GlobalData's Favorite Innovations of 2018

GlobalData looks at its favorite innovations from this year, and what they mean for the future of FMCGs

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Executive summary
Introducing our favorite innovations

Launches that have captured the imagination

GlobalData's industry experts have selected their favorite innovations of the previous 12 months and analyzed why they stand out in their ability to connect with consumers. These products and services provide inspiration for how companies across FMCG markets need to evolve in the following year and predicts what characteristics winning products will have in 2018.

From innovation to action
This report includes some of the most innovative and novel products from 2018, which have been selected and assessed by analysts – all with a wide range of individual specialties. This unique approach provides insight into the sheer variety of innovation in the FMCG market as well as in food service and how the market may develop in the coming years. The 2018 report also provides some action-focused insights based on different innovation types. The aim is to offer inspirations for how to achieve five common goals in product development across the FMCG sectors:

- Innovate in flavor to create sensory excitement.
- Adjust ingredients, formulas, or the production process to add functionality.
- Develop packaging to create more benefits.
- Use marketing and positioning techniques (e.g. on-packing marketing, social media campaign) to stand out.
- Use technology to streamline processes and reach new audiences.
Introducing our favorite innovations

Our favorite innovations fit with the 63 trends in GlobalData's TrendSights framework
How to innovate in flavor to create sensory excitement
Innovate in flavor to create sensory excitement

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**How brands are standing out on shelves through innovative flavors**

2018 has seen innovative brands differentiate their products in a crowded marketplace by focusing on sensory excitement. Key themes include offering a twist on traditional flavors as well as craft inspirations, duplicating trends from adjacent categories to create excitement among more experimental consumers.

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How to bring craft concepts to the vodka category?

Haku Vodka the Japanese craft vodka

A vodka product that uses craft-style formulation processes and marketing to differentiate itself in the competitive US market

• Produced entirely in Japan for export to the US market, this product from drinks giant Beam Suntory looks to tap into the popularity of craft-style beverages in other alcoholic drinks categories following beer, cider and gin.

• The vodka is originally formulated entirely from Japanese white rice and is then filtered through bamboo charcoal, which is claimed to absorb impurities and give a uniquely clean taste to the product. Craft concepts have been utilized extensively in other alcoholic drinks categories, but are relatively unheard of in the vodka category.

“The use of Japanese white rice and bamboo charcoal ensure the product’s formulation has some of the extra steps or eccentricities most consumers would expect from a craft drink, but the on-pack-marketing is also crucial in successfully bringing this concept to vodka.

Beer craft products often utilize a small batch, locally made packaging aesthetic, but it has been recognized that this might not appeal to consumers in a spirits like a vodka product, which consumers recognize could be dangerous. Instead the opulent, clean and modern packaging style gives consumers an image of premium quality, which works far better in the spirits category. This also dovetails far better with the exotic appeal the product can make use of by being imported from Japan, a country known in the US for cutting edge manufacturing excellence.

The “one man in a shed” style branding of many crafts products has been gradually shown to consumers to be misleading, so by instead associating the “craft” with cutting edge formulation other products could take Haku’s lead and give renewed impetus to the craft claim.”

Will Grimwade
Analyst
A special take on the humanization of pets

- A grain-free cheesecake mix for dogs, available in the US for consumers to prepare at home in both salted caramel and peanut flavors
- A truly unique take on animal treats, aligning pets with their owners while creating a novel and experimental experience that works both as a treat for animals as well as consumers

“This launch highlights the space for traditionally human-based food converted for pets; there have been various new launches in 2018 directly targeting trends in the humanization of animals as an increasing number of owners treat their pets as they would themselves. Puppy Cake takes this one step further by offering a unique product previously unheard of being associated with animal food, particularly given the traditionally sweet and high-calorie content, while also having a very rare inclusion of salted caramel flavor. This will especially interest the 62% of global consumers who say they are always or often influenced by how unique or enjoyable food is when choosing for their pets. The cheesecake mix will appeal to consumers that see their animals as part of the family, and as such, enjoy creating and offering indulgent treats as a reward.”

Ben Holmes
Analyst
Chardonnay wine partially aged in scotch barrels

• Available in Australia, this chardonnay white wine offers a distinguished flavor to consumers due to its partial aging in Scotch barrels.

• Using Scotch barrels for aging wine is innovative. The addition of the Scotch barrels enhances the product’s flavor and targets it towards those consumers who are more likely to forsake tradition and look for novel and more experimental choices in wine category.

“How the wine category has long been considered a conservative drink. This is the first time a chardonnay that has been partially aged in Scotch whiskey barrels is launched in Australia, demonstrating how wine-makers are experimenting with non-traditional elements of wine making to reach those younger wine drinkers more likely to look for distinguished and more adventurous features in their alcoholic beverages. In order to produce this wine, the juice of 100% constituent parcels is split into two halves where the first half is fermented in Scotch whiskey barrels and then matured in traditional wine barrels, and the second half is fermented in wine barrels and then finished in Scotch whiskey barrels. After this process, both halves with different taste profiles are blended together. The distinguished process of production of this wine could help this product gain an unusual appeal as compared to wines produced with traditional production methods, especially among consumers that face a shift in their preferences for contemporary wines that meet their taste. This could inspire other beverage brands to innovate in alcoholic beverages with cross-category production methods, offering consumers distinct and enjoyable flavors to create consumption memories.”

