

The Netherlands

# The secrets of brand growth

Danny Thijssen

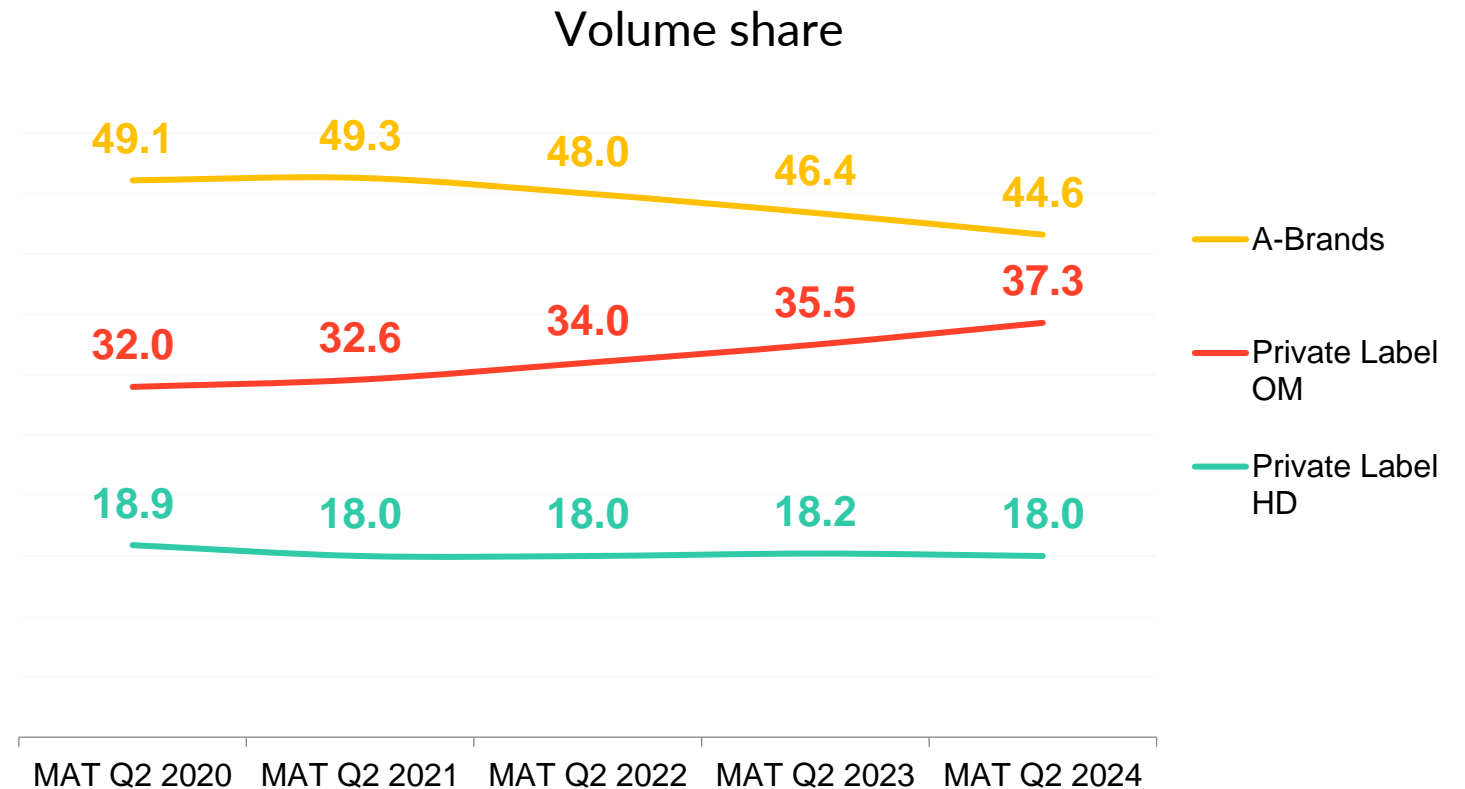
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YouGov Insights Forum Netherlands 2024

# A-brands still feel the pressure from Private Label

Pressure is mainly coming from Private Label outside of Hard Discount

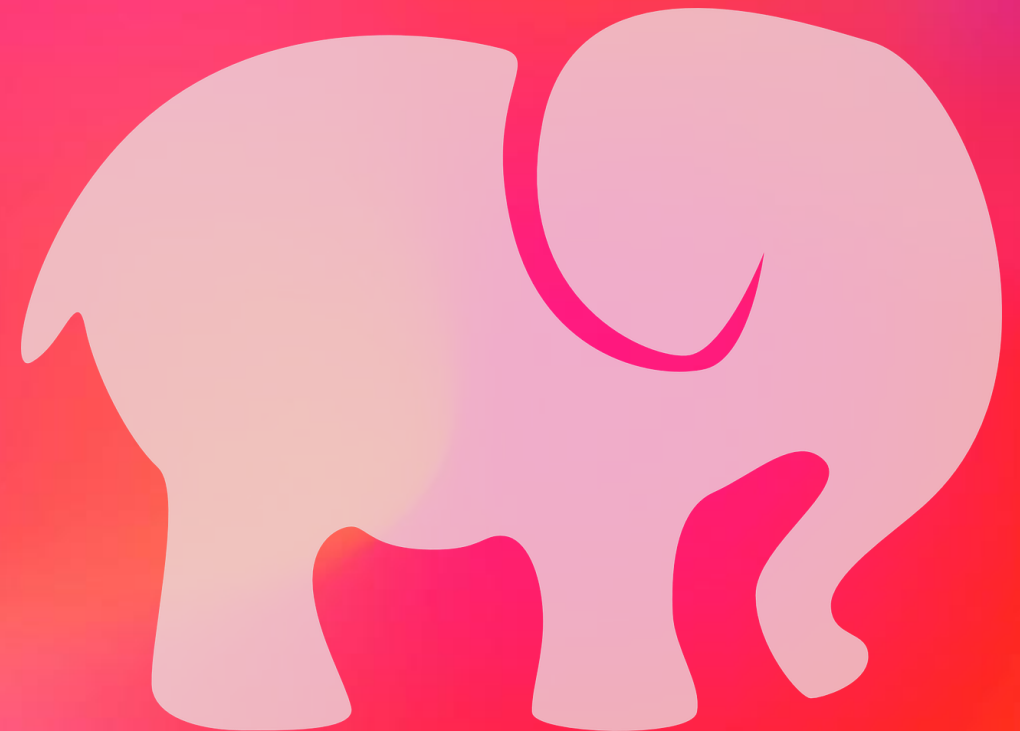
## Volume share development of A-brands and private label in The Netherlands



