BRAND FOOTPRINT 2025

Winning the 50:50 Game

Worldpanel
by Numerator

Guillaume Bacuvier
Global CEO
Worldpanel by Numerator

A warm welcome to the thirteenth edition of Brand Footprint – unveiling Worldpanel's 2025 ranking of the world's Top 50 most chosen FMCG brands.

Since its launch in 2013, we've built the most comprehensive picture of consumer choice available anywhere, now covering more than 30,000 brands across 56 countries. The depth and breadth of this data is incomparable. It enables us to celebrate the brands that reach more of the world's shoppers, more often, than any other.

But not only that: tracking global brand performance over time has allowed us to surface unique, fundamental truths about the reality of the FMCG industry.

In this year's Brand Footprint report, we focus on the 50:50 game.

Year-after-year we've found that around half of the world's FMCG brands are in growth, with the other half in decline.
Mathematically speaking, this means that any given brand faces a 50% chance of increasing its footprint and a 50% chance of losing reach.
The most successful brands have learnt to systematically shift these probabilities in their favour. In these pages, we explain what separates the winners from the rest: they understand that growth isn't a matter of chance, it's a strategic discipline.

And the primary engine of this growth? Indisputably, penetration. Over the past 13 years, 88% of growing brands have increased their shopper base. But it's not just about knowing the fundamentals, it's about applying them. Brand Footprint reveals which brands have achieved the biggest penetration-led growth, and how they've done it.

Of course, we also share the highlights from this year's Top 50 most chosen global brands, and put the standout names and big winners in the spotlight.

Detergent brand OMO climbed two places to claim the no. 2 spot. Pond's, Haribo, and Pringles – with the snack brand entering the global Top 50 for the first time – are among the fastest risers, while Nescafé, Minute Maid and Sprite have all excelled in expanding their global footprint. And we should give due credit to the brand that has remained steadfast at no.1 since the ranking's inception: Coca-Cola. This is a truly remarkable achievement.

Welcome to Brand Footprint 2025, where we decode the mathematics of the 50:50 game and show you how to win it.

Consumer Reach Points – capturing the pivotal moment of shopper choice

At the heart of Brand Footprint lies our unique Consumer Reach Points (CRP) metric, which measures every instance a shopper chooses a brand. It combines two critical dimensions: how many households choose it (penetration) and how often they choose it (frequency). We do this calculation for every brand in every market. This results in a CRP score that represents the size of the brand's global footprint.

Consumer Reach Points (CRPs)
The Calculation

Population
Number of households in a market

Penetration
% of households buying your brand

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

The extensive scope of Brand Footprint is only made possible thanks to our invaluable partners: **Europanel** and **CTR**. Their collaboration enables us to capture the true global landscape of brand performance with unmatched depth and precision.

Worldpanel by Numerator

Winning the 50:50 game

Shifting the odds in your favour

The truth about brand performance: it's a coin flip. But the winners know how to shift the odds in their favour.

Benjamin Cawthray
Global Director, Behavioural Analytics
Worldpanel by Numerator

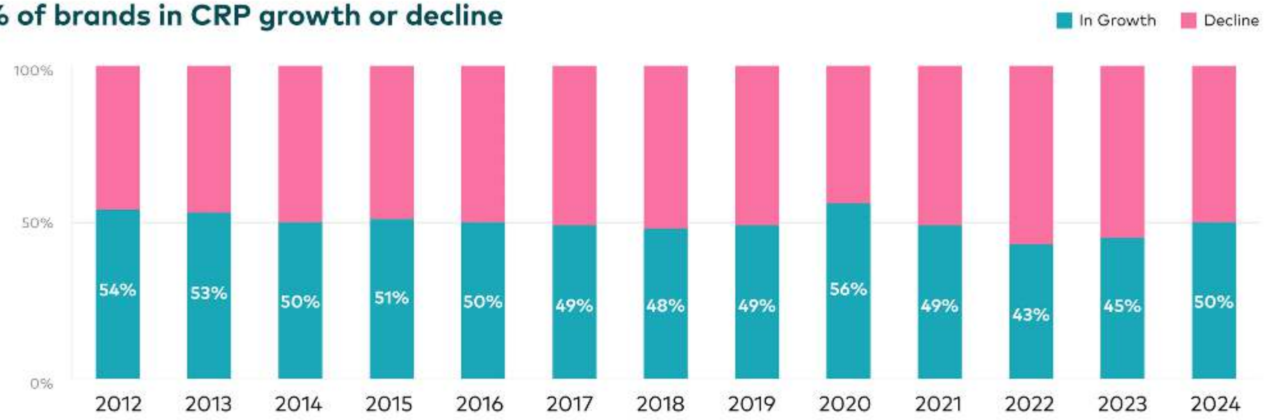
The 50:50 game represents the brutal mathematics of brand performance. On average, any given brand has precisely a 50% chance of growth and a 50% chance of decline. This isn't speculation, or opinion; it's what 13 years of Brand Footprint data reveals about the reality of the modern FMCG market.

But here's the crucial insight: while the overall odds remain stubbornly fixed, brands can systematically shift these probabilities in their favour. The question isn't whether you can escape the 50:50 game, but how you can consistently win it.

That's why the theme of this year's Brand Footprint report is 'winning the 50:50 game', examining what sets the winners apart in this high-stakes competition.

Across 13 editions of Brand Footprint, we've watched this 50:50 split play out with remarkable consistency. The proportion of brands in growth versus those in decline has remained within a narrow 45-55% window, with only two notable exceptions.

% of brands in CRP growth or decline



Source: Top 250 Brands from 39 markets – Worldpanel by Numerator, 15 markets – YouGov, USA – Numerator, Japan – Intage

In 2020, lockdowns triggered one of the biggest behavioural shifts we've seen in FMCG, forcing out-of-home consumption into the home and lifting 56% of brands into growth. Then, just two years later, the highest inflation levels in over a decade created the opposite effect, with only 43% of brands managing to increase their Consumer Reach Points (CRPs).

The 2024 results offer an almost perfect illustration of this fundamental truth, with 50.2% of brands achieving growth. This represents a significant recovery from 2023's inflation-dampened 45%, but confirms that even in improved conditions the basic 50:50 dynamic reasserts itself.

Understanding this baseline is crucial for strategic planning. It means that without deliberate intervention, your brand faces the same odds as a coin toss. The winners are those who understand how to improve these odds, which we will explore through some different lenses.

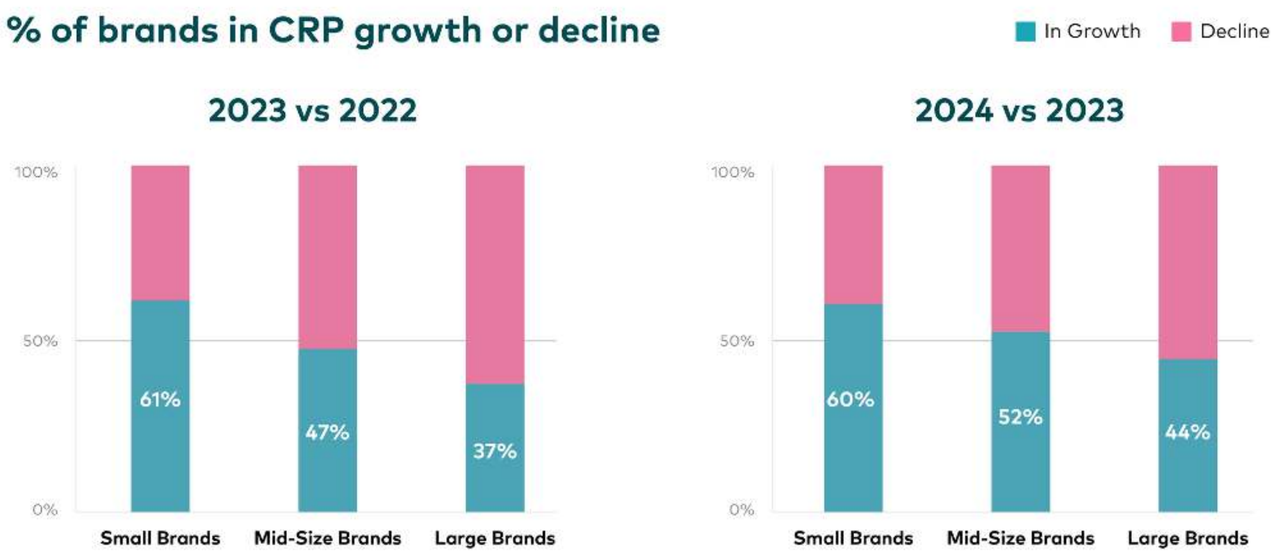
The double-edged sword of brand size

Our first lens examines how brand size influences growth probability. Using brand penetration as our metric, we define small brands as having 10% or less penetration, large brands as exceeding 30%, and mid-size brands as those in between.

