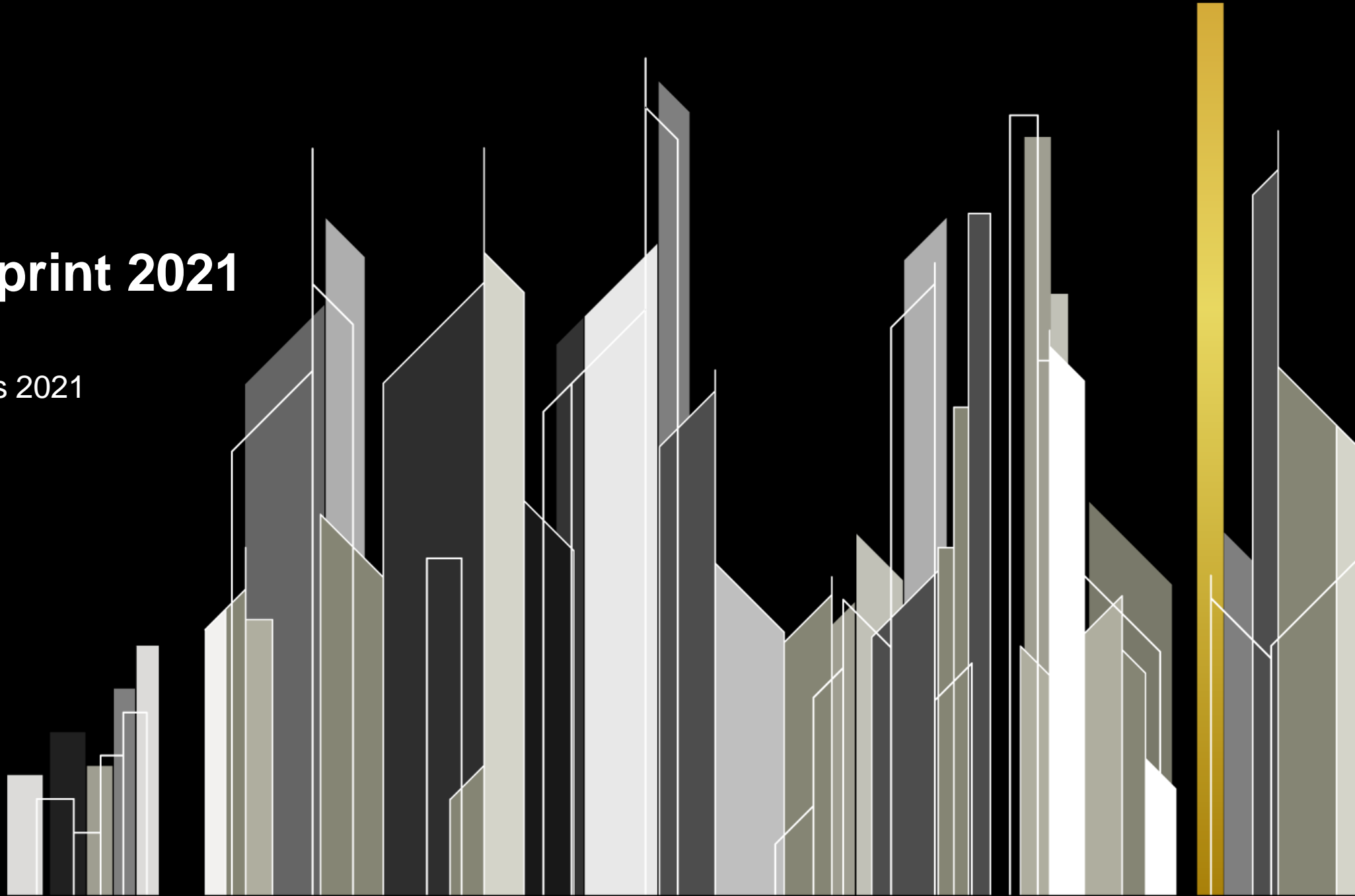


# KANTAR

## Brand Footprint 2021

Most Chosen Brands 2021

Worldpanel Middle East  
May 2021



# Agenda

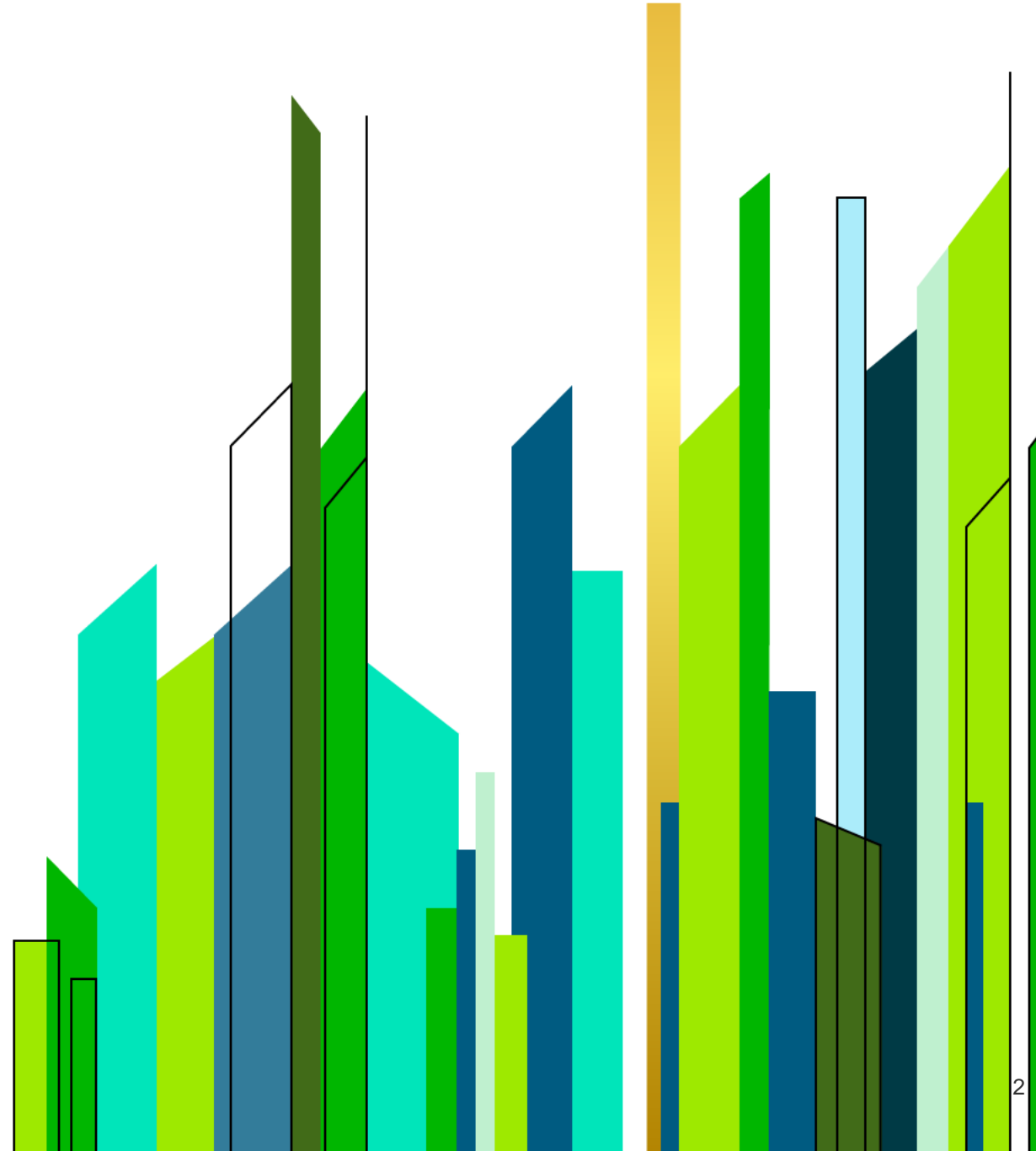
## 1. What is Brand Footprint?

2. How Brands Grew in 2020

3. The Most Chosen Global FMCG Brands 2020

4. Online & Out-of-Home Brand Rankings

5. Focus on MENA





# BRAND FOOTPRINT

What is it?

There is a decision point in every FMCG purchase; a point at which the shopper decides to buy one brand instead of another.

The Brand Footprint ranking reveals which brands are winning at that moment of truth, using the Consumer Reach Points measure.

This measures a brand's strength in terms of the number of times brands are chosen by shoppers.