Shubham Mahajan
Associate Analyst
A sugar-free, extra spicy, unfiltered ginger beer made and marketed in ways resembling the very on-trend craft beer movement

Made locally in the Bushwick neighborhood of Brooklyn, New York, this ginger beer is hand-made in small batches, and uses only five organic, natural ingredients. It is unfiltered and contains real ginger particles that aid in its striking, spicy taste. Furthermore, in its sugar-free variant, as pictured, it contains only 10 calories. Brooklyn Crafted describe it as having an “adult mouth feel”, similar to beer and wine.

“Based on the impact of the craft beer market and the continuing broadening of consumers’ connoisseurship and premium product expectations, genuine “craft” claims continue to gain much traction in the FMCG marketplace. Although soft drinks have been somewhat more challenging to attach such artisanal premium claims to, Brooklyn Crafted shows how this can be achieved by being genuine in terms of details such as small batch production, local sourcing, manufacture, and distribution, and a focus on ingredient simplicity whilst maintaining a striking sensory experience.

The craft beer experience has a social narrative associated with it that cannot be easily duplicated. However, products like Brooklyn Crafted’s Ginger Beer have the potential to “hang” alongside craft beers in a social setting as a non-alcoholic alternative, having a striking taste that provides not only an interesting consumption experience but a talking point.”

Richard Parker
Principal Consumer Insight Analyst
How to increase ready meals appeal through ethical sourcing and global tastes?

Sirena ready meal

A convenient and ethically produced canned ready meal

• Sirena (Aust) Pty Ltd recently released a new ready meal line in Australia – it offers global flavors with all natural ingredients in convenient packaging.
• The meals are presented in a single-serving, ready-to-eat out of the bowl format in the following options: Brown Rice & Quinoa with Tuna, Sicilian Style Pasta with Tuna, Kale & Quinoa Salad with Tuna, and Italian Style Salad with Tuna. Each is made with natural ingredients and feature sustainable tuna that has been caught by hand, one fish at a time, making the product ‘dolphin safe’.

“To meet the needs and lifestyles of busy consumers, ready meals can be an ideal option for a quick lunch or dinner. In Australia, 20% of shoppers say they consume ready meals/ready to cook food 1-2 times per week, whilst a further 10% admitted to consuming such products 3-4 times per week, according to GlobalData1.

Such figures point to an opportunity for manufacturers to attract new consumer bases by catering to global flavors as well as meeting the needs of health minded and environmentally conscious individuals. Offering a ready meal that is all natural, inspired by global tastes and packaged in a single-serve ready to consume format is different from standard products in the category in Australia.

Matteo Natalucci
Associate Analyst

Source:[1] GlobalData 2018 Q3 global consumer survey;
How to innovate with ingredients, formulas, or the production process to add functionality
How to innovate with ingredients, formulas, or the production process to add functionality

Please click on the section of interest

**How brands are creating functionality through ingredients, formulas, or the production process**

2018 has also seen innovative brands differentiate their products in terms of functionality, through the use of ingredients, formulas, and production processes. These functional innovations drive the trend towards product specificity. They are either made for a specific group, address a specific need, and/or target a specific occasion.

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Rye crispbread crackers with pea protein, topped with red quinoa and sesame

- Ryvita is positioned as a health & wellness brand, producing bread substitutes based on rye. Rye is a rich source of protein similar to other grains - although less than wheat - but it is low in gluten and richer in fiber.

- This product is in line with the health & wellness trend, which is highly reflected in the demand for diets with higher intake of protein and fiber.

“This product has an ultra clean-label, with only five pure ingredients. Many other products positioned as clean-label or natural, may contain ingredients that are natural but potentially unhealthy. One such example is palm oil that is even found in other products of Ryvita, but not in this one. Markedly, the ultra-clean label formulation of this product, does not weaken its taste, thanks to the addition of the flavor-intense sesame seeds. Quinoa is a superfood ingredient, which add premium aspect to the product. However, there is an opportunity for its wider adoption by health & wellness brands that carry a premium appeal. Moreover, red quinoa is richer in taste and health benefits than the more common white quinoa. The addition of pea protein is also an innovation, aligned with higher protein intake through fortification. The package contains five packs of four slices, offering convenience in regards to retaining freshness once the main package is opened, and small servings for consumption-on-the-go. Its wide distribution, even in convenience store formats, is indicative of its success.”

Theodore Delimaris
Associate Consumer Analyst
How to innovate in ingredients to add more functions?

Know Brainer Ketogenic reamer with almond and coconut milk

Ketogenic creamer with collagen

• A brain boosting metabolism moving creamer retailed in the USA that is claimed to contain mct oil and organic grass-fed butter while being flagged as free from added sugar, lactose, and casein.

• For the first time, collagen as an ingredient is being used in a ketogenic creamer.

“This launch showcases how brands are developing fit-for-me products instead of one-size products, especially in the beverages category. Usually, consumers following any specific diet (keto in this instance) can be considered as image conscious. Collagen is well-known ingredient in skin care products that is understood to improve the skin elasticity and the addition of this ingredient to a creamer is novel. This cross-category ingredient experimentation goes on to demonstrate how even brands from the beverages category are seeking inspiration from skin care to incorporate unconventional ingredients, probably in an attempt to stand out from regular products. Just over a half (53%) of US consumers consider collagen as an effective ingredient in a beauty/grooming product¹ and the new release may interest all those consumers seeking products that highlight the presence of collagen.”

Kshama Raj
Associate Project Manager

Source: [1] GlobalData’s 2017 Q1 global consumer survey
Sanitary pads offering enhanced comfort

• This sanitary pads formulated with mint leaf extracts to reduce the discomfort during periods for women.
• Mint leaf extracts work to provide a refreshing cooling sensation.