Data from both 2023 and 2024 reveal a clear inverse relationship: the smaller the brand, the higher the likelihood of growth. This creates a strategic paradox. Every brand aspires to scale from small to large, yet our data shows that growth becomes progressively more difficult as brands expand.

This isn't an argument for remaining small, but rather a call for realistic planning.

As brands mature, they must invest disproportionately more resources to maintain the same growth rates. The mathematics are unforgiving: all brands lose shoppers year-on-year, and replacing these lost customers while adding new ones becomes exponentially harder as your base expands.



Source: Top 250 Brands from 39 markets – Worldpanel by Numerator, 15 markets – YouGov, USA – Numerator, Japan - Intage

The momentum trap

Success breeds success. Our analysis reveals that brands that are currently growing face significantly better odds of continued growth the following year.

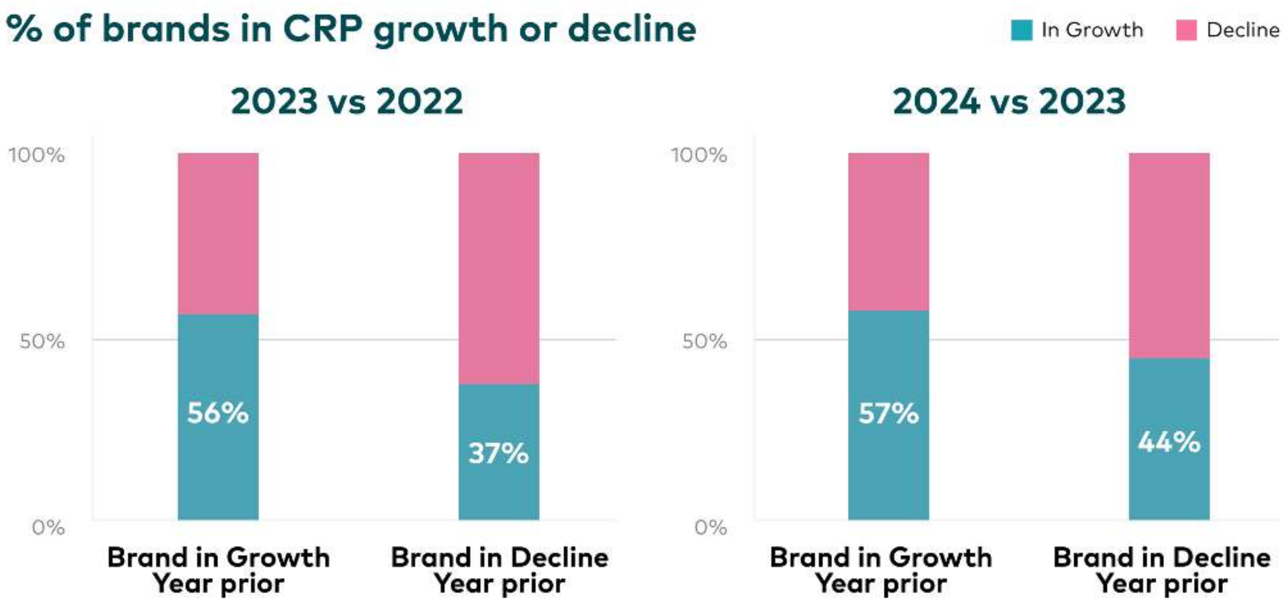
In 2023 and 2024, 56% and 57% respectively of brands that had previously been in growth maintained their trajectory. Unfortunately, the inverse proves equally true: declining brands tend to remain in decline, creating a momentum trap that's difficult to escape.

This finding has profound implications for resource allocation.

Reversing decline requires substantially more investment than maintaining growth. Unless there's significant change in investment levels across marketing levers, declining brands will likely remain trapped in negative momentum.

For companies managing multiple brands, this suggests the need for a portfolio strategy: protect and accelerate existing winners while being realistic about the investment required to turn around declining assets.

The data suggests that defending strong positions may yield better returns than attempting to resurrect struggling brands.



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The price is right

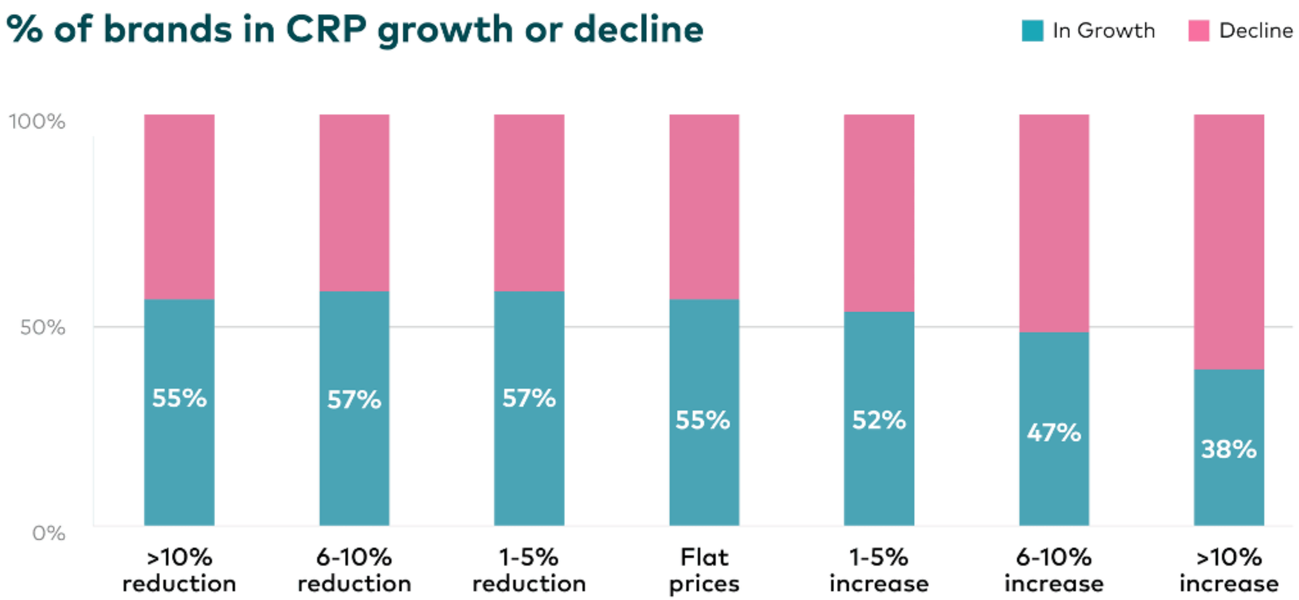
Unlike the previous factors, pricing represents a lever that brands can actively control. Our analysis of price increases and reductions reveals clear patterns in their impact on the likelihood of CRP growth.

Price reductions do shift growth odds favourably, but with diminishing returns. Interestingly, those brands in our ranking that reduced prices by over 10% saw slightly lower growth odds compared to those with more modest reductions.

On price increases, brands can safely raise prices by 1-5% without negatively impacting the likelihood of growth. However, increases of 6% or higher systematically reduce growth probability, which drops from 47% to 38% as increases become more aggressive.

Naturally, these thresholds must be contextualised within competitive and category dynamics. As a strategic rule of thumb, price increases exceeding 5% shift the 50:50 odds against you, potentially sacrificing growth for short-term margin gains.

With inflationary pressures potentially returning this year, brands may face difficult choices between maintaining affordability and preserving margins.



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The geography of growth

Geographic factors give rise to the most dramatic variations in the fundamental growth equation. Unlike brand size, momentum, or pricing, where patterns remain relatively stable, regional performance fluctuates drastically from year to year, driven by local FMCG trends that can completely reshape the competitive landscape.

