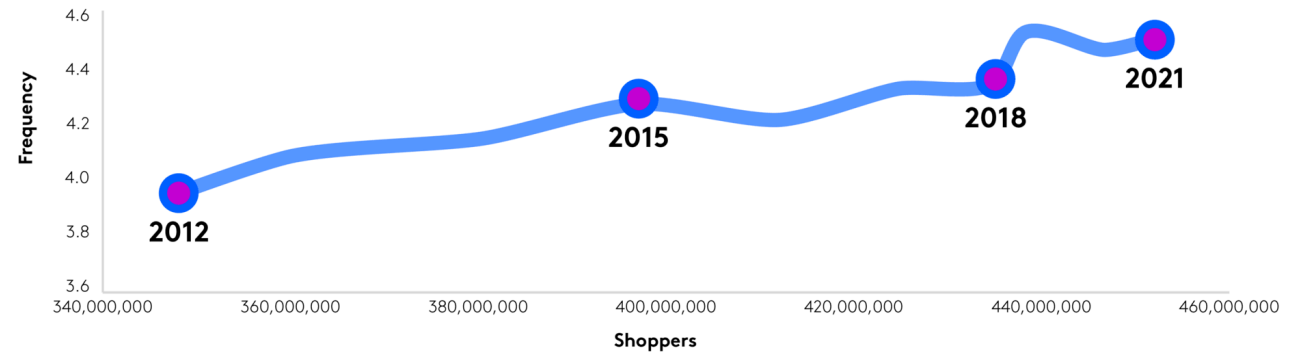
Looking here at Dove we can see as its global buyer base increased, so did its frequency.

But what's key is the degree of change. The number of shoppers increased at a higher rate: it was over double the increase in frequency. We can calculate the ratio of growth is 68:32 in favour of shoppers. (The ratio is also at a similar level for Vim at 67:33)

So, how can brands look to mirror this success by achieving consistent shopper gains?

Firstly, start with setting appropriate penetration targets for each market where your brand is present. Then build a strategy around the various levers you can use to drive growth: More Targets, More Presence, More Categories, More Moments, and New Needs. You'll find more on these levers in our chapter on Brand Success Stories.

Dove - Penetration x Frequency



Source: Kantar, GfK, IRI





The Most Chosen Global FMCG Brands 2021

We've already seen that 27 of the Top 50 brands grew last year. But which brands gained the most? And what sets the biggest brands apart?

Big Brand Revival

We have already seen in the previous chapter that the total number of brand choices grew by 16.2%, in line with population growth. But, over the same time frame, how have the biggest global brands performed?

The global Top 50 have seen their CRPs grow 9.4%, chosen 72 billion times in 2021 – compared to 66 billion times in 2012. So, whilst there is definite growth, it is clearly slower than the rest of the branded market.

But these top-line stats do not show the full picture: the one of resilience. Looking at performance over time, we see that in the last few years, the global Top 50 have started to outperform the market.

Clearly the graph shows a number of years where the Top 250 outperformed the Top 50, who saw a decline. But what's promising is the upward trajectory and fight back from 2019 onwards.

The fact that these brands aren't going anywhere should come as no surprise. As we stated in last year's [Brand Footprint](#), the average age of brands in the Top 50 is over 100.

Consumer Reach Points (CRPs) explained



X

Population

Number of households in a country



X

Penetration

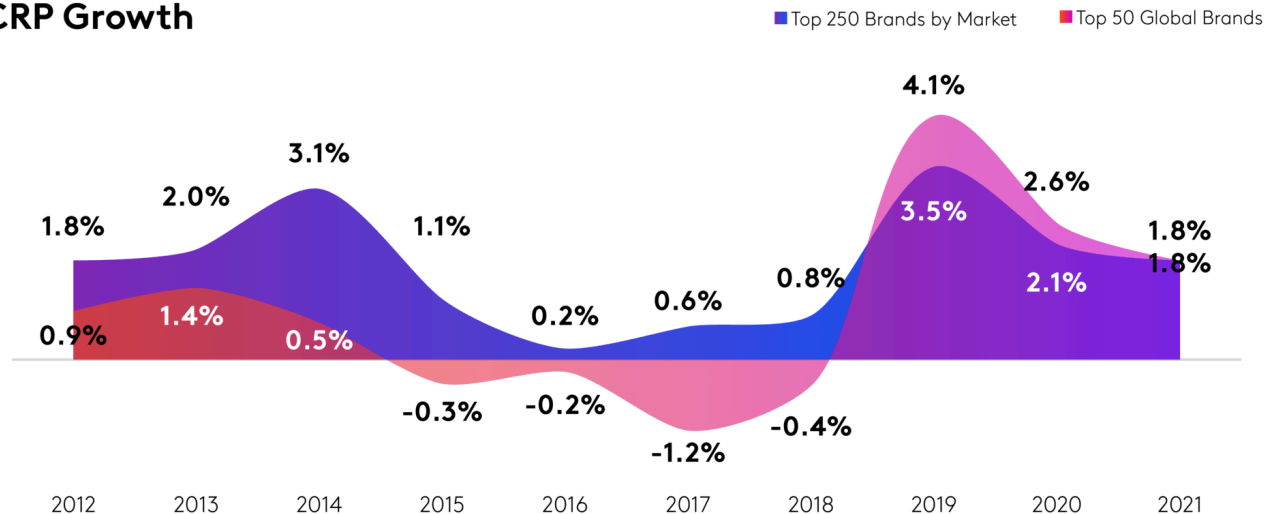
% of households buying your brand



Consumer choice

Number of interactions with your brand across categories in a year

CRP Growth



Source: Kantar, GfK, IRI

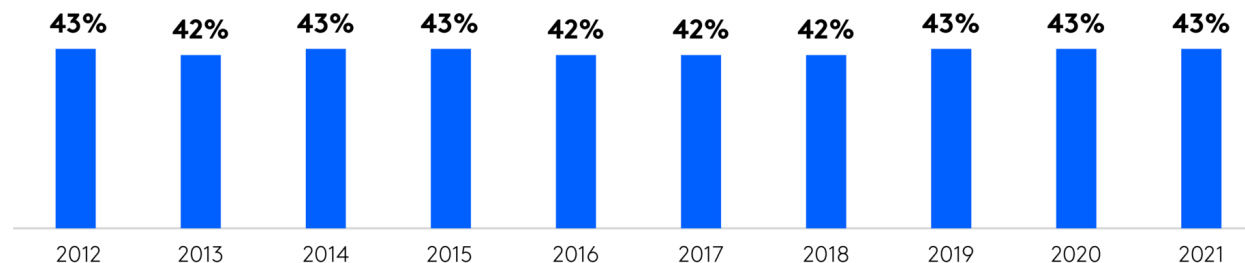
The Biggest of the Big

Instrumental to the performance of the Top 50 are the ten biggest brands. Returning to the theme of consistency, the Top 10 have accounted for over 40% of the Top 50 in each of the last ten years, with very little movement in the metric over time.

What is less consistent, though, is the performance of the Top 10 in terms of growth. This varies considerably, hitting highs of eight brands growing in 2019 and 2021, and dropping as low as three brands in both 2016 and 2017.

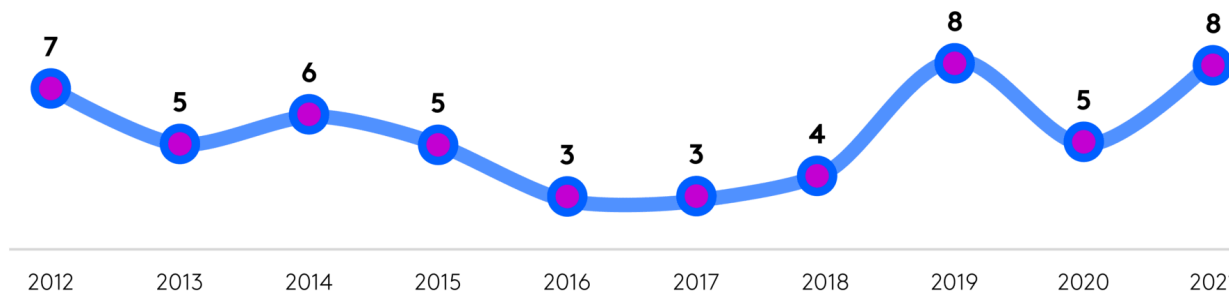
But, looking at the number growing over time and knowing how important they are, it's clear their performance dictates the overall performance of the Top 50. We see that the years of Top 50 decline happened when the fewest Top 10 brands grew, whilst the recent rebound has coincided with the strongest performance.