“Sanitary pads manufacturers usually promote their products on ‘long-term protection’ and ‘high absorption’ claims. For the first time, sanitary pads formulated with mint leaves extracts are available in Indonesia that are claimed to provide cooling effect to reduce discomfort in women during periods. The product also features common tags that consumers look for in the category like ‘maximum absorption’ and ‘leakage prevention without blockage.’ But the point of differentiation attained by using mint leaves extract could help the product in extending the innovation in the category from just experimenting with fragrances to innovate in ingredients that enhance the actual functionality of the product, in this case physical comfort.”

Santhosh Sarma
Associate Analyst
Petfood that prioritizes pumpkin

• This dog treat is stated as a suitable alternative for pets sensitive to grain and is mentioned to be free from corn, wheat, and soy.
• Available in three formulas - salmon & pumpkin, duck & pumpkin, and chicken & pumpkin, the dog treat that is formulated with pumpkin as a key ingredient is different from standard grain-based products in the category in the US.
• This new release may capture the attention of ingredient-conscious consumers, especially those seeking to incorporate superfoods (in this case pumpkin) in their pet’s diet.

“As someone who has ingredient-sensitive pets, one of the best solutions I have found for their digestive problems has been the incorporation of the occasional bit of pumpkin or butternut squash; the grain-free soluble fiber content, anecdotally, seems to help them immensely. I think that this company is definitely on the right track by utilizing pumpkin as an ingredient in dog treats; health-conscious pet owners will be attracted to its premium superfood status, and word of mouth will spread in person and online if the product is seen to aid digestive health. We could even see a significant change in future formulations for healthier pet treats over the next few years – away from grains and more towards squashes and pumpkins, although this will mostly depend on the price of ingredients.”

Ryan Whittaker
Consumer Analyst
How to create new functional appeal in RTD tea with a trending ingredient?
Botanic Lab cannabidiol tea

A new RTD tea in the UK uses cannabidiol as a central ingredient

• Botanical Lab has added a cannabidiol variety to its range of botanical tea drinks, marketing it as the "UK's first CBD-infused soft drink."

• The new beverage contains botanical hemp CBD extract – the non-psychoactive compound sourced from the cannabis plant, touted to have stress relief functions. It is combined with sour cherry and hibiscus juices and is tagged as free from artificial flavors, colors, refined sugar, and sweeteners.

“Healthy drinks manufacturer Botanic Lab is a pioneer in the use of the cannabidiol ingredient in the UK and the first to come up with a functional RTD tea based on it. CBD is set to have a big impact in the drinks space in 2019, with market leader Coca-Cola considering using it in an infused beverage line¹. The ingredient is much talked about and culturally significant, mostly known to support relaxation – a function sought after by the Millennial crowd. Moreover, the drink format is a winner when it comes to health enhancing ingredients, targeting the younger generation. GlobalData’s 2017 Q4 global consumer survey found out that 37% of UK consumers prefer the drink format for health enhancing ingredients, rising to 58% for 25 to 34 years old males in particular². As CBD is non-psychoactive and there is a widespread belief in its medical value, it will keep rising in popularity, especially among consumers looking to achieve relaxation, while remaining sober.”

Aleksandrina Yotova
Associate Analyst

How to innovate a daily oral care product with added functionality?

Kao Pyuora foam tooth cleaning liquid

A tooth brushing liquid that cleans the entire mouth, teeth and tongue

• This tooth brushing liquid is presented in a foaming pump bottle. The agent comes out as a foam, and a consumer places it on her/his tongue. The foam sticks to the tongue and has an antibacterial benefit, thereby cleaning the tongue more effectively. The foam also turns into liquid and once spread out in the mouth the user can start brushing their teeth.

• The manufacturer, Kao, states that consumers are concerned about multiple oral hygiene issues, such as bad breath and gum disease, and these are often caused by the unhygienic tongue, thus “tongue care” is important.

“The use of a foam formula on the tongue to clean and prevent bad breath is an interesting idea, and this launch really stood out in Japan’s oral care market in 2018. As well as being innovative, this foam formulation provides a highly effective impression as consumers can see and feel the foam working on their tongue. Moreover, one of the products key features, bad breath prevention, is spot-on to cater to consumers’ oral care concerns; 62% of consumers in Japan are concerned about bad breath, although only 13% of them are actively buying products that address this issue¹. Kao Pyuora’s novelty features are likely to encourage this consumer base in trying this new product.

Additionally, combining tongue cleaning with tooth brushing is a new concept and offers multi-functional benefits to consumers as it cleans the entire mouth with one product. Adding a new functionality to everyday toothpastes is more convenient than introducing an extra product to clean just the tongue in addition to their daily tooth brushing routine.”

Mitsue Konishi
Senior Innovation Analyst

Source:¹ GlobalData 2017 Q1 global consumer survey;
How do you increase household penetration for a product that fewer than 50% of consumers use globally?

Listerine Ready! Tabs chewable mouthwash tablets

Chewable mouthwash tablets that "transform from a solid to a liquid in seconds"

- Recently launched in the US, these bi-layer, compressed and chewable mouthwash tablets are intended to be chewed for 10 seconds, after which they transform from a solid to a liquid which is swished in the mouth for 30 seconds, and is then swallowed.

- Made of food-grade ingredients and free of alcohol, these tablets are swallowed after use – unlike liquid mouthwash – which means one does not have to be near a sink to use them.

