Consumer Panel GfK Italy

Come crescono davvero i Brand

Brand Footprint

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CPS GfK Italy Commercial Director

1 luglio 2024

Il Consumer Panel è un osservatorio unico sui reali comportamenti di acquisto delle famiglie nel Largo Consumo

Chi?

Shoppers
End Users
Attitudini

Cosa?

Categorie
Brands
SKUs

Dove?

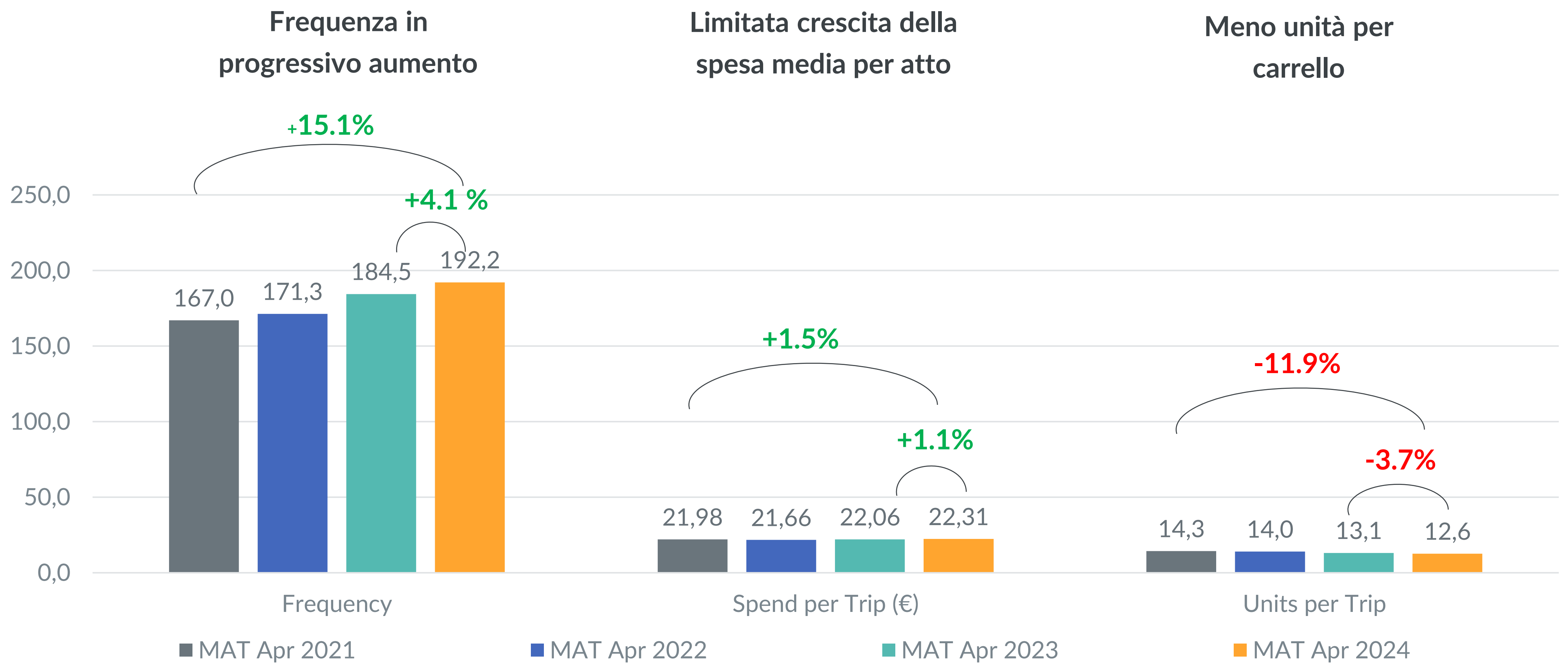
Canali
Insegne
Online/ Offline

A che Prezzo?

Prezzo pieno
Promozioni

- * products without bar code are usually identified by using a codebook

Lo Shopper cerca di contenere lo scontrino medio e finisce con l'aumentare la Frequenza di acquisto

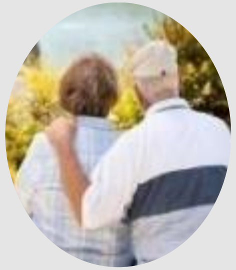


Packed FMCG with Loose Weight Fresh Foods

I target Shopper più giovani non riescono a confermare le proprie preferenze di acquisto nel tempo. I Senior sostengono la spesa

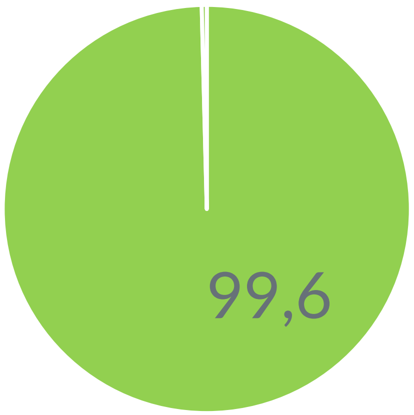
Trend di spesa
FMCG

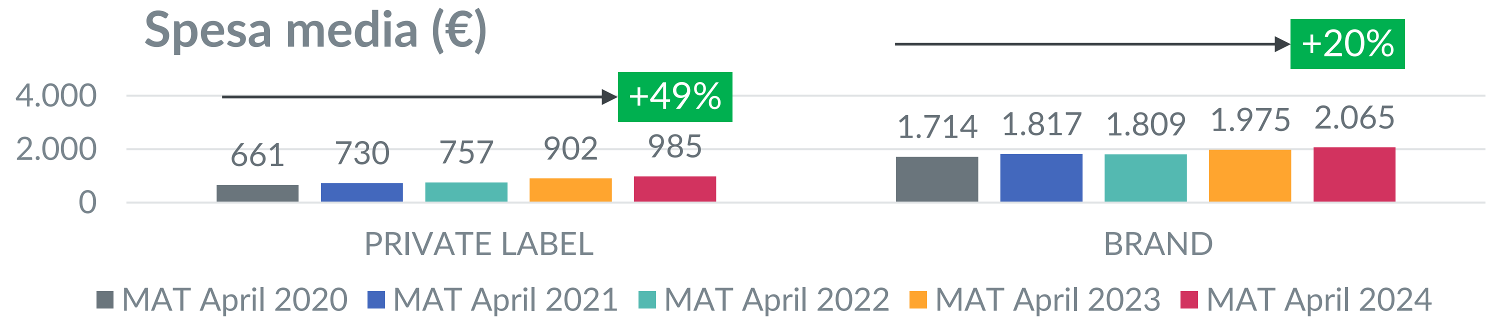
+16.8%
MAT Apr 2024 vs MAT Apr 2021

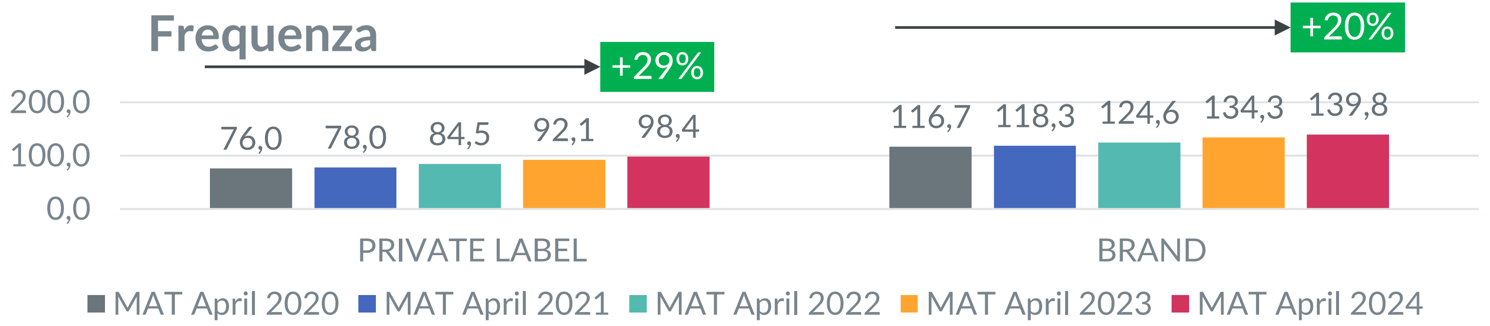
RE-CONSTRUCTORS	BABY BOOMERS	GENERATION X	MILLENNIALS+
			
PRE 1952	1952-1966	1967-1981	1982-2011
+31.3%	+23.3%	+13.4%	+1.5%

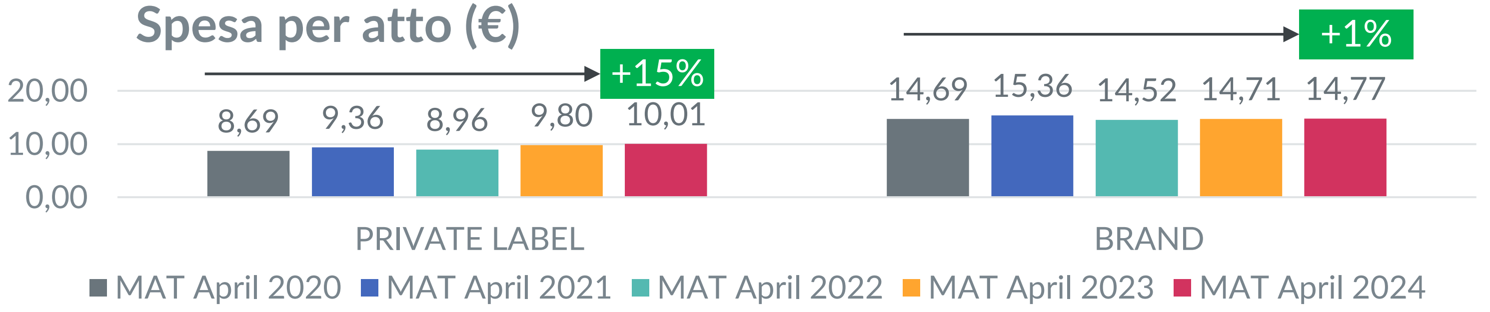
Le Marche affrontano la forte crescita della Private Label