# Consumer Reach Points

The calculation

## Population

---

Number of households  
in a country



## Penetration

---

% of households  
buying your brand



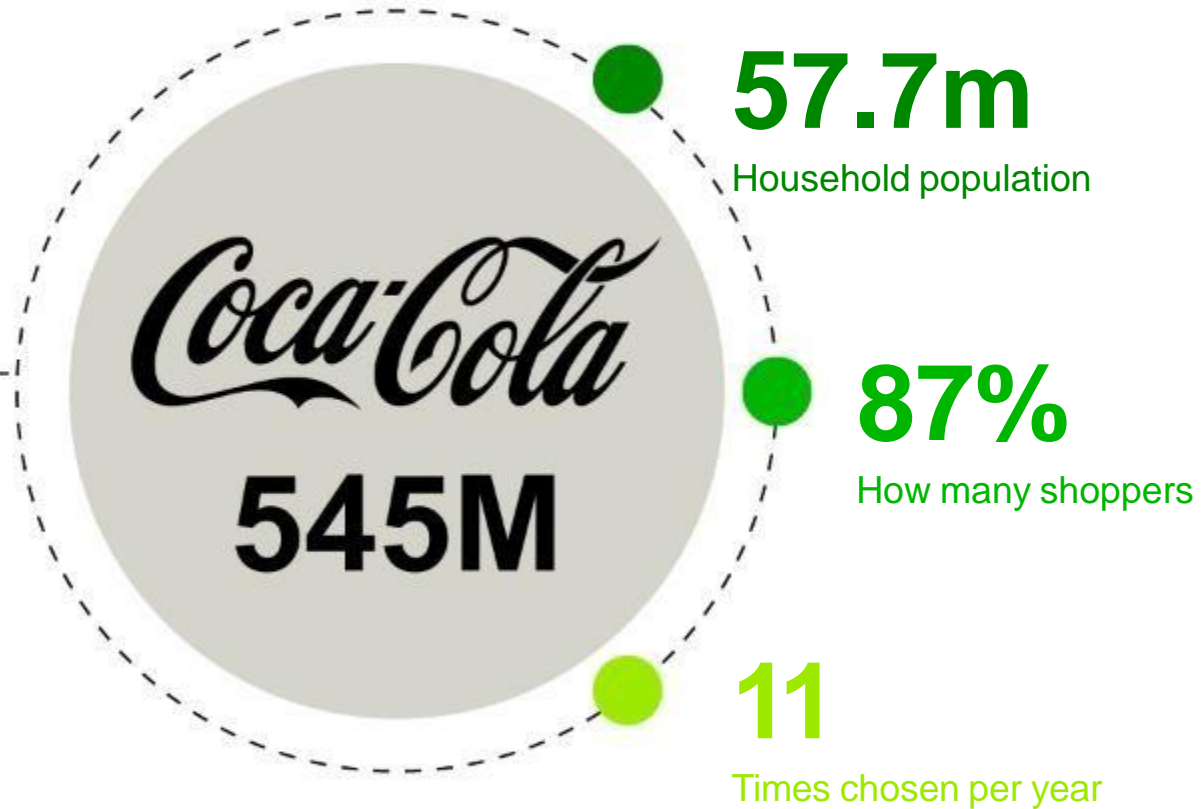
## Consumer choice

---

Number of interactions  
with your brand across  
categories in a year




# Consumer Reach Points

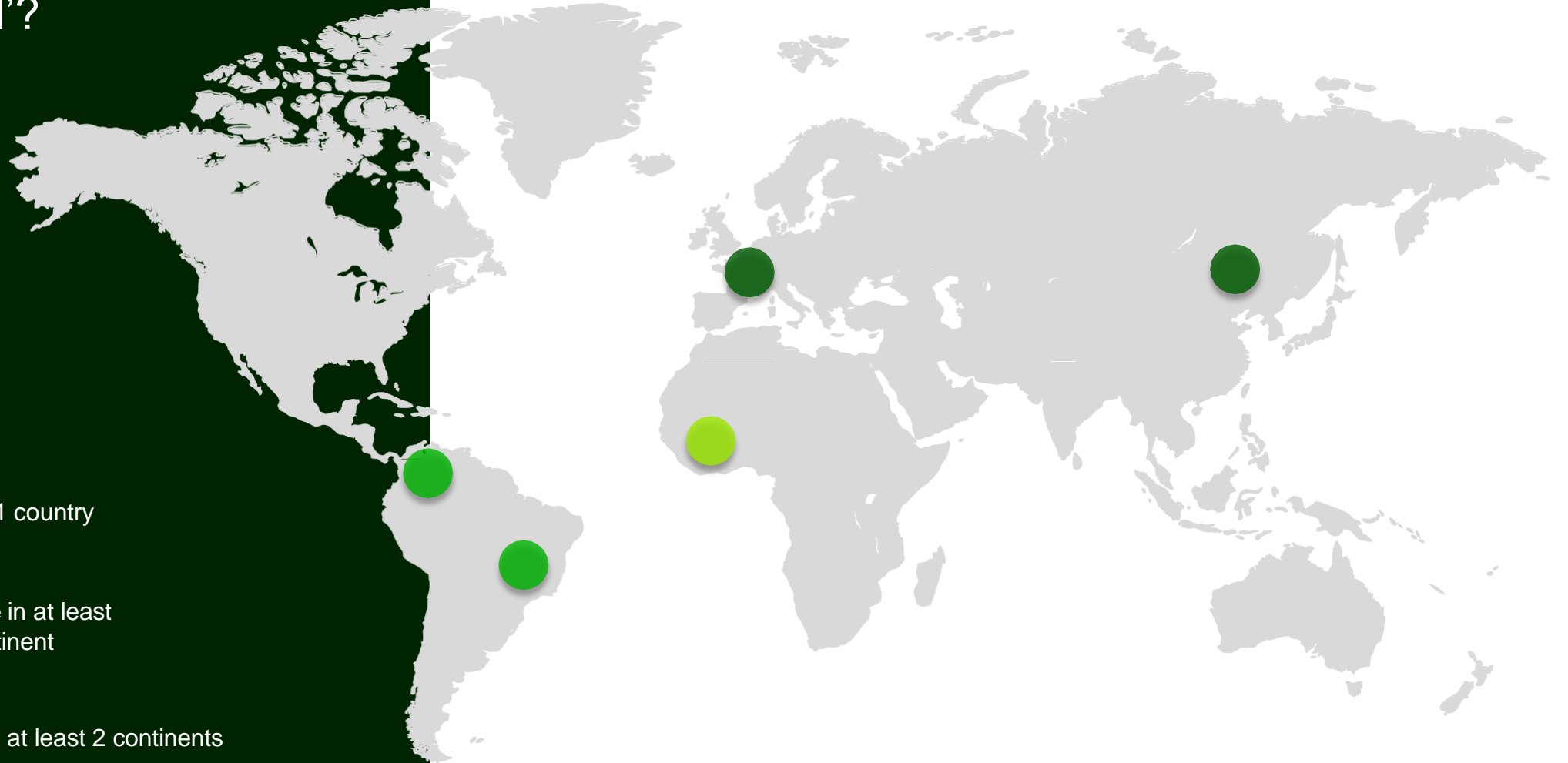
Exposing the 'Moment of Truth'



# A ranking of global brands

What is 'global'?

-  **Local:** presence in 1 country
-  **Regional:** presence in at least 2 countries of 1 continent
-  **Global:** presence in at least 2 continents



# Our most comprehensive global read ever

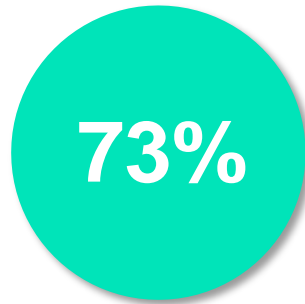
A world of choices



Continents



Markets



Global  
population



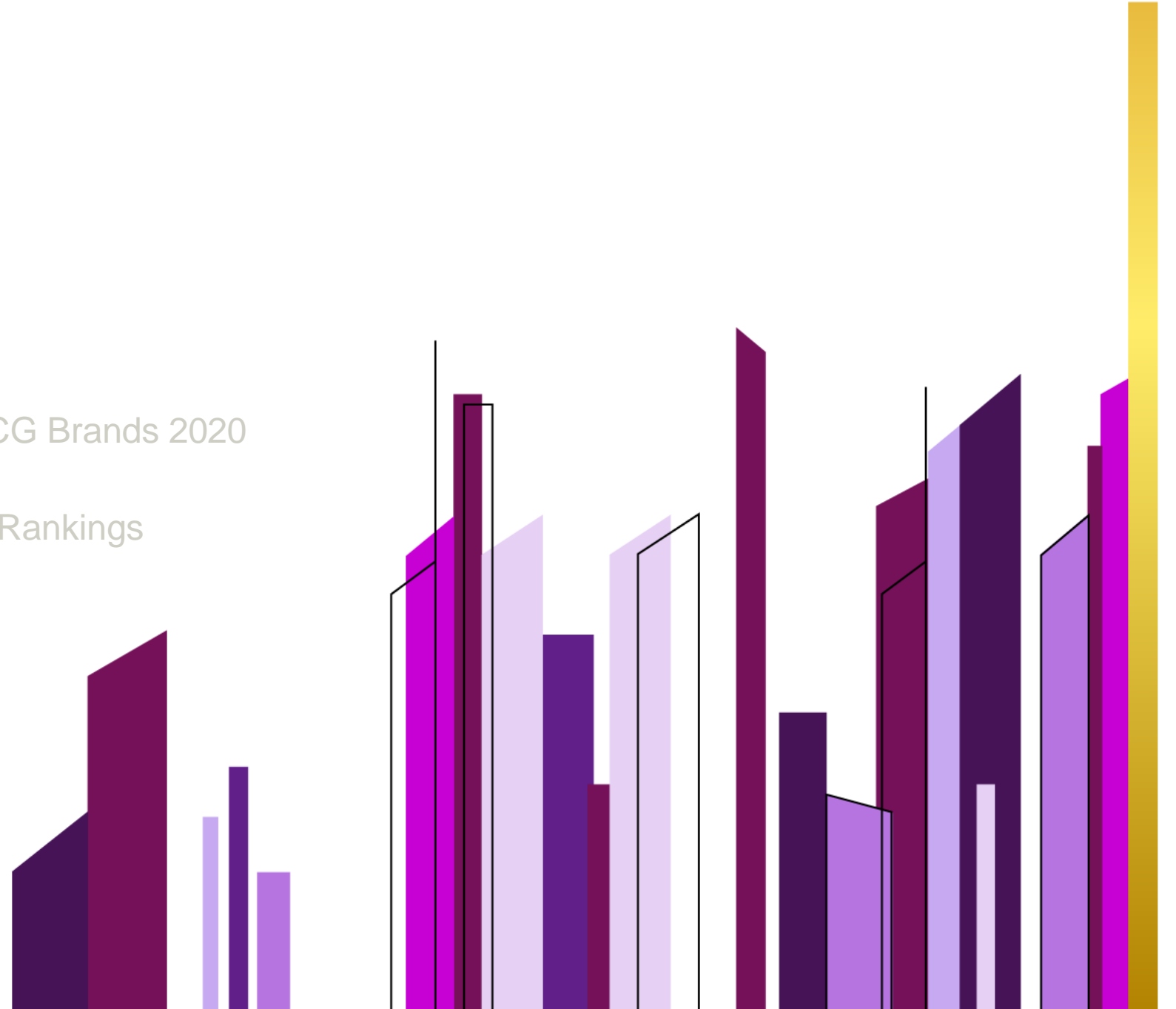
GDP coverage



Brands

# Agenda

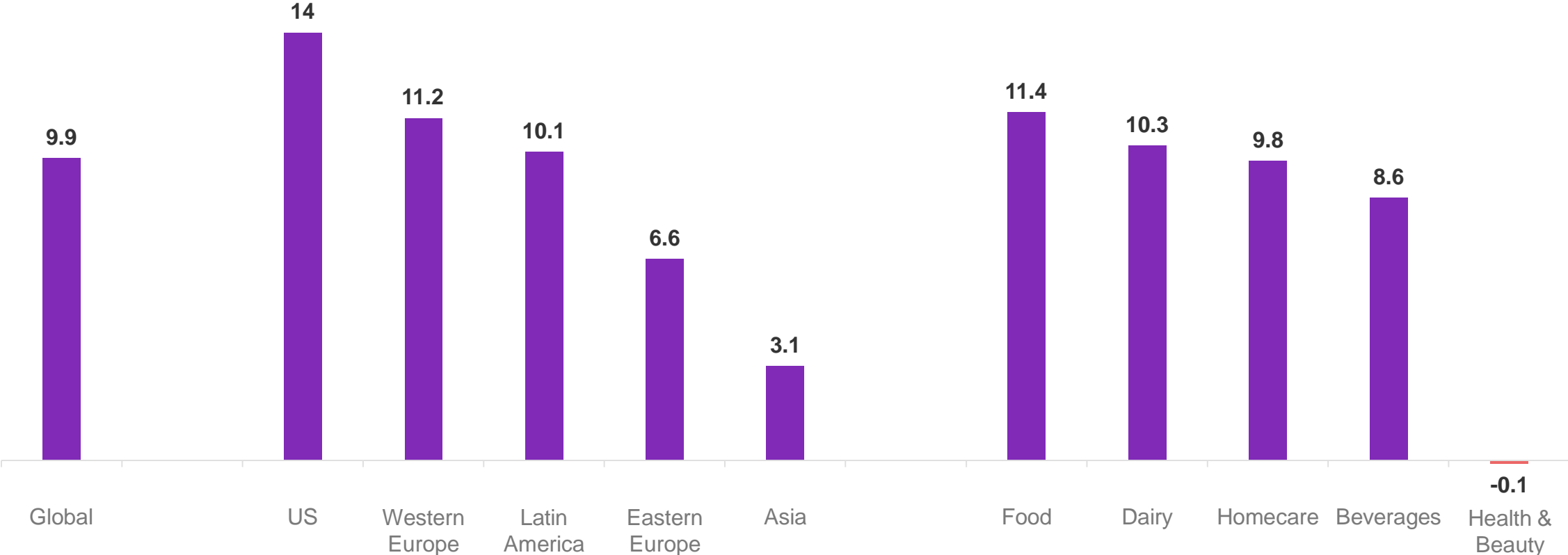
1. What is Brand Footprint?
- 2. How Brands Grew in 2020**
3. The Most Chosen Global FMCG Brands 2020
4. Online & Out-of-Home Brand Rankings
5. Focus on MENA