**Big, well-established  
FMCG brands, can still  
realize strong growth.**

**And as for any other  
brand, the same laws of  
growth apply**

Based on Top 100 largest FMCG brands in turnover on  
the 12 months ending Q2 2024.



# Top 100 FMCG Brands volume development

Strong Growing Brands



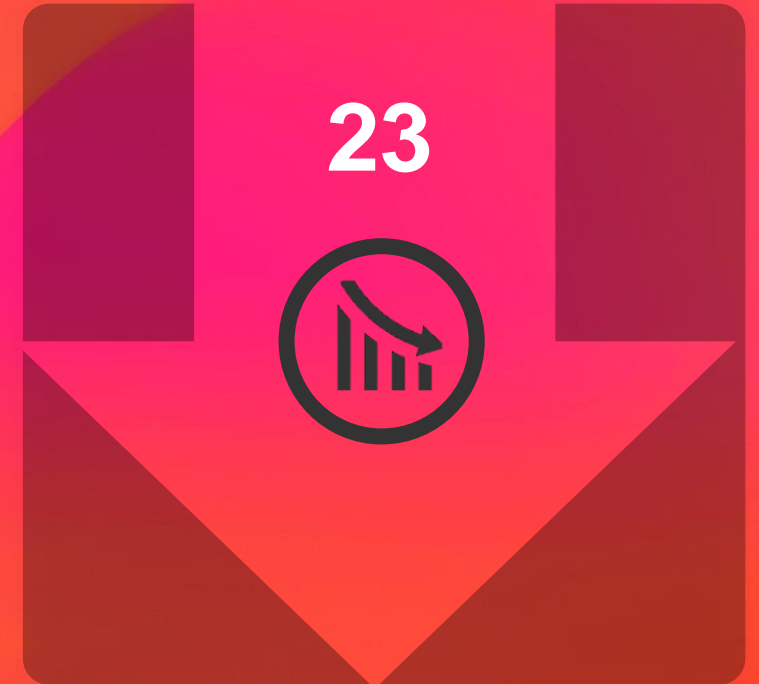
At least 10%  
volume growth

Stable Brands



Volume % Chg  
between -10% and +10%

Strong Declining Brands



10% or more  
volume decrease

**Growth  
is still  
possible**

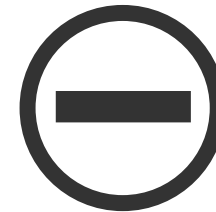
**Top 100 Brands | Volume % Chg vs MAT Q2 2023**