The US and Asia have emerged as consistent growth havens. In both 2023 and 2024, over 50% of brands in these regions achieved CRP growth. This stability creates significant strategic advantage.

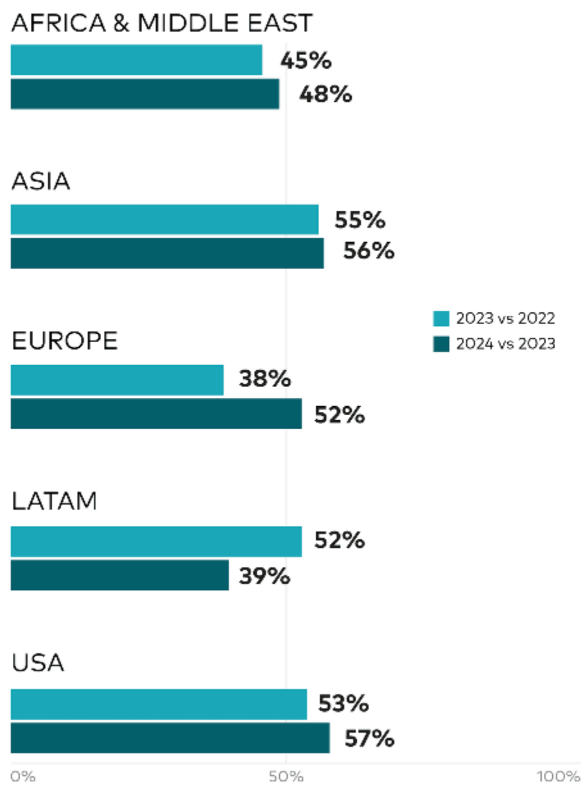
Europe and Latin America tell a more volatile story. Brands in Europe faced severe headwinds in 2023, with only 38% achieving growth. However, 2024 brought a dramatic reversal, with the likelihood of growth jumping to 52%.

Latin America experienced the inverse: after a strong 52% growth rate in 2023, growth probability fell to just 39% in 2024.

This volatility has profound strategic implications. Brands need to understand their market's trajectory to calibrate growth expectations and resource requirements. A brand operating in a 39% growth environment needs fundamentally different investment levels to one operating where 52% of brands succeed.

The geography of growth reminds us that whilst the global 50:50 game remains constant, local markets can deviate substantially, creating both risks and opportunities for brands with regional or global portfolios.

% of brands in CRP growth



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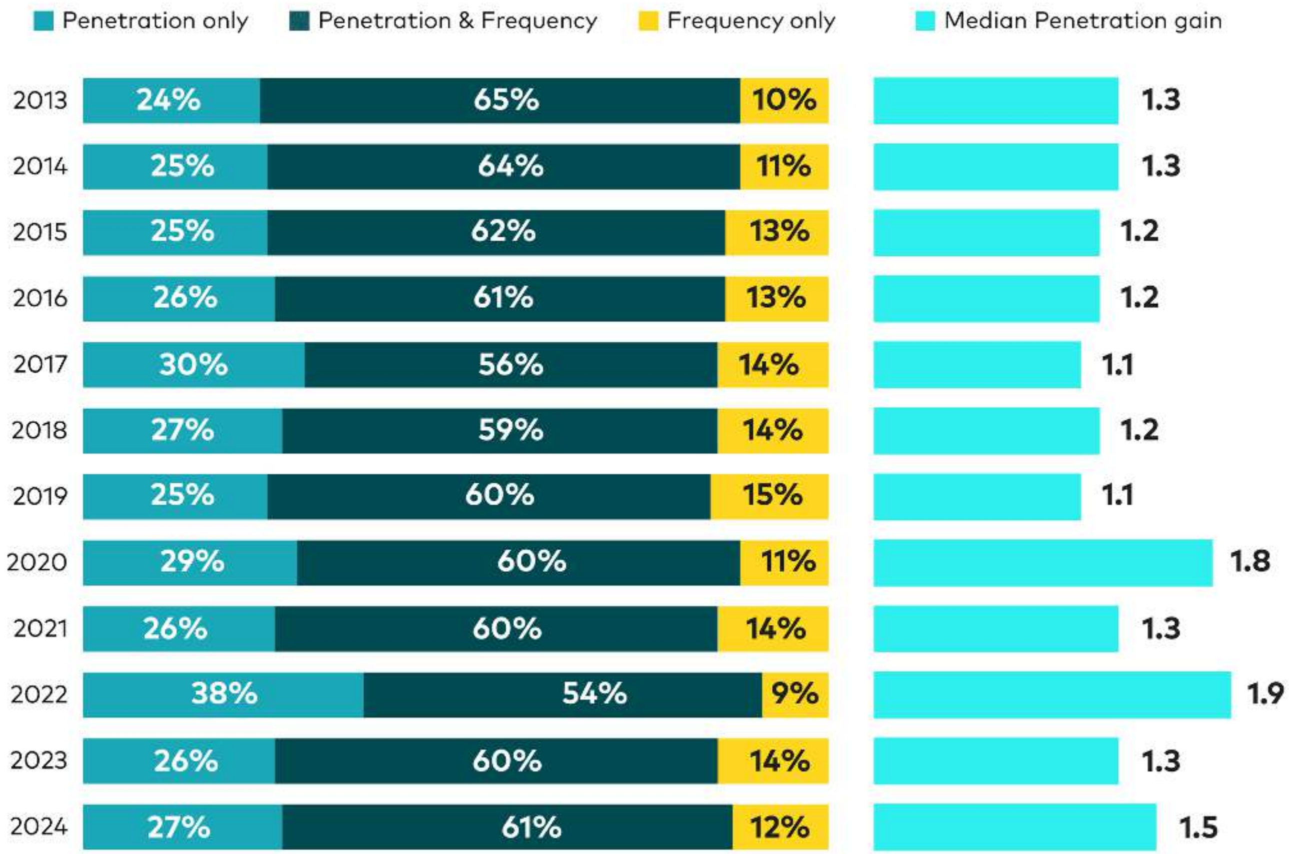
The rules are the rules

Moving from likelihood to certainty, our analysis of successful brands reveals one near-universal truth: growing your shopper base guarantees growth. Just as the 50:50 split has remained constant across the lifetime of Brand Footprint, so have the mechanics of growth. Penetration is king: over the 13 years, 88% of growing brands increased their number of shoppers.

While the specific mechanisms of growth have shown slight variations over time, this fundamental requirement has remained remarkably consistent.

The 2022 inflation spike created a more noticeable shift, with significantly more brands achieving growth through penetration gains alone, highlighting how external economic pressures can alter the growth dynamics.

Drivers of CRP growth



Source: Top 250 Brands from 39 markets – Worldpanel by Numerator, 15 markets – YouGov, USA – Numerator, Japan - Intage
Filtered to brands in CRP growth of 2.5% or higher

Should prices rise again in the next 12 months, we may witness a similar pattern, with penetration emerging as even more critical as consumers become price-sensitive and brands compete more aggressively for share.

While the drivers of growth have remained remarkably consistent over time, the level of penetration change required to expand a brand's footprint has shifted considerably. From 2013 to 2019, growing brands averaged 1.2 penetration points gained. Over the past five years, this average has increased to 1.6 penetration points, suggesting that while the building blocks of growth stay the same, the bar for meaningful growth has risen permanently.

Understanding this change is crucial for setting realistic targets and benchmarking performance expectations.