Private Label Penetrazione %



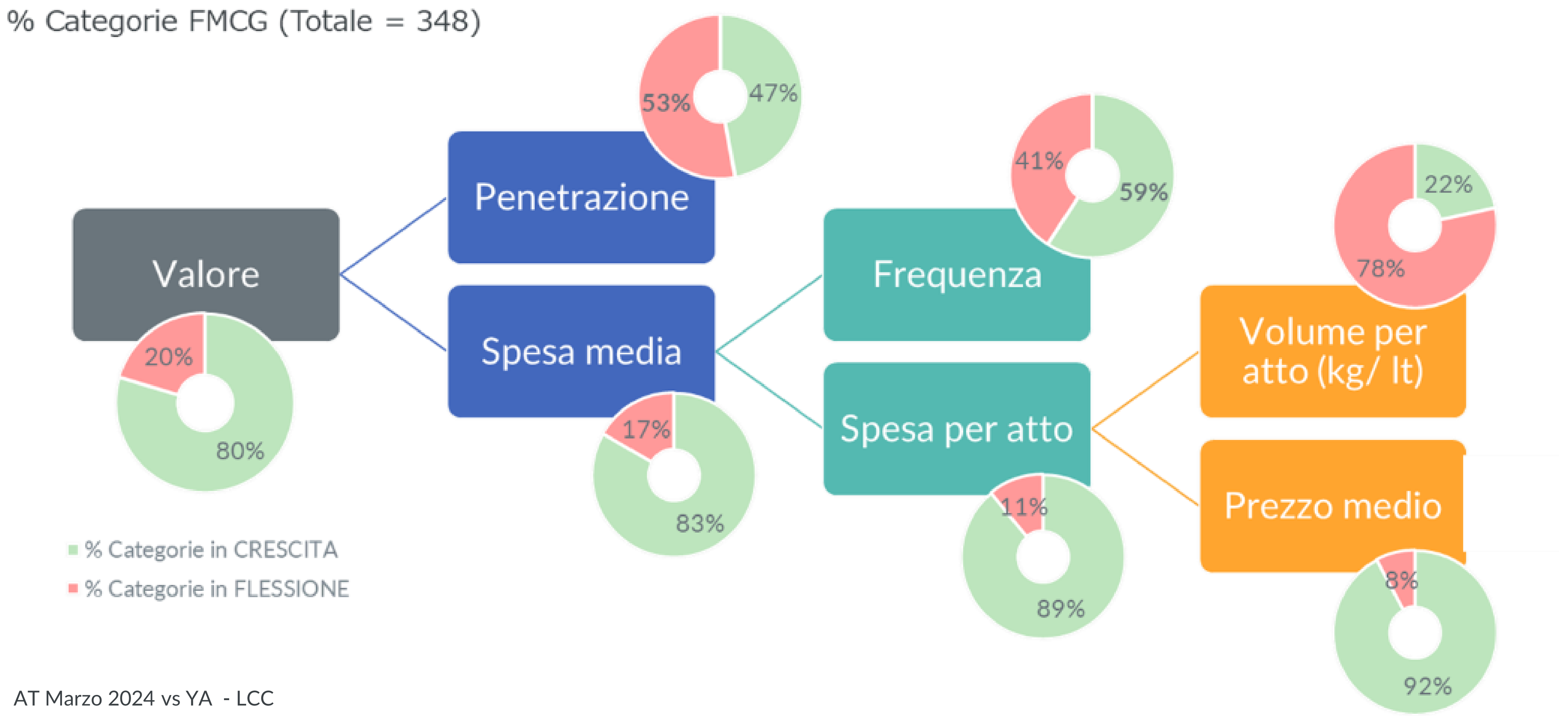






Totale FMCG

Il periodo Inflattivo ha causato una riduzione diffusa della Penetrazione tra le Categorie del Largo Consumo



AT Marzo 2024 vs YA - LCC

Penetration is King!

- Byron Sharp: How Brands Grow

9/10

of growing brands* have increased

penetration

4/10

of growing brands* have increased

frequency

*source: BG20 based on absolute change per year for 8.081 top 10 category brands in 79 categories in 16 countries.

Brand Footprint: un database Consumer globale e unico

CONSUMER REACH POINTS = **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

5 Continents

86% GDP coverage

62 Markets

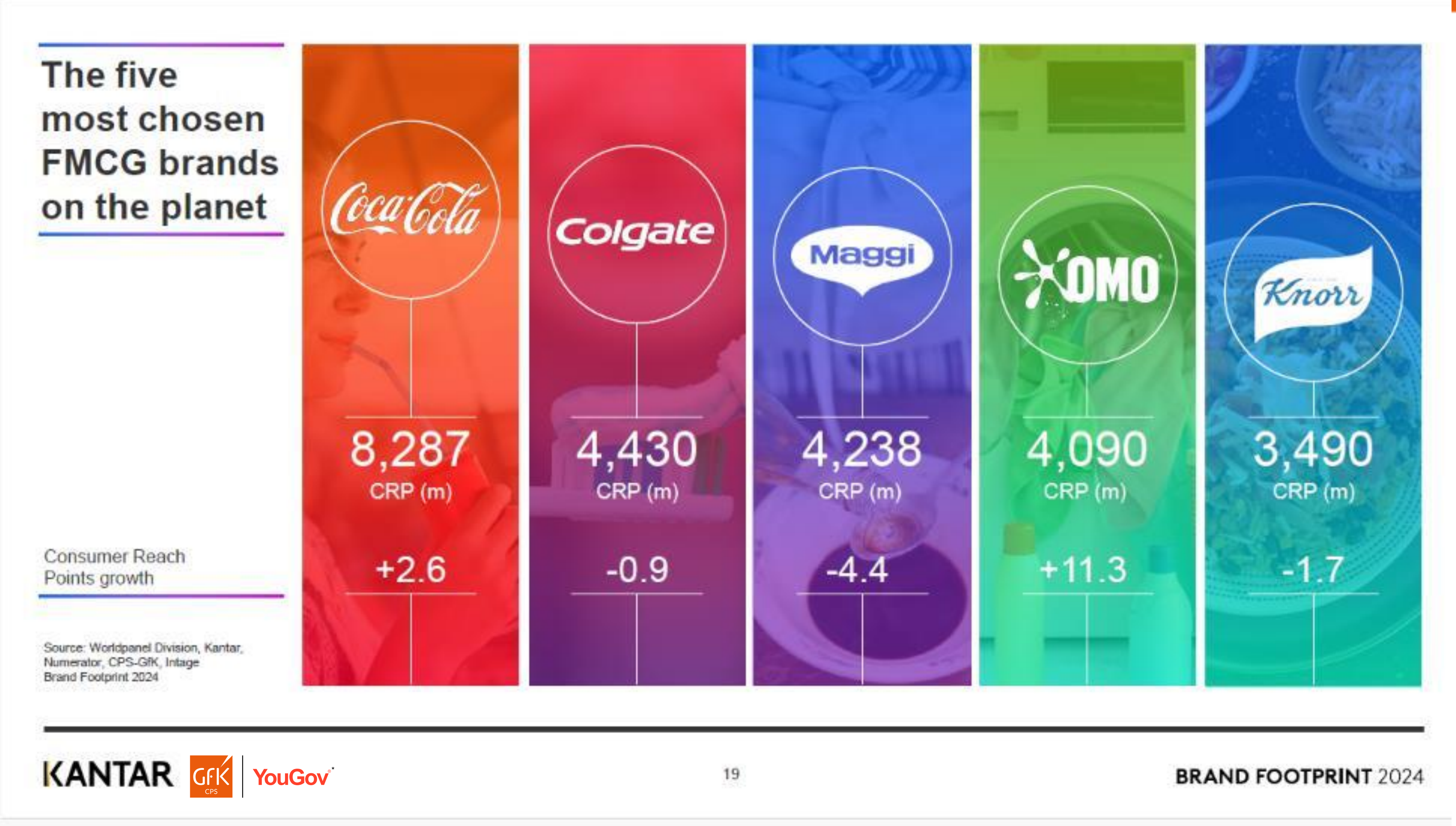
42,800 Brands

76% Global population

Tutti i dati derivano di Consumer Panel di:

KANTAR · GfK CPS | YouGov* · Numerator · KANTAR WORLDPANEL A CTR SERVICE IN CHINA · intage Know today, Power tomorrow

Brand Footprint: I 5 Brand più scelti al Mondo



Brand Footprint: I Brand più scelti al Mondo (#6-25)

6	7	8	9	10	11	12	13	14	15
Lay's	pepsi	Sunlight	Indomie	NESCAFÉ	Lifebuoy	sunsilk	Klin	Dove	LUX
3,376 CRP(m)	3,322 CRP(m)	3,268 CRP(m)	3,266 CRP(m)	2,896 CRP(m)	2,661 CRP(m)	2,485 CRP(m)	2,203 CRP(m)	2,042 CRP(m)	1,895 CRP(m)
3.1%	2.3%	-5.7%	-1.2%	5.8%	-2.3%	5.0%	5.6%	0	7.1%

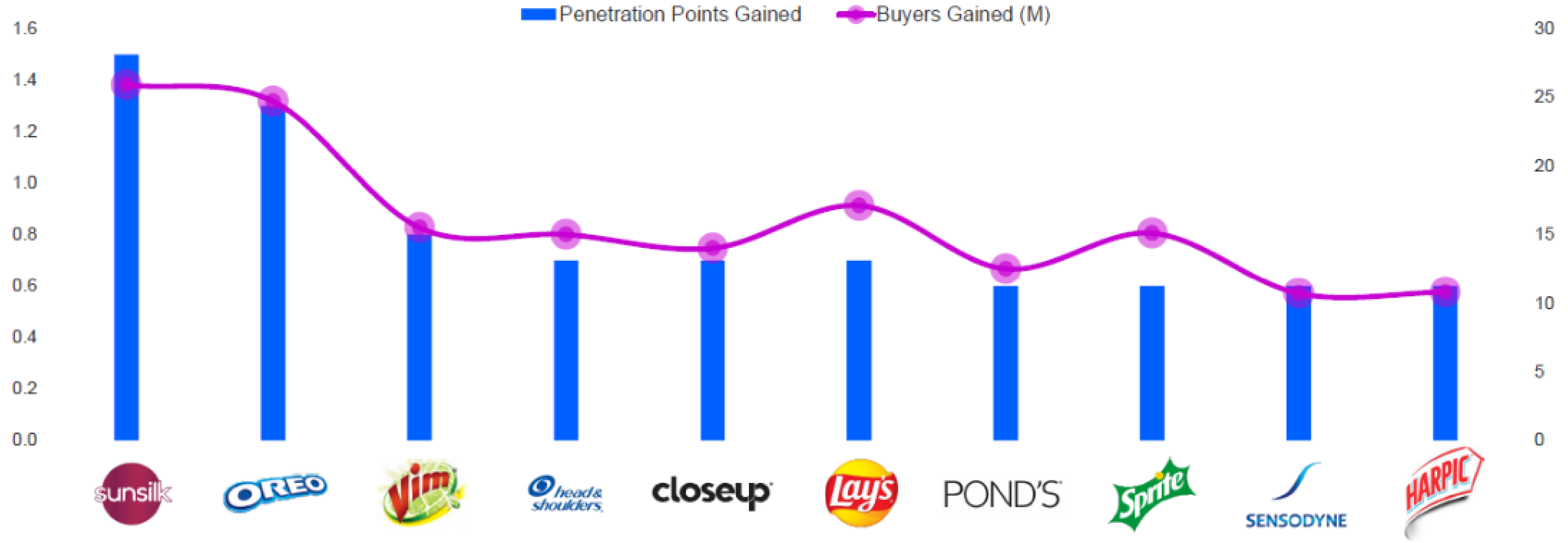
16	17	18	19	20	21	22	23	24	25
Downy	OREO	Sprite	GATORADE	Red Bull	Doritos	Pepsodent	MILO	MONSTER	Comfort
1,572 CRP(m)	1,498 CRP(m)	1,485 CRP(m)	1,453 CRP(m)	1,432 CRP(m)	1,428 CRP(m)	1,410 CRP(m)	1,381 CRP(m)	1,368 CRP(m)	1,246 CRP(m)
-1.0%	8.1%	1.6%	4.3%	17.8%	7.4%	-3.4%	-1.0%	14.6%	-0.7%

KANTAR Source: Worldpanel Division, Kantar, Numerator, GfK-CPS, Intage, Brand Footprint 2024 20