#10



**+18,8%**

#67



**-1,1%**

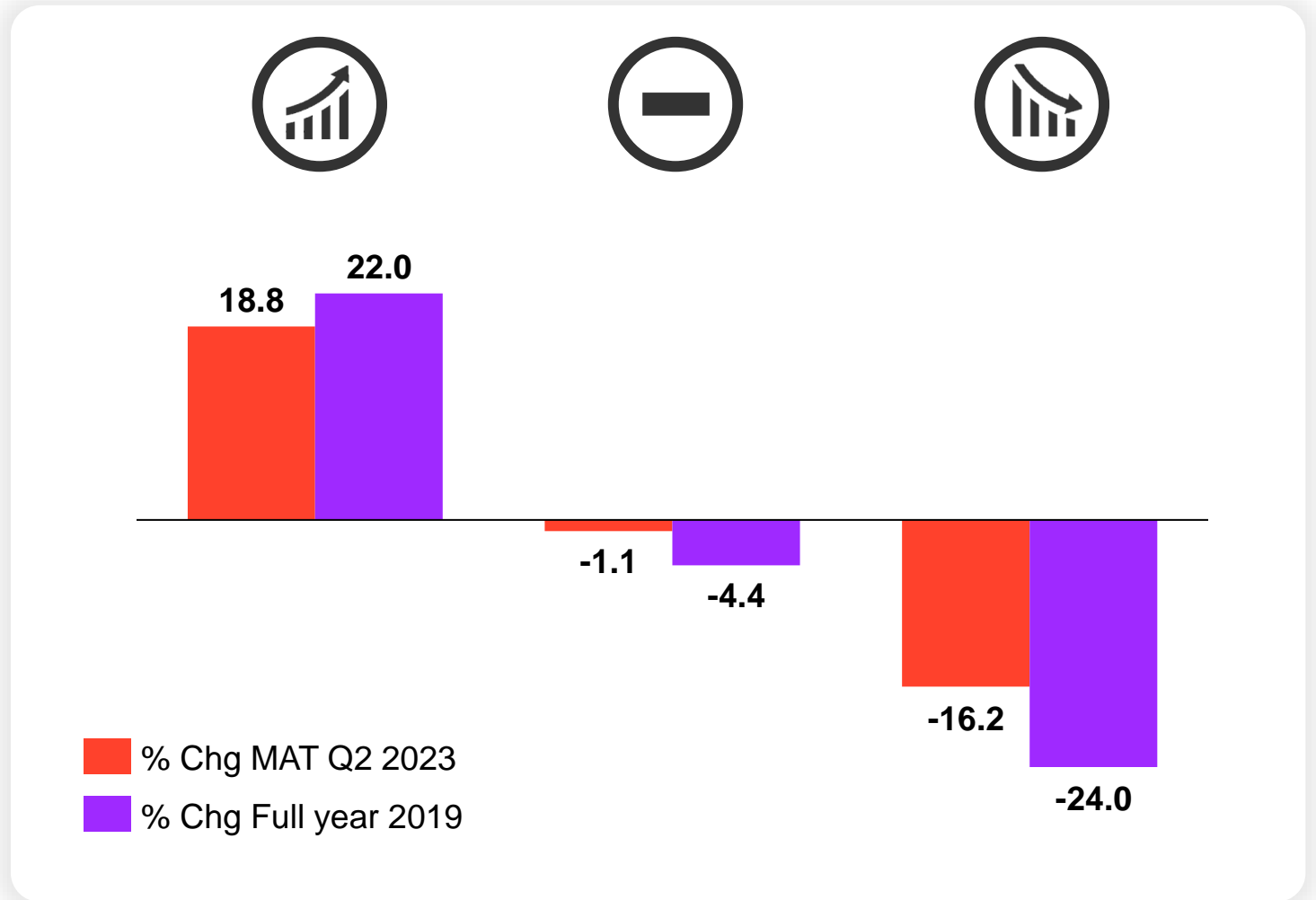
#23



**-16,2%**

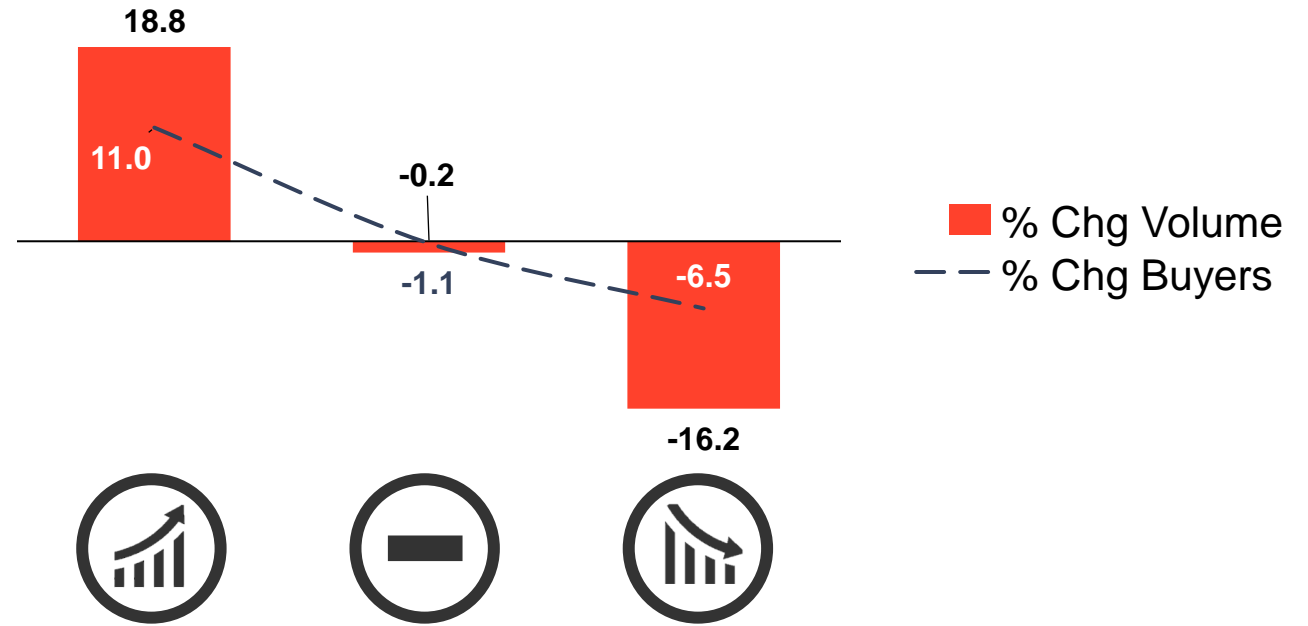
# Growth is a continuous journey

Top 100 Brands | Volume % Chg vs MAT Q2 2023 and Full year 2019

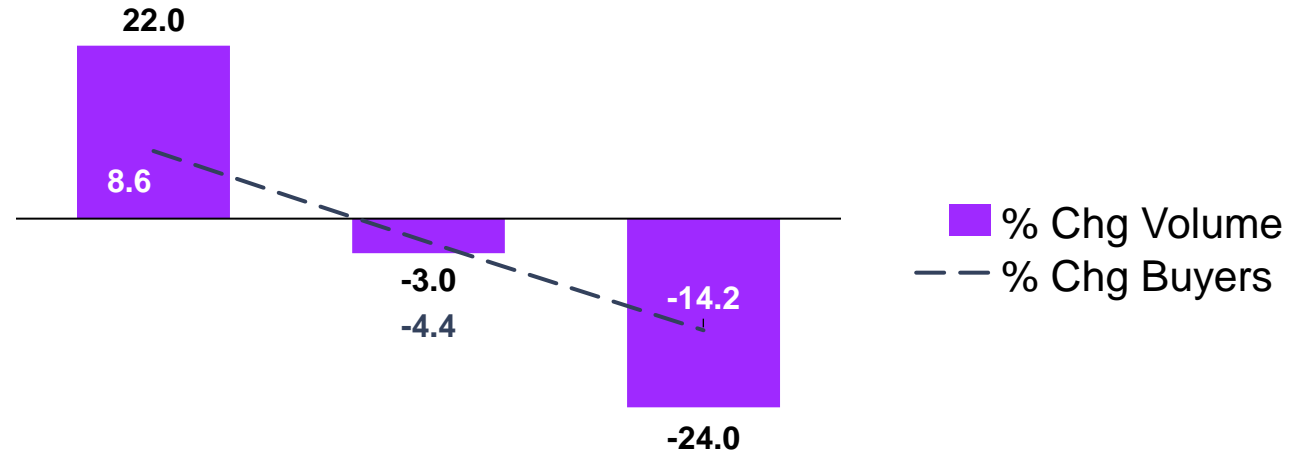


# Penetration is king

Top 100 Brands | Short Term