# +10% global FMCG growth in 2020 with significant differences by region

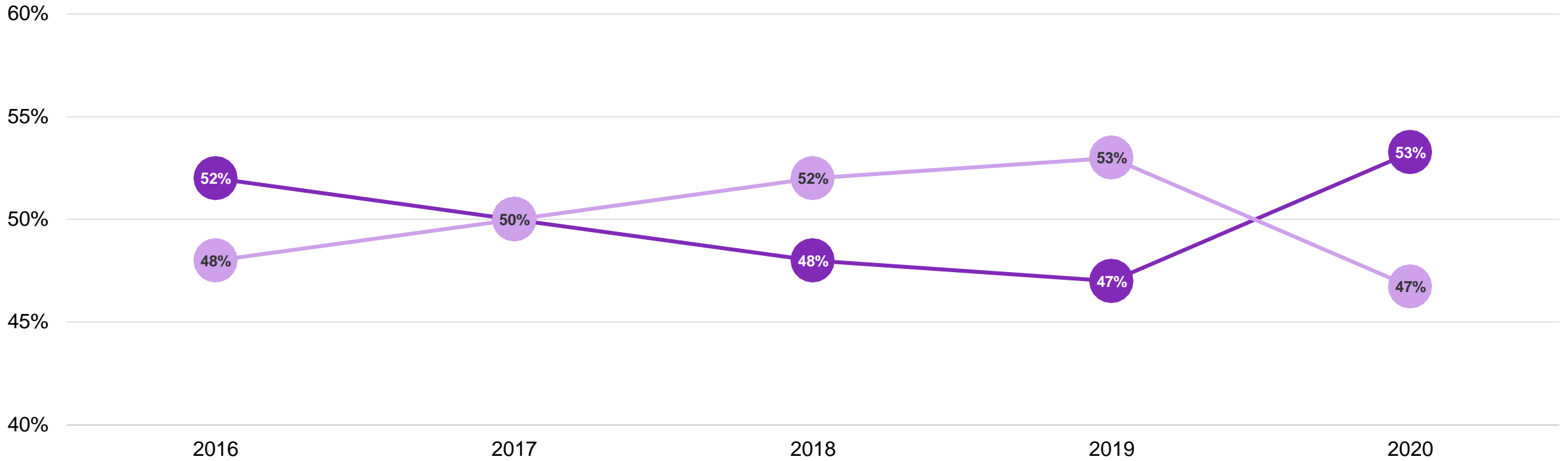
2020 In-Home FMCG value growth



# The global FMCG growth is reflected in how many brands grew in 2020

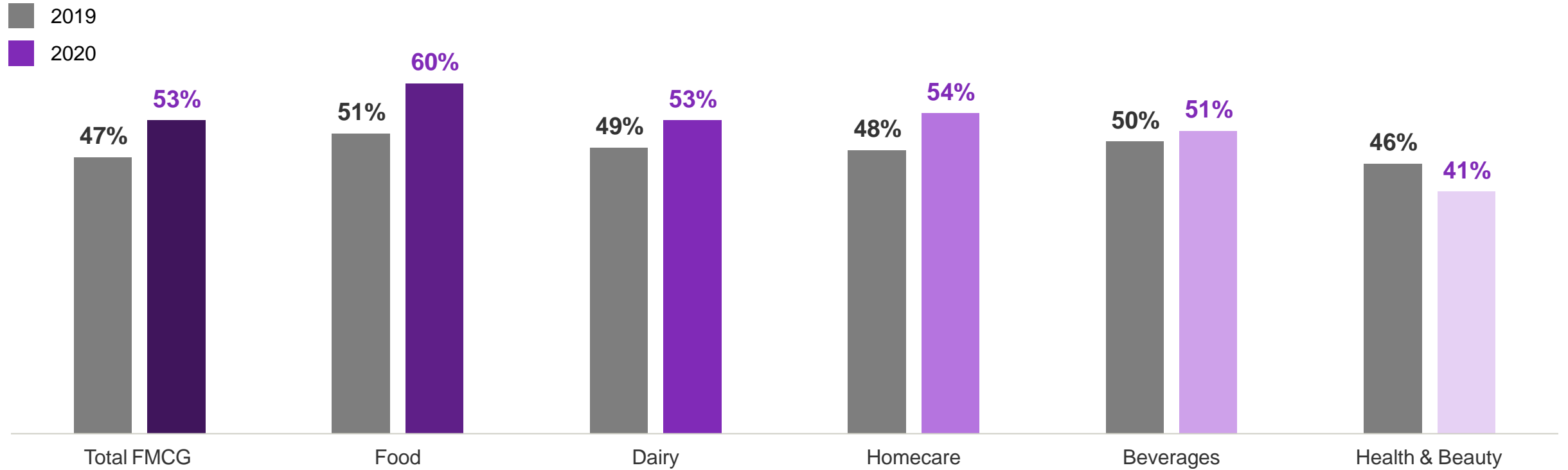
% of all brands growing/declining CRP

■ Growing ■ Declining



# The global FMCG growth is reflected in how many brands grew in 2020

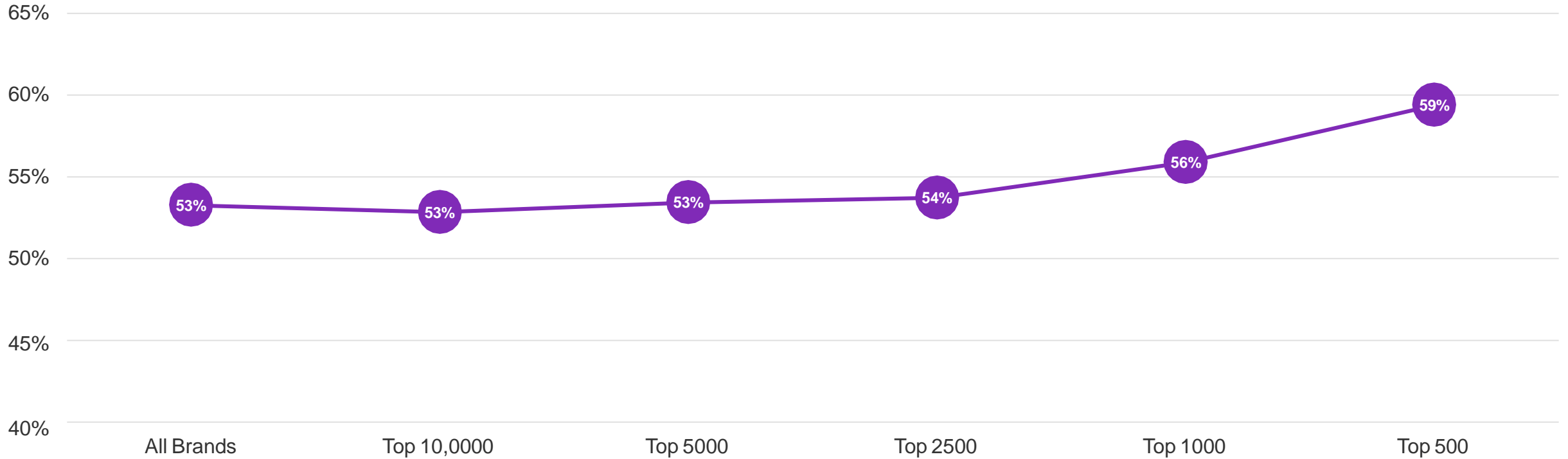
% of brands growing in 2020



# And the level of growth increases as we look at the biggest brands

% of brands growing in 2020

■ Growing



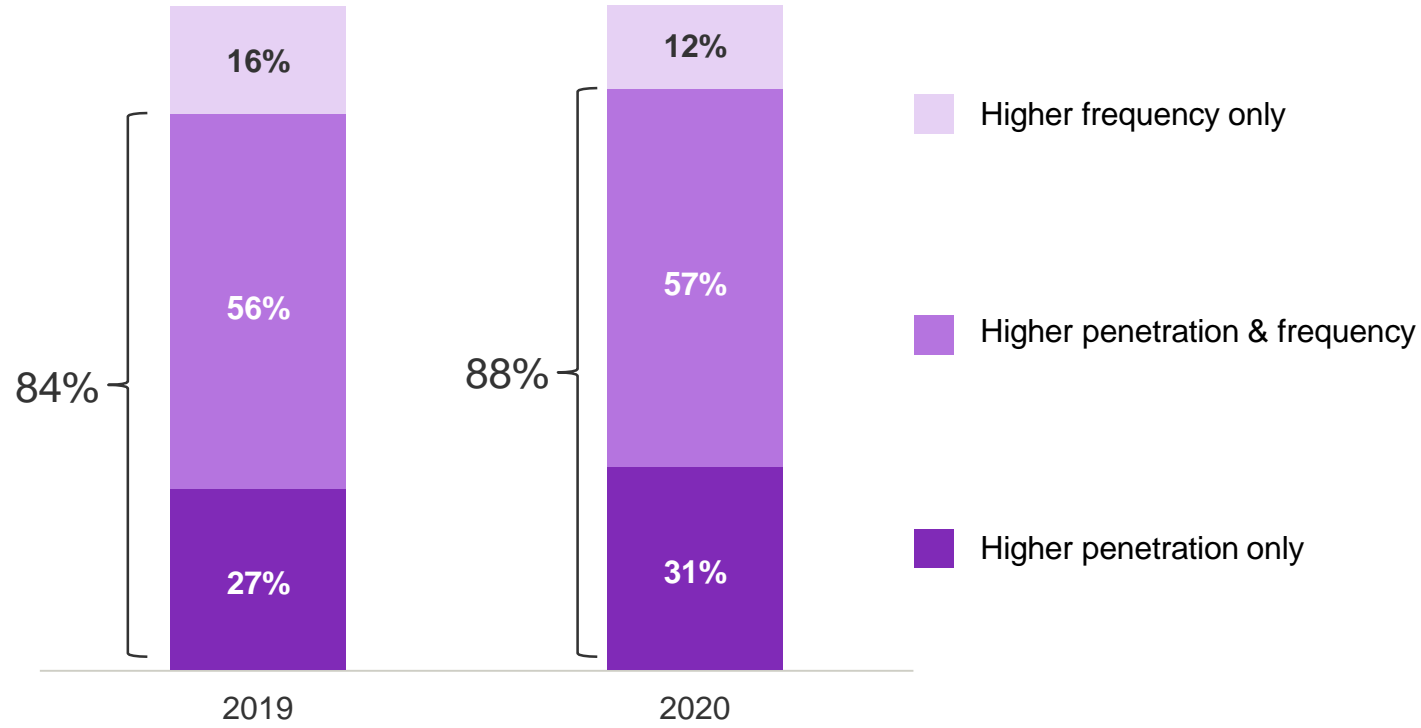
# 1.6 billion less grocery trips were made in 2020