Global Top 10 share of Top 50



Source: Kantar, GfK, IRI

Number of Global Top 10 Brands Growing



Source: Kantar, GfK, IRI

Despite the up-and-down nature of Top 10 growth, as a whole they have outperformed the Top 50, growing their reach by 10.7% (vs 9.4% for the Top 50).

In actual terms that's a 3 billion CRP increase, almost half of the Top 50 growth in the last decade.

Being a Top 10 Brand

We've already talked about the resilience of the Top 50. The Top 10 follow this trait more intensely: they are even tougher and hard to move. This is proved by the fact seven have been in the Top 10 in every edition of *Brand Footprint*.

So, how do you become the biggest of the big? There are two rules of thumb:

1. Global penetration over 30%
2. Being chosen six times or more per year

There were, however, two exceptions to this rule.

Having exceptionally high penetration can help brands win out – such as the case of Dove, which has the third highest global penetration, after gaining additional shoppers for ten years straight.

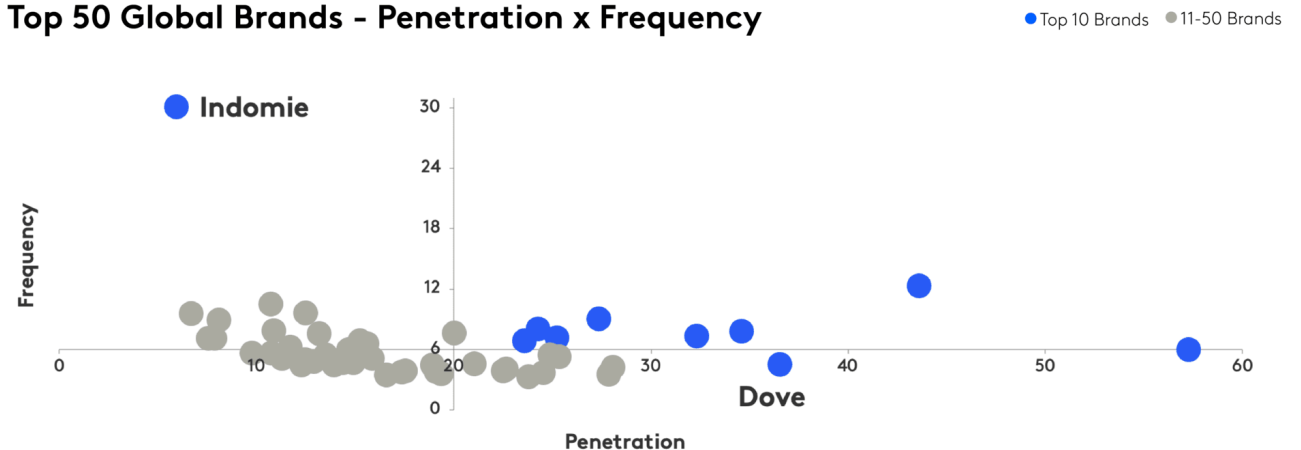
The other exception is brands having exceedingly high frequency. In this instance Indomie is unique, with frequency 5x higher than the Top 50 average. Uniquely, Indomie has a particularly high footprint in specific markets, which accounts for their dominance.

When we think beyond the very biggest brands and look at the Top 50, we see that penetration is the best way to enter the rankings. High penetration accounts for many of the brands' successes: 45 have reached a penetration of 10% or over, rather than having a particularly high frequency.

And with that, we've reached the point in the publication to unveil this year's most chosen FMCG brands in the world (which you'll find on the next page). A big congratulations to all brands for being part of this elite group, and especially new entrant Philadelphia, and bounceback brand Gatorade, which has re-entered the rankings.

The number of brands chosen over one billion times is now 28 – up from 16 brands back in 2012 – with Close-Up and Cheetos becoming the latest brands to hit this milestone.

Top 50 Global Brands - Penetration x Frequency



Source: Kantar, GfK, IRI

The Top 25 Most Chosen Global FMCG Brands 2021

2021 Rank	Rank Movement	Brand	CRP (M)	CRP Performance	Penetration 2020	Penetration 2021	Times Chosen 2020	Times Chosen 2021
1	=	Coca-Cola	6628	3	42.7	43.6	12.4	12.3
2	=	Colgate	4229	-1	58.4	57.3	6.0	6.0
3	1	Maggi	3330	11	33.6	34.6	7.4	7.8
4	-1	Lifebuy	3036	1	27.9	27.4	8.9	9.0
5	=	Lay's	2926	6	31.6	32.4	7.2	7.3
6	=	Pepsi	2402	4	23.3	24.3	8.2	8.0
7	1	Nescafé	2227	2	24.8	25.3	7.3	7.1
8	-1	Indomie	2211	0	6.0	6.0	30.4	30.1
9	=	Dove	2031	2	36.8	36.6	4.5	4.5
10	=	Sunsilk Sedal Seda	1998	4	23.4	23.6	6.7	6.9
11	1	Vim	1885	11	19.0	20.0	7.4	7.6
12	1	Nestlé	1684	4	25.1	24.9	5.3	5.5
13	-2	Knorr	1650	-4	26.1	25.3	5.4	5.3
14	7	Brooke Bond	1489	24	11.8	12.5	8.4	9.7
15	=	Lux	1475	3	28.2	28.1	4.2	4.3
16	-2	Sunlight	1395	-3	10.9	10.7	10.8	10.5
17	-1	Downy	1289	-4	15.0	15.2	7.4	6.9
18	2	Kinder	1271	5	15.5	15.6	6.4	6.6
19	-1	Kraft	1233	-4	13.8	13.2	7.7	7.6
20	2	Oreo	1212	4	27.1	27.9	3.5	3.5
21	-2	Heinz	1189	-2	21.0	21.0	4.8	4.6
22	2	Sprite	1129	4	24.1	24.5	3.7	3.7
23	-6	Dettol	1128	-16	25.6	22.7	4.3	4.0
24	2	Danone	1088	10	14.0	14.7	5.9	6.0
25	-2	Head & Shoulders	1083	-1	22.6	22.5	4.0	3.9

Source: Kantar, GfK, IRI

The Next 25 Most Chosen Global FMCG Brands 2021

2021 Rank	Rank Movement	Brand	CRP (M)	CRP Performance	Penetration 2020	Penetration 2021	Times Chosen 2020	Times Chosen 2021
26	-1	Pepsodent	1058	-1	11.1	10.9	7.9	7.9
27	5	Close-Up	1041	14	18.4	18.9	4.1	4.5
28	-1	Cheetos	1007	2	15.9	15.9	5.1	5.1
29	-1	Nivea	964	-1	23.8	23.8	3.4	3.3
30	5	Doritos	910	3	13.3	13.5	5.5	5.5
31	-2	Rexona	907	-5	19.8	19.1	4.0	3.9
32	4	Dr. Oetker	896	1	12.1	11.7	6.1	6.2
33	-3	Bimbo	894	-4	8.3	8.1	9.3	9.0
34	=	Quaker	869	-3	15.6	14.9	4.7	4.7
35	6	Fanta	860	4	19.1	19.4	3.6	3.6
36	-5	Palmolive	837	-10	16.1	14.4	4.8	4.7
37	-4	Pantene	837	-8	18.5	17.5	4.0	3.9
38	-1	Tide	813	-4	17.8	17.4	3.9	3.8
39	=	Barilla	804	-5	14.9	14.0	4.7	4.6
40	=	Ajinomoto	793	-5	6.7	6.7	10.3	9.6
41	-3	Mc Cormick	773	-9	13.5	12.5	5.1	5.0
42	6	Comfort	768	15	12.5	12.9	4.4	4.8
43	-1	Lipton	767	2	14.3	13.9	4.4	4.5
44	-1	Milka	749	4	10.8	10.7	5.5	5.7
45	5	Pond's	715	10	15.9	16.6	3.4	3.5
46	-2	Hershey's	711	0	11.7	11.3	5.0	5.1
47	5	Gatorade	689	6	7.8	7.9	6.9	7.1
48	3	Philadelphia	680	5	12.4	12.3	4.3	4.5
49	-4	Activia	677	-3	10.2	9.8	5.7	5.6
50	-4	Milo	661	-3	7.6	7.6	7.4	7.1

