Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

KANTAR

Press release

21/06/2023

Kantar's Vietnam Brand Footprint 2023

Kantar reveals Vietnam's most chosen FMCG brands in 2023

- **Vinamilk** is the undisputed No. 1 brand name among urban households, purchased by 9 out 10 families in Urban 4 key cities.
- **Coca-Cola** tops the Beverages rankings in both Urban 4 and Rural areas, becoming the most chosen beverage brand across the board.
- **Unilever** solidifies its reign in personal & home care sectors, with household brand names consistently topping the charts in both urban 4 & rural.
- **Masan** reinforces its No. 1 position as the Most Chosen Brand Owner in Rural regions, owning multiple top-ranking brands in packaged foods.
- **Suntory-Pepsico,** is the only brand owner that sustained more purchase occasions since last year, contributing to a good year of performance for the Beverages sector.

I. About Kantar's Brand Footprint

Kantar Worldpanel Vietnam has published the Brand Footprint 2023 report, revealing the annual rankings of Vietnam's most chosen brands in FMCG.

The report is part of the 11th edition of Kantar's global Brand Footprint study, a detailed analysis of the shopping habits of shoppers in 53 countries, representing 85% of the global population.

The Brand Footprint Vietnam report, leveraging Worldpanel's household purchase data, highlights top 10 FMCG brands in 5 sectors, including Food, Beverages, Dairy and Dairy Substitutes, Health & Beauty, Home Care, as well as the top 5 Brand Owners that were purchased the most by consumers, in Urban 4 Key Cities (Ho Chi Minh City, Ha Noi, Da Nang and Can Tho) and Rural Vietnam.

The rankings employ the unique and insightful Consumer Reach Point (CRP*) metric to assess brand success. CRP, a proprietary metric of Kantar, measures how many households around the world are buying a brand (penetration) and how often (frequency), thus providing a true representation of shopper choice.

II. A look back at FMCG landscape in 2022

In 2022, Vietnam's economy experienced a remarkable GDP growth of 8%, the highest in over a decade. However, the local economy has been impacted by global instabilities and inflation, leading to a significant rise in the consumer price index (CPI) toward the second half of 2022.

Both Urban 4 cities and Rural areas in Vietnam witnessed overall value growth in the FMCG sector, primarily driven by increased prices. While volume consumption in Rural areas showed potential, it grew at a slower rate compared to price increases.

KANTAR

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

As prices began to soar, consumers started tightening their belts and seeking ways to save money. Brands now must compete more rigorously for consumer choice. This year's edition of Brand Footprint celebrates the brands that have found their ways to win more consumers in a time of uncertainties.

III. FMCG Brand rankings by Sector

1. Top 10 most chosen Packaged Foods brands – Urban 4 & Rural

Vietnam ranking

Packaged Foods – Urban 4 key cities and Rural

Urban 4

2022 Rank	Brand	CRP (M)	Penetration% 2022	Consumer Choice 2022
1	Hao Hao	14.0	73.6	6.0
2	Chin Su	13.0	65.8	6.2
3	Nam Ngu	12.0	67.0	5.6
4	Ajinomoto	10.0	74.3	4.1
5	Cholimex	9.0	57.5	4.9
6	Maggi	8.0	67.9	3.8
7	Bien Hoa	8.0	56.9	4.4
8	Simply	8.0	51.3	4.7
9	Hai Chau	7.0	29.4	7.1
10	Tuong An	7.0	54.0	3.8

Rural

2021 Rank	Brand	CRP (M)	Penetration % 2022	Consumer Choice 2022
1	Nam Ngu	125.0	78.6	8.8
2	3 Mien	84.0	55.2	8.4
3	Chin Su	83.0	78.3	5.9
4	Hao Hao	75.0	60.0	6.9
5	Kokomi	73.0	58.5	6.9
6	Ajinomoto	58.0	65.8	4.9
7	Gau Do	55.0	49.6	6.1
8	Simply	49.0	53.6	5.1
9	Tam Thai Tu	41.0	38.0	5.9
10	Oishi	39.0	30.4	7.1

KANTAR 24 BRAND FOOTPRINT 2023

In the Packaged Foods frontier, **Hảo Hảo and Nam Ngư have maintained their strongholds as The Most Chosen Food brands in Urban 4 and Rural Vietnam respectively**. Nearly three-quarters of urban households have purchased Hảo Hảo in the past year, solidifying its position as the No.1 household name in Urban 4 cities thanks to its ubiquitous promotional campaigns across many consumer touchpoints, from eCommerce to gamer communities.