“One challenge with trying to grow liquid mouthwash sales is the need to be near a sink and running water to use the product. Conventional liquid mouthwash is swished around the mouth for some time and is then spit into a sink because it is not safe to swallow. Many liquid mouthwash products contain alcohol, and are not intended to be swallowed after use.

Listerine Ready! Tabs chewable mouthwash tablets eliminate this barrier to usage because the product can be used anywhere and is simply swallowed after use by virtue of its food-grade ingredients and lack of alcohol. With consumers spending much of their time out of the home, a product that can be used anytime, anywhere has universal appeal. According to the product manufacturer (Johnson & Johnson), household penetration of mouthwash is just 45% globally. An innovation like this could significantly increase that percentage and bring new users to the category.”

Tom Vierhile
Innovation Insights Director

Source: [1] Seekingalpha.com, September 2018
Unique new formulation offers indulgence with less sugar

• Cadbury has developed a new version of its famous Dairy Milk chocolate bar with 30% less sugar than the original, which will sit alongside the standard version on shelves from 2019.
• The new chocolate bar is said to have the same “great” taste without the use of artificial sweeteners, and, importantly, without increasing the calorie content.
• The natural formulation uses a plant fiber in place of some of the sugar to retain the structure and texture of the chocolate, while providing natural sweetness.

“This new innovation from Cadbury highlights how mainstream confectionery brands are proactively tackling concerns about sugar, and the contribution their products make to consumers’ overall daily intake.

The new formulation uses natural ingredients, including plant-based fiber. This will prove highly appealing among British consumers, who according to a survey by GlobalData are more likely to associate “natural” claims with being healthy, than “low in sugar” claims.  

Sensibly, Cadbury has chosen to launch this product alongside the original Dairy Milk bar, rather than replacing it. For an indulgence led category like confectionery it is important taste remains at the forefront. Cadbury’s approach gives consumers the choice as to whether they potentially compromise on this for a healthier option, or continue to indulge with the original.”

Melanie Felgate, Senior Consumer Insights Analyst

Source:[1] GlobalData 2017 global consumer survey
How to create an oral nutraceutical formula to offer a unique position in the sector?

Svarn Sathi oral nutraceutical formula

First oral nutraceutical formula offering unique protection benefits

- An oral nutraceutical formula from India that features a blend of curcumin, piperine, and lycopene to provide antioxidant and anti-cancer benefits for tobacco and betel nut consumers as well as for people prone to pollution.

“Oral nutraceutical formula variants in India are generally available as products that supplement the daily consumption of vitamins, minerals, and other nutrients. This is the first oral nutraceutical formula to be formulated and positioned as a variant that can help provide antioxidant and anti-cancer actions. This product features curcumin derived from turmeric, piperine (black pepper), and antioxidant lycopene found in tomatoes and other red fruits and vegetables, such as red carrots, watermelons and papayas. The unique formulation and the positioning as a product that can help prevent cancer and the convenient mouth freshener like sachet packaging might help this product gain a distinctive and effective appeal compared to regular stop-smoking products and other dietary supplement type oral nutraceutical formula products. This launch could also inspire other brands to innovate in the oral nutraceutical formula category and provide more targeted solutions that can help avoid the consequences of compulsive habits such as smoking, chewing tobacco or betel nuts among consumers.”

Sai Rahul
Associate Analyst
How to use packaging to create more benefits
How to use packaging to create more benefits

Please click on the section of interest

How brands can benefit from innovative packaging with added value
Packaging innovation does not only help the product to stand out visually, but also provides more benefits to make it more appealing. Examples of packaging innovations found in 2018 include customizability focused products, eco-friendly sustainable packaging, and highly convenience-driven food and drink preparation ideas.

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How to create a premium beer product beyond craft products?

Beck's lager beer

Lager in a flute-shaped can

• Part of a limited edition launch, Beck’s has released a lager beer in an unusual flute-shaped can with an aluminium finish.

• The contents of the drink remain the same as Beck’s other beer but the new packaging is likely to create curiosity and interest amongst consumers.

"The beer market has, for some time, been saturated with a large number of mainstream lager brands that offer similar prices and products to Beck’s and brands that are looking towards premiumization have generally headed towards introducing craft products with unique tasting beers. This product takes a new approach to premiumization within the beer market, one which is not often seen before, as the brand has focused its effort entirely on packaging as opposed to the content. As such, this flute-shaped beer can with an aluminium finish tries to create the link that beer is as premium as champagne drinks in order to establish its premium image. Going beyond this, it shows to other manufacturers and brands that premiumization can be found beyond the ingredients and manufacturing process of beer but that the packaging and look can also have a major effect on how to deliver a premium beer product."

Ryan Choi
Associate Analyst
Nicotine-Free E-liquid in a personalized dispenser format
- Available in the UK, this new e-liquid is claimed to feature unique customized format of dispenser to add preferred nicotine shot
- In line with the Personalization trend, the new e-liquid contains 50ml of nicotine-free liquid, with 10ml of extra space within the bottle to accommodate consumer's nicotine shot of choice and allows to create a liquid with the desired nicotine strength.

“Customizing the product to meet a specific preference is easily achieved by handing the control in consumer hands by making the products just the way they like. The packaging benefit is what differentiates this e-liquid from the existing ones in the industry. Each e-liquid comes in distinct dessert flavors with a unique dispenser that can be customized as per the consumers preference. The e-liquid is available only in 0mg selection and features 50ml of nicotine-free e-liquid with an extra space of 10ml where the nicotine shot can be filled. Catering to individualistic and empowered desires of consumers by creating products that allow consumers to be able to actively self-customize and co-create in accordance with their own preferences helps create a potential market for manufacturers trying to experiment with the existing offerings in the category and help them expand their reach.”