## Change in FMCG Purchasing Behaviour



# 88% of growing brands found more shoppers – up from 84% in 2019

## Drivers of CRP brand growth

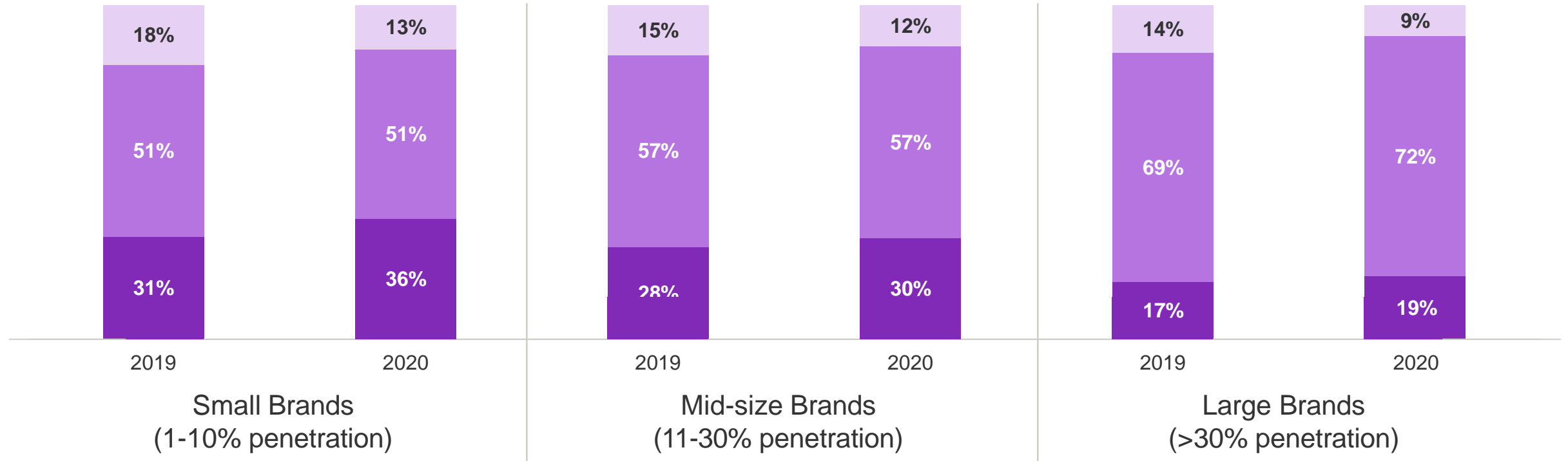


Growing brand defined as >2.5%, starting penetration 1%+

# This pattern was also seen across brand sizes

## Drivers of CRP brand growth

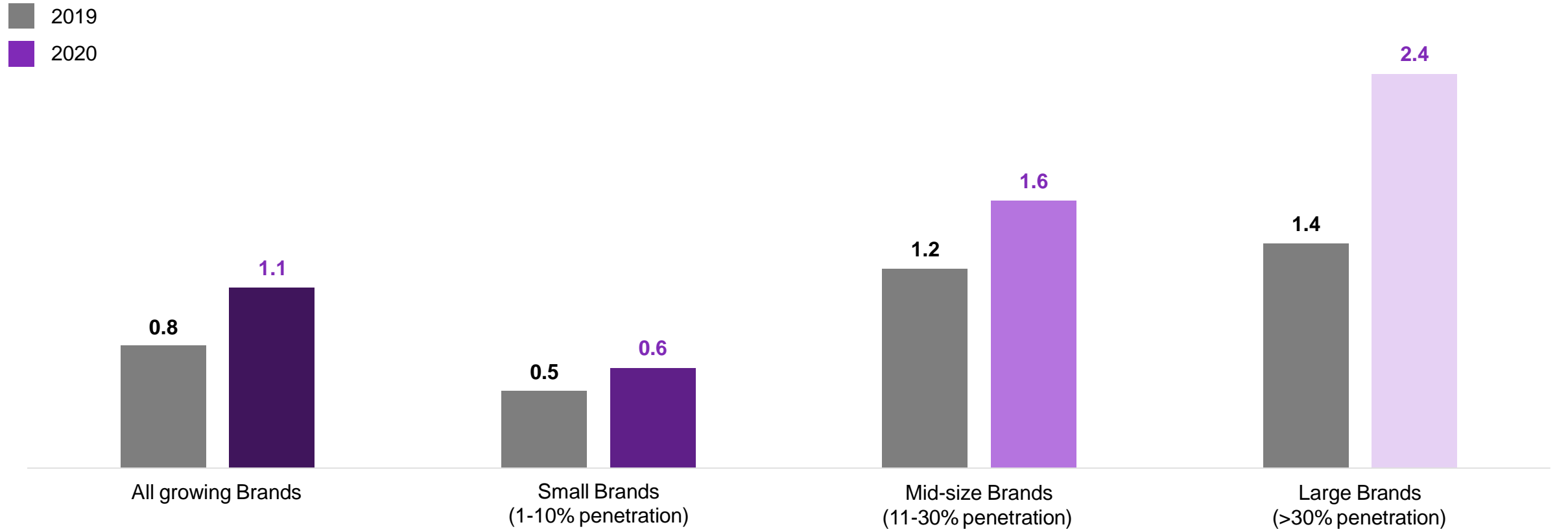
- Higher frequency only
- Higher penetration & frequency
- Higher penetration only



Growing brand defined as >2.5%, starting penetration 1%+

# Particularly for larger brands

## Penetration Point Change amongst growing brands



Growing brand defined as >2.5%, starting penetration 1%+



# How Brands Grew in 2020 Conclusions

1

More brands grew in 2020 than in the previous four years - attracting more shoppers being more key than ever

2

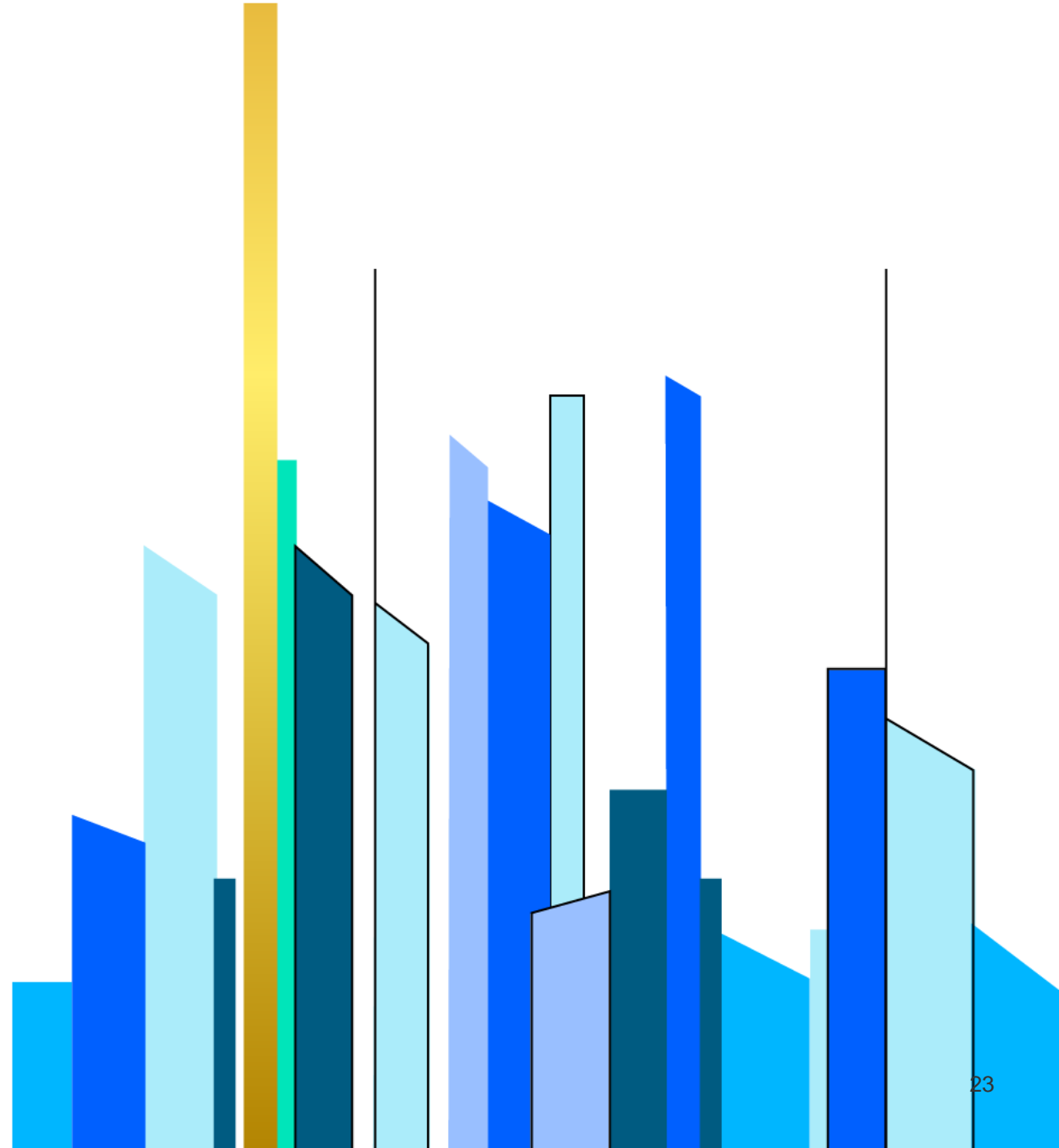
Plan smart: look at your current brand penetration and set an appropriate target

3

Local brands still gained share in 2020

# Agenda

1. What is Brand Footprint?
2. How Brands Grew in 2020
- 3. The Most Chosen Global FMCG Brands 2020**
4. Online & Out-of-Home Brand Rankings
5. Focus on MENA