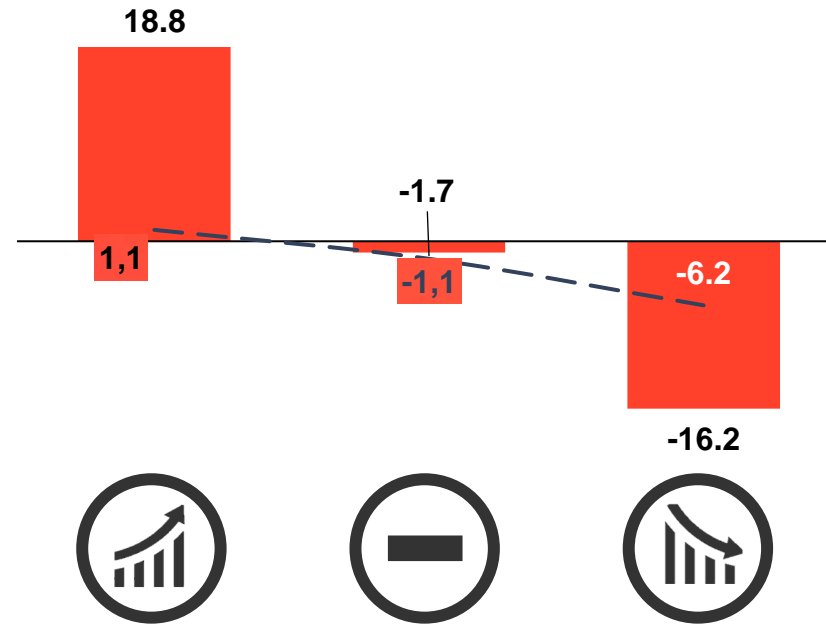


Top 100 Brands | Long Term



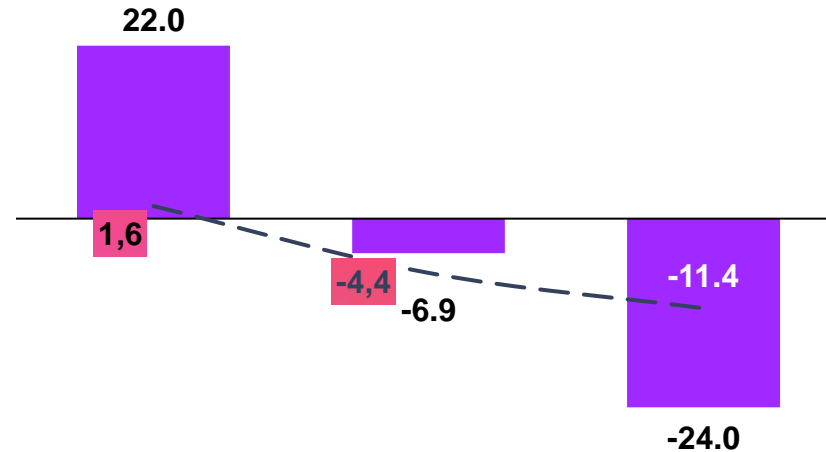
# Buying Frequency is less relevant

Top 100 Brands | Short Term



■ % Chg Volume  
- - % Chg Buying Frequency

Top 100 Brands | Long Term

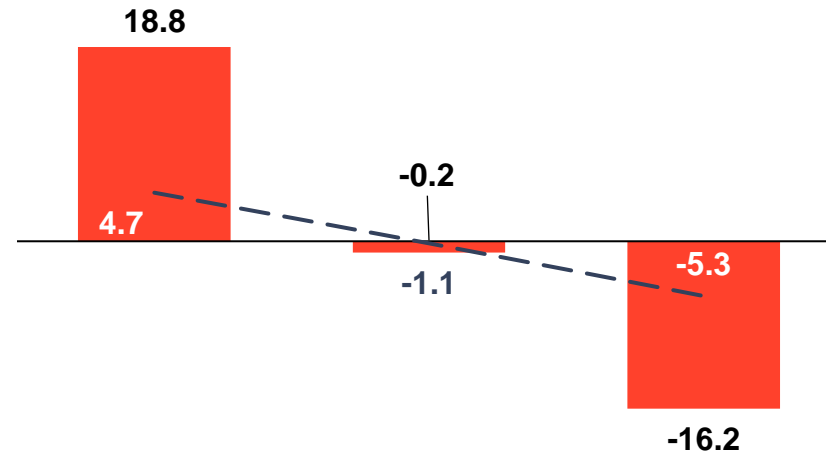