Asthha Chandrayan
Senior Analyst
How to express creativity and offer visual delight via packaging?

Lancôme Le Teint Macaron blush and blender duo

“Innovative packaging is used in the make-up industry, as a market differentiator, making the product more appealing, and attracting more customers, who are usually drawn to interesting-looking items. For its 2018 Spring Collection, Lancôme released make-up products in colorful packaging, inspired by the famous French desert, the macaron. Although all the items in the collection come in eye-pleasing pastels, the ones that stand out are the blush and blender duos. Their packaging is carefully crafted, and a lot of attention is paid to small details, so that the product looks very similar to the French pastry. The duo will likely appeal to customers who value delightful and perky appearance. It is also attractive to people who want to add more excitement into their make-up application routine, by making it funnier and more stimulating, as the process might look like indulging in sweet treats.”

Elena Mogoș
Associate Analyst

The aesthetically pleasing packaging makes the product stand out

- The macaron-shaped blush and blenders come in sets of two or four.
- The blush is presented in two shades: Coral Whipped Cream with a Raspberry Blender (available in department stores such as Sephora), and Rose Whipped Cream with a Pistachio Blender (only available online).
How to create a sustainable product?

Love Beauty and Planet shampoo

A shampoo that is formulated using ethically-sourced ingredients and packaged in bottles made from 100% recycled plastic that are 100% recyclable

• Positioned as a premium product designed to appeal to the eco-conscious millennial consumer.

• The product is said to use a “fast-rinse technology” which has the environmental benefit of requiring less water to rinse the product out of hair.

“Hair care brands are becoming more committed to minimising their carbon footprint. In particular, the recent spotlight on plastic packaging and its environmental impact has raised awareness of this issue and, in turn, places pressure on brands to respond through their product offerings. With nearly a quarter (24%) of global consumers saying that they would buy products packaged using recycled plastic more or more often, and 35% sharing this sentiment for products packaged without any plastic at all, according to GlobalData’s 2018 survey, there are opportunities to develop products that resonate with these increasingly environmentally-conscious consumers.

A great example of this is Unilever’s newest personal care brand called Love Beauty and Planet. The range claims to be formulated using ethically sourced ingredients, and is packaged in bottles made from 100% recycled plastic that are 100% recyclable.”

Iliyana Mesheva
Associate Analyst

Source:[1]GlobalData’s 2018 global consumer survey
How to give users more control over their skincare regimes?

Clinique ID

“A customizable skincare range that consumers can adapt to their needs

• Launched in late 2018, Clinique ID offers a customizable facial skincare regime that consumers can adjust depending on their skincare needs.
• The range offers three different bases in the form of its Dramatically Different hydrating jelly, moisturizing lotion, or oil control gel alongside five different active concentrate cartridges, each addressing a different skin concern including irritation, fine lines and wrinkles, and fatigue.
• Users simply need to choose their base and insert the cartridge of their choice into the bottle, which then dispenses a 90% base and 10% active concentrate formula. Cartridges are interchangeable with the base formulation to meet the user’s changing skincare needs on a daily or even hourly basis.

“The launch of Clinique ID highlights the growth of customizable solutions in mainstream beauty regimes. While traditional customized products have remained exclusively within the super-premium skincare space, this launch makes reactive and personalized solutions more accessible to a wider audience. In the case of Clinique ID, rather than creating formulations which are bespoke to each individual customer, the brand uses interchangeable packaging to allow customers to change the serums and base depending on their requirements.

Customizable benefits are increasingly important to today’s consumers. This is particularly evident among younger cohorts – 29% of Gen Zs and 25% of Millennials associate customizable options with high quality in personal care products. For brands to target these individualistic and experience-driven segments, providing product ranges that consumers can “chop and change” to meet their needs presents an opportunity for growth across the beauty space.”

Jamie Mills
Senior Analyst

Source: [1] GlobalData’s 2018 Q3 global consumer survey
How to win with sustainability-conscious consumers in the food delivery market?

Just Eats’s Ooho! seaweed sauce sachet

“Just Eat began trialling the world’s first seaweed sauce sachets in July this year. The company announced in October that it would expand its trial of these 100% compostable and biodegradable sachets to 10 restaurants in London. Following the first trial in Southend, feedback from consumers was overwhelmingly positive, with 89% saying that they would like to see more of their takeaway sauces coming in the seaweed based sauce sachets.

“In the UK’s fast-growing and competitive food delivery market, innovation and consumer opinion has never been more important. The recently published UN Environment report on plastic pollution has opened many consumers’ eyes to the devastating impact of single-use plastic waste generation, kick-starting rapid and sweeping changes across the foodservice market.

With this trial, Just Eat has propelled itself ahead of the competition in the ‘war’ on plastic waste, a notable concern in the packaging-heavy food delivery space. In doing so, the company is successfully building trust with a growing share of consumers who see environmentalism and sustainability as a key concern of choice when ordering in or eating out.”

Morgane Richert
Senior Analyst - Foodservice

Sources: [1] Just Eat Group, October 2018
How to maximize convenience in cooking?