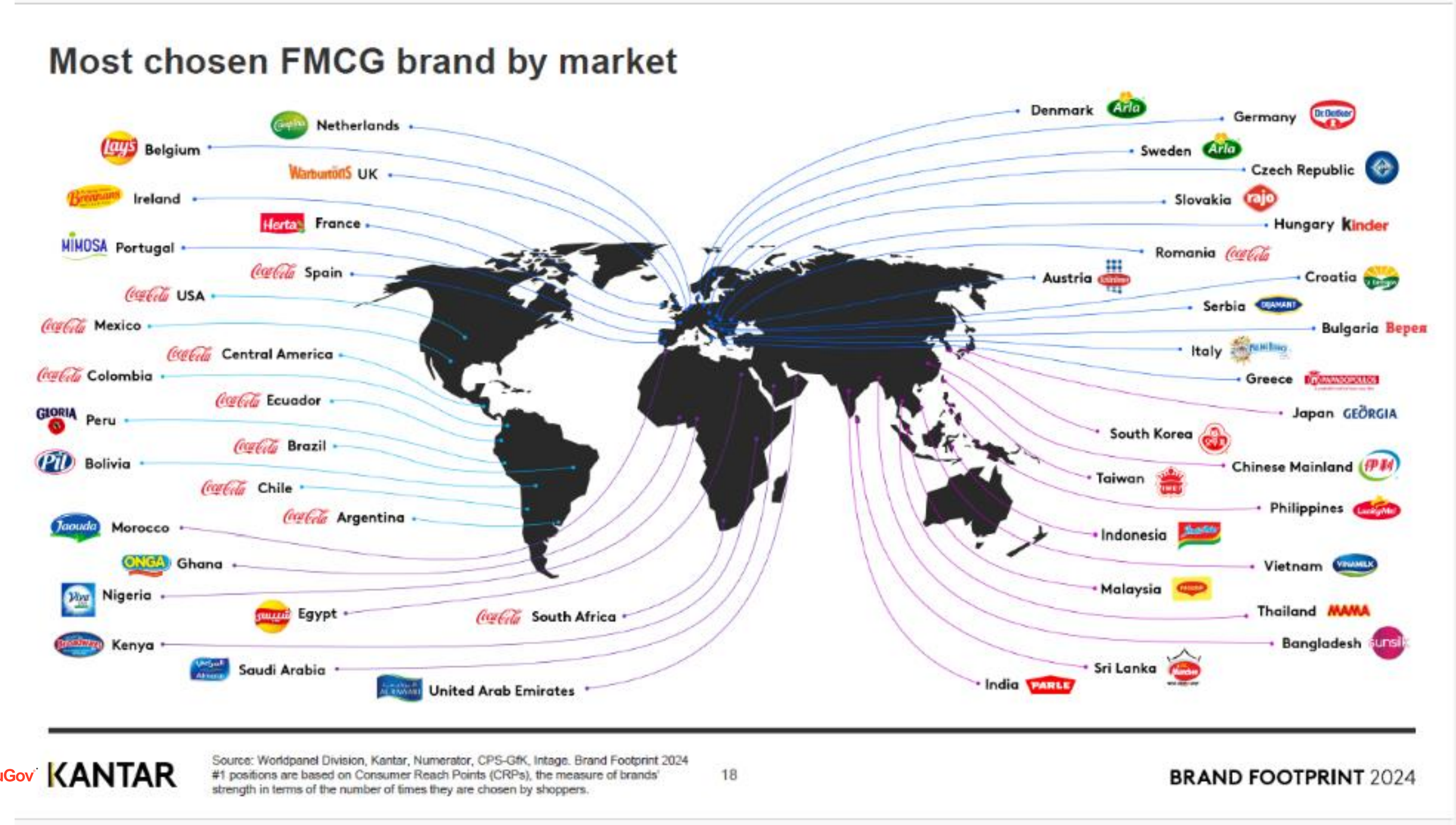
BRAND FOOTPRINT 202

Brand Footprint: I Top recruiter Brands al Mondo

Top 10 recruiters in the world



Brand Footprint: I Brand più scelti al Mondo per Paese



Tanta Italia tra i brand follower che crescono maggiormente in Europa...

Top Five European Small Brands Leading By CRP Growth

	1 Divella	2 Cristaline	3 San Benedetto	4 Aia	5 Flora
CRP (m)	108	217	162	115	110
Growth	+11%	+11%	+8%	+6%	+4%
Rank	#96 Rank (+28)	#42 Rank (+7)	#61 Rank (+6)	#89 Rank (+15)	#94 Rank (+12)

Source: CPS GfK, Kantar Worldpanel, Brand Footprint 2024 | Based on top 100

Top Five European Mid-Sized Brands Leading By CRP Growth

	1 Red Bull	2 Weihenstephan	3 Tuc	4 Mutti	5 Rexona
CRP (m)	217	151	125	113	131
Growth	+16%	+10%	+9%	+8%	+7%
Rank	#41 Rank (+13)	#65 Rank (+9)	#79 Rank (+17)	#92 Rank (+20)	#75 Rank (+9)

Source: CPS GfK, Kantar Worldpanel, Brand Footprint 2024 | Based on top 100

I Top 10 Brand in Italia per Consumer Reach Points

GfK CPS | YouGov

Top 10 Brands in Italia nel FMCG per Consumer Reach Points | FY 2023 (tra parentesi trend vs FY 2022)
Le frecce indicano la variazione nel ranking rispetto al 2022

#1 ?

#2 ?

#3 ?

#4 San Benedetto
CRP: 159.0M (+9.0%)
PEN: 66.2% (+0.8 pts)
FREQ: 8.9 (+0.7%)

#5 Barilla
CRP: 158.6M (-8.9%)
PEN: 75.5% (-2,3 pts)
FREQ: 7.9 (-0.5%)

#6 Granarolo
CRP: 142.4M (-1.2%)
PEN: 70.6% (+0.6 pts)
FREQ: 7.6 (-0.1%)

#7 Divella
CRP: 107.9M (+11.3%)
PEN: 46.9% (+3.8 pts)
FREQ: 8.5 (+0.3%)

#8 AIA
CRP: 107.5M (+6.8%)
PEN: 64.3% (+1,4 pts)
FREQ: 6.4 (+0.3%)

#9 Müller
CRP: 88.7M (+1.9%)
PEN: 51.0% (+0.4 pts)
FREQ: 6.7 (+0.1%)

#10 Findus
CRP: 87.3M (-12.6%)
PEN: 59.0% (-4.7 pts)
FREQ: 5.8 (-0.3%)

I Top 10 Brand in Italia per Consumer Reach Points
#3: Coca-Cola

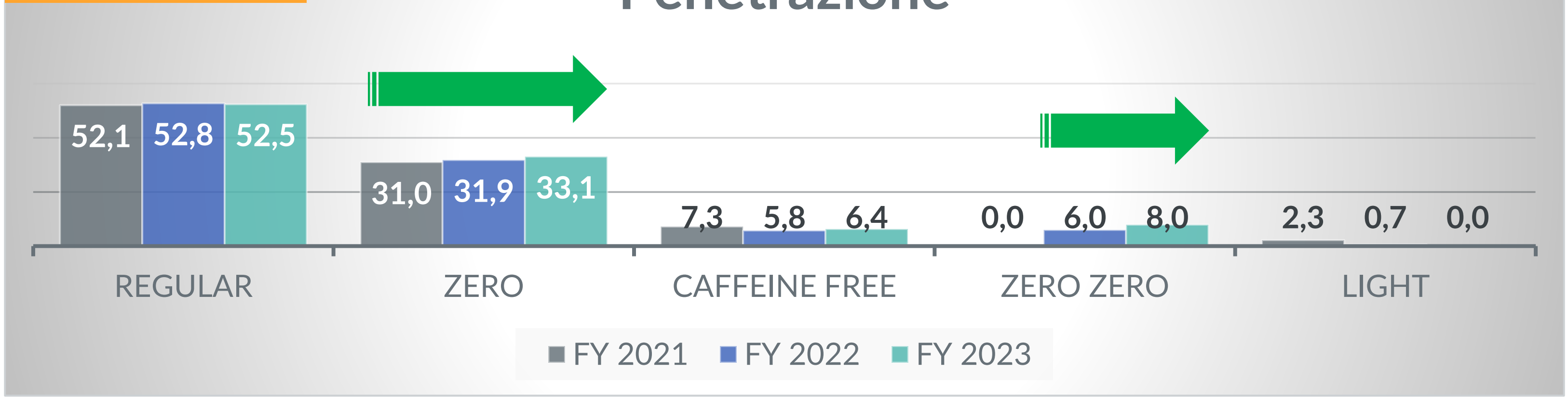
#3

CRP: 174.9M (-1.2%)
PEN: 66.7% (+0.9 pts)
FREQ: 10.3 (-0.2%)

- **150** EAN con acquirenti nel 2023
- Famiglie acquirenti medie per EAN = **114.000**
- **+6%** famiglie acquirenti nel Nord-Est: **+8%** nelle famiglie di alta condizione