The penetration imperative

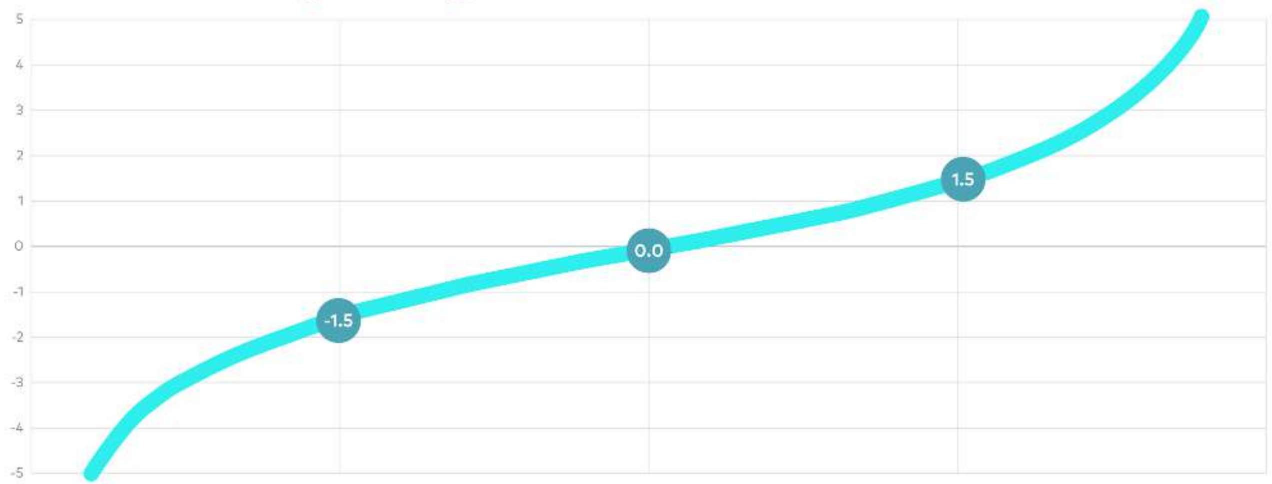
The penetration game mirrors the broader 50:50 dynamic: exactly half of all brands achieve penetration growth in any given year.
The median penetration gain in 2024 was 1.5%, meaning that achieving this level placed brands in the top 25% of performers globally. As a pragmatic benchmark, we recommend setting a target penetration gain of 1%, which would still position your brand in the top third of global performers.

Success requires understanding how all factors interact. As we have shown, your growth probability depends on your current brand size, existing momentum, proposed pricing strategy, and the market dynamics in your region. Brands that systematically address each factor can shift the fundamental 50:50 odds substantially in their favour.

Looking ahead, the brands that consistently win the 50:50 game will be those that treat growth not as a matter of chance, but as a strategic discipline built on consistent application of proven principles.

Two top performers in particular were entirely in command of these principles in 2024: Lay's and OMO. Both gained over 20 million shoppers each; the kind of systematic acquisition that would make any brand envious, and precisely what winning the 50:50 game is about.
Which other brands conquered the global penetration battle? The next chapter showcases the Top 50 most chosen brands in the world – revealing the winners of the 50:50 game.

Penetration change amongst all brands 2024 vs 2023



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Worldpanel by Numerator

The Global Top 50

The most chosen FMCG brands in the world

Before unveiling this year's Brand Footprint Top 50, it's worth re-emphasising that the 50:50 game has consistently applied to the global brands in our ranking since 2012. The average number of brands in growth over the 13 editions stands at 25 – bang on 50%.

However, in 2024, just 20 of the global Top 50 were growing – quite a reduction from 2023's record high of 30 brands.

That's the nature of the 50:50 game: some years swing one way, others swing back, but the underlying principle remains constant. And when analysing 50 brands rather than tens of thousands the swings look more dramatic.

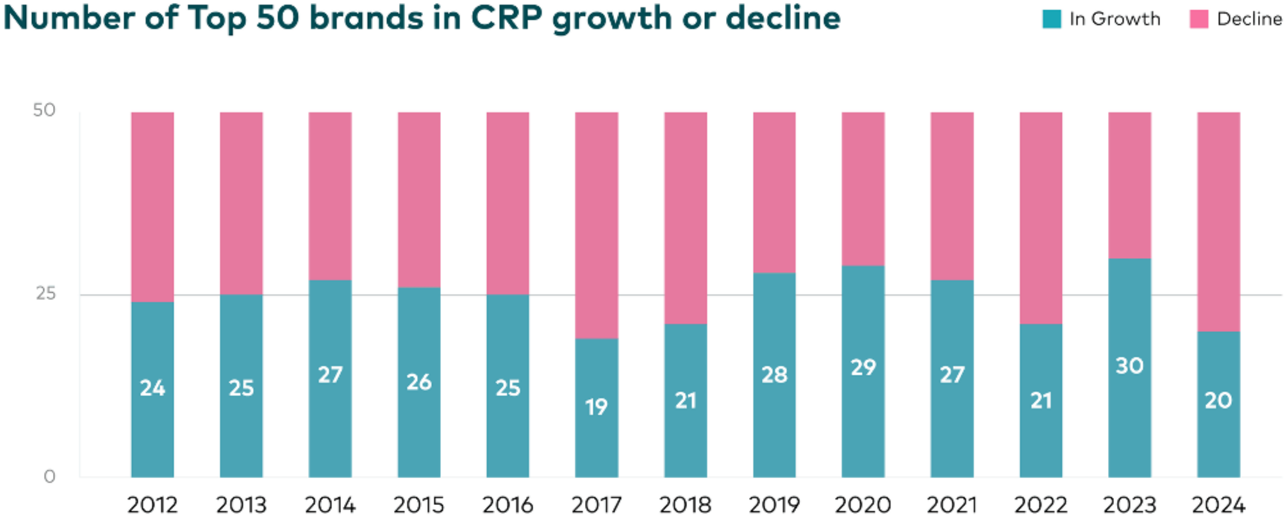
While this topline view paints a more negative picture than in previous years, digging a bit further into the numbers provides a reality check: the Top 50 were still chosen a combined 88 billion times in 2024, just a 0.6% reduction from 2023. These 50 giants are being chosen only slightly less often, with the 20 growing brands' Consumer Reach Point (CRP) gains almost offsetting the losses made by the 30 in decline.

However this still represents a shift; so what is driving it? The simple answer lies in India's influence on global brand performance. In 2024, we observed a slowdown in FMCG industry growth in this crucial market, with the total rise in CRPs dropping from 8% in 2023 to 5% in 2024.

This directly impacted the Global Top 50. Of the brands in the ranking with a strong Indian presence, 82% grew their CRPs in 2023. Fast forward a year and this number fell to 68%. Put another way: of the brands that declined in India, 100% saw a drop in their total global CRPs.

Against this backdrop, here are the Top 50 most chosen brands in 2024.

Number of Top 50 brands in CRP growth or decline



Source: 38 markets – Worldpanel by Numerator, 15 markets – YouGov, USA – Numerator

The **Top 25** Most Chosen FMCG Brands Globally 2024

2024 Rank	Rank Movement	Brand	CRP (M) 2024	CRP Performance	Penetration 2023	Penetration 2024	Times Chosen 2023	Times Chosen 2024
1	=	**Coca-Cola**	**8,297**	-0.5%	49.1	48.5	12.8	12.7
2	2	**Omo**	**4,705**	12.5%	40.5	41.6	7.8	8.4
3	-1	**Colgate**	**4,424**	-0.4%	56.3	55.6	5.9	5.9
4	-1	**Maggi**	**4,034**	-5.3%	35.6	35.2	9.0	8.5
5	1	**Lay's**	**3,417**	2.4%	35.1	36.3	7.1	7.0
6	-1	**Pepsi**	**3,169**	-7.3%	28.2	27.3	9.1	8.6
7	2	**Sunlight**	**3,142**	-2.8%	30.2	29.5	8.0	7.9
8	-1	**Indomie**	**3,079**	-5.1%	9.6	9.7	25.4	23.4
9	1	**Nescafé**	**3,027**	5.8%	28.7	29.5	7.5	7.6
10	-2	**Knorr**	**2,998**	-7.4%	30.2	29.2	8.1	7.6
11	1	**Sunsilk**	**2,438**	1.1%	27.1	27.5	6.7	6.6
12	-1	**Lifebuoy**	**2,421**	-7.9%	25.0	24.0	7.9	7.5
13	=	**Dove**	**2,158**	1.9%	38.2	38.4	4.2	4.2
14	=	**Lux**	**1,901**	1.1%	29.6	29.7	4.8	4.7
15	2	**Sprite**	**1,567**	4.3%	30.7	31.2	3.7	3.7
16	2	**Red Bull**	**1,525**	3.3%	9.7	10.0	11.4	11.3
17	-1	**Oreo**	**1,522**	0.1%	31.6	32.2	3.6	3.5
18	-3	**Downy**	**1,459**	-6.2%	21.1	20.8	5.5	5.2
19	3	**Radiant**	**1,449**	13.5%	17.3	17.3	5.5	6.2
20	-1	**Doritos**	**1,371**	-2.1%	16.0	16.2	6.6	6.3
21	=	**Milo**	**1,369**	0.5%	9.8	9.7	10.5	10.5
22	3	**Close-Up**	**1,280**	3.9%	21.5	21.6	4.3	4.4
23	=	**Mountain Dew**	**1,272**	1.6%	8.1	7.9	11.6	11.9
24	-4	**Pepsodent**	**1,245**	-8.7%	17.8	17.4	5.8	5.3
25	1	**Danone**	**1,226**	1.0%	13.4	13.6	6.8	6.7