Morinaga Momi Momi hotcake mix

Pancake mix that removes the necessity of almost all utensils
- This product comes in a resealable pouch in which consumers just need to add milk and eggs into the bag. There is a fill-line that shows the consumer how much milk they should pour in so there is no need for measuring jugs.
- Once any extra ingredients have been added, the pouch is sealed and consumers mix the batter in the bag by kneading the packaging.
- There is a pouring nozzle that can be cut open, which makes it easy for the mixture to be poured straight into the frying pan.
- The only equipment needed for this is a frying pan and a spatula, saving consumers’ time and effort in preparation and washing.

“Cooking can be a hassle for many people especially for busy families and young professionals who may not have time to prepare everything from scratch. Moreover, specifically for younger generations, they may not be fully equipped on cooking utensils, making activities such as baking more difficult. Convenience is an important quality for many products across FMCG, and often people associate this with portability or ready-to-use formats. However, this product allows consumers to experience the full cooking experience without the hassle of washing up or taking time to measure out the ingredients. In Japan, pancake mix is already popular and are considered quite convenient, but this product goes a step further. Globally, 61% of consumers stated that they rely heavily on time-saving products and services.\(^1\) This illustrates an opportunity for producers both in and out of Japan, with emphasis on how far convenience can go while maintaining a fun and experience-driven element for consumers.”

Mayu Teeven
Associate Analyst

Source: [1] GlobalData 2016 Q3 global consumer survey
How to improve sustainability with plastic-free packaging?

Troo Foods granola cereal

Granola packaged in a paper-based pouch that is fully recyclable or compostable

- Troo Foods granolas are positioned as 100% natural with a high fiber content and prebiotic ingredients to help promote good gut health.

- The paper-based pack presents a natural image for the brand, and a special heat-seal coating on the inside means that the packaging contains absolutely no plastic, so it can be recycled in the paper waste stream or home composted.

“This paper pouch is a genuine, cost-effective alternative to the petroleum-based flexible packaging that has now become commonplace in virtually all product categories and most global regions. Flexible plastics have their advantages, such as offering improved shelf life and reduced packaging costs, but many formats comprise mixed materials and cannot be easily recycled. Recent publicity about the effects of plastic waste on the environment has led to increased awareness among consumers, who now expect manufacturers to improve the sustainability of their packaging to reduce the environmental load. This packaging is likely to find favor with the 35% of global consumers who say that they would buy more products (or buy them more often) if packaged without any plastic at all.¹ The supplier of the pouch is now working on the development of high-barrier and ovenable versions which would open up the format to new markets and enhance its appeal for more brand owners that are looking to raise their eco-credentials.”

Gemma Hill
Lead Packaging Analyst

Source: [1] GlobalData 2018 Q3 global consumer survey
An energy drink in the form of a self-stirring, 3D-polycapsule printed cup

- Available in the US and online, this energy drink, which has a light coffee flavor, needs to be filled with water in order to make it ready to drink.

- Smart Cups are "3D-polycapsule printed" packs with the drink contents microencapsulated and attached at the bottom of the packaging. The micro-capsules are activated (dissolve) when water is added to the cup.

“The product disrupts the idea that an energy drink must come in a bottle or can and is targeted towards active consumers who need a convenient energy boost. The self-stirring cups are self-sustained, require only cold water to activate and could be an ideal solution for on-the-go, sports, camping, traveling or any sort of outdoor activities. The concept may be appealing both to consumers who look for a modern twist and for those who are likely to drink easy to prepare beverages on-the-go. The format is convenient for traveling as it is lightweight and more easy to carry than heavy bottles with liquid. In addition, the Greenware® cups used for the product are made from Ingeo™ biopolymer (a PLA resin derived from plants) and are compostable. This helps to ease the first impression that the product is a bit "over-packed" and delivers too much waste to the environment. The idea of 3D-polycapsule printed cups is novel and is not limited to energy drinks only. It can be applied to other beverage categories and sectors including pharmaceutical or water purification.”

Pawel Urban
Packaging Analyst
How to use marketing and positioning techniques to stand out
How to use marketing and positioning techniques, including on-packing marketing and collaboration to stand out

Please click on the section of interest

How brands can use innovative marketing techniques to create a "wow" factor
Brands are now creating innovative and memorable marketing strategies to try to stay ahead of the competition. Successful marketing innovation helps to grab as much attention as possible and convey key messages to the mass market, making differentiation effortless.

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How to establish a product as a premium brand without a retail presence?
CoAqua coconut water

100% pure coconut water packaged in a glass bottle

• CoAqua positions itself as a high-end product, packaged in a single-serve clear bottle with a metallic pull tab cap.

• CoAqua places an emphasis on ethical practices from its packaging to production. The use of recyclable glass is to refrain from plastic usage, and its coconuts are sourced from small suppliers in Vietnam.

“The flavoured water market has become saturated with many multinational companies offering their variety of fruit water. CoAqua deliberately avoids the traditional retail space to avoid shelf competition with other coconut water brands. Instead, CoAqua pursues the ultra-premium space of luxury resorts and restaurants in its home market of Oceania and Southeast Asia; and focuses on the direct-to-consumer online channel in the US.”

“CoAqua is very selective in choosing where to sell the product. The drink is sold mostly domestically in New Zealand at upmarket restaurants and independent cafes. The few outlets abroad tend to be five star hotels, and include the Langham in Hong Kong, the Four Seasons and the Atlantis Palm in Dubai. Through this operation, the brand maintains its exclusivity whilst also reinforcing its association with luxury.”

George Henry
Associate Analyst

How to capitalize on brand flexibility by combining classic flavors with pop culture to engage with consumers?