Source: Kantar, GfK, IRI

Biggest penetration gains 2021

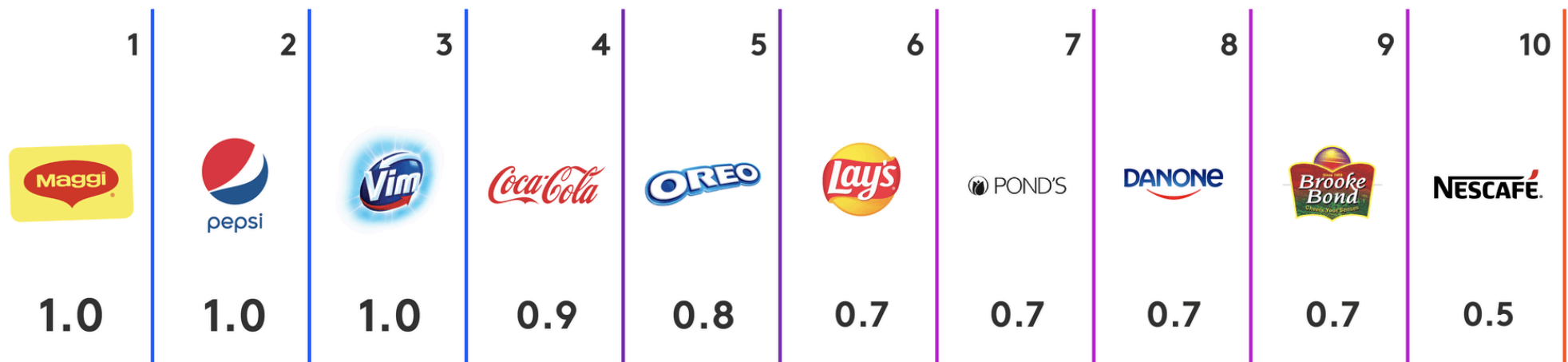
We've shown that consistent brand growth can only be achieved by brands that increase their penetration.

Therefore, each year we have a secondary ranking of the largest penetration gains globally.

This year, we have three brands all gaining 1% penetration point: Maggi, Pepsi and Vim. But in

terms of actual shoppers gained, Maggi has won out due to the fact it had a higher starting penetration than both Pepsi and Vim. This meant Maggi needed to find 6.75 million shoppers (due to population growth) just to maintain the same level of penetration. The brand then found additional shoppers on top of this figure to grow penetration, which should be commended.

The Top 10 biggest global penetration gains



Source: Kantar, GfK, IRI



Explaining Maggi's success

Maggi is no one-hit wonder, with growth in seven of the last ten years globally. Since 2012, it has increased its number of shoppers by 33%, and in 2021 it gained penetration in nine of its ten biggest markets. In its two biggest markets, India and Philippines, the brand gained +3.3% and +3.2% penetration points respectively.

In India, Maggi grew on the back of high growth in snacking that started during the pandemic. For perspective, other snacking categories like Biscuits and Savoury snacks have gone up by 10% and 14% respectively (in volume). Noodles, where Maggi plays a large part, grew by 15%.

Last year Maggi manufacturer Nestlé also launched the ONE Nestlé project. It is an entrepreneurship program, where youth will be given the chance to open franchises of Nestlé's products. One of the popular franchises as a

part of that program was Maggi Hotspot. These initiatives have helped drive further interest for the brand, encouraging shoppers to go and try these recipes at home.

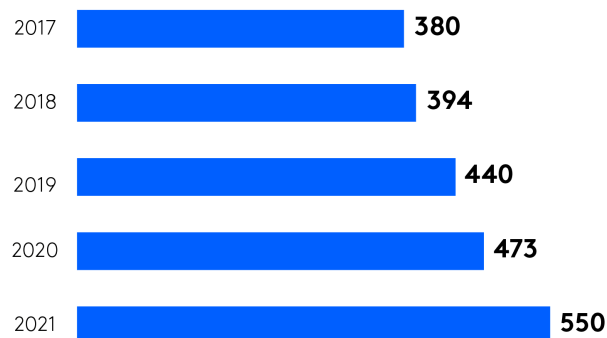
Whilst in the Philippines, despite the FMCG industry being hard-hit by the pandemic, some categories (particularly cooking staples in which Maggi operates) thrived. Maggi Magic Sarap is their biggest variant, and the market leader in meal flavourings being both affordable and versatile (as it can be used across many different dishes). The 8g single sachet was a key driver of their success. It is present in key retail channels and sits at an accessible price point to help cash-strapped shoppers manage their spend.

The brand has also adopted their offer by increasing their bundle packs from 12 to 14 and bigger individual sachets of 50g and 120g. This has helped them capture shoppers in Modern Trade retailers.

The brand to keep an eye on – Red Bull

Red Bull saw the biggest CRP gain outside of the Top 50 take-home FMCG brands, with a +16% CRP increase, which equates to 77M more in 2021. This is the joint 10th biggest increase seen globally, moving it up 13 places in the rankings to 65th.

Red Bull CRPs (M)



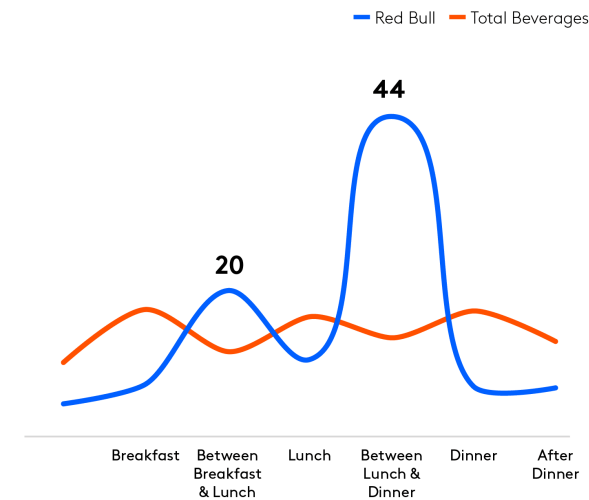
Source: Kantar, GfK, IRI

This strong performance is a continuation of the growth it has seen for the last four years, increasing CRPs by 170M since 2017. If the brand continues a similar trajectory it could break into the Top 50 within the next 5 years.

Behind its 2021 performance was a global +0.7% penetration-point increase. As a result, it sits on a level pegging with some of the biggest penetration gains we saw last year; in terms of shoppers it gained an extra 9.6M globally. The brand gained CRPs and shoppers in most of its key markets including the US, Germany, Mainland China, the UK and its home market, Austria.

In the US, the brand has captured the attention of consumers in need of extra energy and looking for Ready-to-Drink alternatives to the more traditional coffee, with Red Bull becoming the favoured caffeine staple for young adults. Carving space between meals in the afternoon, the brand delivers on its main functional benefit: providing energy without compromising on taste.

US, Red Bull % occasions across the day



Source: Worldpanel US Beverage Consumption panel | 12m Dec 2021

As the long-standing category leader, Red Bull has benefited from – and outpaced – the continued growth seen in the Energy category. Red Bull has evolved in terms of ingredients and flavours, consistently adding to the core offering. Zero-sugar versions in 2020 promise to taste like the original, and the brand is keeping things fresh with its seasonal flavour launches (e.g. pomegranate and dragon fruit).



All of this points to a broader macro trend within beverages towards 'Better For You Functionality'. Fuelled by so much information, consumers are seeking out the next way to maximise function (in this case, energy) but with a story.

Similarly in the UK, where the brand gained +2% penetration points, the brand relaunched their "Zero" range, with a new formulation, winning 1 million new shoppers in its first year of launch.

Red Bull stands out from competitors by portraying a sociable and fun beverage: in fact, 1 in 4* Red Bull drinking occasions are because it is "fun to drink".

Continuing its efforts to keep the category younger and stay relevant, collaborations in industries aligned with GenZ – such as gaming – continue to grow in popularity, with Red Bull's longstanding involvement with the e-sports /streaming scene. Fundamentally, Energy Drinks

and gaming go hand and hand: 1 in 10* occasions occur when consumers are gaming, and recent innovations aim to provide gamers with the energy and nutrition needed for those long gaming sessions.

*Source: Worldpanel US Beverage Consumption panel

Brand Success Stories

Dive into success stories from the brands getting it right – and a recap of the levers for growth

Levers for Growth

In the previous two chapters we demonstrated the vital role that growing penetration plays in achieving growth – both in the short and long term. Across the next few pages, you'll find examples of brands who have done exactly that.