The **Next 25** Most Chosen FMCG Brands Globally 2024

2024 Rank	Rank Movement	Brand	CRP (M) 2024	CRP Performance	Penetration 2023	Penetration 2024	Times Chosen 2023	Times Chosen 2024
26	-2	**Cheetos**	**1,206**	-2.6%	15.5	15.7	6.0	5.7
27	=	**Kinder**	**1,197**	0.1%	14.8	14.7	6.1	6.0
28	=	**Dettol**	**1,155**	-2.9%	23.0	22.2	3.9	3.9
29	1	**Fanta**	**1,155**	-0.7%	24.2	24.2	3.6	3.5
30	-1	**Head & Shoulders**	**1,144**	-3.4%	24.1	23.6	3.7	3.6
31	=	**Comfort**	**1,107**	-1.3%	16.8	17.5	5.0	4.7
32	=	**Ajinomoto**	**1,076**	-2.6%	8.0	8.1	10.4	9.8
33	=	**Nivea**	**1,030**	-2.8%	24.6	24.4	3.2	3.1
34	=	**Tide**	**1,018**	-2.2%	21.7	20.7	3.6	3.6
35	4	**Pond's**	**983**	9.8%	17.8	18.5	3.8	3.9
36	1	**Minute Maid**	**949**	4.3%	18.8	19.0	3.6	3.7
37	1	**Heinz**	**896**	-1.0%	17.9	17.9	3.8	3.7
38	2	**Always**	**882**	-0.7%	21.4	20.7	3.1	3.2
39	-3	**Rexona**	**846**	-8.3%	18.0	17.4	3.8	3.6
40	-5	**Ariel**	**842**	-13.0%	16.4	15.2	4.4	4.1
41	=	**Pantene**	**838**	-5.5%	17.8	17.0	3.7	3.6
42	=	**Kraft**	**823**	-4.1%	11.7	11.5	5.5	5.3
43	3	**Haribo**	**791**	3.8%	11.1	11.3	5.2	5.2
44	-1	**Dr. Oetker**	**783**	-1.9%	9.6	9.5	6.2	6.1
45	-1	**Nestlé**	**767**	-4.0%	16.8	16.4	3.6	3.5
46	-1	**M&M's**	**749**	-1.9%	12.6	12.7	4.5	4.4
47	4	**Pringles**	**734**	4.6%	13.9	14.2	3.8	3.8
48	1	**Barilla**	**717**	1.0%	12.6	12.5	4.2	4.2
49	-2	**Palmolive**	**711**	-2.3%	12.5	12.1	4.4	4.3
50	-2	**Garnier**	**692**	-3.7%	16.8	16.6	3.2	3.1

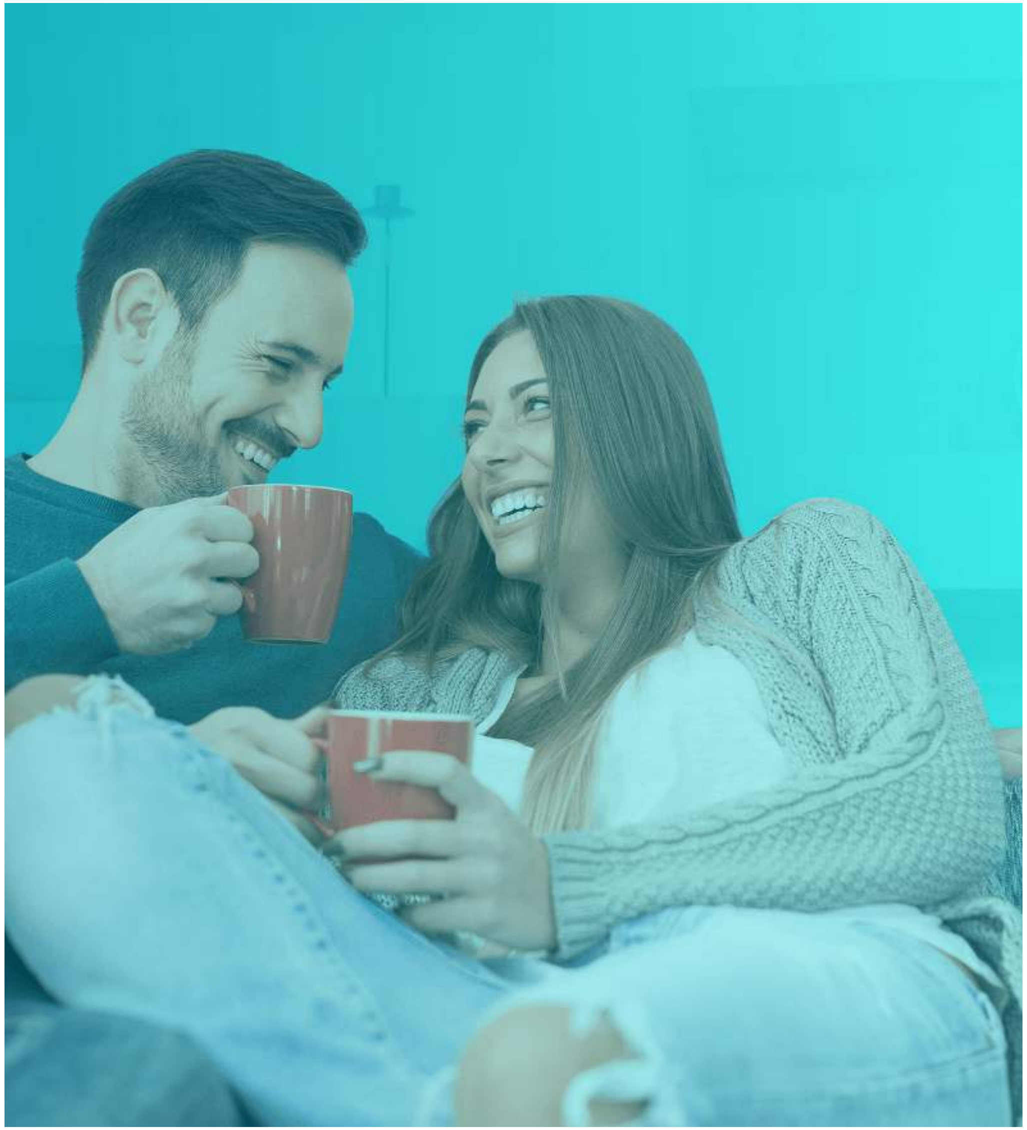
A tale of two halves

The headlines from this year's Top 50 Most Chosen Brands reveal a fascinating divide.

Fourteen of the 20 growing brands sit within the Top 25, showcasing the continued resilience of the biggest global brands, while only six from the next 25 saw growth.

The big winners

- **OMO** saw the biggest increase in CRPs, chosen 4.7 billion times in 2024 – an increase of 520 million – catapulting it to our new number 2 in the global ranking.
- **Lay's** was another high achiever, increasing its CRPs by over 80 million to move up to fifth in the ranking. This signifies eight years of back-to-back growth – a masterclass in momentum.
- **Nescafé** gained over 160 million CRPs, representing quite the turnaround for the brand. Having managed to break the decline momentum, the brand has now achieved four consecutive years of CRP growth.



The serial successes

- **Dove**, with a modest 1.9% rise in CRPs, remains the only brand to have grown in every edition of Brand Footprint – the ultimate consistency champion.
- **Sprite** and **Red Bull** continue to impress with 4.3% and 3.3% CRP growth respectively. Both were also big winners in the previous two years' rankings.

The second half heroes

Despite only six brands from the second half of the Top 50 seeing growth, three in particular deserve special recognition:

1. **Pond's** rose four places to number 35, adding 88 million CRPs with one of 2024's biggest global penetration gains.
2. **Haribo** cemented its place in the global Top 50, rising three places and adding 29 million CRPs.
3. **Pringles** moved from outside the Top 50 to 47th position, adding 32 million CRPs through one of the biggest penetration increases seen last year.