CANALI

VARIANTI

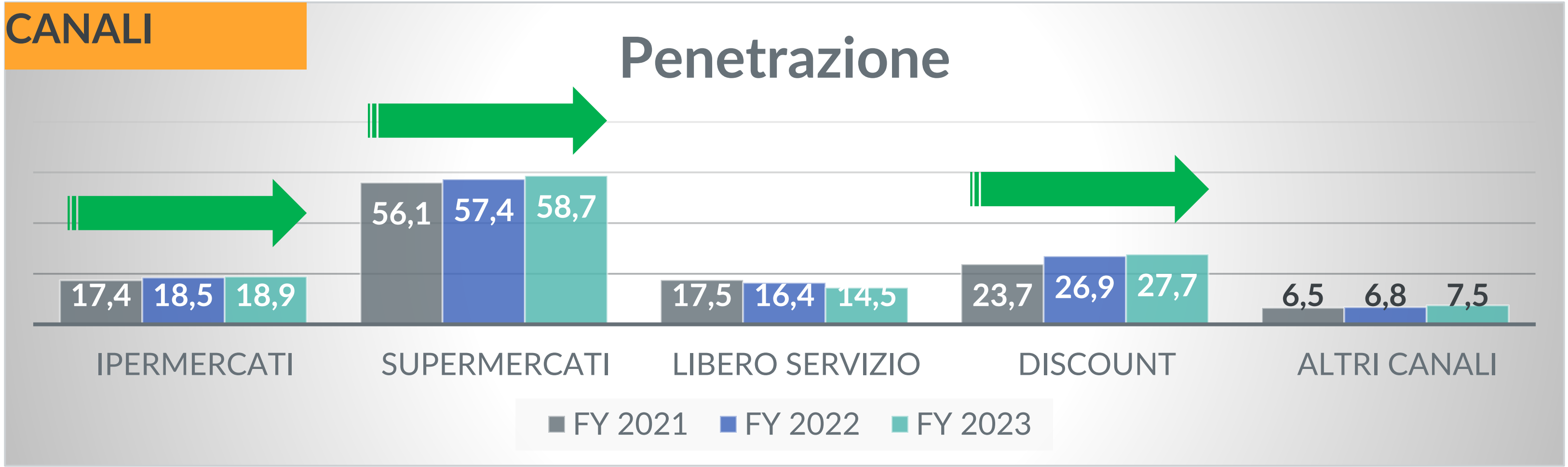


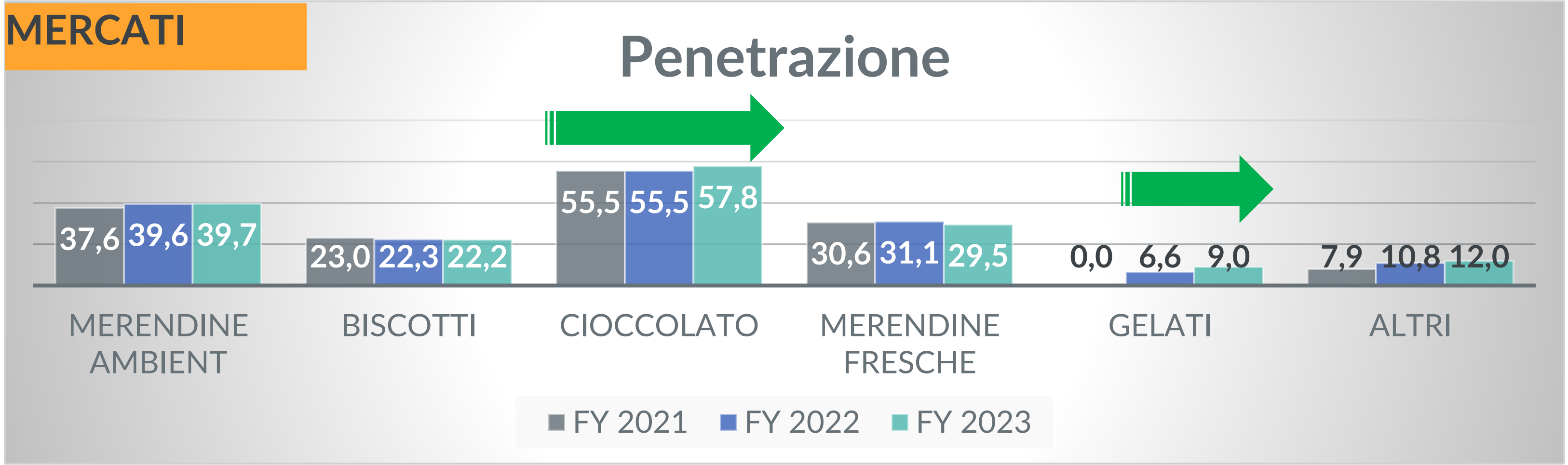
I Top 10 Brand in Italia per Consumer Reach Points
#2: Kinder

#2

CRP: 222.6M (+6.7%)
PEN: 72.1% (+1.0 pts)
FREQ: 11,0 (+0.6%)

- **160** EAN con acquirenti nel 2023
- Famiglie acquirenti medie per EAN = **115.000**
- **+12%** famiglie acquirenti nei Singles



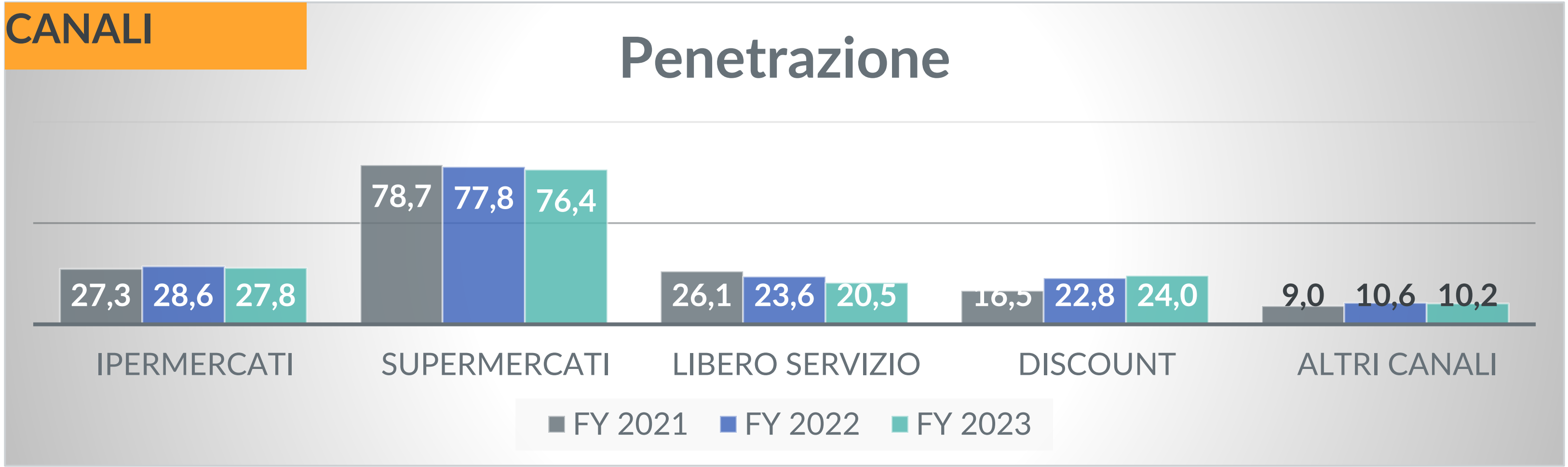


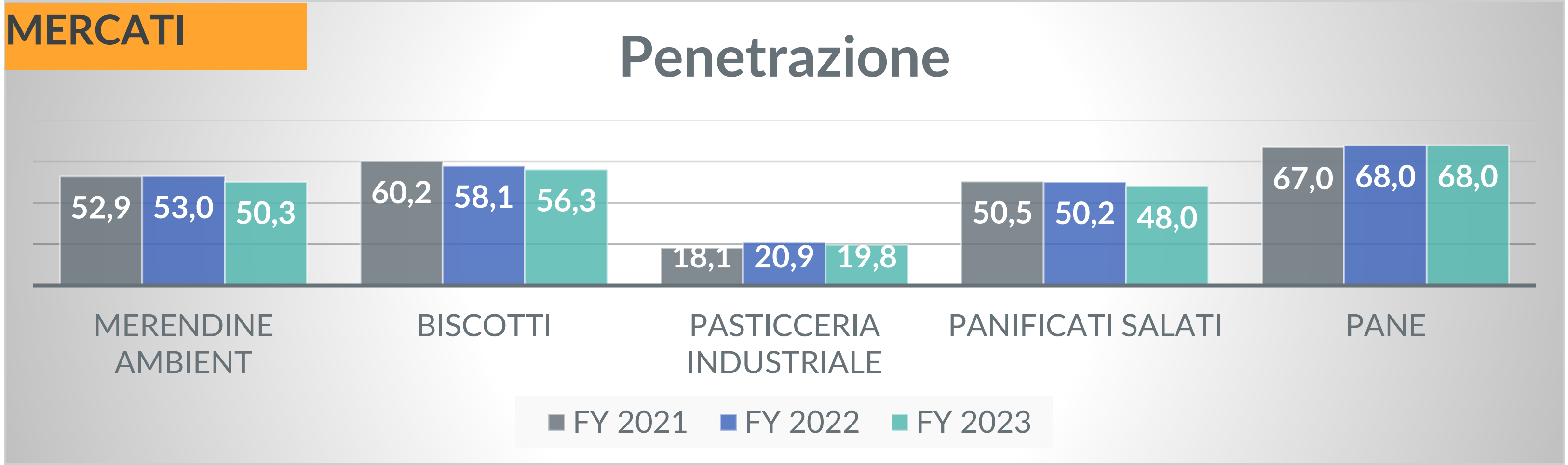
I Top 10 Brand in Italia per Consumer Reach Points
#1: Mulino Bianco

#1

CRP: 381.9M (-1.7%)
PEN: 87.4% (-0.7 pts)
FREQ: 15.2 (+0.0%)

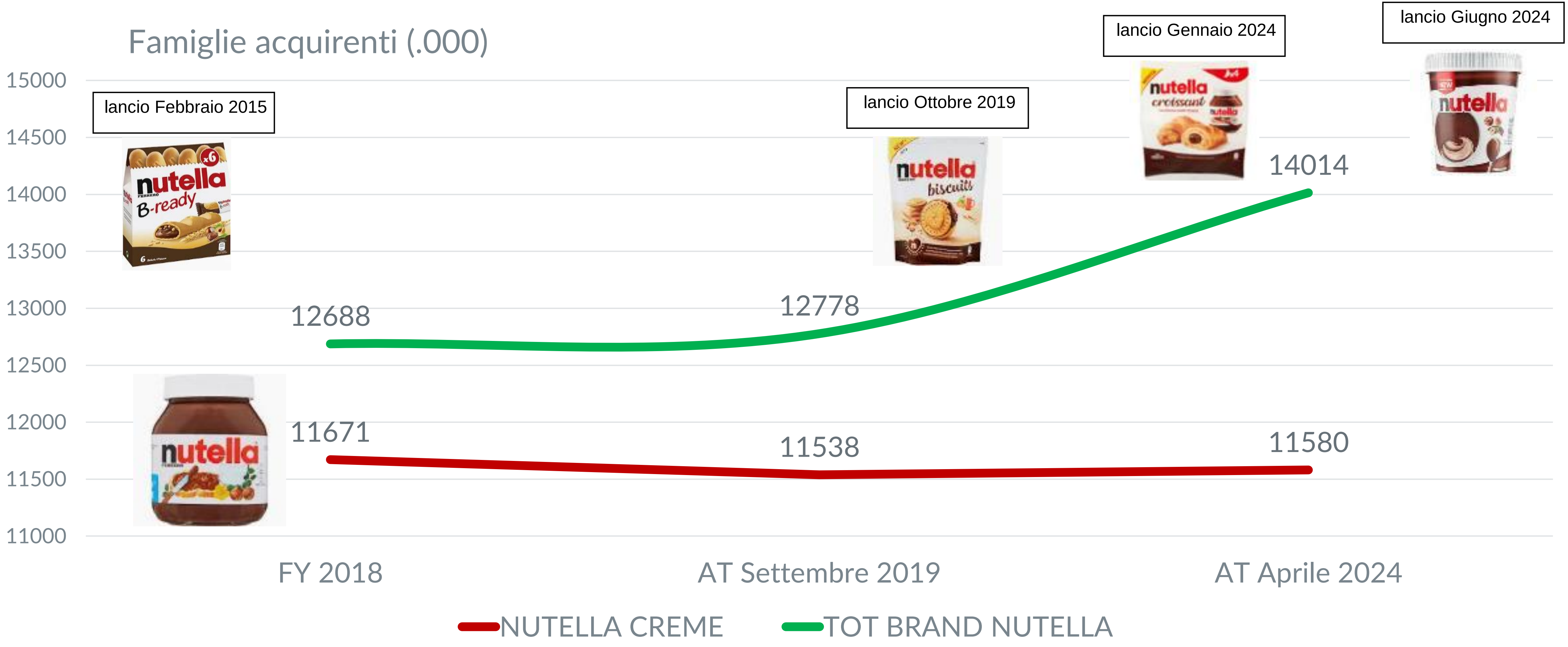
- **251** EAN con acquirenti nel 2023
- Famiglie acquirenti medie per EAN = **90.000**
- **+4%** famiglie acquirenti nei Singles