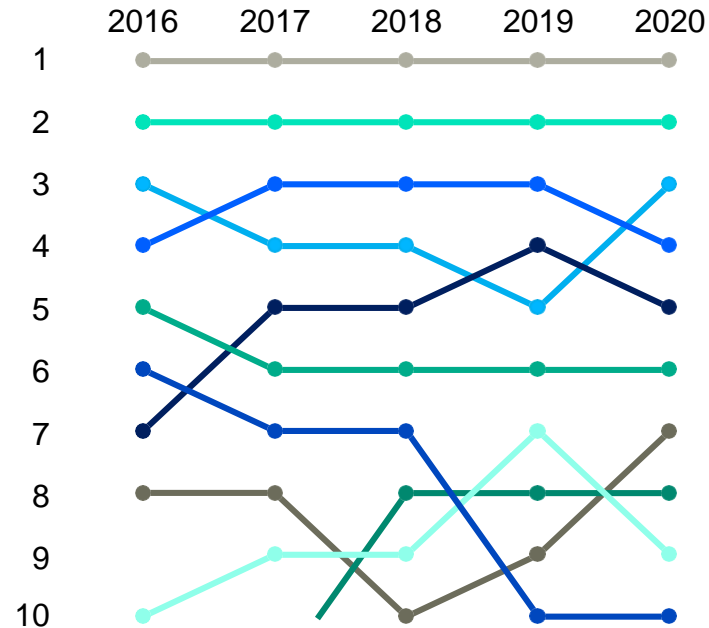
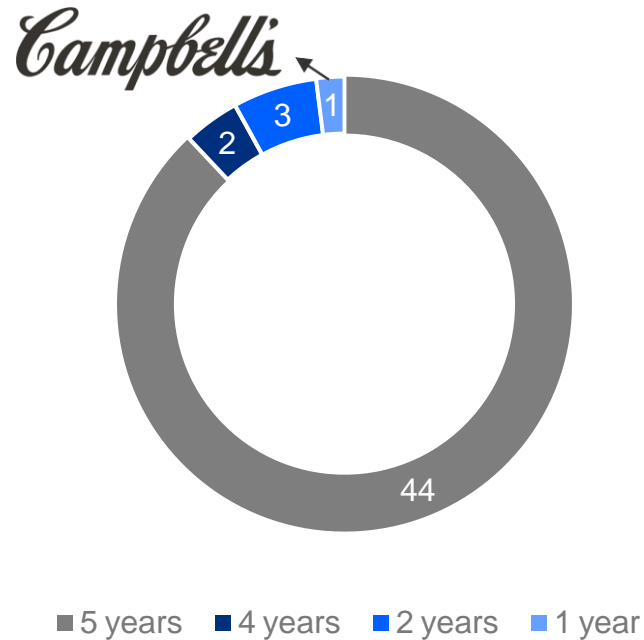


# For all the changes seen in FMCG in 2020 we only had one new entrant

The Top 50 brands are extremely consistent and resilient – average age 103

44 brands of the Top 50 have appeared in each of the last 5 years

9 of the Top 10 have appeared in each of the last 5 years



# But it is possible to make an impact and climb up the rankings

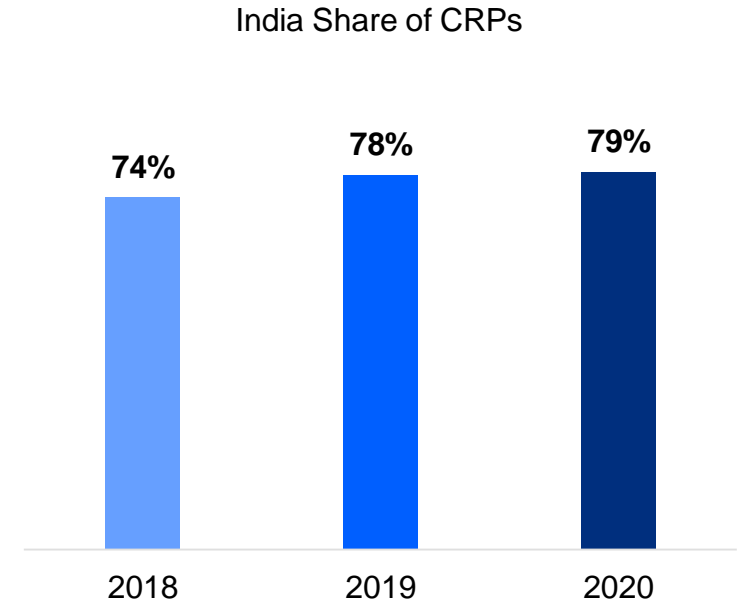
The Top 50 brands are extremely consistent and resilient – average age 103

44 brands of the Top 50 have appeared in each of the last 5 years

9 of the Top 10 have appeared in each of the last 5 years

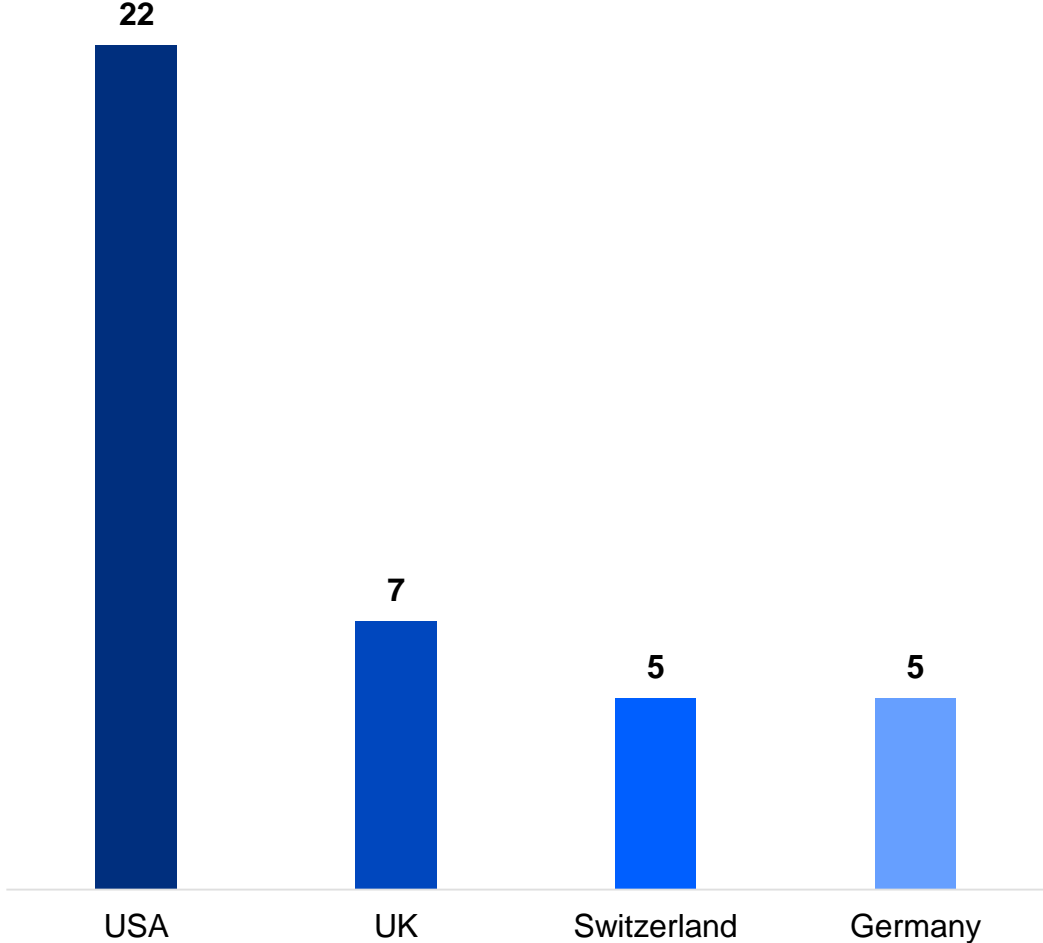
4 brands have moved 10+ places – India key for these brands