For each case study in this chapter, we have identified the combination of growth levers each brand has used. Here's a quick reminder of the five levers.



More Presence

Many brands are increasing the number of locations (both geographical and across retailers/channels) in which a shopper can choose their brand. This often requires adapting product ranges to suit local tastes.



More Targets

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



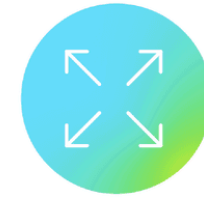
More Categories

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



New Needs

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



More Moments

People buy a repertoire of brands, and at every category occasion there's a chance they might purchase yours. Brands must ensure they are available and relevant in as many moments of consumption as possible, by creating new formats or flavours for a broader range of occasions.

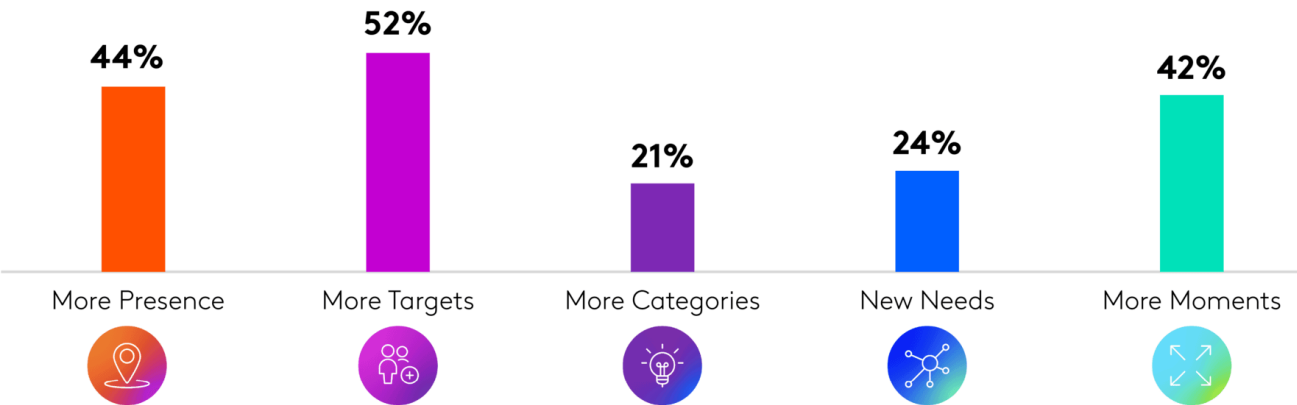
We have been identifying these levers across the last five editions of *Brand Footprint* and, with over 130 case studies, we've been able to quantify which of these are the most commonly used.

From this analysis, it's clear to see that some levers are easier to implement and use, with 'More Targets' the most popular used in over half the examples.

We can also see that brand owners tend to use a combination of levers to drive growth, with two levers being used on average.

Over the next few pages, you'll see the icons for each lever used throughout the stories to indicate which levers each success story has pulled.

How often the Levers for Growth are used



Source: Kantar (based on >130 case studies from L5Y)



ASIA

KERATIN
plus®



KERATIN PLUS Philippines

Hair care brand Keratin Plus is the fastest growing brand in the Philippines. Despite shoppers spending less on the category during the pandemic, the brand saw its CRP grow by 77%, with an 8.3% penetration point increase.

Keratin Plus has satisfied shoppers seeking affordability and salon-level benefits. The brand's Hair Treatment variant comes in a bigger pack sachet at a lower price than key Hair Conditioner brands. This has led to lower-income homes buying it more times (an increase of 21 million occasions in 2021 vs 2020). Keratin Plus also leverages shoppers who value proximity stores, particularly sari-sari stores (small neighbourhood convenience stores found all over the Philippines) where more homes buy the brand.

As most hair salons were closed due to the pandemic, shoppers may have needed to do their hair care treatments at home. Keratin Plus communicated the brand's complete benefit versus individual offerings of other Post Wash brands – leveraging on testimonies from product users rather than celebrity endorsers.

BEAR BRAND Indonesia



Bear Brand, the Dairy brand from manufacturer Nestlé, saw a +35% growth in CRPs and is now bought by over half over Indonesian households (55.2%) following a 9.5% penetration-point increase.

Having established itself as a brand with perceived health benefits, Bear Brand has been communicating benefits beyond health to tap into a wider audience – reaching far beyond consumers simply concerned with health.

By putting itself forward as a healthy beverage that is relevant for consumers in the New Normal, Bear Brand was able to attract +6.6 million new shoppers this year.

ASIA & MIDDLE EAST

NESCAFÉ

Kurkure

KUKURE India



Kurkure, is a snacking brand marketed by Pepsico in India. It is India's largest extruded snack brand, though it is also present in the non-extruded snack segment. The brand has increased its penetration from 15.5% to 17.7% in 2021. It was also bought more frequently – up from 11.5 times in 2020 to 14 times in 2021 – leading to a 45% increase in CRPs.

The brand has largely benefitted because of category expansion – or more targets. The Salty Snacks category within which it operates has moved its penetration from 76% to 80%. during this period. The work from home trend that came as a result of the pandemic boosted the sales across snacking categories. This behavior only expanded into the second year of the pandemic, despite things being more 'normal'.

During the initial days of the pandemic, the local snack shops, sweet shops and bakeries that usually sold traditional salty snacks were all closed and only branded snacks were available in the market. People seem to have developed a preference for these branded products, and as a result we see Kurkure gaining from local unbranded snacks.

The key pack which sells at Rs.10 is also a sweet spot that makes adoption amongst Indian households much easier.



NESCAFÉ
Saudi Arabia

Global brand Nescafé grew its CRP in Saudi Arabia by 9%. It was one of the markets spear-heading the brand's return to global growth, after several years of CRP decline. The brand has now entered the top 25 brands in the Saudi market.

In 2021, Nescafé introduced new product offerings capitalising on new demand moments, and emerging trends. These included Nescafé plant-based lattes, Nescafé Ice, and Nescafé 2in1, supported with both ATL & BTL communication. The core lines of Nescafé Red Mug, Nescafé Gold, and Nescafé 3in1 benefitted from a packaging revamp while maintaining consumers favourite recipes.

Excellent trade execution, enhanced distribution, new formats, promotions and success online led to increased penetration while also building weight of purchase.

LENOR

Great Britain



Lenor, the fabric conditioner brand from P&G, saw its CRP grow by 22% in 2021 – more than any other brand in the Top 20 Homecare rankings. It has now risen two places, putting it in 4th. Driving this growth was a substantial increase of 2.9% penetration-points.

The biggest driver of their success was the launch of Outdoorable, which was the most valuable FMCG innovation in 2021. This variant was a new concentrated format which appealed to all shoppers due to its lower price/pack format.

Lenor Beads, which are scent boosters, also continued to grow throughout 2021. With this innovation, Lenor is effectively creating a new need within fabric care, as shoppers are adding beads to their wash load alongside the usual laundry detergent and fabric conditioner. This innovation did particularly well in high-street bargain stores, reaching shoppers across different channels.

BARRY'S TEA

Ireland



Barry's Tea grew its CRPs for a second consecutive year at 7%, with a 1.4% penetration-point increase in 2021. It has now risen to 43rd in Ireland's Top 50 most chosen FMCG brands, consolidating its 5th position in the Beverages Top 20.

The brand's growth was down to the continued success of its herbal and caffeine-free range, and the brand saw particularly strong performance with their largest demographic, older dependents, with whom they saw a 12% growth.

Their advertising campaign also helped increase their presence and remain front of mind, with their 'We make the tea, you make the moment' TV campaign.