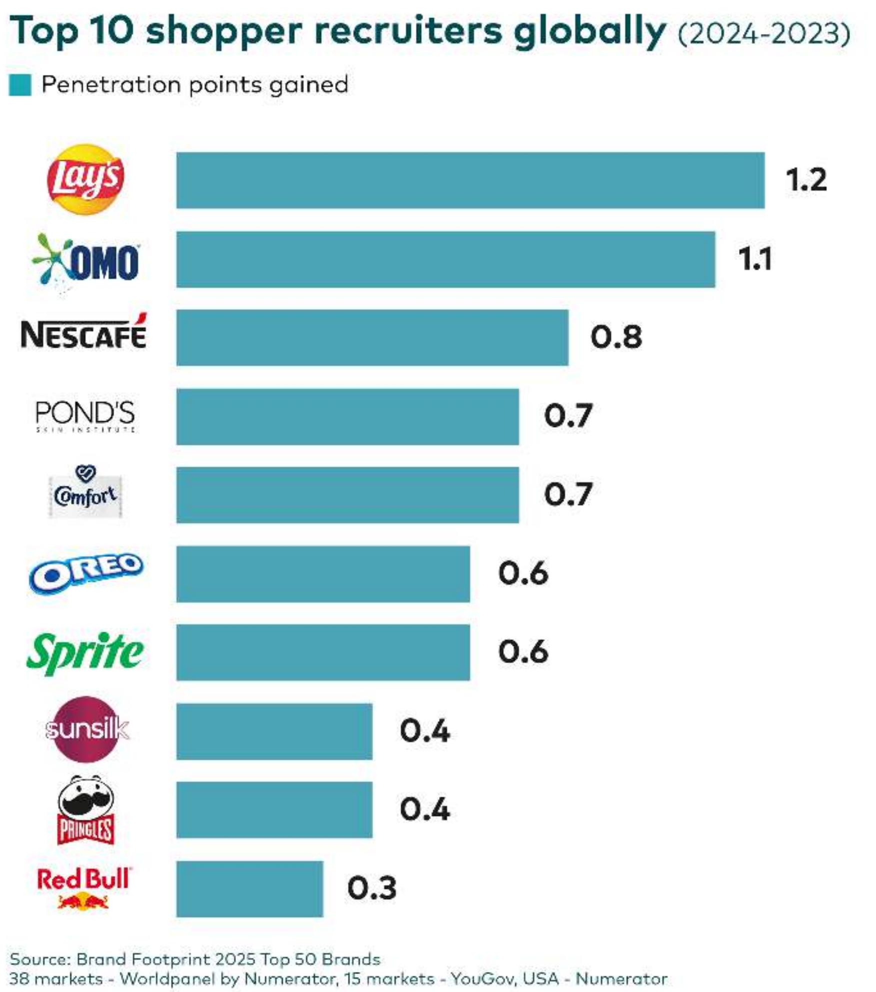
Repeat recruiters

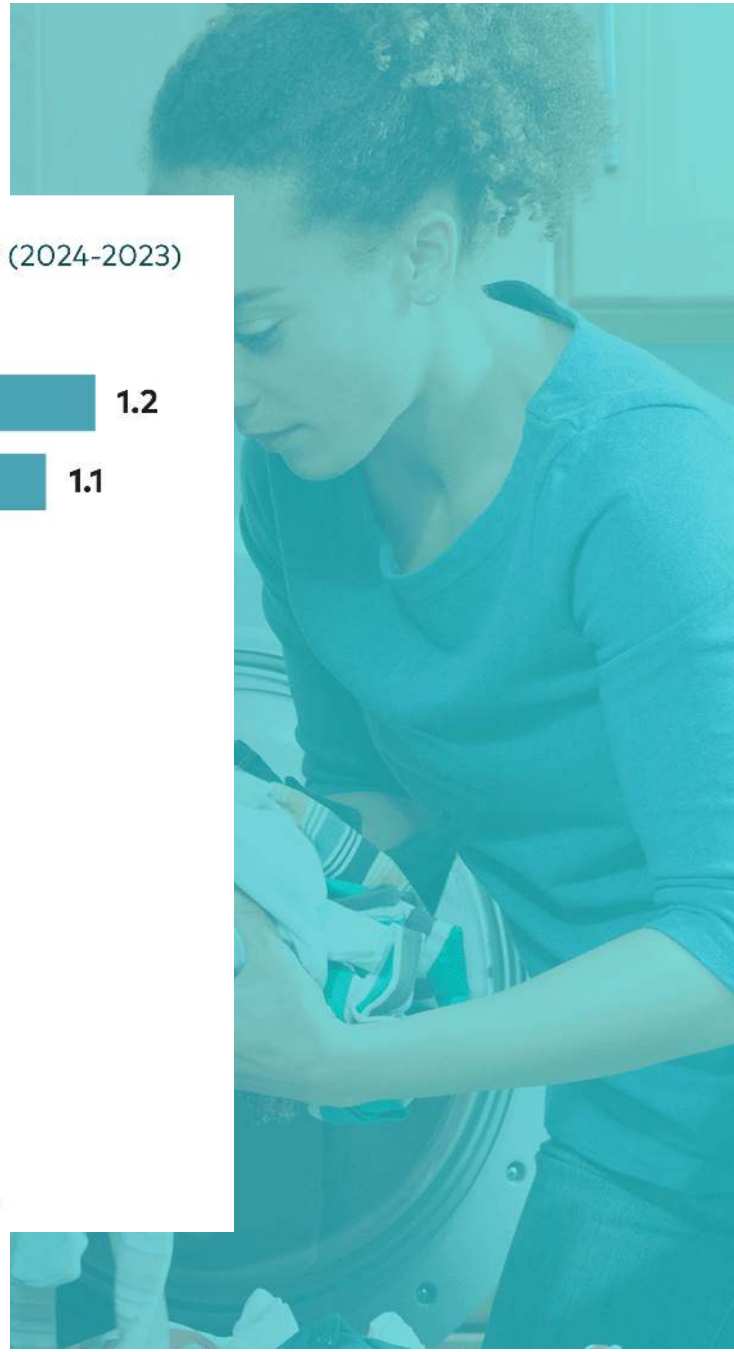
It should come as no surprise that the brands which recruited the most shoppers showcased some of the strongest growth. All of the names appearing on this list deserve congratulations.

The fact that seven of these brands were also top recruiters globally in 2023 demonstrates how powerful momentum truly is. As we showed in the previous chapter, momentum is a powerful force in brand performance and is just as relevant at the global level.

But the brands that really stood out in 2024 were **Lay's** and **OMO**, both extending their penetration by over 1% across the globe. This represents an increase in their shopper base of over 20 million shoppers each.

But how exactly did OMO and Lay's achieve these remarkable results? The following chapter reveals the precise strategies that shifted the 50:50 odds decisively in their favour.





Masters of the 50:50 game

How Lay's and OMO win the coin toss, year after year

36.1%
Global penetration

+1.2%
Penetration points

+22.7m
New shoppers
vs YA

#5
Position in
global rank

Lay's: The global penetration powerhouse

Lay's, PepsiCo's flagship snacking brand, delivered exceptional penetration growth in 2024. Adding 1.2 penetration points globally, and recruiting 22.7 million new shoppers, Lay's has secured the number 5 position in Brand Footprint's Top 50 global brand ranking. Its transformation from solid performer to penetration champion demonstrates how brands can recruit shoppers across diverse markets.

What made its success particularly notable was its focused approach to market selection. Despite winning in fewer markets, with a drop from 58% of its markets seeing CRP growth in 2023 to 52% in 2024, Lay's concentrated its efforts where they mattered most: three priority penetration markets of Mainland China, the US, and India.

What makes Lay's compelling is its consistency paired with flexibility. For over a decade, it has maintained its core message of joy and indulgence while adapting creative execution across markets. The 'Betcha Can't Eat Just One' spirit remains a unifying thread, even as campaigns evolve from traditional TV to digital-first, influencer, and user-generated content.