*Campbell's*



**Being American also helps.  
39 of the Top 50 originated  
from just four countries**

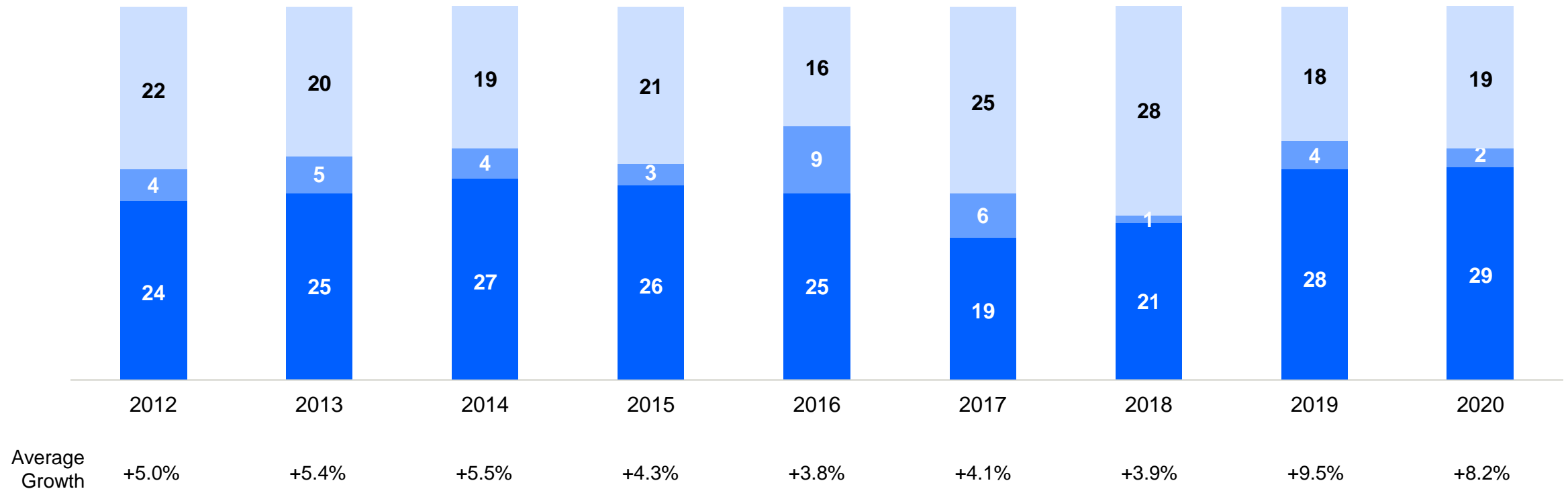
### Top 50 Brands Country of Origin



# More of the Top 50 grew in 2020 than any other edition of Brand Footprint

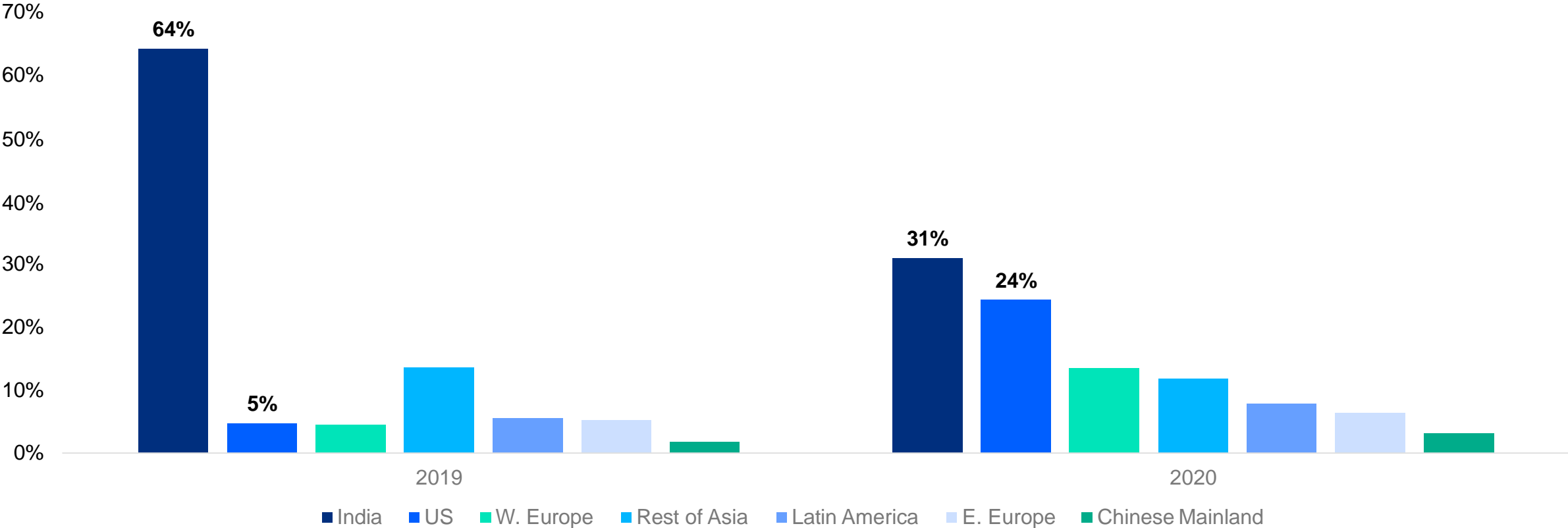
## Number of Top 50 Brands Growing

Declining <-0.5%   Flat   Growing >0.5%



# India and the USA contributed 55% of global brand growth

## Contribution to Top 50 Brand Growth





# The five most chosen FMCG brands on the planet

1

6,509 CRP(m) | +4%

*Coca-Cola*

2

4,311 CRP(m) | -2%

**Colgate**

3

3,014 CRP(m) | +15%



4

3,004 CRP(m) | -4%



5

2,768 CRP(m) | +4%





# The next 20 most chosen global brands

All the Top 25 chosen over one billion times a year

6



2,354 CRP(m)  
+6%

7



2,221 CRP(m)  
=

8



2,033 CRP(m)  
+1%

9



1,943 CRP(m)  
-4%

10



1,814 CRP(m)  
-3%

11



1,735 CRP(m)  
+22%

12



1,674 CRP(m)  
+1%

13



1,459 CRP(m)  
+5%

14



1,434 CRP(m)  
-5%

15



1,419 CRP(m)  
-3%

16



1,366 CRP(m)  
+39%

17



1,356 CRP(m)  
-11%

18



1,273 CRP(m)  
+12%

19



1,203 CRP(m)  
+8%

20



1,188 CRP(m)  
+11%

21



1,173 CRP(m)  
+7%

22



1,092 CRP(m)  
-2%

23



1,083 CRP(m)  
-2%

24



1,078 CRP(m)  
+1%

25



1,037 CRP(m)  
+9%

# The top 5 gains made in 2020 were all bigger than any gains made in 2019

The Top 10 biggest global penetration gains



# Dettol

Fastest-growing Top 50 Global Brand 2020



**16<sup>th</sup>**

most chosen  
FMCG brand  
(up 11 places)

**6<sup>th</sup>**

most chosen  
Health & Beauty brand

**10<sup>th</sup>**

highest global  
penetration

**25.9%**

household penetration

A promotional graphic for the Dettol #HandWashChallenge. It features the Dettol logo at the top center, which consists of a cross inside a circle with the word "Dettol" below it. Below the logo, the text reads "PARTICIPATE IN THE #HandWashChallenge" and "LET'S MAKE HAND WASHING COOL!". At the bottom center, there is a yellow button with the text "JOIN NOW". On the right side, there is a white icon of two hands being washed, with water droplets around them, all enclosed in a rounded square frame. The background is a dark green gradient with a subtle glow effect.

**Dettol**

PARTICIPATE IN THE  
**#HandWashChallenge**

LET'S MAKE HAND WASHING COOL!

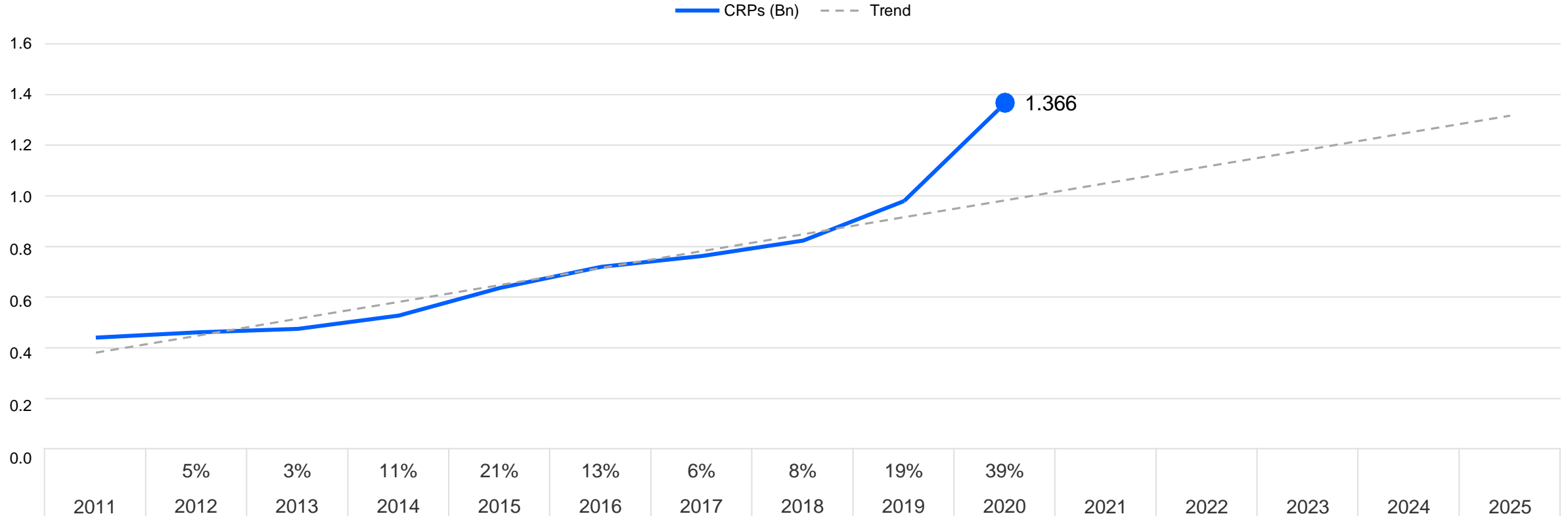
**JOIN NOW**

TM&C Apply

# Chosen almost 1 billion more times in 2020 (v 2011)



## Dettol Long-term CRP Performance



# The Most Chosen Global FMCG Brands 2020 Conclusions

1

More of the Top 50 grew in 2020 than any other edition of Brand Footprint

2

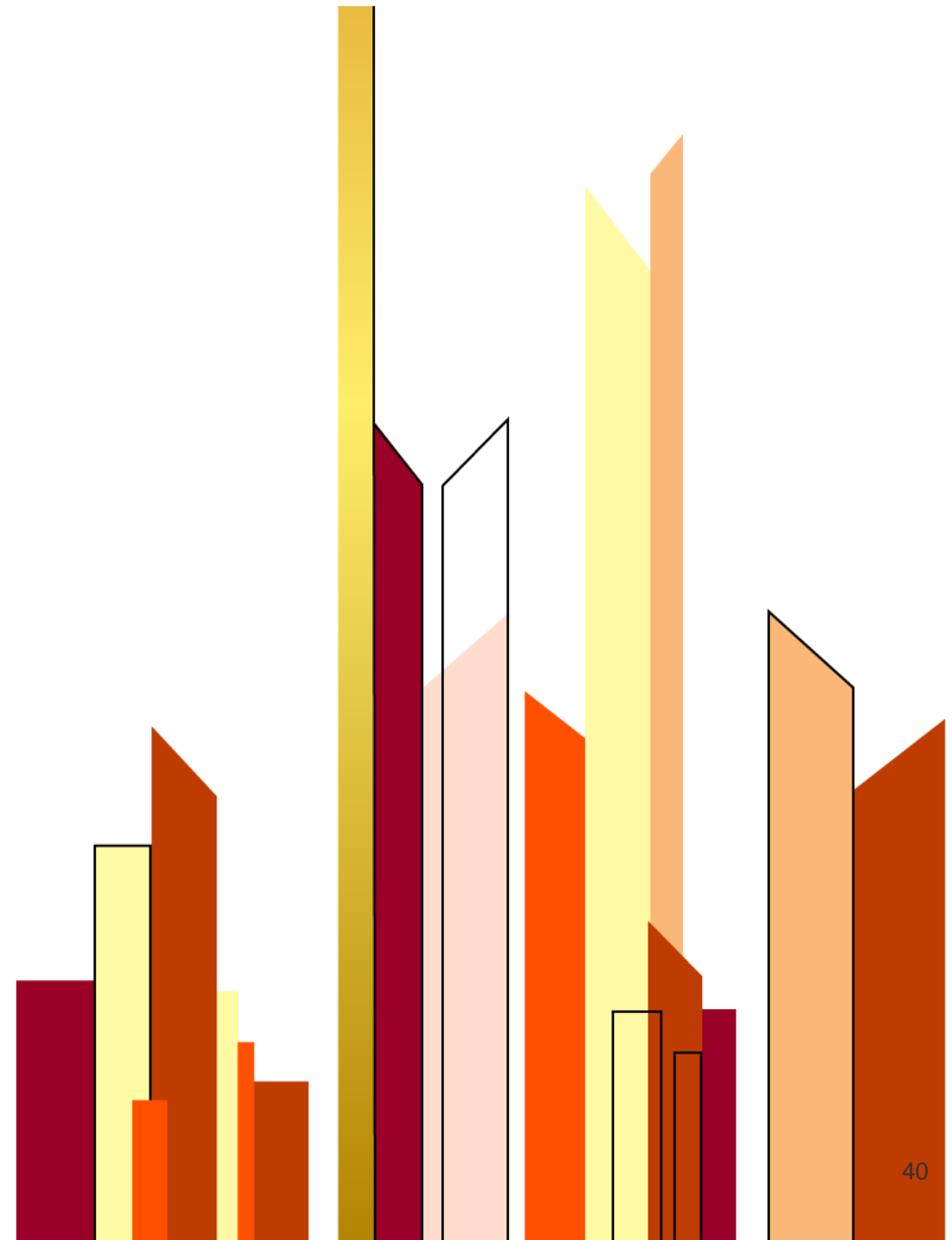
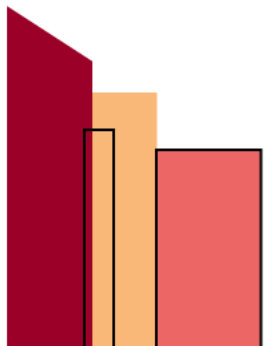
India and the USA accounted for 55% of Top 50 CRP growth

3

Dettol fastest growing brand in 2020, making the biggest ever penetration gain seen