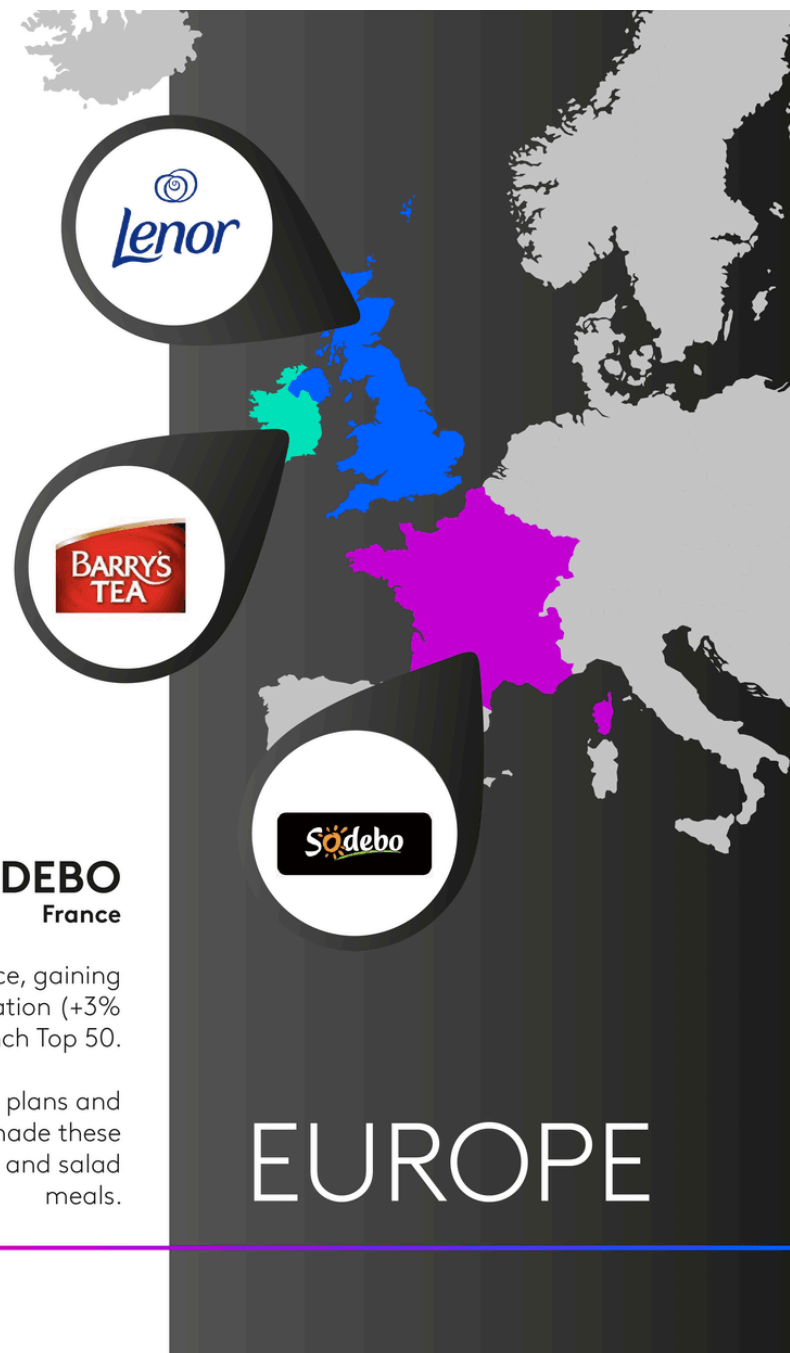


SODEBO

France

Sodebo, the French food brand, entered the Top 20 most chosen brands in 2021 by positioning itself in 17th place, gaining four places on last year's standing. The brand saw +14% CRP growth, having reached 56% penetration (+3% penetration-points / 940,000 additional shoppers). This growth was the strongest in the French Top 50.

After a growth in home-cooking in 2020, the return to reality in 2021 meant shoppers had less time and more plans and activities going on outside the home. This has encouraged the consumption of ready-made dishes and made these categories particularly dynamic in 2021. Sodebo benefitted from this trend – and in particular their sandwiches and salad meals.



ALPRO Spain



Alpro has cemented its place amongst the Top 100 chosen FMCG brands in Spain. It has risen up the rankings and now has the strongest CRP growth (+24%) in the Top 100, gaining 2% penetration on top of the 2% gained in 2020.

Its development comes mainly through its plant-based yoghurts. During the last year, Alpro expanded the number of SKUs within Mercadona's portfolio – the main Spanish retailer – which represented a great achievement for the brand.

It has also increased its presence within regional Supermarkets, reinforcing itself in almost all Spanish regions, especially among young targets.



MAGNUM Portugal

After a great 2020, Magnum didn't slow down in 2021, with CRP growth accelerating from +16% to +27%. With higher demand from consumers spending more time at home and new additions to its already rich portfolio, the brand saw back-to-back penetration increases with a combined 5% increase over the two years. This is well above the average penetration gain for growing brands within Portugal.

In 2021, Magnum was the Ice Cream brand that recruited the most buyers in Portugal, and with that, it became the number 1 brand in terms of overall purchasing households in its category. It is also the brand with the highest purchase frequency in Ice Creams, which has also grown 10.4% vs. 2020. Magnum's target audience is young but valuable buyers, with high levels of family income, and mostly living in large urban areas.

Shopper recruitment came from both its core segment, Sticks, and from Pints, which benefited from the now very popular flavour Double Gold Caramel Billionaire, introduced in 2021, which was promoted to the core line-up of the brand for 2022. Driving penetration in both Sticks and Pints helped Magnum become part of more consumption moments for shoppers.



PRINGLES

Latin America



Looking at Latam's Food Rank movement, the brand that rises most sharply is Pringles, moving 7 places, finally entering the Top 50. Globally, Brazil contributes most to this shift, with Pringles growing 10 positions locally, more than doubling its CRP in the last year and increasing over 5% penetration points.

The brand is now perceived as good value for money thanks to new packages and flavours adapted to the Brazilian shopper – as well as media efforts to leverage brand awareness. This investment in repositioning the brand showcases how can a brand take advantage of behavioural change – in this case increasing snacking moments during the pandemic – and can manage to grow, even in a Premium segment.

In other Latin America markets, Pringles has also seen shopper growth in Colombia, Ecuador and Chile, resulting in double-digit CRP growth in each. The pandemic was essential to this change in fortunes, as the brand was losing shelf space in 2020 across both Colombia and Chile.



SEARA

Brazil

Seara is a Brazilian food producer, specialised in alternative proteins, and has entered the Top 5 most chosen FMCG brands for Brazil. It started showing up in our ranking in 2013, when it occupied the 96th position, with 51.6% penetration, and has gained 91 positions in 8 years. Today over 30% more Brazilian shoppers buy the brand, with penetration reaching 82.7% in 2021. Seara is a multi-category brand, so part of its massive growth it is due to its presence in various categories. The brand has also invested in being seen as a more “youthful” brand, positioning itself and communicating more – and more precisely – to this target demographic.

This year, it also stands out as one of the brands that gained the most penetration (+4.9 penetration-points) compared to the previous year. Their new release “Levíssimo” (low sodium and low calorie ham) was partially responsible for the growth, which has the dual benefit of increasing penetration by nearly 1% penetration, and placing the brand in a healthier segment, for public perception.

Another growth driver comes from a pandemic trend. Consumption in-home grew and Seara conquered space across snacks, main meals and other moments that they hadn't previously performed as well across. The search for more practical preparations has also been a big driver of growth across categories in post-pandemic Brazil, boosting Seara's presence.



A photograph of a supermarket entrance at night, with warm interior lights visible through the glass doors. In the foreground, several yellow shopping carts are parked in a row on a wet, reflective pavement. A large, dark grey silhouette of a rabbit is overlaid on the left side of the image, with its ears extending upwards and its body partially obscuring the scene.

10 Findings from 10 Years of Brand Footprint

Sorry, you must sign up in the online version to view this content.

The Most Chosen Brands Online 2021

Online is still the strongest performing channel globally, with 4 in 10 households globally now using the channel for their FMCG purchasing. But what does the future look like? And which brand is best-in-class?