Johnnie Walkers’ White Walker Limited Edition whisky

A classic whisky with a reimagined brand to stay relevant in a trending society

• Inspired by the popular television show, Game of Thrones, the White Walker whisky entwines that narrative into both its manufacturing and packaging processes, using eye catching visuals to attract a new customer base ready for Christmas. It is available in selected locations and airports world wide, furthering its premium ‘limited edition’ tag.

• Made from Walkers’ distilleries in the northern most regions of Scotland, the brand brings a twist to its classic taste with seasonal hints of caramelised sugar, vanilla, and fresh red berries.

“This is not the first ‘limited edition’ line that Johnnie Walker has produced, however, it is the first to reach such a wide variety of people, capitalizing on the popularity of Game of Thrones (GoT). Marketing is key here, as all aspects from packaging to the serving method follows the ‘winter’ theme, distinguishing it from other whiskies. Its October launch is synchronized with the winter months and the run up to GoT’s final season, whilst the textured, glacial blue packaging – a far reach from the brand’s usually suave appeal – uses thermochromic ink that glows blue when exposed to cold temperatures. To get the best flavors, the whisky is designed to be served cold, another novelty that will further entice experimental customers and connoisseurs alike. What is more, White Walkers’ launch has set in motion a new ‘Westeros’ inspired line of whiskies from other well-known distilleries, each Single Malt based on one of the ‘Houses of Westeros’, almost mirroring that of the sequel culture found in movies today. This demonstrates the success White Walker has gained, and how a brand’s flexibility, for instance, remodelling the iconic Johnnie Walker logo after the ‘Night King’, can be used to further strengthen brand recognition.”

Carmen Bryan
Associate Analyst
Domino’s ‘Paving for Pizza’ campaign helps US cities fund pothole repairs for the purpose of ensuring pizza can be delivered safely.

- Consumers are able to directly nominate potholes in their town or city for repair through the PavingForPizza website. The Domino’s logo is spray-painted on repaired potholes however this is temporary and purposely washes away with rain.
- TRIP, a national transportation research group, claim forty-four percent of America’s major roads are in ‘poor or mediocre condition’. Driving on roads in need of repair is thought to cost US motorists $130 billion a year in extra vehicle repairs and operating costs – working out to $599 per motorist.

“The concept of basic infrastructure projects and the maintenance of public roads being siphoned off to private companies for the purpose of marketing has proven both controversial and spectacularly successful for Domino’s. While the campaign is making a short term, and arguably negligible impact on the wider US road network its winning what matters, column inches. ‘Paving for Pizza’ caught the attention of prominent global media outlets, with USA Today, The Guardian and Bloomberg all writing editorial pieces on the campaign. ‘Paving for Pizza’ also acts as rare example of a win-win-win scenario in which customers (safely delivered pizza), Domino’s (publicity) and local Government (improved roads) are able to draw tangible positives. This is particularly beneficial for Domino’s when their direct and growing competitors, GrubHub and UberEATS, are coming under fierce scrutiny for their use (arguably exploitation) of the ‘gig economy’.”

Peter Ramshaw
Foodservice Analyst
How to position prestigious, high-end beauty products towards the male demographic?

Chanel Boy de Chanel makeup range

Chanel enters the male beauty market with a high-end make-up range for men
• This “Boy de Chanel” makeup range includes a tinted fluid foundation, a lip balm, and an eyebrow pencil, all of which are targeted towards the male demographic.
• South Korea was selected by Chanel to be the initial launch market for the range due to the already elaborate beauty and grooming routines of South Korean men.
• Chanel has opted to focus on markets where using male makeup is already the norm and therefore, investing in premium makeup products may have heightened appeal.

“Unlike the relatively simple male grooming routines in the West, beauty products for men have an established position within South Korean culture. This has offered a strong customer base for Chanel to launch its high-end beauty range for South Korean men to engage with, increasing the likelihood of product adoption and success. In fact, according to GlobalData’s Q3 2018 primary consumer survey, 75% of South Korean males claim to use a beauty/grooming treatment at home at least once a week or more, compared with just 38% in Chanel’s home market of France.1 This launch allows Chanel to leverage its strong brand heritage and luxury credentials within beauty and fashion to offer a point of differentiation in the male beauty space. Looking ahead, ample opportunities remain for luxury brands to penetrate the relatively untapped male beauty space, particularly in the realm of color cosmetics. Eastern markets will be a key platform for growth, while continuing to serve as a source of inspiration for beauty manufacturers worldwide.”

Lia Neophytou
Analyst

Source: [1] GlobalData’s 2018 Q3 global consumer survey
An adult soft drink positioned as a healthy ‘wine water’

• Now available in the US, this beverage is touted as a “world-first” alcohol-free, gourmet ‘wine water’. The product has been created by an Israeli startup company called Wine Water Ltd.

• The range features still and sparkling red and white wine variants and contains natural ingredients of wine, such as red or white grape skins and seeds derived from wine grape waste.

“The concept of a hybrid, ‘wine water’ beverage is unique, and will likely attract attention from health-conscious consumers, particularly given the product’s all-natural formulation. This product may also interest those consumers who do not want to drink alcohol, but are looking for a substitute drink to have at social events or work meetings that can provide the same taste of wine but without the alcohol content. The product looks to achieve this by targeting a more adult audience with a healthy wine alternative positioning, drawing emphasis to the inclusion of “wine grape” skins and a premium bottle design. In addition, the wine skins and seeds used in the product are derived from wine grape waste. Not only does this allow the brand to tap into a sustainable angle and boost its reputation, but it also supports the all-natural, adult positioning of the beverage.”