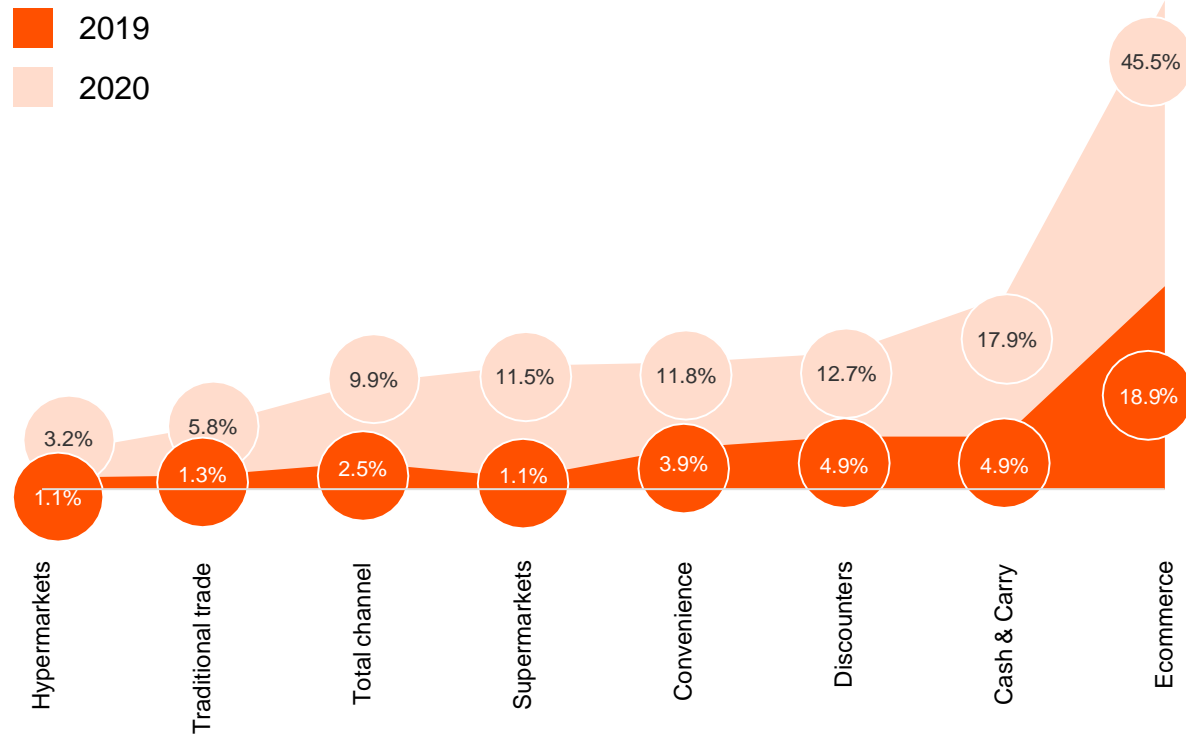
# Agenda

- 1. What is Brand Footprint?
- 2. How Brands Grew in 2020
- 3. The Most Chosen Global FMCG Brands 2020
- 4. Online & Out-of-Home Brand Rankings**
- 5. Focus on MENA

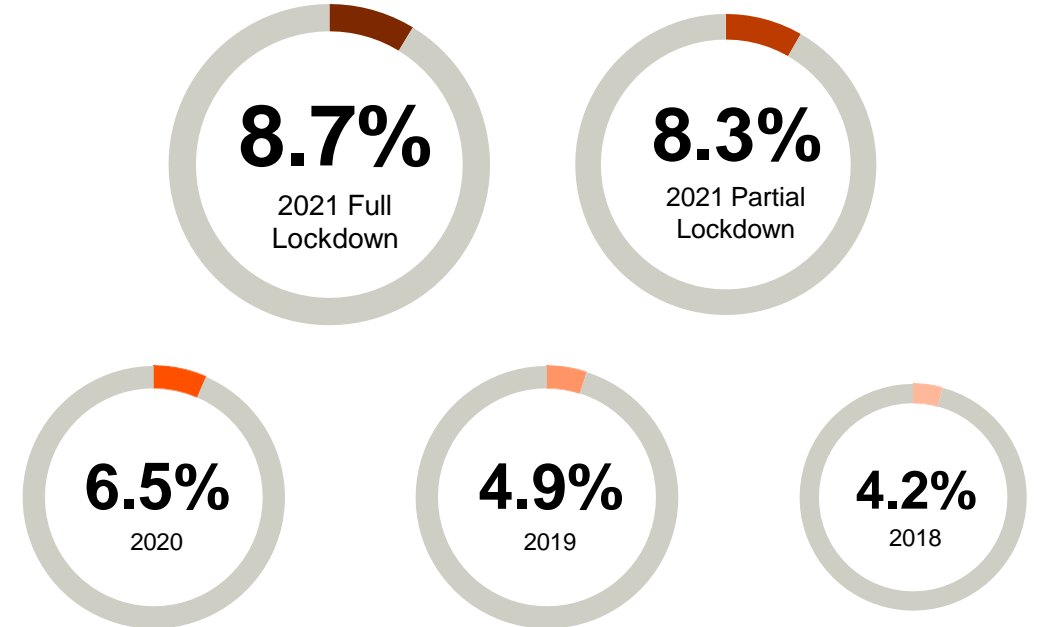


# The pandemic accelerated channel trends with online more than doubling its rate of growth

## 2020 In-Home FMCG value growth



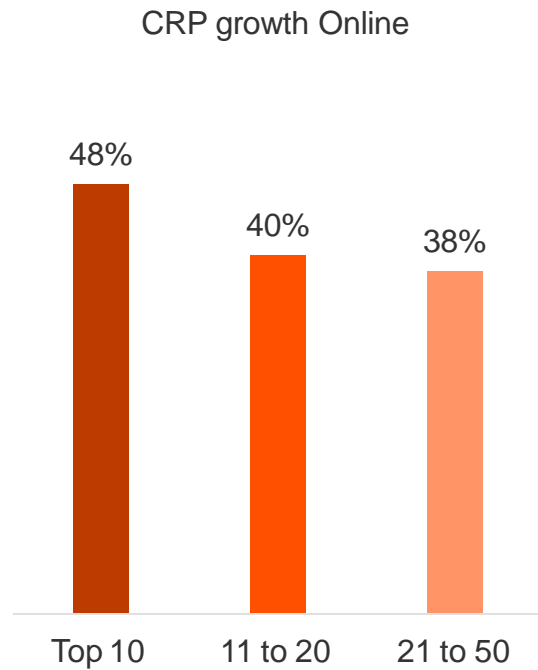
## Ecommerce value share forecast



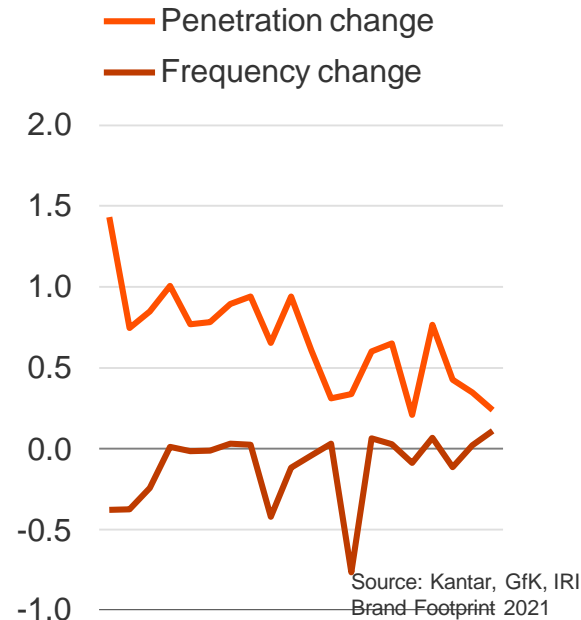
# Shoppers turned to the biggest brands online, with an average +0.7 penetration points gained

## The Top 20 Most Chosen Online Brands

**The Top 10 saw faster growth than the rest**



**All 20 grew increasing their online penetration**

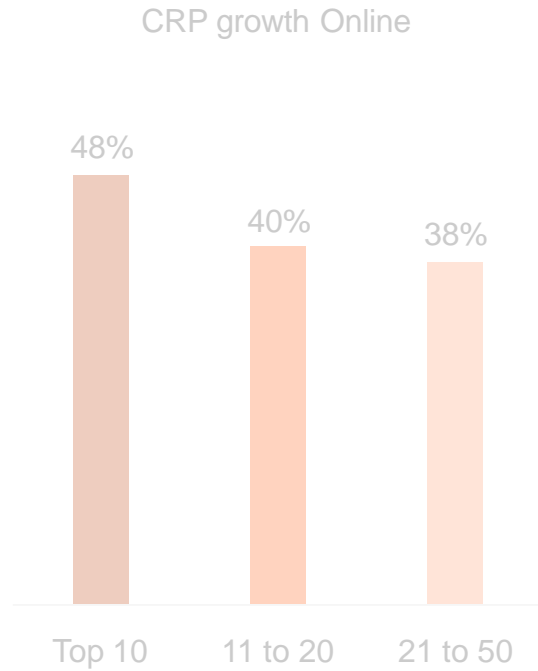




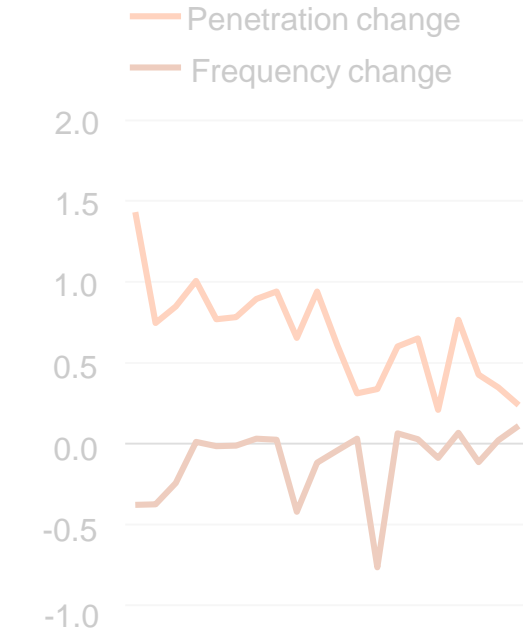
# Online has a 5.4% share of CRPs, whilst share of growth is 7x higher at 38%

## The Top 20 Most Chosen Online Brands

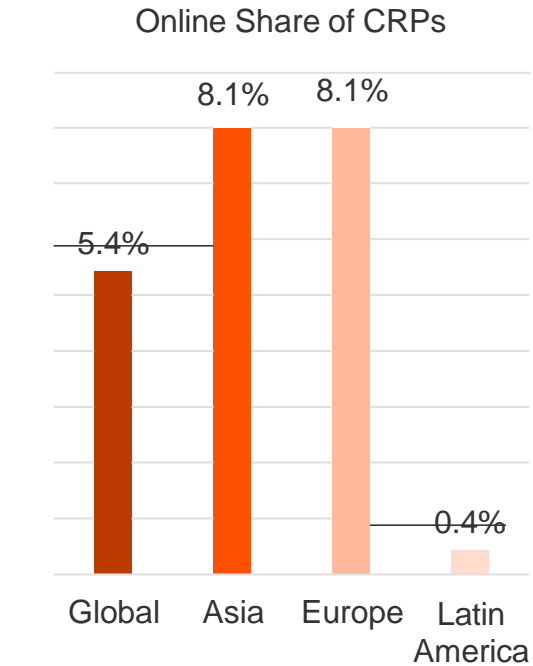
The Top 10 saw faster growth than the rest