Indicati solo i mercati principali

Il caso Nutella

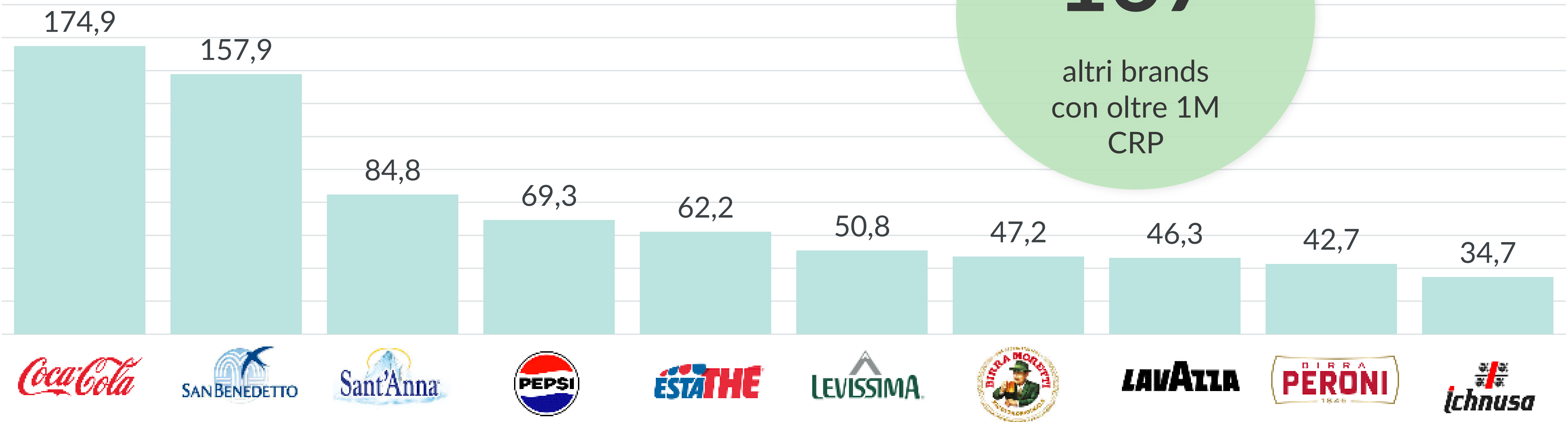


Esclusi Muffin Nutella (Peso Variabile) = 1.2 milioni di famiglie acquirenti – AT Aprile 2024

I Top 10 Brand in Italia per Consumer Reach Points

Beverages

Consumer Reach Points (M)



167

altri brands con oltre 1M CRP

Penetration %

66,7	66,1	42,7	30,2	30,1	31,5	34,8	40,9	34,5	29,9

Frequency

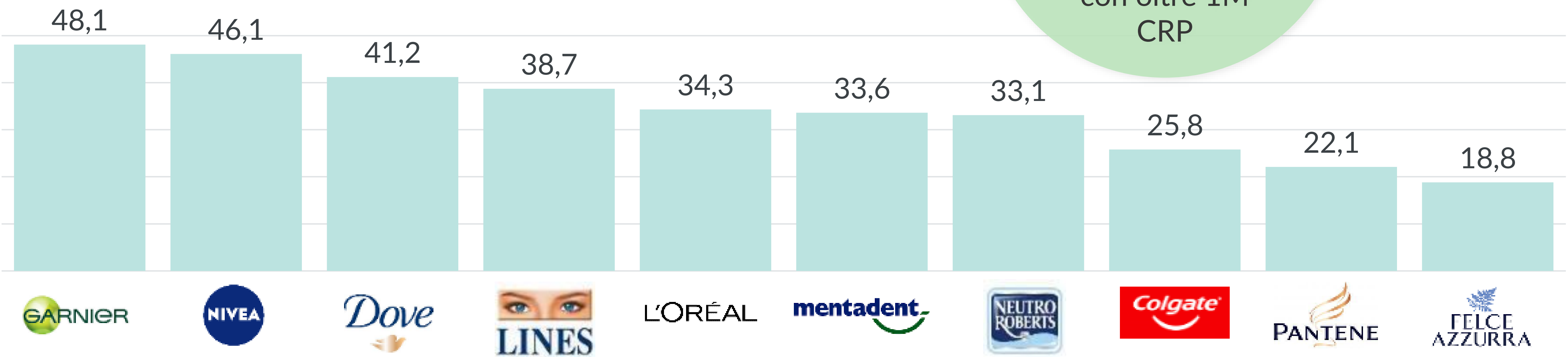
10,3	8,9	7,6	9,0	8,1	6,2	5,3	4,4	4,8	4,5

I Top 10 Brand in Italia per Consumer Reach Points
Personal Care

107

altri brands con oltre 1M CRP

Consumer Reach Points (M)



Penetration %

46,6	48,2	42,1	36,0	36,3	43,1	40,8	35,5	26,5	26,5

Frequency

3,7	3,4	3,7	4,2	3,3	3,0	3,1	2,8	2,9	2,7

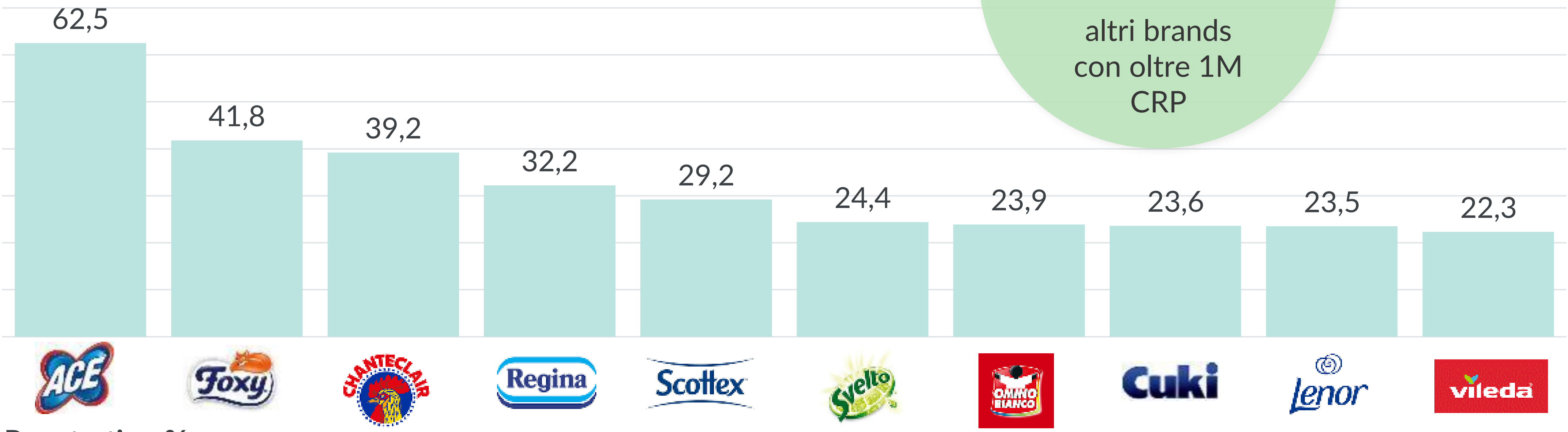
Paper excluded

I Top 10 Brand in Italia per Consumer Reach Points
Home Care

98

altri brands
con oltre 1M
CRP

Consumer Reach Points (M)



Penetration %

57,9	41,5	46,0	36,2	38,6	34,2	34,6	34,4	27,0	37,3

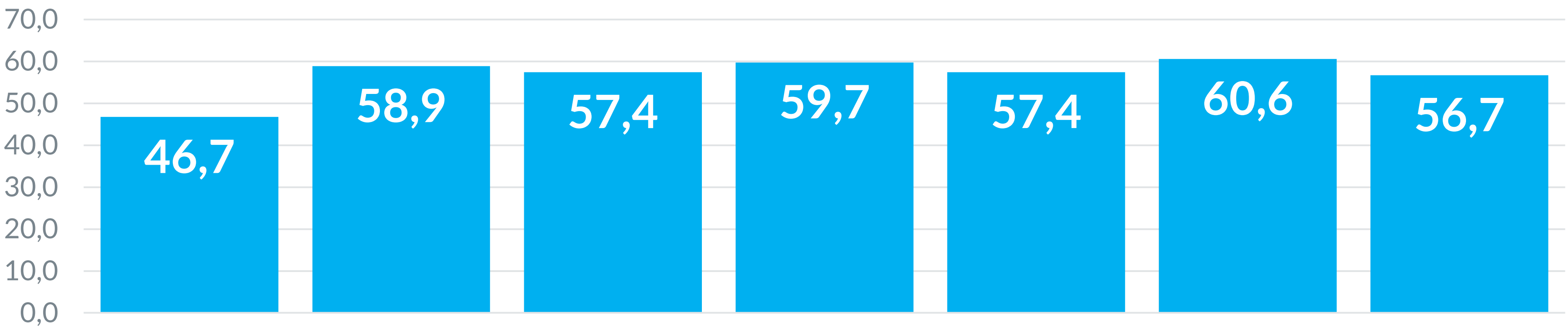
Frequency

4,0	3,9	3,1	3,5	3,0	2,8	2,6	2,7	3,3	2,3

Paper included

Il caso ACE

Penetrazione ACE

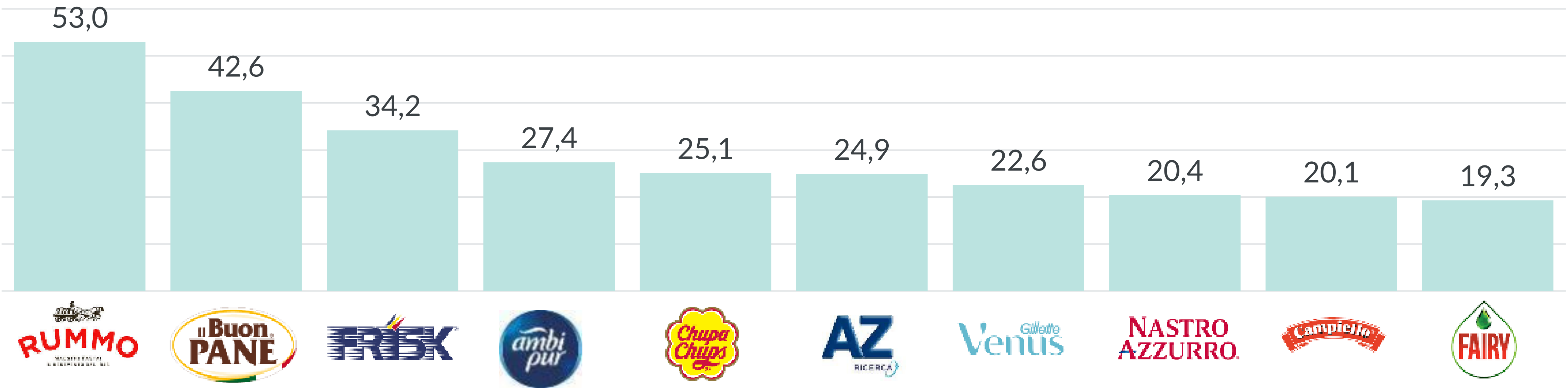


	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	AT Aprile 2023	AT Aprile 2024
CANDEGGINA CLASSICA	36,7	45,0	41,8	40,0	36,3	39,5	35,8
CANDEGGINA DELICATA	10,7	13,6	15,5	18,8	19,4	19,4	19,0
CANDEGGINA TABS	0,0	0,1	0,2	2,2	2,1	2,7	2,0
DETERGENTI WC LIQUIDI	8,1	10,7	11,5	12,5	13,3	13,0	13,6
DETERGENTI WC TAVOLETTE	0,0	1,7	2,4	2,4	2,0	2,3	2,0
DETERGENTI PAVIMENTI	1,4	7,7	7,7	9,1	11,2	9,8	11,3
DETERGENTI PICCOLE SUPERFICI	0,5	9,1	10,6	12,7	12,7	12,5	12,9
WIPES DETERGENTI	0,0	0,9	1,3	0,7	0,4	0,6	0,4