■ % Chg Volume  
- - % Chg Buying Frequency

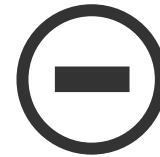


# Increasing the basket size can help

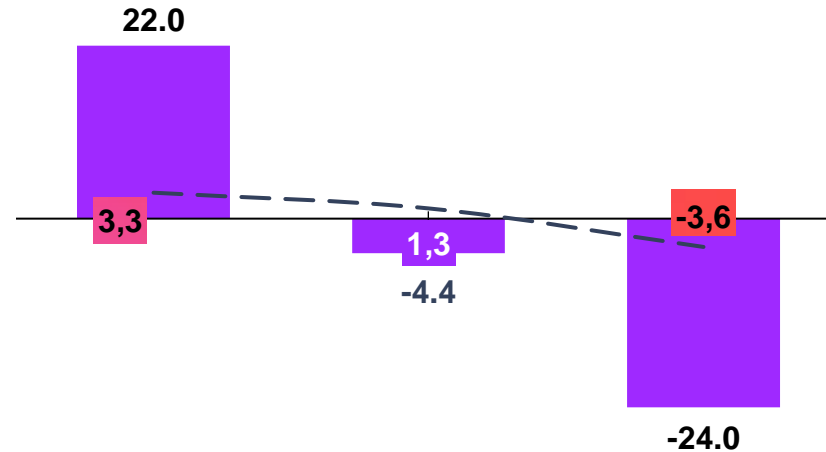
Top 100 Brands | Short Term



■ % Chg Volume  
- - % Chg Volume per Trip

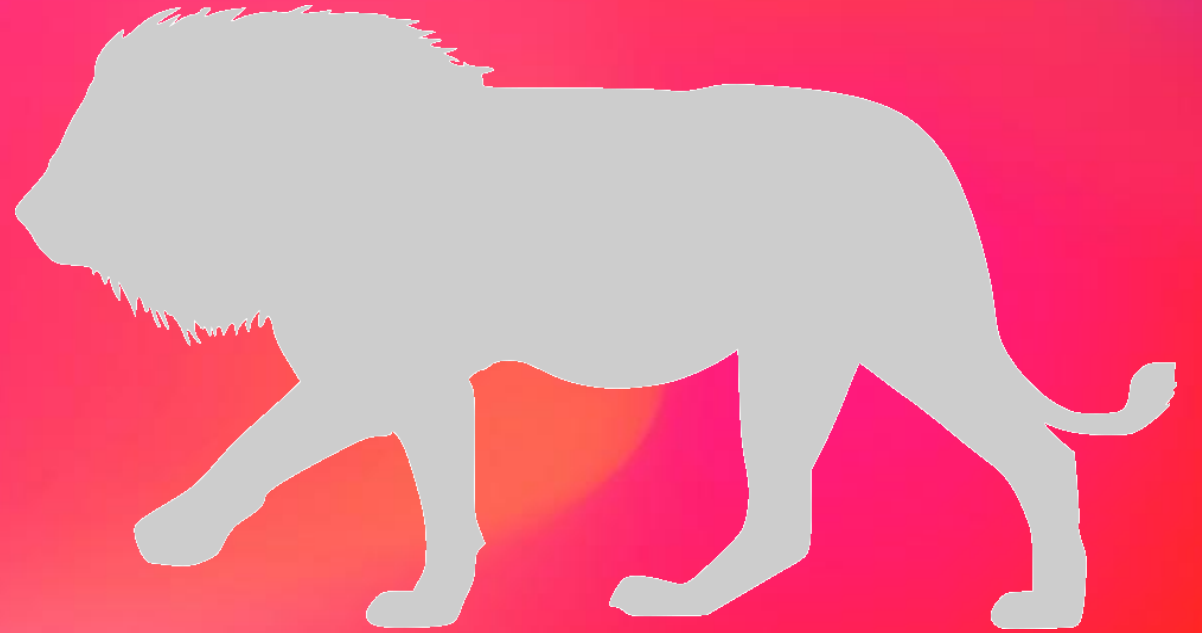


Top 100 Brands | Long Term