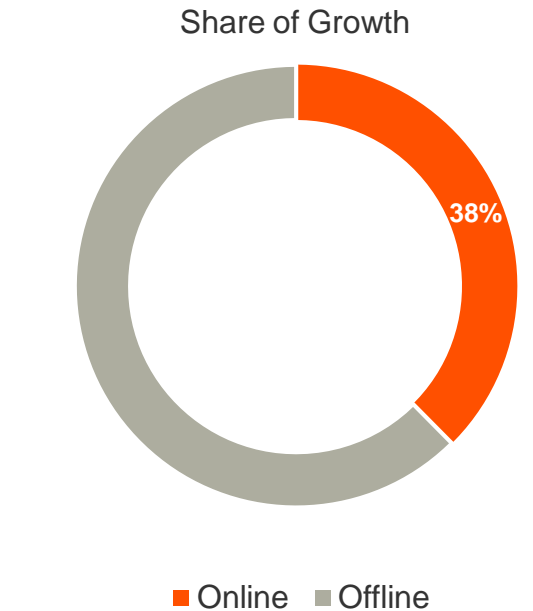
All 20 grew increasing their online penetration



1 in 20 brands choices made online

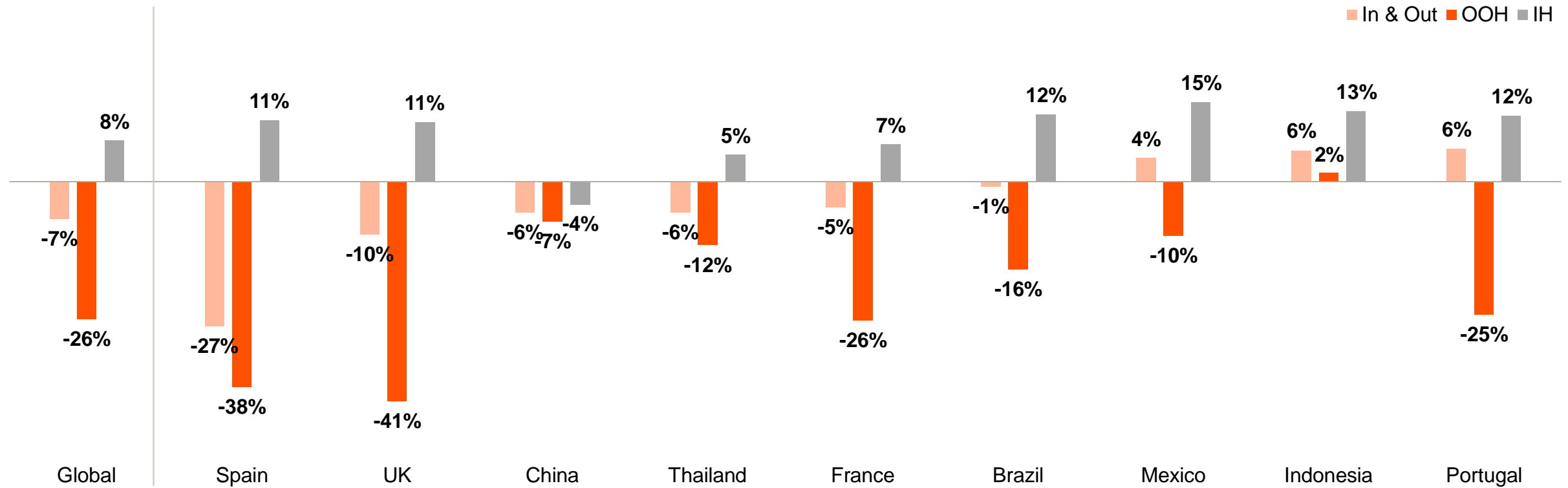


Online contributed 38% share of growth



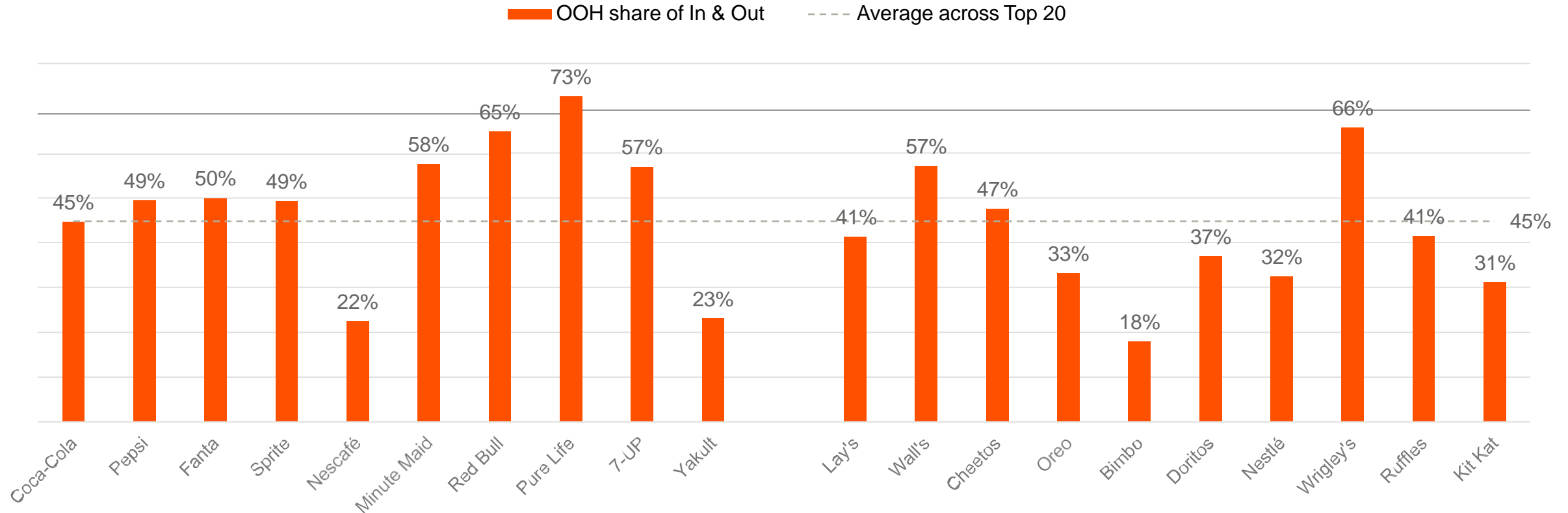
# COVID-19 is behind a double digit decrease of OOH across Europe and Latam

## Snacks & Non-Alcoholic Drinks In & Out Value – 2020 vs 2019



# Despite the fall in CRPs in 2020, OOH still accounted for 45% of brand choices

## The Top 20 Most Chosen Out-of-Home Brands



# Online & Out-of-Home Brand Rankings 2020 Conclusions

1

Shoppers turned to the biggest brands online - The Top 10 saw faster growth than the rest

2

When the OOH performance is considered the number of brands seeing growth falls from 11 to 5

3

OOH still accounted for 45% of brand choices – the bounce back of the hospitality industry is vital

# Agenda

1. What is Brand Footprint?
2. How Brands Grew in 2020
3. The Most Chosen Global FMCG Brands 2020
4. Online & Out-of-Home Brand Rankings

## 5. Focus on MENA



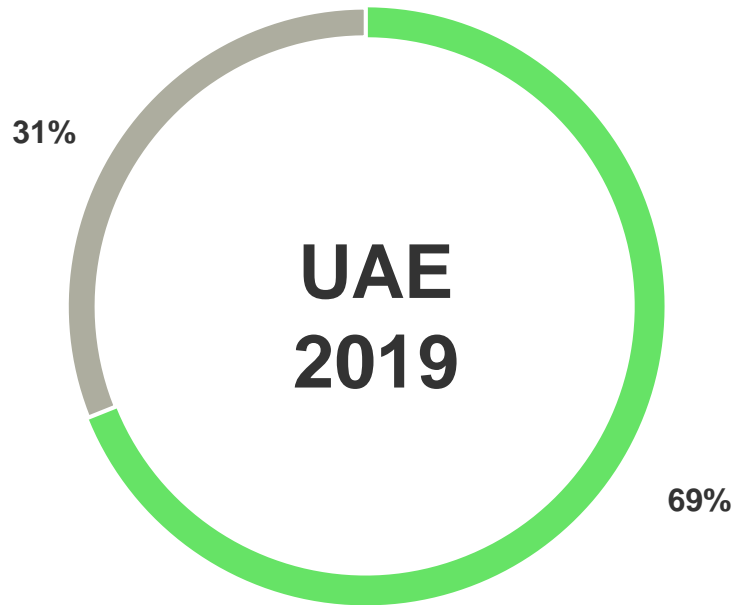


## UAE Rankings



# In the UAE we saw a slight decline in number of brands that grew CRP

% of all brands growing/declining CRP



Growing

Declining



# Fairy

UAE



**+28%**  
CRP growth

**#1**  
Homecare brand







# The top 10 penetration gainers were ...





# The UAE top 20 ranking

<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
									
73 CRP(m) -	56 CRP(m) -	46 CRP(m) -	23 CRP(m) -	13 CRP(m) +2	12 CRP(m) -	12 CRP(m) +1	12 CRP(m) +2	11 CRP(m) +2	11 CRP(m) +2
<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>
									
11 CRP(m) +3	11 CRP(m) -3	9 CRP(m) +5	9 CRP(m) -9	8 CRP(m) +8	8 CRP(m) -	7 CRP(m) +4	7 CRP(m) -1	6 CRP(m) +3	6 CRP(m) -5



# The UAE top 10 ranking in Food



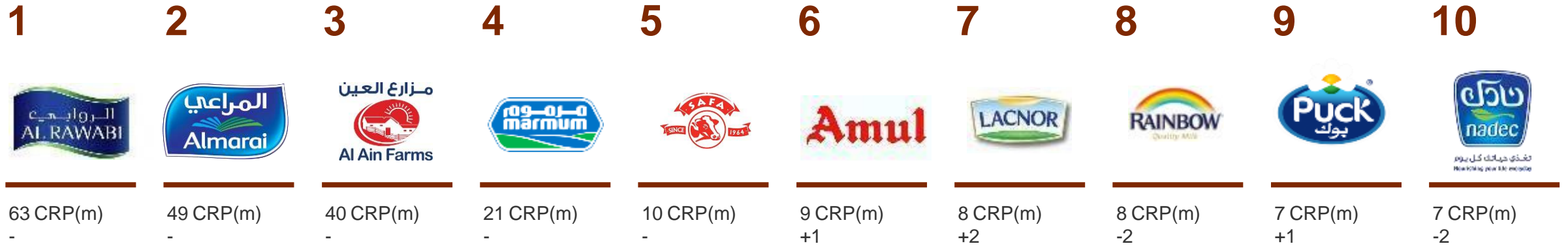


# The UAE top 10 ranking in Beverage





# The UAE top 10 ranking in Dairy





# The UAE top 10 ranking in Beauty & Personal Care





# The UAE top 10 ranking in Home Care



## Some final thoughts

- 1** Chances are it will be a brand we already know
- 2** Or could it be a young brand from Africa or Asia? Or a brand unlike any in the current rankings, such as plant-based
- 3** What we do know is that attracting 10% of global households and winning in India and the US will go a long way