Top 3 Markets	2023	2024
Mainland China	●	●
USA	●	●
India	●	●

Source: Brand Footprint 2025:
38 markets – Worldpanel by Numerator,
15 markets – YouGov,
USA – Numerator

The Asia-Pacific engine

Asia became Lay's penetration playground, demonstrating its focus on high-impact markets. In India, one of its three priority markets in the region, the brand executed comprehensive recruitment through three pillars: the 'Flavours of the World' launch, the relaunch of wafer chips and, crucially, increased packet sizes. This counter-trend approach recognised that value-conscious consumers reward brands that offer more, not less.

In Mainland China, another priority market, Lay's demonstrated hyperlocal innovation that exemplifies its localisation expertise. Its partnership with Douyin (TikTok) targeted migrant workers with limited-edition flavours from their home provinces. Roasted Oysters with Garlic, Crispy Grilled Fish, and Cumin Lamb weren't just products, they were emotional connections to home, with nostalgic packaging designed around local landmarks. This campaign shows how Lay's consistently tailors campaigns to local tastes while keeping its global brand essence intact.

Lay's Bangladesh: Supply chain strategy drives penetration breakthrough

Lay's explosive growth in Bangladesh demonstrates how operational excellence can unlock market potential in price-sensitive categories. The brand's penetration skyrocketed from just under 2% in 2023 to 11% in 2024 following the establishment of a local manufacturing facility in mid-2023, which fundamentally transformed its competitive position in a market dominated by local players.

The factory investment delivered immediate supply chain benefits that translated directly into market access. Reduced logistics costs enabled Lay's to introduce smaller pack formats at accessible price points. This pricing strategy proved crucial in Bangladesh's highly price-sensitive snack category, where affordability often determines brand choice.

Focused discipline pays off

In the USA, a market where penetration is over 80%, the brand managed through a variety of different flavour innovations (the ‘Do Us a Flavor’ contest) and marketing campaigns (‘No Lay’s, No Game’), to stem the shopper losses it saw in 2023, instead driving an increase in buyers in 2024.

The Brazil blueprint

In Brazil, Lay's gained two million more households through focused portfolio management. Penetration growth was driven by three core variants: Lay's Original, Lay's Sour Cream, and Lay's Rústicas. Smaller pack sizes proved crucial, demonstrating how packaging innovation can unlock new shopper segments.

41.6%
Global penetration

+1.1%
Penetration points

+22.8m
New shoppers
vs YA

#2
Position in
global rank

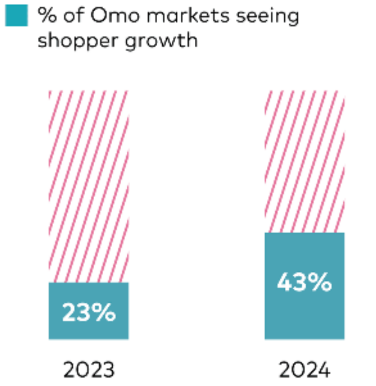
OMO: Innovation-led excellence

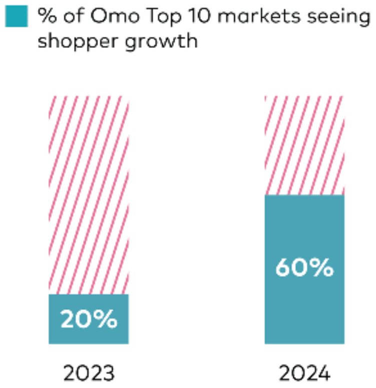
OMO, Unilever's global detergent brand – also known as Persil, Skip, and Surf Excel – achieved remarkable penetration growth in 2024. Through the addition of 1.1 penetration points, OMO has become the second most chosen brand in the world. Its success centres on market focus combined with category-defining innovation.

The brand's discipline was evident in its market performance. While still growing in fewer than half of its markets, OMO tripled its success rate in its Top 10 penetration markets – expanding growth from two markets in 2023 to six markets in 2024. This demonstrates that focused investment in priority markets delivers compound returns.

Central to this success was Wonder Wash, a detergent engineered for 15-minute washing cycles that didn't just solve a consumer problem; it created an entirely new usage occasion.

What makes OMO's story particularly powerful is its remarkable consistency in both message and creative execution. For over two decades, OMO's 'Dirt is Good' philosophy has remained unwavering, making it a textbook example of brand consistency. Unlike many brands that show stability in strategy but variation in execution, OMO maintains both – its campaigns are instantly recognisable and reinforce the same values globally.





Source: Brand Footprint 2025:
38 markets – Worldpanel by Numerator,
15 markets – YouGov,
USA – Numerator

The innovation catalyst

Wonder Wash addressed a critical shift in consumer behaviour: most clothing is now soiled by invisible sweat and odours rather than visible stains. This insight led to a product that outperformed leading competitors in malodour removal, residue prevention, freshness, and fabric care – supported by 35 pending patents.

The rollout approach was equally impressive. Wonder Wash reached 10 markets in its first six months, with plans to expand to 20 within 20 months. This rapid global expansion helped OMO become the number one liquid detergent brand in several key countries, while maintaining or achieving number one or two market share positions across all markets.

Wonder Wash: Innovation impact in the UK

Wonder Wash became the biggest innovation in the UK FMCG industry in 2024 by value sales, demonstrating how breakthrough products can reshape entire categories. Analysis of spend in the 32 weeks ending October 2024 revealed the innovation's comprehensive impact:

- **Over half of the spend came directly from competitor brands**
- **Over a quarter was beneficial to the entire category, driving additional shopping trips.**

This performance of minimal cannibalisation, significant competitive gains, and category expansion, represents the ideal innovation outcome. Wonder Wash didn't just grow Persil; it expanded the addressable market while recruiting shoppers from rival brands.

The shopper expansion approach

Wonder Wash's strength lay in its ability to attract new consumer segments to OMO. The product appealed to pre-family households, Generation X, and empty nesters, demographics traditionally underserved by conventional laundry marketing. By creating a product for time-pressed consumers, OMO expanded its addressable market significantly.

The cultural connection

OMO's marketing evolved beyond product benefits to provide cultural resonance while maintaining its core 'Dirt is Good' message. The brand consistently uses storytelling, emotional appeals, and real-life family situations. Its visual language, often featuring children and outdoor play, has remained stable across platforms, ensuring a unified brand experience even as execution styles modernise.

In the UK, the brand's sports partnerships with Arsenal Football Club forged emotional connections that extended beyond functional performance. Meanwhile in Vietnam, animated campaigns featuring 'monster-like' dirt characters made laundry care engaging for consumers of all ages, resulting in double-digit value growth and a 1.1% market share increase during Lunar New Year.

The penetration playbook revealed

The success of Lay's and OMO reveals three fundamental principles that separate penetration champions from the rest. These aren't theoretical concepts, but practical approaches that shift the 50:50 odds decisively.

1. **A targeted focus on non-buyers.** Both brands demonstrated obsessive focus on non-buyers rather than existing customers. Lay's identified 200 million Chinese migrant workers as an untapped segment, while OMO recognised that time-pressed demographics were underserved. This requires deep market understanding and the courage to invest in unfamiliar territory.

2. **Innovation that expands occasions.** Wonder Wash didn't just improve existing laundry experiences, it created new ones. Similarly, Lay's hyperlocal flavours turned snacking into cultural expression. The most effective penetration approaches expand the category's addressable market rather than simply competing for existing demand.

3. **Brand consistency as foundation**. Both brands understood that sustained penetration requires unwavering brand consistency. OMO's 'Dirt is Good' message has remained constant for two decades, creating instant recognition. Lay's maintains consistency in brand values while allowing executional flexibility for local relevance.

Their success proves that the 50:50 game isn't about luck, but the diligent application of proven principles, executed with operational excellence and cultural sensitivity. The brands that consistently win this game treat penetration not as a hoped-for outcome, but as a practice that requires investment, innovation, and relentless focus on non-buyers.

As we move through 2025, the economic headwinds that continue to gather suggest that mastering these penetration principles won't just be advantageous, they will be essential for growth. Read on for our three predictions for brand growth in the rest of this year and beyond.