■ % Chg Volume  
- - % Chg Volume per Trip

# double jeopardy law



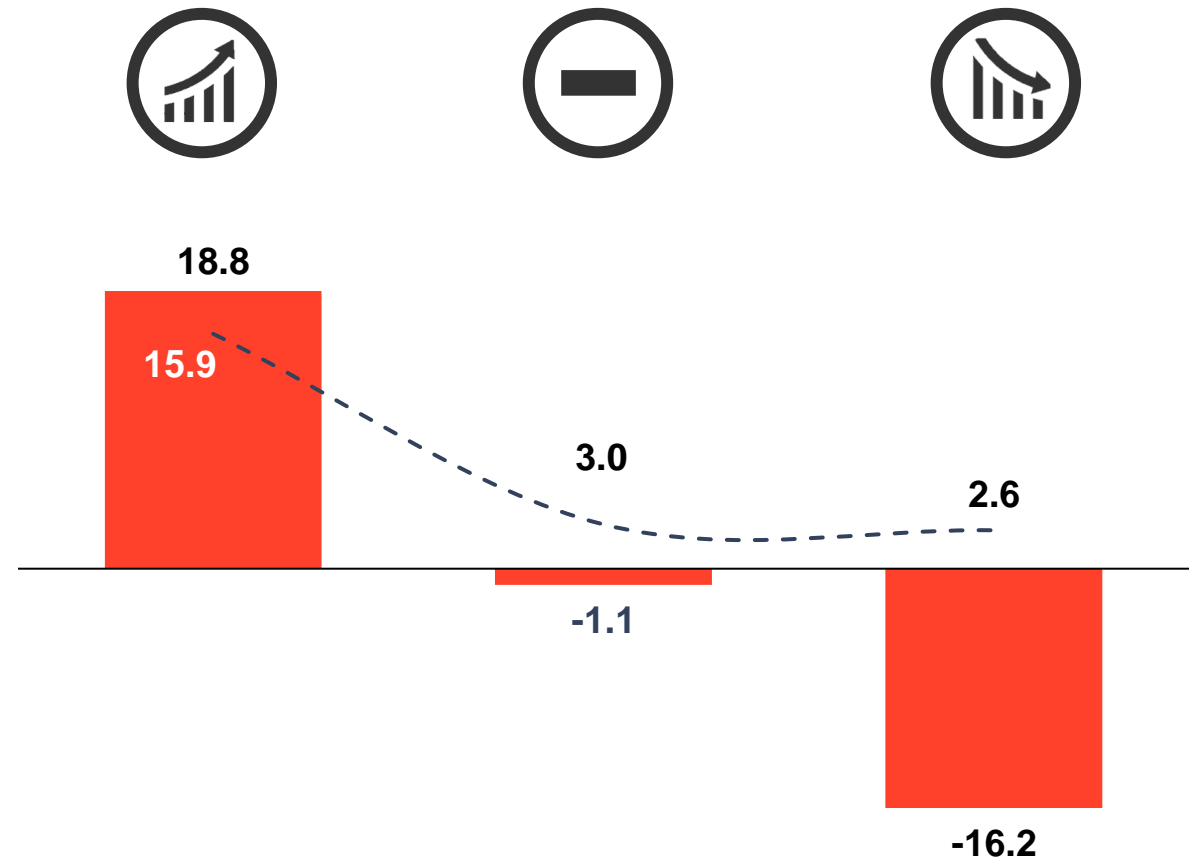
**If penetration  
is king..**

**..who is his  
queen?**



# Promotions are a treacherous piece

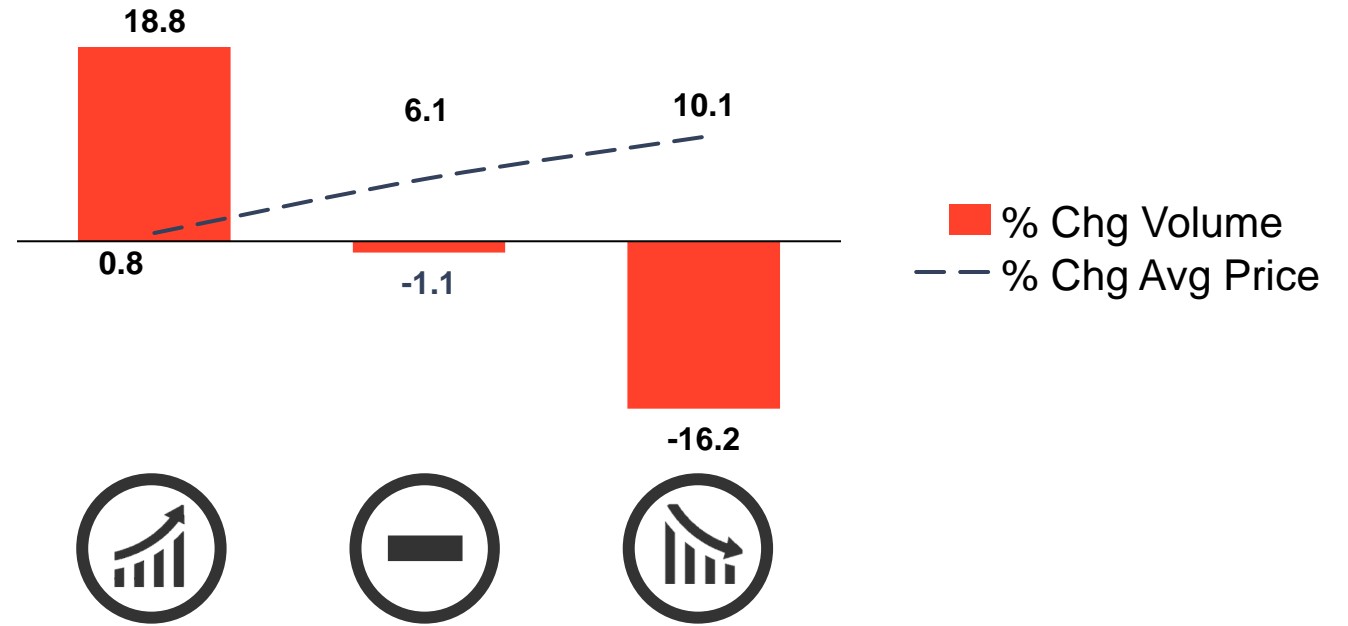
## Top 100 Brands | Promo Sales and Volume % Chg vs MAT Q2 2023