I Top Brand in Italia per Consumer Reach Points

Alcuni tra i Brand in Maggiore crescita nell'ultimo anno

Consumer Reach Points – Trend % vs YA



CRP (M)

29,5	11,4	8,0	5,7	5,1	18,7	12,3	8,9	9,7	9,1

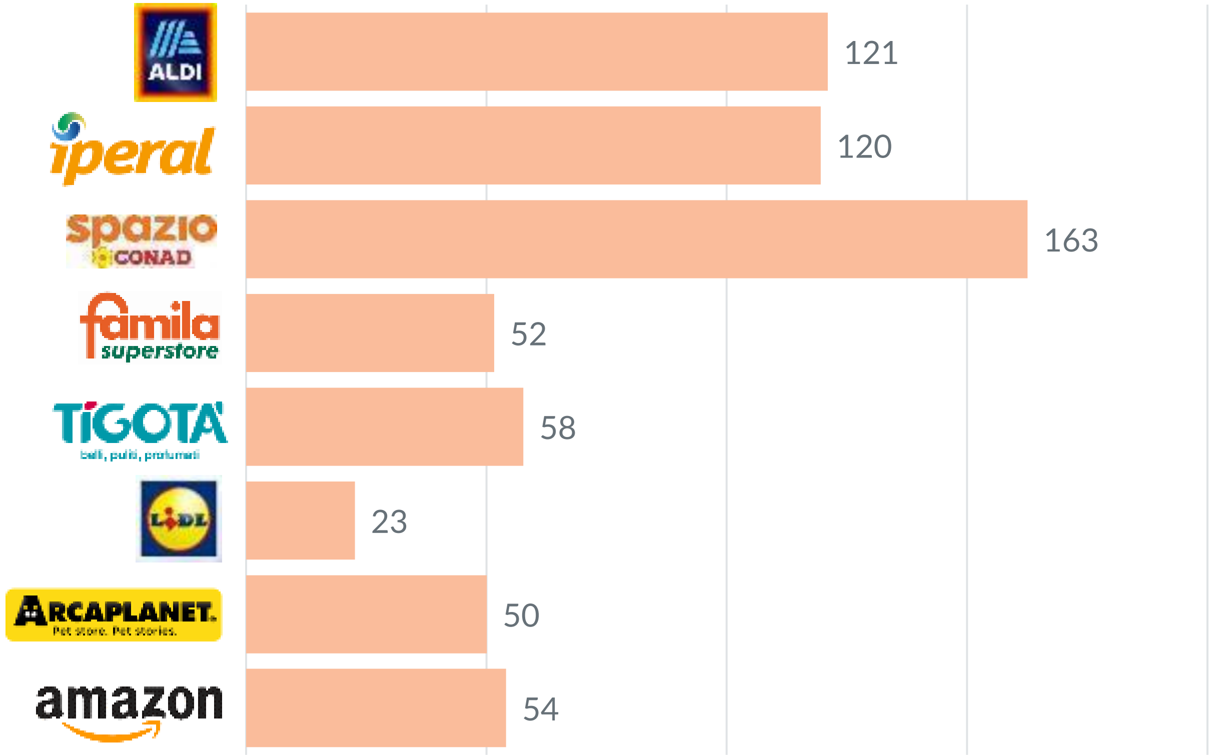
Penetration %

36,4	15,0	10,2	10,2	10,3	27,4	18,0	13,7	13,2	15,1

Anche per i Retailers “Penetration is King”!

Tutti i Retailers più in crescita nel periodo 2019-2023 hanno aumentato in modo rilevante la Penetrazione

Trend di parco clienti dei Retailers più in crescita nel periodo 2019-2023



How Retailers Grow?

±100%

dei Retailers con crescita a volume > 10% (2019-2023) sono cresciuti in Penetrazione

±83%

di questi Retailers ha mostrato una crescita di parco clienti più che proporzionale alla crescita a volume

Penetration is King! … Ma come guadagnarla?

- Byron Sharp: How Brands Grow

9/10

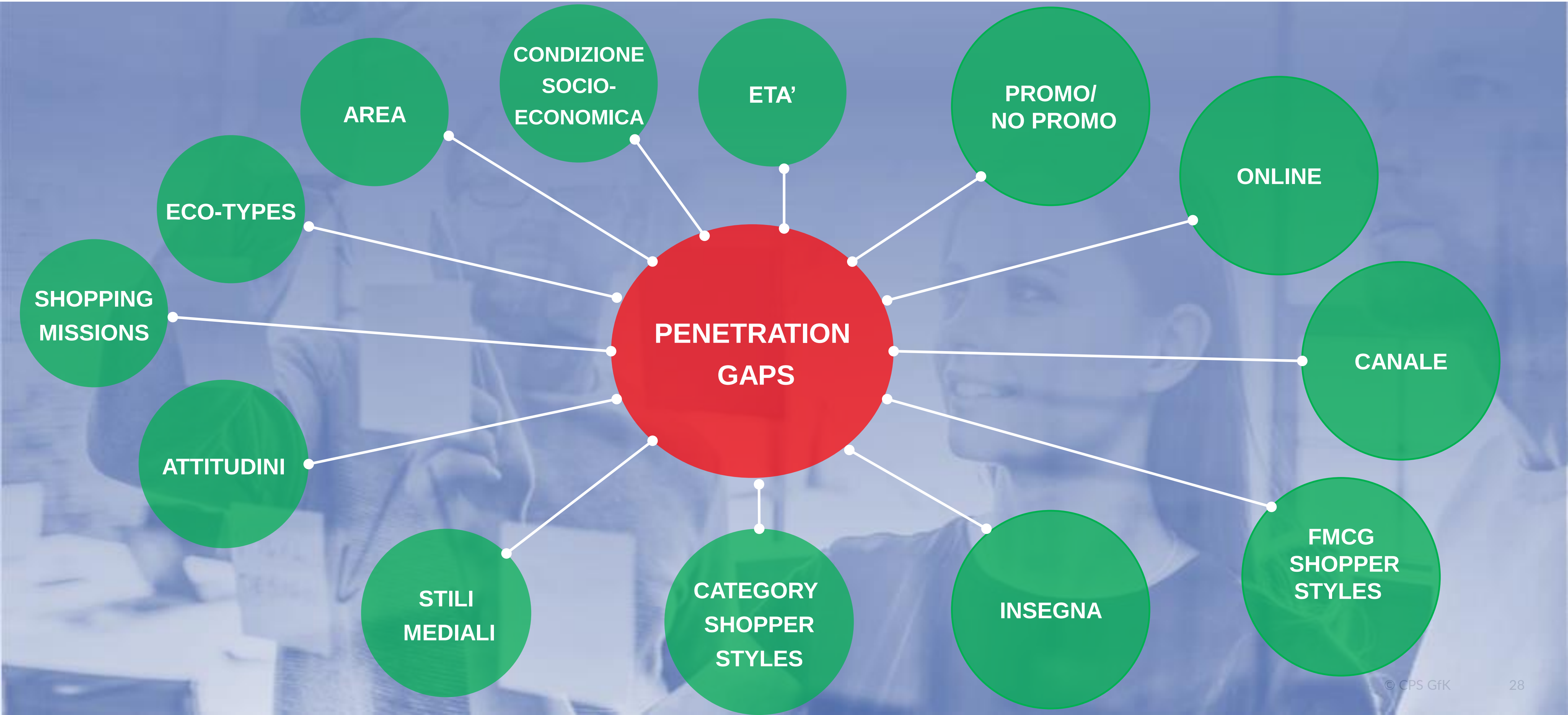
of growing brands* have increased **penetration**

4/10

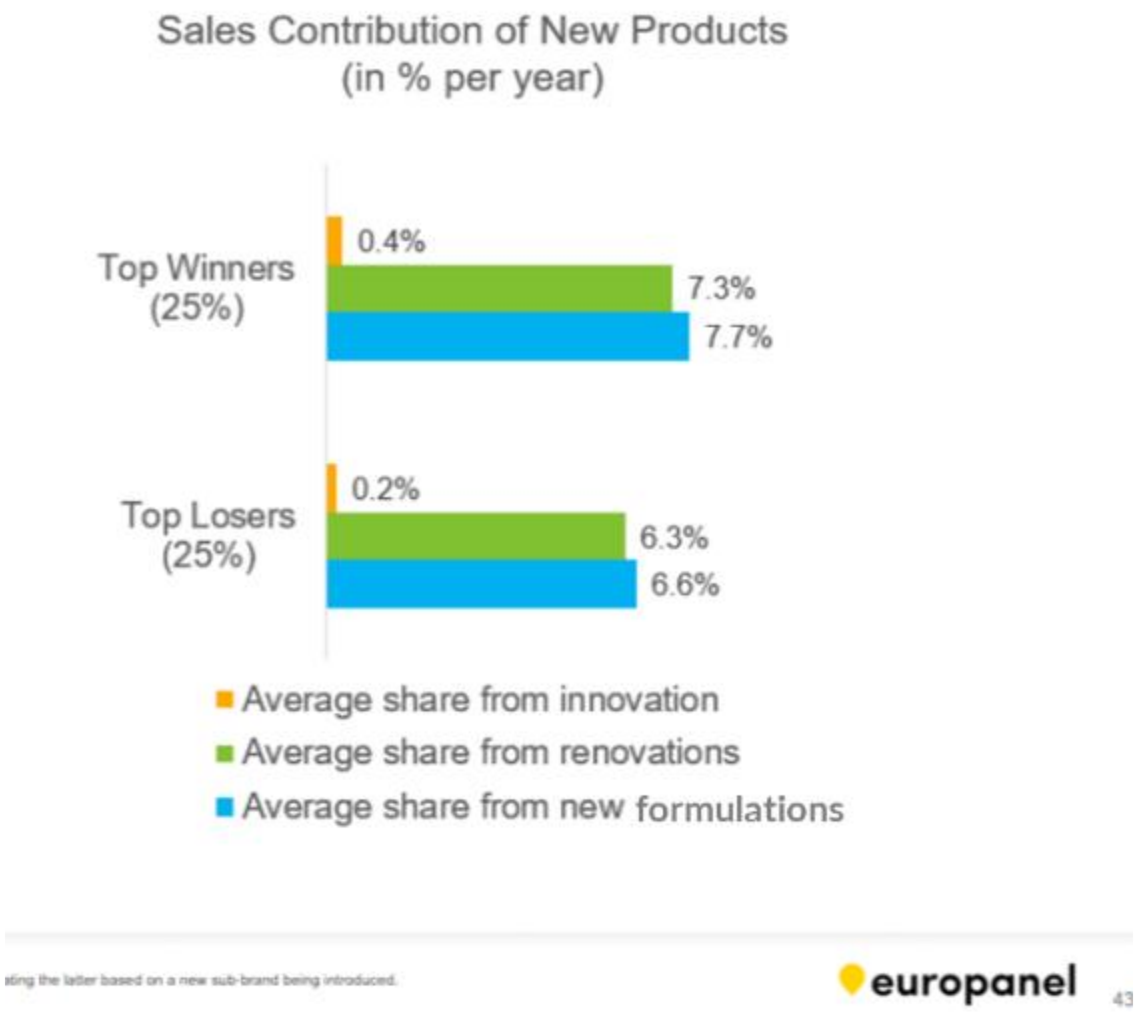
of growing brands* have increased **frequency**

*source: BG20 based on absolute change per year for 8.081 top 10 category brands in 79 categories in 16 countries.