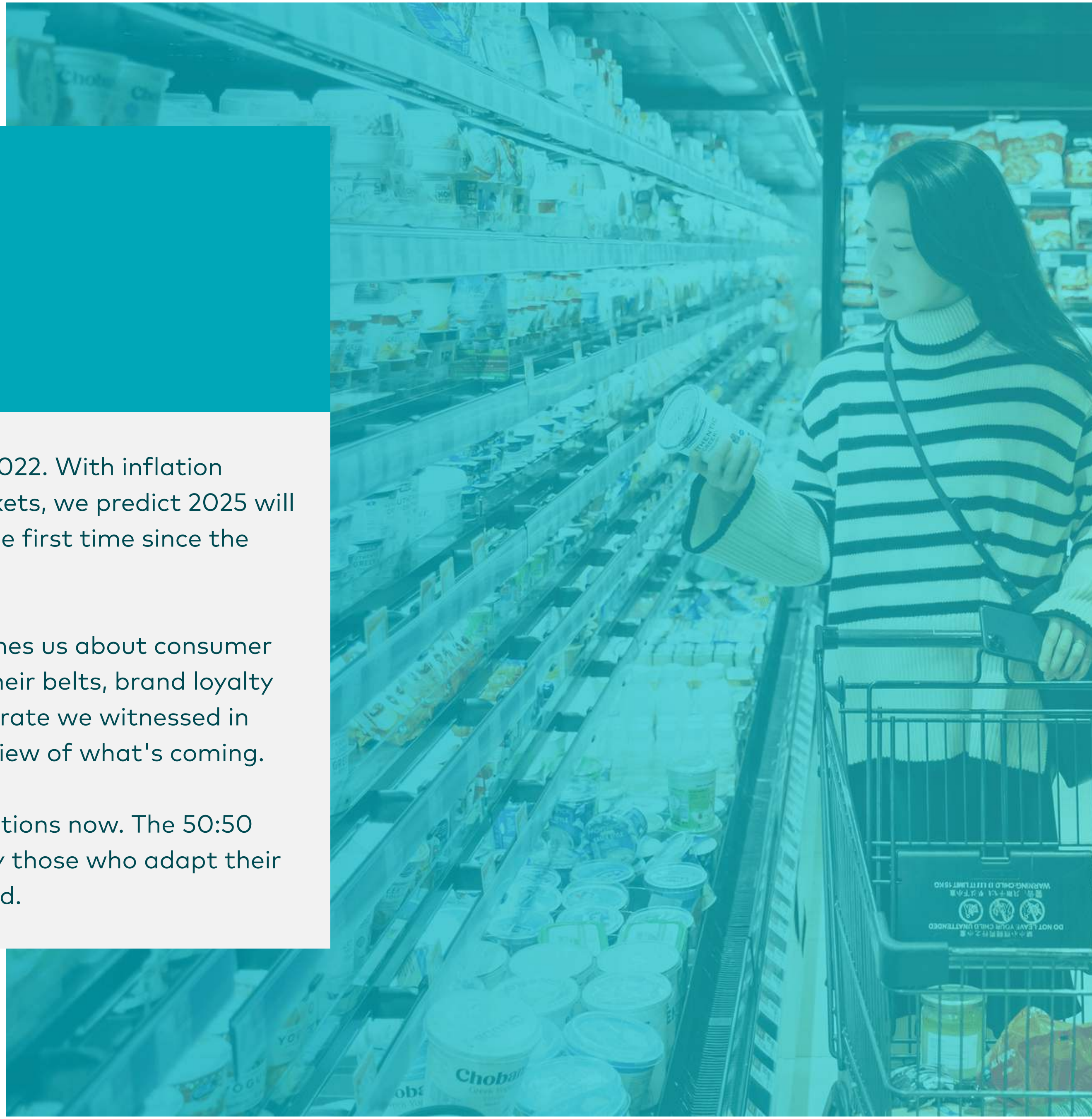
Predictions for the remainder of the year

01
The inflation headwind returns

Brand growth is about to face its sternest test since 2022. With inflation showing renewed upward momentum across key markets, we predict 2025 will see fewer than 50% of brands achieving growth for the first time since the post-pandemic correction.

This isn't speculation; it's what economic history teaches us about consumer behaviour under pressure. When households tighten their belts, brand loyalty becomes a luxury many can't afford. The 43% growth rate we witnessed in 2022 during peak inflation may well prove to be a preview of what's coming.

For brand managers, this means recalibrating expectations now. The 50:50 game is about to become a 45:55 proposition, and only those who adapt their strategies accordingly will avoid being caught off guard.



02
The penetration imperative intensifies

When consumers become price-sensitive, the growth rules don't just apply more strictly—they become exponentially more important. We expect that penetration-led growth will become disproportionately critical in 2025, just as it did during the 2022 inflation spike.

The 1.6 percentage point average penetration gain we've seen over the past five years will likely increase to 1.8 percentage points or higher.

Brands that haven't yet mastered the mechanics of shopper recruitment will find 2025 unforgiving. The mathematics suggest that economic pressure separates those that are strategically disciplined from the rest.

03
We already know who will win

The biggest global penetration gain in 2025 will come from one of the Top 10 penetration winners of 2024, and at least five of the top penetration winners will emerge from this same elite group.

History supports this forecast. Success breeds success, and in challenging years this fundamental truth becomes more pronounced. The current Top 10 shopper recruiters are best-positioned for growth.

The question isn't whether this year will be challenging, but whether your brand is prepared for penetration-led growth.

It's not just about understanding the growth fundamentals; it's about applying them to every future marketing decision. Every sales target is a predictable penetration target, and this makes knowing more about your non-buyers the single most important element of marketing.

This isn't theoretical. To follow a penetration-led growth path in 2025's challenging environment, you need to answer these questions:

- Are you measuring and reviewing with the right category lenses and cadence?
- Do you know how many non-buyers you need to attract to meet your sales target?
- Are you investing enough to reach and attract them?
- Do you know what you need to do to attract today's harder-to-reach non-buyers?
- Do you understand every usage occasion – and can you identify which new spaces offer the greatest opportunity?
- Do you know who is responding to every piece of marketing activity?
- Do you have a category and brand story, based on real shopper behaviour and trends, to convince retail partners to give you greater support?

These aren't just questions for your next strategy meeting. They should be the foundation for every marketing decision you'll make today and beyond. In an inflationary environment, the brands that can answer them will be the ones writing the growth stories of tomorrow.

Discover three new solutions that enable you to interpret and define the most effective approaches for penetration-led growth.

GROWTH MAPPER

Scale

Quantify the buyers you need to deliver your financial targets and the odds of success.

SHOPPER MAGNET

Identify

Determine the prospective buyers most critical to your brand's growth and understand how to attract them.

BRAND LEVERS

Understand

Survey verified target buyers to uncover what drives their purchase decisions and optimise your brand positioning to convert them.

What is Brand Footprint

Understanding Brand Footprint

The Brand Footprint report is Worldpanel by Numerator's annual ranking of the most chosen Fast-Moving Consumer Goods (FMCG) brands worldwide. It employs a unique metric known as Consumer Reach Points (CRPs) 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.

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.

Defining Global Brands: to be considered global a brand must have a presence across at least three continents, and not get more than 90% of total CRPs from one market.

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 ≤ 10%
- Mid-Size Brand: Penetration between >10% and ≤30%
- Large Brand: Penetration >30%

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 2023 to the end of October 2024.

The 'universe': data is collected from 56 markets covering 84% of global GDP.

Data source: Brand Footprint is a Worldpanel by Numerator initiative.

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

Data for the USA was provided by Numerator.

Data for Mainland China was provided in collaboration with CTR.

Powered by europanel

Data for Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Germany, Hungary, Italy, Netherlands, Poland, Romania, Serbia, Slovakia and Sweden was provided by YouGov.

Data for Japan was provided by Intage.

About this report

There may be small changes in the data reported this year compared to previous editions due to ongoing panel enhancements and data restatements. The overall result is that this year's ranking is our most accurate reflection of global Consumer Reach Points.

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.

About Worldpanel by Numerator

Worldpanel by Numerator is a global first-party consumer data company that tracks over 563 billion consumer-brand interactions and 4 million consumption moments each year across more than 65 markets (including partners). Combining verified behavioural and attitudinal data with advanced analytics, we help the world's leading brands decode how and why people buy — both online and in-store — to drive sustainable growth.

Decoding Shopper Behaviour to Shape Your Brand Future

Worldpanel by Numerator

Find out more

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

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