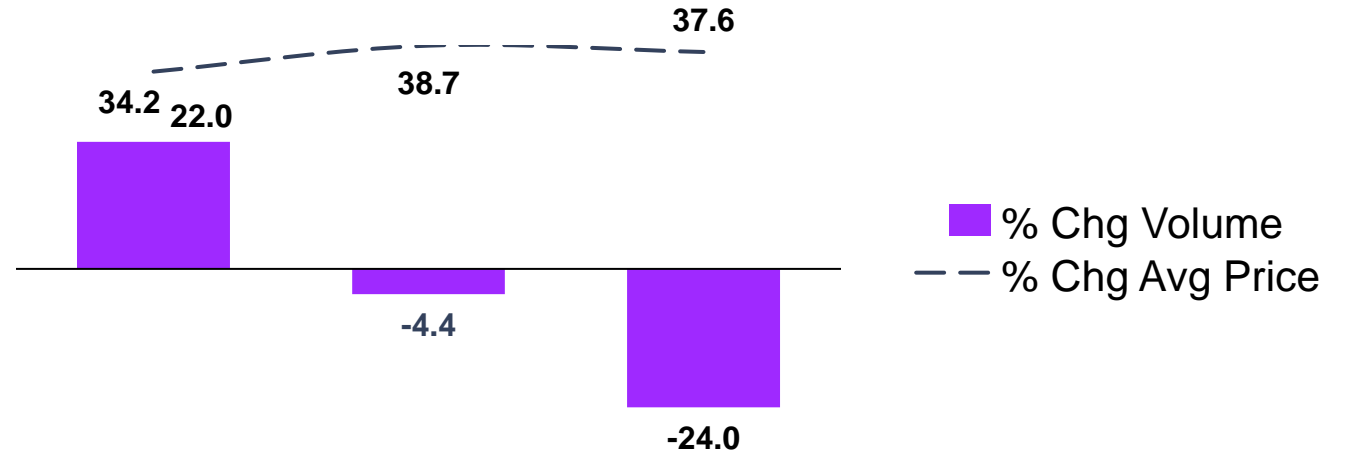
-- % Chg Promo Sales ■ % Chg Volume

# Price elasticity can work for you

Top 100 Brands | Short Term

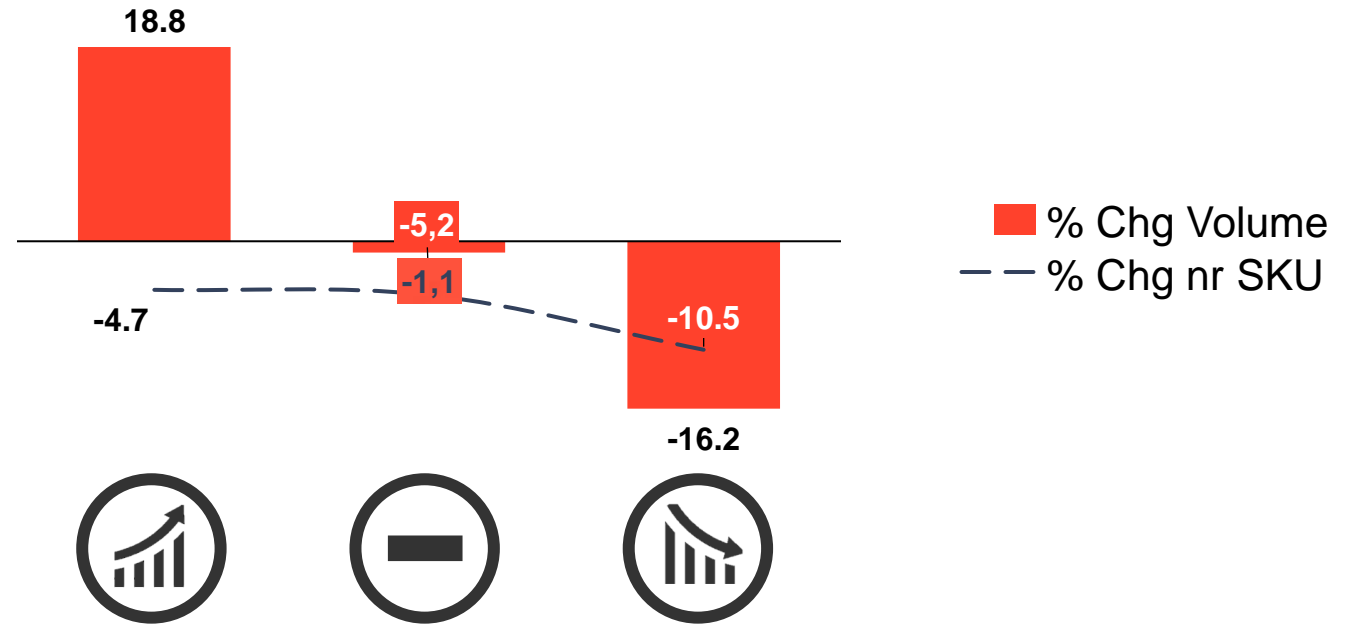


Top 100 Brands | Long Term

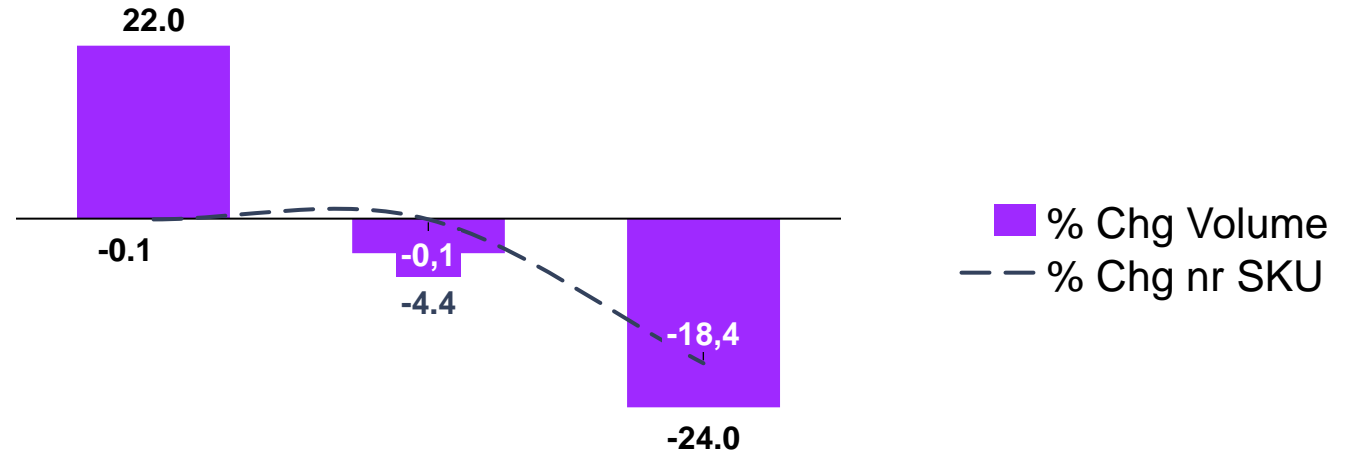


# Innovation matters

## Top 100 Brands | Short Term



## Top 100 Brands | Long Term



\*(source: BG20)



61.26

256

257

258

**Innovations that are  
incremental to the assortment  
are the strongest source  
of growth for brands**



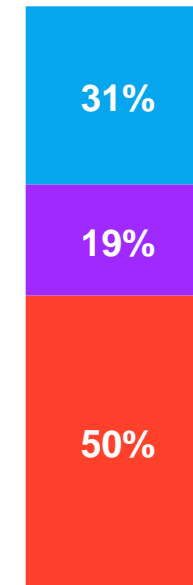
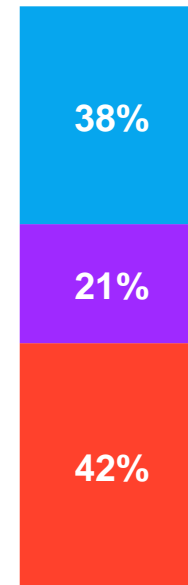
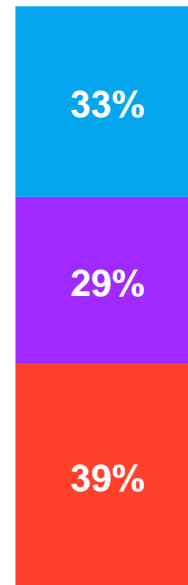
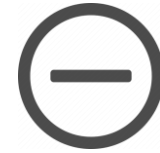
# Long term winners