Identificare i gap di Penetrazione del Brand a 360° e mettere in campo azioni per colmarli



L’Innovazione resta la via principe per aggiungere Penetrazione, ma deve essere messa sul mercato con questo obiettivo



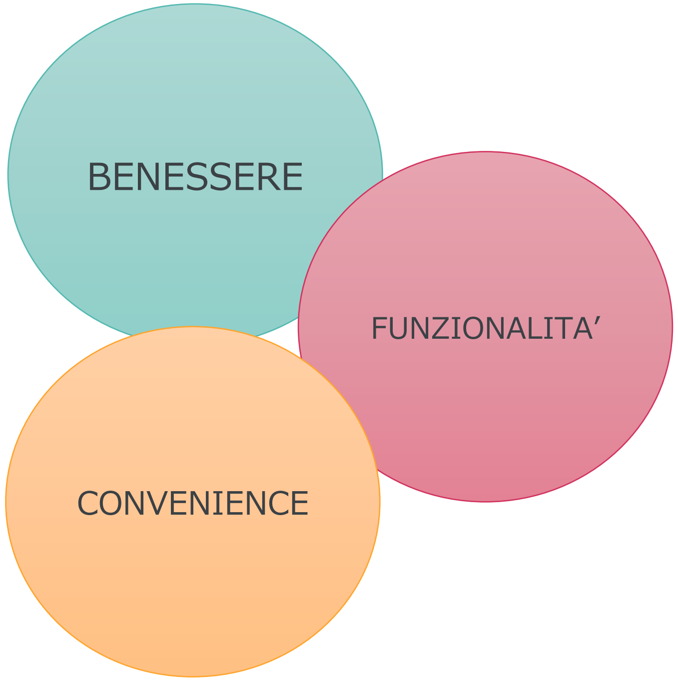
How Brands Grow?

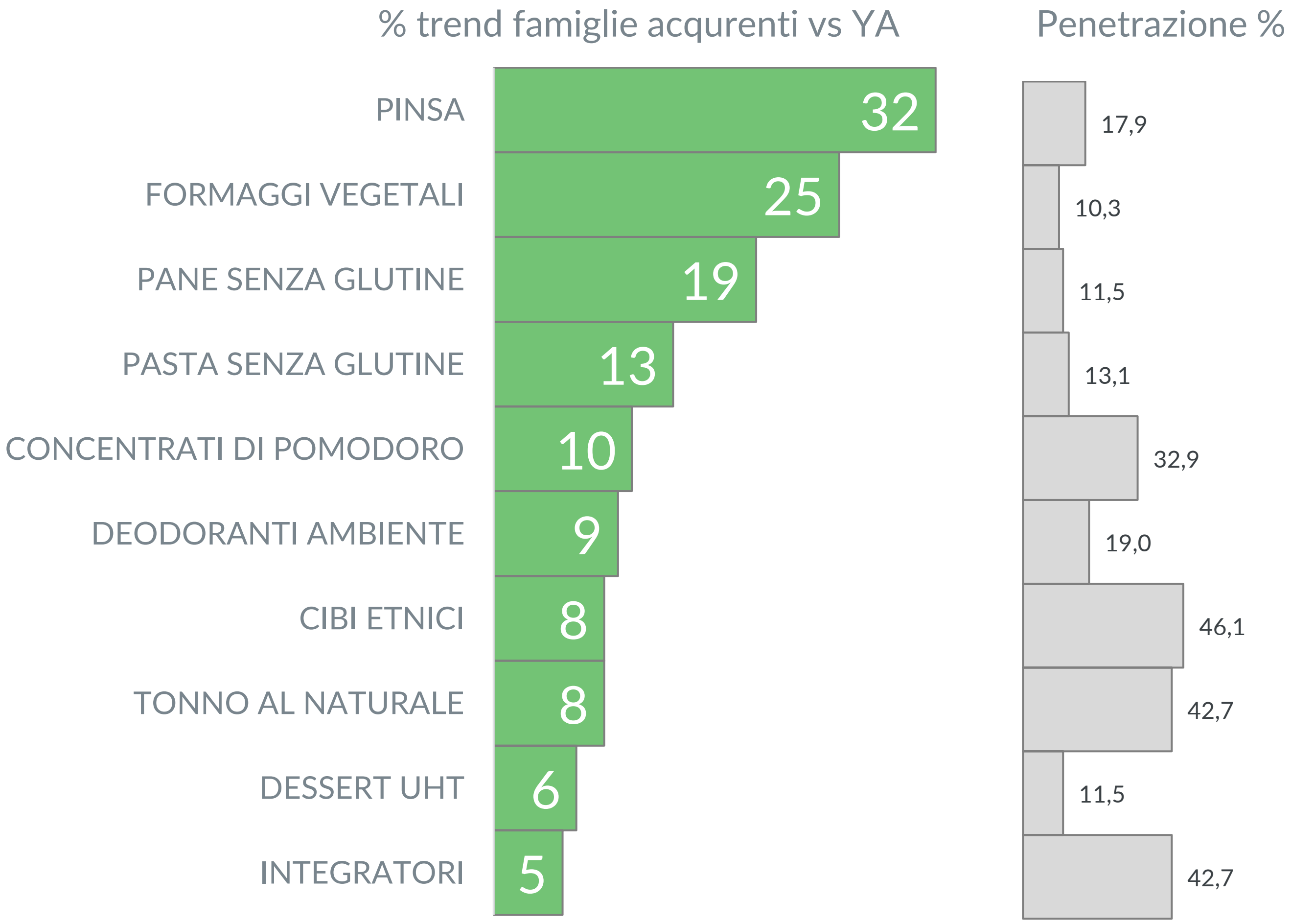
- I Brand che vincono sul mercato in tutto il Mondo hanno tassi doppi di quota derivante dalle Innovazioni di prodotto
- Gli Winner Brands sono superiori ai Brand che perdono quota anche in termini di rilanci e rinnovamenti
- L’evidenza è valida in tutti i principali comparti: Food, Beverages, Home Care, Personal Care

Le Categorie che crescono maggiormente in Penetrazione denotano posizionamenti specifici

% Categorie FMCG (Total = 348)