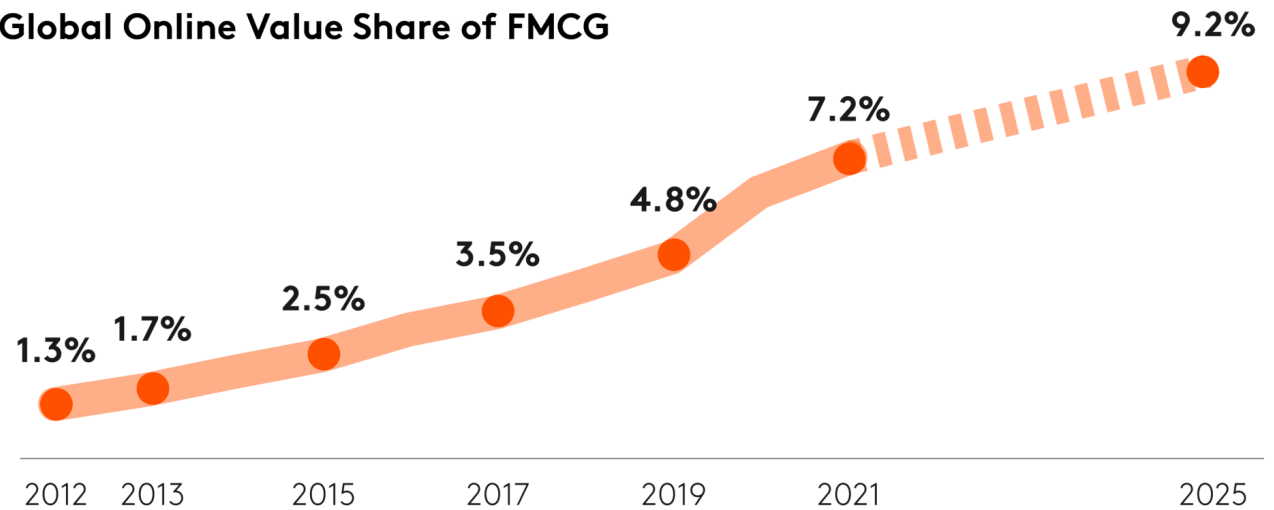
The biggest change in FMCG shopping

As shown in [10 Years of Consumer Choices](#), the FMCG industry has grown by 33% in the last decade. The industry has demonstrated incredible resilience and consistency year after year, alongside a changeable consumer landscape.

While this industry growth is impressive, it does not show the meteoric rise of the Online channel specifically, and its part in FMCG growth. In fact, the Online channel grew 18 times faster than the industry baseline gaining 6% value share of the whole industry over that time (7.2% in 2021 vs 1.3% in 2012).

And the Online channel is not set to slow anytime soon. We expect to see Online continuing its trajectory, growing faster than other channels and gaining share. We forecast

Global Online Value Share of FMCG



Source: Kantar, GfK, Intage | [Omnichannel 2022](#)

that it will gain +0.5% share per annum and reach 7.7% share by the end of this year. In the next four years, we predict that its share will reach over 9%.

This rapid expansion is mirrored at a brand level too. All 20 of the most-chosen brands online saw growth in the channel, with 18 seeing double-digit growth. This growth was also stronger than offline performance across all the brands.

Some brands managed growth across both Online and Offline; for these brands ecommerce represented 43% of brand growth – punching well above its weight.

Biggest Online adopter - L'Oréal Paris

From the Top 20 most chosen brands Online, the average amount of total CRPs coming from the channel is 7%. However, there are four brands which get over 10% of their CRPs from the Online channel, and leading the way is L'Oréal Paris with over 18% of CRPs occurring Online.

Since 2015, the brand has seen its Online CRPs increase three-fold, growing from nine million to 32 million in 2021. At the same time the proportion of brand choices made Online has increased from 6.7% to 18.4%.

The fact L'Oréal Paris is leading the way is no surprise. Parent manufacturer, L'Oréal has been targeting the channel for the past few years, and the beauty manufacturer expects 50% of its sales to come from ecommerce by 2023.

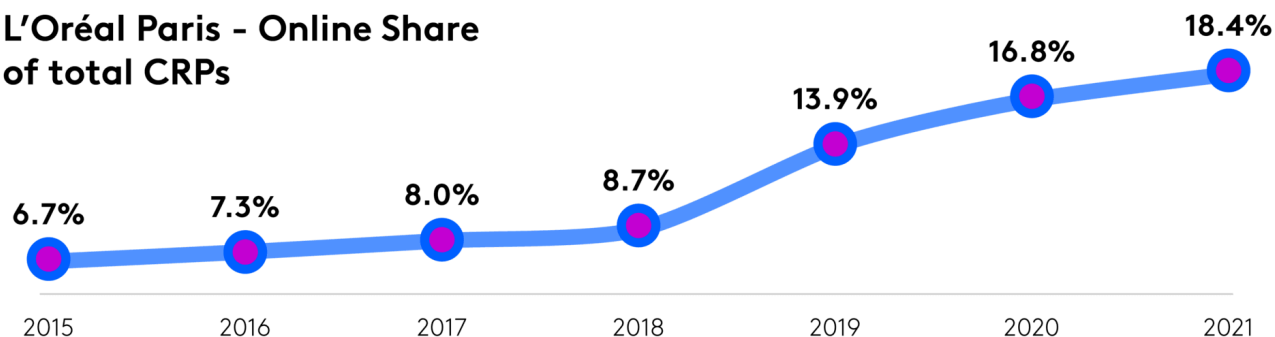
A big part of this success is due to the brand's performance in Mainland China, which represents 82% of all its Online CRPs.

In this market, L'Oréal Paris has seen success with digital try-ons: they have the dual benefit of helping customers from an education perspective (i.e. helping customers find the right product) and also in terms of personalisation, creating informed customer journeys and personalised product recommendations.

The brand has also built up a solid ecosystem of advocates and social sellers, jumping onto trending topics such as clean beauty and simplified skincare. Their perceived relevance increases further when we consider their use of influencers: they frequently create co-branded campaigns, relying on the popularity of celebrities to drive brand recognition and popularity.

These marketing efforts are also supported by their product offering. Their products take consumer segmentation into account, meaning they offer multiple products targeted to different age groups. This means they can appeal to the whole market, which is bolstered by their commitment to innovation and R&D from an investment perspective, leaving them in a strong position to appeal to all customers.

L'Oréal Paris - Online Share of total CRPs



Source: Kantar

The Top 20 Most Chosen Global FMCG Brands Online

2021 Rank	Rank Movement	Brand	ONLINE					OFFLINE	
			CRP (M)	CRP Performance	Penetration	Frequency	% of Total CRPs	CRPs (M)	CRP Performance
1	=	Coca-Cola	79	38%	4.4	3.2	2%	4122	3%
2	1	Nescafé	60	36%	3.7	2.9	4%	1311	-3%
3	-1	Heinz	59	25%	2.4	4.3	11%	486	-6%
4	2	Pepsi	39	59%	2.3	3.0	4%	1064	2%
5	-1	Colgate	39	31%	3.5	2.0	3%	1465	-4%
6	-1	L'Oréal Paris	32	21%	3.4	1.6	18%	142	-5%
7	1	Lay's	31	29%	2.8	1.9	4%	658	2%
8	2	Oreo	31	31%	2.9	1.9	5%	559	1%
9	-2	Dove	29	21%	2.8	1.9	4%	692	-3%
10	-1	Nestlé	26	9%	2.5	1.9	5%	538	2%
11	=	Nivea	26	11%	2.5	1.8	5%	469	-2%
12	5	Omo	25	56%	2.8	1.5	5%	453	0%
13	-1	Yoplait	24	30%	1.0	4.3	11%	203	-2%
14	1	Kleenex	23	26%	1.5	2.6	15%	130	-9%
15	-2	Activia	22	18%	1.0	4.0	8%	266	-5%
16	=	Head & Shoulders	21	27%	2.4	1.5	3%	600	2%
17	2	Comfort	20	28%	1.8	1.9	8%	234	-6%
18	-4	Dettol	19	7%	1.8	1.9	7%	253	-14%
19	1	Knorr	19	37%	1.6	2.1	2%	846	-4%
20	-2	Quaker	19	18%	1.4	2.3	6%	301	-6%

Source: Kantar

Markets included: Argentina, Bolivia, Brazil, Central America, Chile, Chinese Mainland, Colombia, Ecuador, France, GB, Greece, Indonesia, Ireland, Malaysia, Mexico, Peru, Philippines, Portugal, South Korea, Spain, Taiwan, Thailand, Vietnam

Winning Omnichannel 2022: Get full retail landscaping across 50 markets

Worldpanel offers a ready-to-use global omnichannel dashboard, giving you insight into the last three years of FMCG data, including sales evolution, share, performance, spend per trip, frequency by channel and a ranking of top retailers by country.