**New items** = not on shelves in 2019, on shelves in MAT Q2 2024

**Maintained items** = on shelves in 2019 and still on shelves now

**Discontinued items** = on shelves in 2019, but no longer now

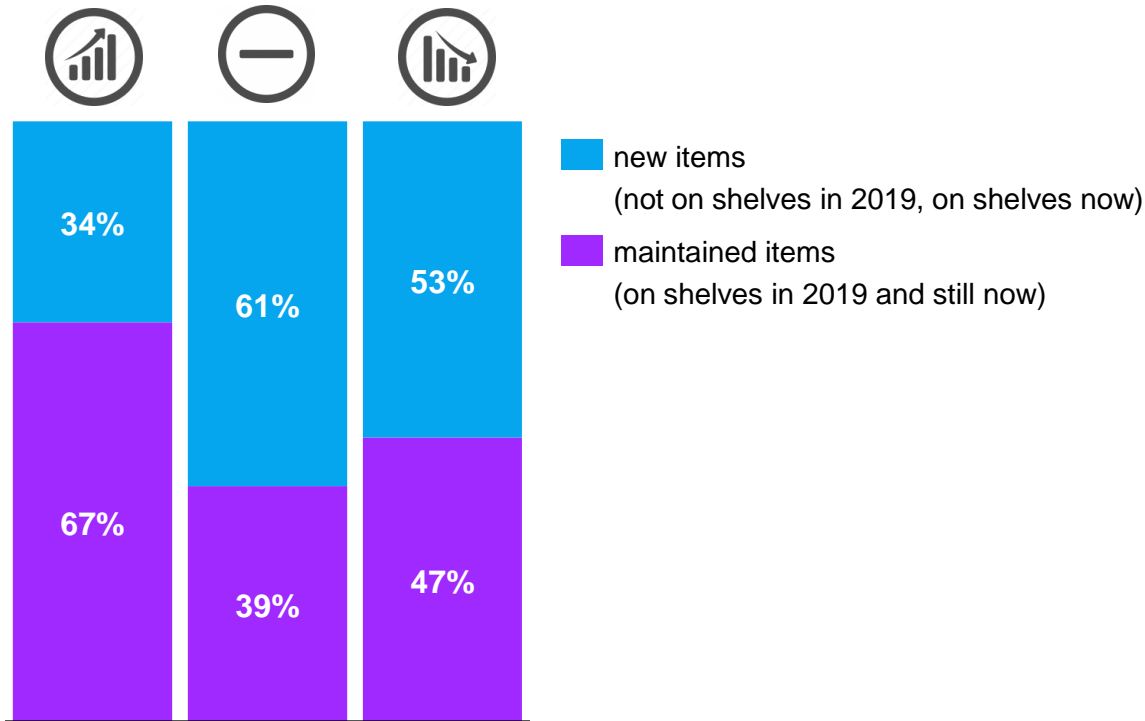
## Top 100 Brands | Assortment renewal by group of brands ( # SKU)



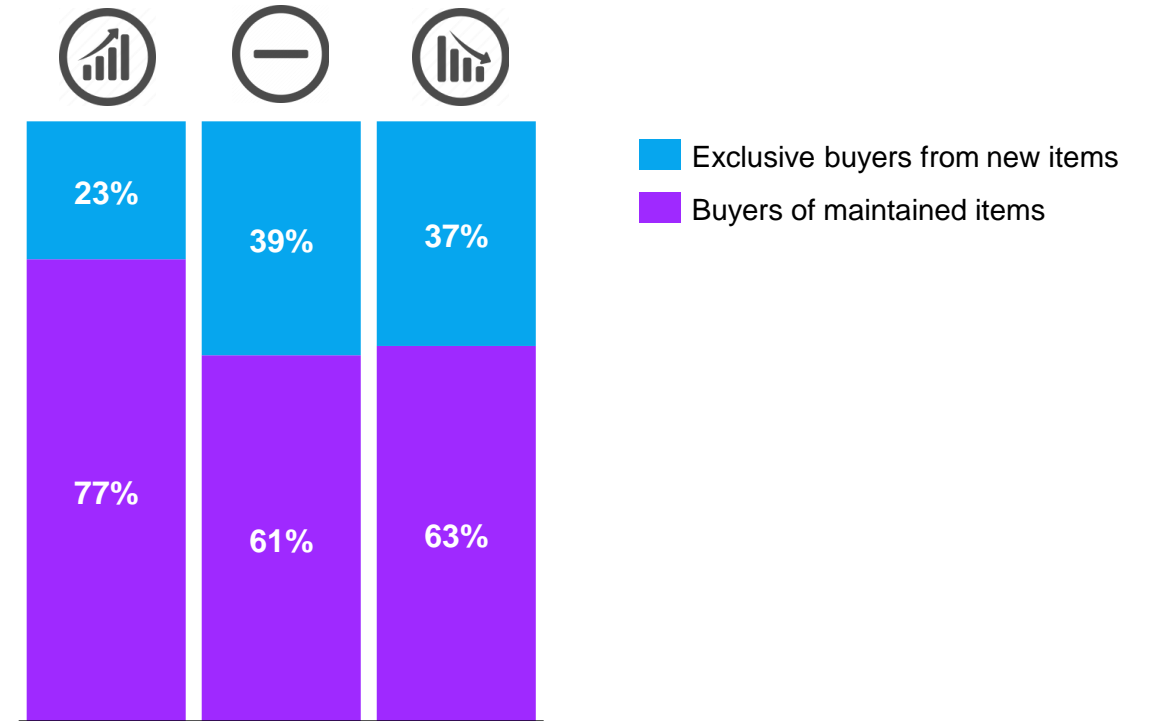
- new items
- maintained items
- discontinued items

# Maintained items contribute to more Volume & more Buyers for the top performing brands

### Contribution of new vs old assortments to brand Volume



### Contribution of new vs old assortments to brand Buyers



The best growing brands derive more Buyers & more Volume from the maintained products

**If penetration  
is king..**

**..innovation  
is his queen!**



# Thank you

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