47% **Penetrazione**





Innovation Food & Beverage 2019-2023
Top 71 launches per valore/ % numerica

10%

PROTEICO

SERVIZIO 13%

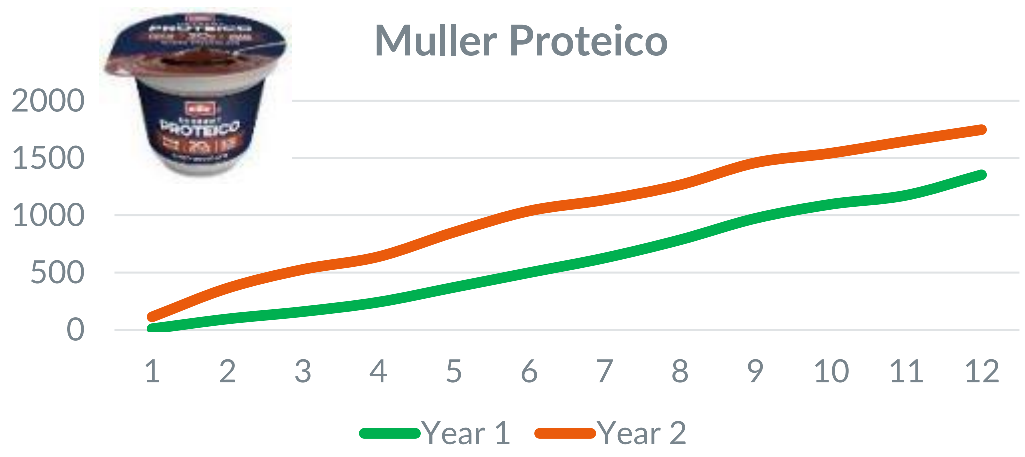
INDULGENCE/ GUSTO 50%

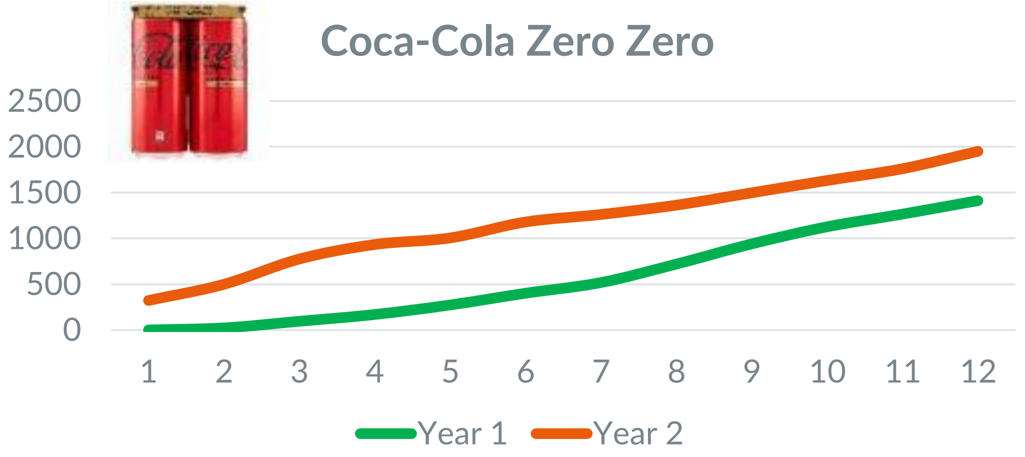
SALUTISTICO 17%

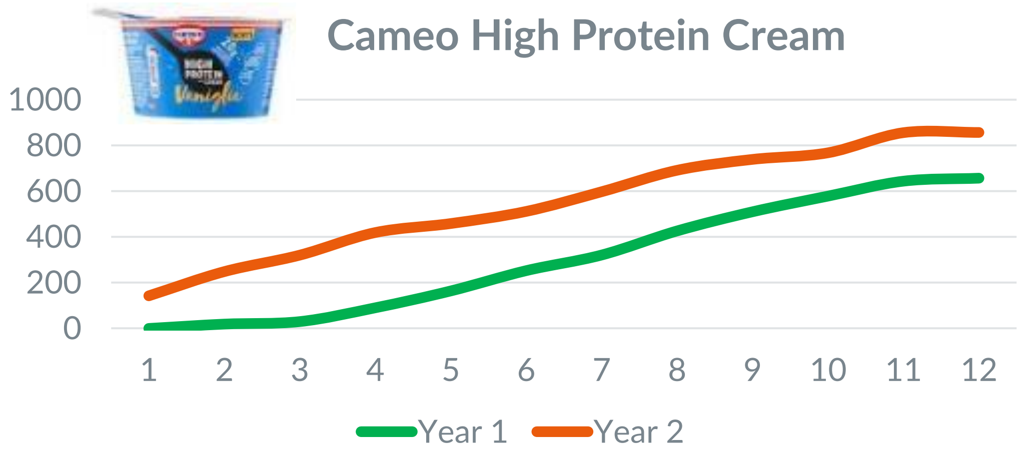
ALTRO 10%

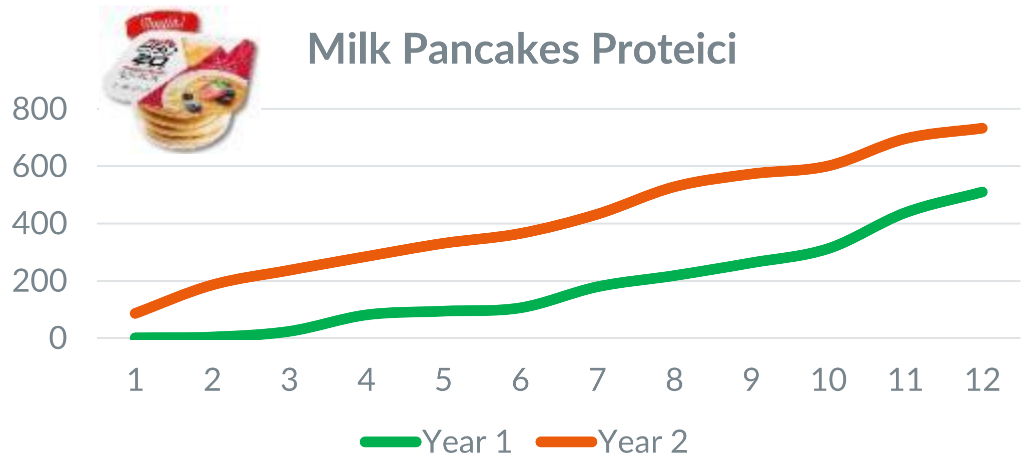
Innovazione: le Innovazioni che hanno lavorato sui trend più significativi per I Consumatori, hanno aumentato la Penetrazione anche nell'anno 2

Cumulative Penetration

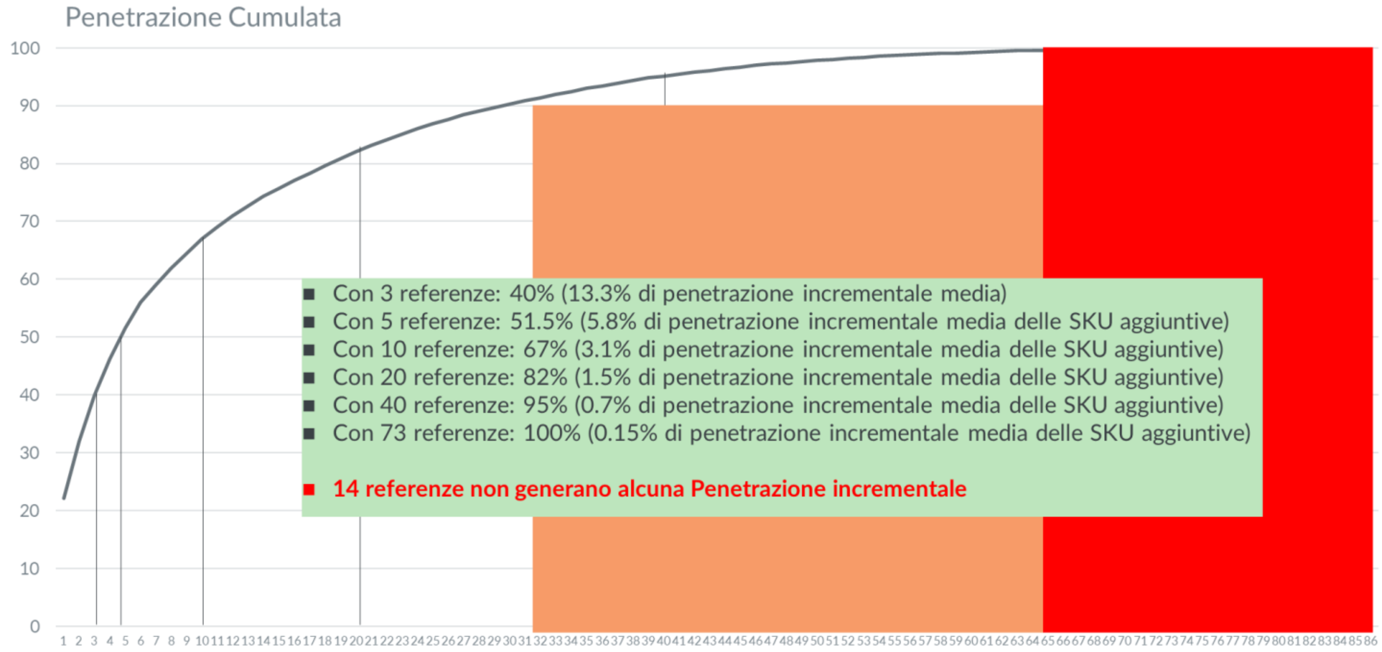








Ampliare gli assortimenti secondo la logica della Penetrazione Incrementale



How Brands Grow?

- Ampliando l'assortimento per **guadagnare visibilità**
- Far guidare l'ampliamento dell'assortimento dall'obiettivo di **generare Penetrazione Incrementale**
- **Assortment Optimizer**: molti brand hanno tante SKU che non sviluppano alcuna Penetrazione Incrementale e mancano di varianti che la potrebbero invece genererare

Penetration Growth Drivers

How to recruit new buyers?

Attitude, Purchase & Profile comparison of:

New Buyers vs. Non-Buyers

Recruitment Power	Which drivers were most characteristic for recruitment of shoppers in the past?
Recruitment Pool	How many non-buyers can be recruited by these drivers at best?
BOOSTERS	Which drivers to focus on in the future in order to maximize recruitment?

Possible drivers based on:

Attitudes
Purchase Preferences
Demographics
Segments

How to keep current buyers?

Attitude, Purchase & Profile comparison of:

Retained Buyers vs. Lost Buyers

Retention Power	Which drivers were most characteristic for retention of shoppers in the past?
Retention Pool	How many lost buyers can be retained by these drivers at best?
KEEPERS	Which drivers to focus on in the future in order to maximize retention?

The 15 Core Penetration Drivers

derived from an extensive set of individual attitudinal and purchase drivers

QUALITY

INNOVATION

ECOLOGY

ADVERTISMENT

MEAT REDUCTION

CONVENIENCE

HEALTH/ SELF CARE

PROMO

OUT OF HOME

CHOICE

PRICE

ONLINE

ORGANIC

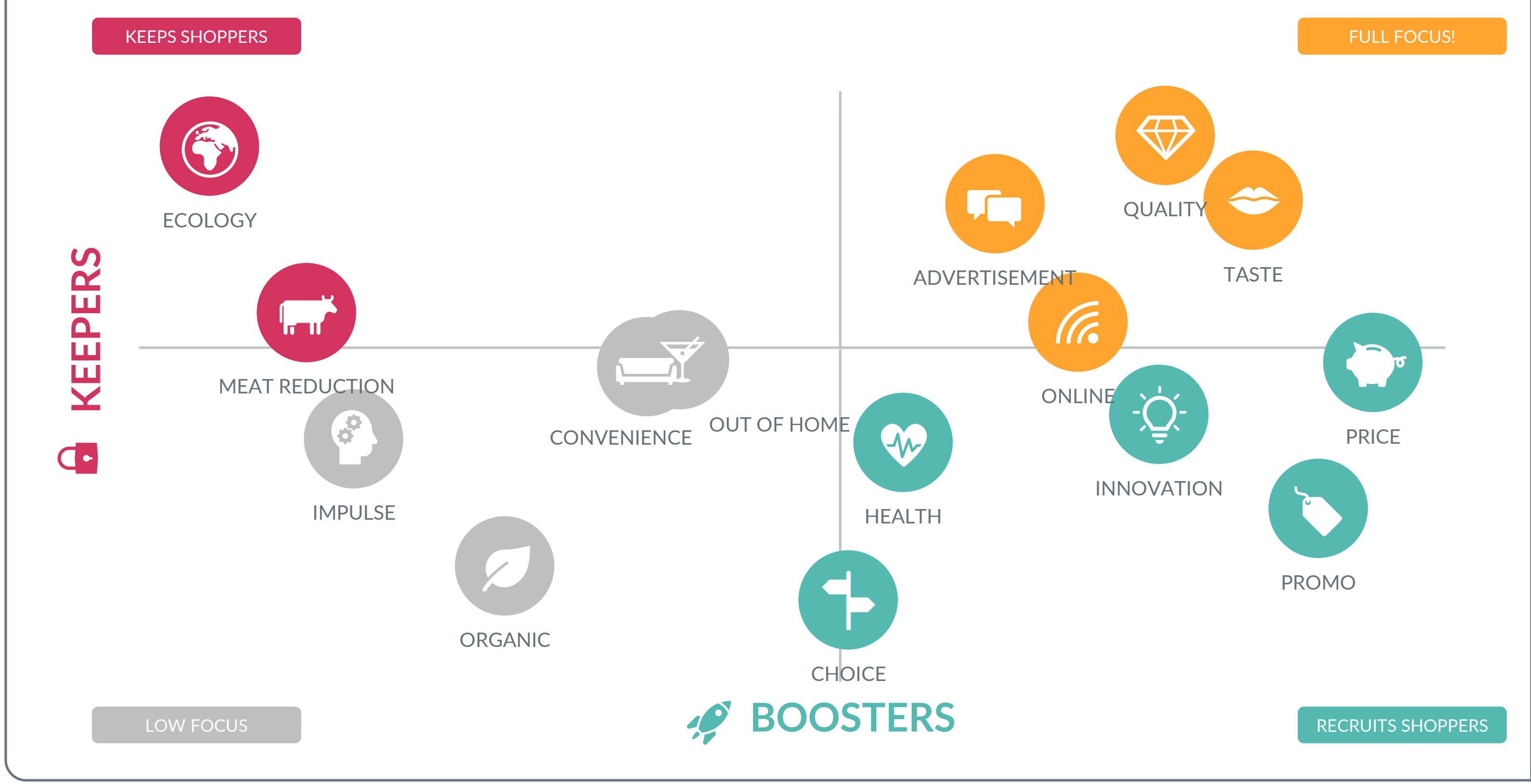
TASTE

IMPULSE

Output Example

Set the focus right using penetration Boosters & Keepers

Penetration Boosters & Keepers



Combining recruitment power and pool leads to the driver BOOSTER. Combining retention power and pool leads to the driver KEEPER. Analyzing our previous examples, we can conclude:

- PROMO is a strong booster for recruiting new shoppers but does not help in keeping current ones.
- ECOLOGY is very important for your current buyers, and therefore a vital keeper. Ecologic claims are however not recruiting new shoppers.
- TASTE is both a booster and keeper. Current shoppers stay because of this driver, new shoppers join.

Grazie