Worldpanel's Global Omnichannel Dashboard helps you:

- Track channel performance and evolution
- Discover the Top 10 retailers and ecommerce players
- Learn more about ecommerce models
- Understand the promotions and private labels landscape

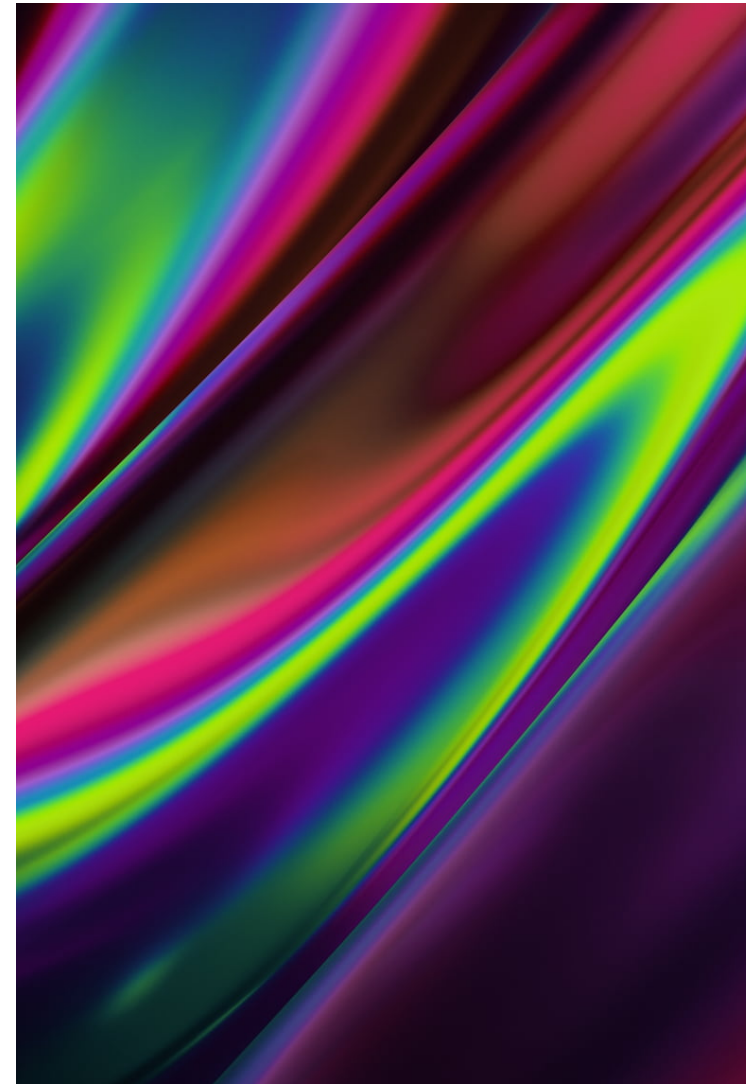
[Get the Global Omnichannel Dashboard](#)

Retail Channel Forecast 2025

Worldpanel's Retail Channel Forecast 2025 offers comprehensive projections on how the retail landscape will evolve over the next two years, including:

- Detailed data by quarter
- Customised to your needs – including any countries where we can access a minimum of three years' back data per quarter
- All FMCG categories – including food, beverages, dairy, home care and health & beauty
- Done at channel or country level

[Get the Global Forecasting Dashboard up to 2025](#)



The Most Chosen Out-of-Home Brands in 2021

As restrictions across the globe started to lift and consumer confidence returned, people slowly returned to their pre-pandemic habits. But how did this impact out-of-home brand performance?



On the road to recovery

COVID-19 led to a \$22 billion fall in out-of-home (OOH) sales in 2020, against a backdrop of restrictions, home working and social distancing. Sales continued to suffer throughout Q1 2021. But, with increased mobility from this point onwards, OOH value sales rose for three consecutive quarters, increasing 19% in Q4 compared with a drop of 25% in the same period in 2020.

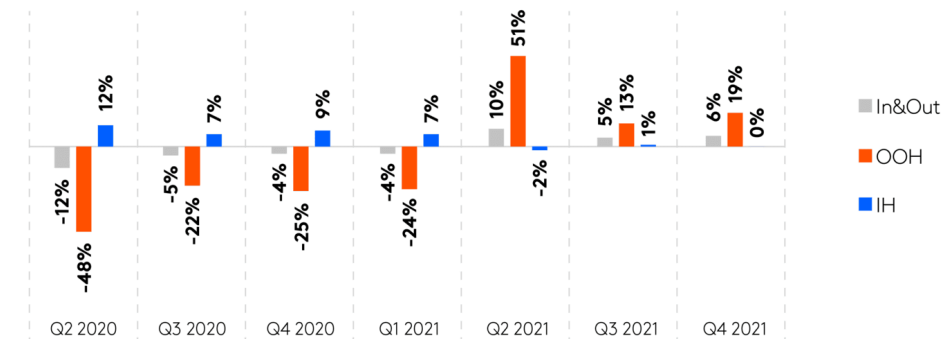
This boosted the value of the total in-home and OOH market by 6% year-on-year; almost three quarters of which was made up of sales from the UK, Spain, Mainland China and France.

While this overall picture is positive, looking at the evolution of OOH spend in these categories over a three-year period provides valuable perspective: it is still 10% lower than it was in the fourth quarter of 2019, before COVID-19 hit.

The rebound is also reflected in brand performance. Across the combined top 10 beverages brands and top 10 snacking brands, 18 saw a decline OOH in 2020. In 2021, we see a more positive picture, where just ten brands saw a decline and eight brands saw growth.

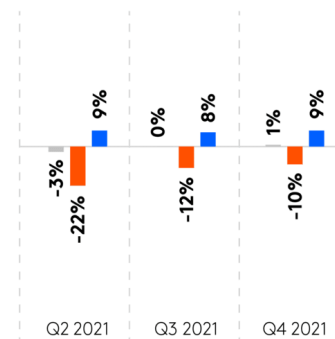
Comparing the combined CRPs, in beverages the OOH decline was 17% in 2020. This slowed in 2021, where we saw a decline of just 2%. Similarly, in snacking, the CRP decline was 5%, slowing to just 1% in 2021.

Growth vs Year ago

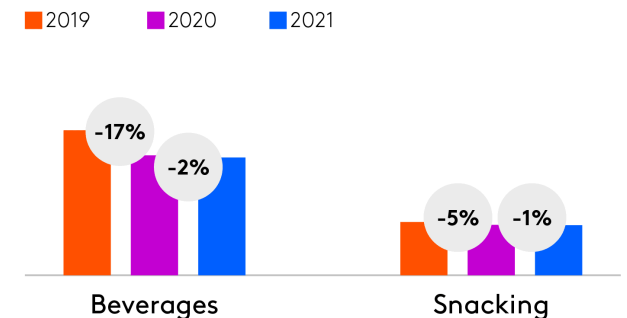


Source: Kantar OOH Purchase Panels

Growth vs 2 Year ago



Combined CRPs of Top 10 OOH Brands



Source: Kantar OOH Purchase Panels

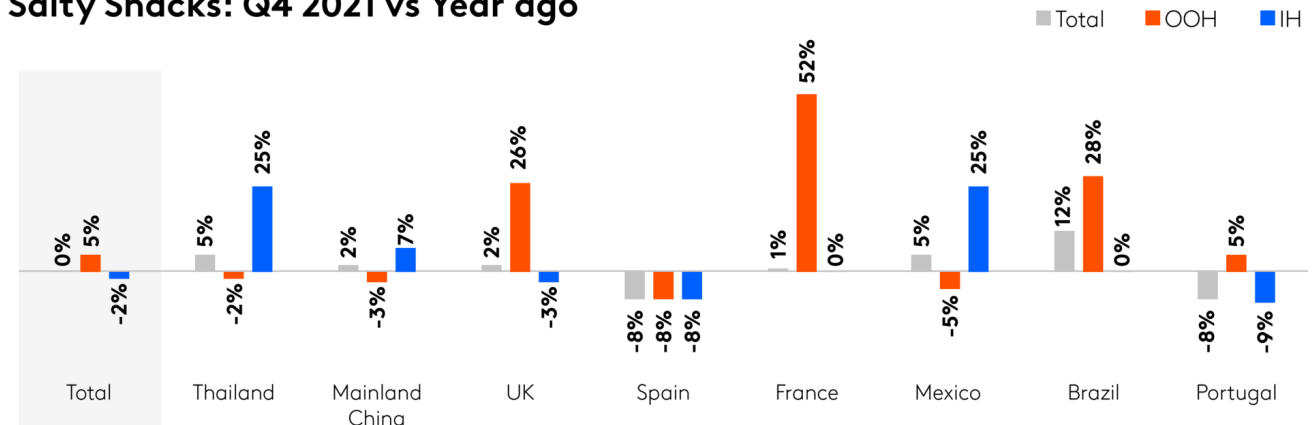
Standout performers

Across both sectors there were two standout performances; Red Bull and Lay's both saw the biggest increase in CRPs in their respective sectors.