Matthew Perry
Associate Analyst
How to boost appeal among today’s tech-savvy consumers?

Bröö Moods Connect touch screen hand cream

Hand cream targeted at touch-screen users

• This “touch screen” hand cream was launched in the US in April 2018, explicitly targeting today’s tech-savvy generation of consumers who are typically heavy users of touchscreen devices such as smartphones and tablets.

• The cream claims to be non-greasy, without leaving smudge marks on the touchscreen even when a device is used soon after hands are moisturized.

“This launch is a great example of a disruptive innovation in personal care, in the way the product is positioned and marketed to a very niche group of consumers. Although the ingredients list emphasizes many free-from claims, the product stands out due to the marketing claims made on the packaging and marketing copy. For instance, the brand uses several interesting word-plays on technology and social media terms in order to resonate with the target market e.g. “[this product]” lets you update your hand “status” from dry to drenched” and “we put our finger on the ‘right swipe’ for digital hands”. These type of marketing claims can prove to be important purchase drivers, particularly to those shopping online for personal care products, where they have to solely rely on product descriptions and marketing claims rather than trying out a product before purchasing it.”

Ramaa Chipalkatti
Lead Analyst, Consumer
How to use technology to streamline processes and reach new audiences
How to target a gap on the market and reach a new audience with unique positioning

How brands are standing out with a unique technological innovation

Innovations aligned with new technology has been becoming a key area development in FMCG as well as food service industries. Brands actively collaborate with tech companies to differentiate their products and services to stand out in the competition, and boost popularity. Some examples of unique technology-driven innovations found in 2018 include unique collaborations and home appliance development.

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How to manage your diet smartly?

Panasonic’s CaloRieco dietary management system

A device that can scan the amount of calories in any given food item

• Another innovation within Panasonic’s repertoire, this device measures the nutritional and calorific content by using near infrared rays to scan the foods. Data is visualized using the device screen or the phone app which serves as an extension of the device and its capabilities.
• Pricing point and launch details are still to be decided as the product gets tweaked for widespread use.

“This product innovation has potential to be revolutionary for consumers. Managing your diet is often a cumbersome time consuming task and due to consumers increasingly busy schedules, they often forgo monitoring this in favour of convenient indulgent food, which is often unhealthy. This will be ideal for consumers ranging from gym goers, diabetics and just the general populace who want to keep an eye on their food intake. The tech aspect of this product is sure to appease consumers as it is simple, and the true convenience of it is relayed through its very accessible app. In my opinion, a great use of data analytics and data visualisation to directly impact lifestyles at home!”

Cassius Prempeh
Foodservice Analyst
Quick food, ultra personalised

• Vita Mojo developed software, showcased in its three London restaurants which allow customers to pre-order food, choosing ingredients and adjusting quantities.

• By investing in and making use of this technology, Elior is promising to bring personalised nutrition into workplaces and other institutional channels, offering consumers real benefits in the increasingly competitive foodservice atmosphere.

“Vita Mojo is a company, based in London, which aims to offer consumers unprecedented levels of customization of their food, even involving DNA test data, through a partnership with DNA Fit, into their suggestions. While they have initially used their software in their own restaurants, the goal is to focus on providing it to other operators.

Given that 57% of consumers globally are often or always influenced to buy a food product due to how well it is tailored to their needs, the technology could be a powerful tool in attracting customers.

French caterer Elior Group saw this as a unique opportunity to improve its offering, becoming an early investor in the tech. Towards the end of last year, the collaboration started in earnest, with Elior introducing Vita Mojo’s tech into a City law firm’s canteen towards the end of 2017, which resulted in a doubling of site sales. With the number of Elior sites using the technology growing and Vita targeting new partnerships, the future is bright.”

Lewis Towell
Analyst

Source:[1] GlobalData 2018 Q3 global consumer survey;
Reimagining the cocktail experience for at-home consumption

- A collaboration between Keurig Dr Pepper and Anheuser-Busch InBev, the appliance was developed to enable consumers to make bar-quality drinks at home.

- Users can prepare 24 different beverages using proprietary pods that contain signature blends crafted by in-house mixologists. The drinkmaker calculates the precise amount of water and carbonation required for each drink, to create a professional and consistent beverage every time.

“Ever since the global financial crisis, alcoholic beverage companies have gone to considerable lengths to recapture drinkers who have curbed alcohol spending and turned to off-trade consumption to save money. At-home cocktail dispensers have been one such solution; in fact, GlobalData has been tracking the development of this technology for almost five years, ever since Pernod Ricard unveiled its home bar prototype in 2014. It is indeed exciting and satisfying to see the concept finally come to market.

Clearly taking cues from the game-changing coffee pod machine, this drinkmaker turns the traditionally cumbersome task of cocktail making into something easy and familiar. The challenge for this innovation is convincing drinkers that the final product is actually superior in quality to a readily available premixed cocktail. And much like the branding strategies of coffee pod machines, the key lies in selling not just a beverage but a lifestyle.”

Katrina Diamonon
Principal Analyst
Appendix

References and further reading

References

• Foodnavigator-usa(2018) "CoAqua targets premium-seeking audience relying on direct-to-consumer online channel," https://www.foodnavigator-usa.com/Article/2018/04/19/CoAqua-targets-premium-seeking-audience-relying-on-direct-to-consumer-online-channel, April 2018
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Appendix

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