



BRAND POWER

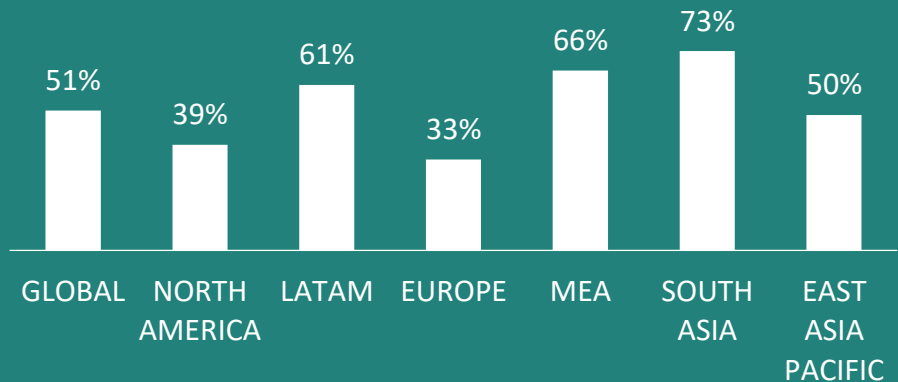
Big Brands at a Crossroads

Globally, big brands continue to lose significant ground to smaller, emerging brands in the battle for health. HealthFocus International takes a deeper look at the drivers behind this trend globally, regionally and across 22 individual countries. Our focus is to help companies better understand how big brands can compete more powerfully in healthy eating and how to recapture healthy equity leadership.

Brand choice is still highly important to over half of global consumers, though brand strength does vary quite significantly between countries. Generally, brand power is stronger in emerging markets than developed markets, 61% vs. 34% respectively. Brand power is notably lower in North America and Europe.

Brand name/reputation of manufacturer

Extremely/Very Important Brand Influence



Big vs. Small Brands – who has the advantage in each category?

Expertise	+10 pts	Big Brand Advantage
Food safety	+9 pts	
Innovation	+8 pts	
Trust	+4 pts	
Sustainability	-	Same
Higher quality products	-	
Believing more in the product	-5 pts	Small Brand Advantage
→ Healthier products	-7 pts	
Animal treatment	-10 pts	

Big brands continue to outperform in the areas of expertise, food safety, innovation, and trust—yet they underperform on animal welfare, believing in their products, and producing healthier products. Health and wellness is top of mind for consumers, and falling behind emerging brands in terms of producing healthier products is the biggest concern for the future of the established big brands.