Red Bull's performance was of a similar level to its take-home performance, with the brand successfully winning consumption moments between meals and adding to its core offering with zero-sugar variants to win more shoppers. For a deep dive on Red Bull, and reasons behind the brand's success, head [here](#).

Lay's performance was also notable – and it could be seen as even more impressive, given the Salty Snacks category saw even slower recovery than the other OOH categories, with growth of just 5% in Q4 2021 (versus the 19% for total OOH).

Salty Snacks: Q4 2021 vs Year ago

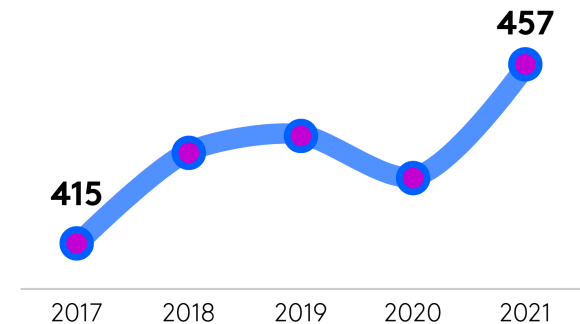


Source: Kantar OOH Purchase Panels

On top of this, Lay's biggest OOH markets are Mainland China and Thailand, where salty snacks were still in decline in Q4. Defying the odds, the brand managed to see growth in both markets.

This strong 2021 performance means that Lay's CRPs were higher in 2021 than in 2019. Its decline in 2020 stands as the only negative movement across the last five years. Against a tough market backdrop, this is a real accomplishment for the brand.

Lay's OOH CRPs (M)



Source: Kantar OOH Purchase Panels

The Top 10 Most Chosen Out-of-Home Non-Alcoholic Beverages Brands 2021

2021 Rank	Rank Movement	Brand	OOH CRP (M)	OOH CRP Performance	Penetration 2021	Frequency 2021	% of Total CRPs	In & Out CRPs (M)	In & Out Performance
1	=	Coca-Cola	2061	-4%	48.8	8.7	43%	4820	-1%
2	=	Pepsi	751	-1%	25.6	6.0	48%	1563	2%
3	=	Fanta	402	0%	23.7	3.5	49%	821	1%
4	=	Sprite	396	4%	27.2	3.0	51%	771	1%
5	1	Minute Maid	199	-4%	16.7	2.4	55%	365	-3%
6	-1	Nescafé	198	-7%	8.8	4.6	31%	635	-2%
7	=	Red Bull	193	17%	6.7	5.9	64%	303	18%
8	2	Lipton	121	3%	5.1	4.8	54%	223	6%
9	2	7-UP	121	5%	6.1	4.1	60%	202	0%
10	-2	Yakult	110	-13%	6.7	3.3	32%	344	-10%

The Top 10 Most Chosen Out-of-Home Snacking (incl. Ice-Cream) Brands 2021

2021 Rank	Rank Movement	Brand	OOH CRP (M)	OOH CRP Performance	Penetration 2021	Frequency 2021	% of Total CRPs	In & Out CRPs (M)	In & Out Performance
1	=	Lay's	457	6%	20.9	4.5	42%	1089	4%
2	=	Wall's	366	-6%	18.3	4.1	57%	644	-6%
3	=	Cheetos	289	-7%	16.8	3.5	47%	613	-8%
4	=	Oreo	240	-1%	18.1	2.7	32%	742	0%
5	=	Bimbo	128	-5%	4.1	6.4	95%	135	-4%
6	=	Doritos	108	-9%	6.1	3.6	30%	366	-2%
7	=	Nestlé	98	4%	8.2	2.4	33%	297	9%
8	=	Kit Kat	89	10%	4.0	4.5	32%	275	8%
9	1	Kinder	88	19%	4.9	3.6	28%	315	12%
10	1	Snickers	72	0%	4.6	3.2	44%	165	-2%

Source: Kantar OOH Purchase Panels

Markets included: Brazil, Chinese Mainland, France, GB, Indonesia, Mexico, Portugal, Spain, Thailand.



What is
Brand Footprint

The categories

The complete ranking comprises five global FMCG sectors – Beverages, Food, Dairy, Health & Beauty, and Homecare – tracked by consumer purchase panels. Non-barcoded Fresh Food, Batteries and Pet Food are not included in the global ranking. All data relates to purchases brought into the home to be used or consumed there.

The data period

The Brand Footprint ranking is based on data collected over the 52-week period between November 2020 to the end of October 2021.

Criteria of eligibility for a brand to appear in the Global ranking

Only global brands are analysed to create the global Top 50 Ranking. To be considered as global, a brand must be available in at least two continents and above 1% Penetration. Data collected from Egypt, Japan, Kenya, Morocco, Nigeria and UAE is not included in the global ranking, and therefore if a brand is present in any of these markets plus only one other continent it will not be considered global.

Brand Definition

Brand Footprint only covers consumer brands; retailers' own-label brands are not included. Brands listed include all variants, categories and formats that sit within them – for instance Pantene includes all of its shampoo, conditioner, hair treatment, hairspray and hair oil products. Brands sold under different names in different countries are considered as individual brands – for instance Tide and Ace. However, for brands with a name that has been directly translated into a local language, for example Mr Muscle and Mr Músculo, both are counted as the same brand.

The 'universe'

The data is collected from 52 markets covering 87% of global GDP.

Data source

Brand Footprint is a Kantar initiative.

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

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

Data for the USA was provided by IRI

Data for Japan was provided by Intage

Kantar in collaboration with CTR in China



About this report

There may be small changes in the data reported for Bangladesh, Belgium, Colombia, Chile, Germany, Peru, Philippines and Portugal due to ongoing panel enhancements and data restatements.

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

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

About Kantar

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

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

Find out more

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

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Explore the data

[You can access this year's Brand Footprint data for all markets and sectors online. Learn more about your brand's global footprint and the most chosen brands in your sector and market.](#)



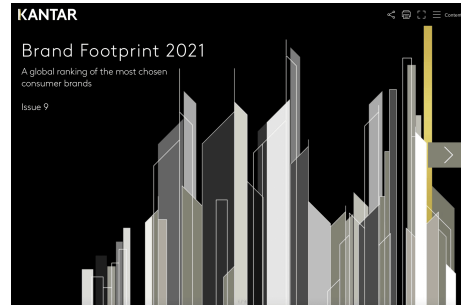
Food for Thought

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

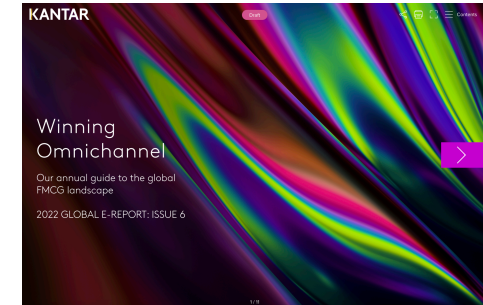
Food for thought



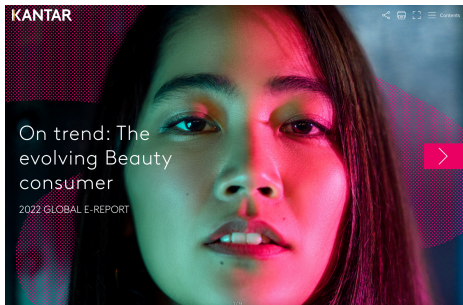
Watch the webinar



Brand Footprint 2021



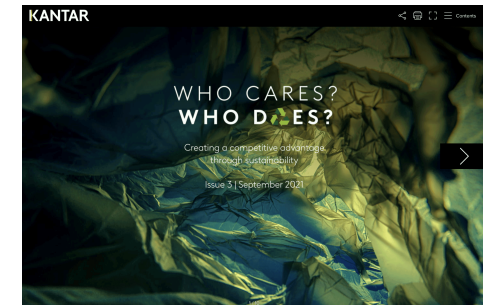
Winning Omnichannel 2022



On trend: The evolving Beauty consumer



How Meal Delivery has transformed the Foodservice industry



Who Cares, Who Does? 2021

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