Meanwhile, **Chinsu gained an extra 12 million purchase occasions in both Urban 4 & Rural, climbing one place in each ranking**. The sauce and condiment brand is the only one in top 5 Packaged food brands in Urban 4 to gain CRPs in 2022 even after the stockpiling period.

Cholimex entered Urban's top 5 this year, **followed by the Nestlé-owned brand, Maggi**, both gaining 1 place from their 2021 positions and maintaining a relatively stable buyer base in Urban 4 cities since the pandemic.

Masan's instant noodle brand Kokomi secured its position in Rural's Top 5 most chosen food brands by moving up one spot. With a remarkable 73 million purchases last year, Kokomi experienced a significant 15% growth in CRP, coming close to Hảo Hảo.

Impressively, **the cooking oil brand Simply, owned by Calofic, climbed 2 places to take No. 8 in both rankings,** pushing its competitor, Tuong An cooking oil, to its previous ranking. Simply managed to retain its buyer base and increase frequency with existing customers even beyond the stockpiling period.

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

2. Top 10 most chosen brands in Beverages – Urban 4 & Rural

Vietnam ranking

Beverages – Urban 4 Key cities and Rural

Urban 4

2022 Rank	Brand	CRP (M)	Penetration% 2022	Consumer Choice 2022
1	Coca-Cola	11.0	67.8	5.1
2	Tiger	7.0	36.1	6.1
3	Sting	6.0	30.8	6.3
4	Nescafé	6.0	34.1	5.4
5	G7	5.0	39.0	4.1
6	Aquafina	4.0	24.6	5.5
7	Tea Plus	4.0	28.6	4.4
8	C2	4.0	32.0	3.8
9	La Vie	4.0	27.5	4.2
10	333	3.0	18.9	5.3

Rural

2022 Rank	Brand	CRP (M)	Penetration % 2022	Consumer Choice 2022
1	Coca-Cola	30.0	51.4	3.2
2	Saigon (Beer)	27.0	32.0	4.7
3	Nescafé	22.0	24.0	5.2
4	Ha Noi (Beer)	20.0	27.8	3.9
5	Red Bull	18.0	27.8	3.6
6	G7	18.0	30.1	3.3
7	Q Café	18.0	11.8	8.3
8	Sting	13.0	18.6	3.8
9	Mirinda	13.0	26.9	2.6
10	Pepsi	10.0	22.1	2.6

KANTAR 25 BRAND FOOTPRINT 2023

The year 2022 marked a good year for the Beverages sector, especially for liquid refreshment beverages categories. The top-performing brands in these categories gained positive CRP growth after a year of heavy Covid-19 impact.

Coca-Cola topped the chart, protecting its No. 1 position in Urban 4. The iconic carbonated soft drink brand achieved a remarkable feat by recruiting over 1 million new household buyers and **secure No. 1 spot in Rural Vietnam as well**. It's a fantastic comeback for Coca-Cola.

Tiger Beer held its place as the second most chosen Beverage brand in Urban 4 while its counterpart in Rural is Saigon Beer, giving up the No.1 position to Coca-cola.

A formidable contender in the Beverages sector is **the Suntory-PepsiCo owned energy drink brand, Sting, which has consistently ascended to No. 3 in urban 4's beverages rankings**, attracting more than 122,000 household buyers in Urban 4. In Rural, Sting also makes strong stride, with 31% CRP growth while another player in energy drinks, Red Bull, steadily makes its way into the top 5 most chosen beverages brand by rural consumers, gaining 1 spot from last year's 6th position.

Nescafé and **G7**, the two shopper-favorite coffee brands respectively take No. 4 and No. 5 in the Urban ranking. G7, the core brand of Trung Nguyen, ascends one place from last year's position by attracting over 300,000 household buyers in Rural while maintaining its position and buyer base in Urban Vietnam.

For the first time, the ready-to-drink tea brand, **Tea Plus, has entered the top 10 of consumer choices in Beverages**, continuing its growth streak from 2021. Tea Plus managed to maintain its double-digit CRP growth in Urban, surpassing its competitor C2 to take the 7th place in Urban 4 ranking. C2, however, make significant strides in rural regions to be in the Top 20 most chosen beverages brands.

KANTAR

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

3. Top 10 most chosen brands in Dairy & Dairy Substitutes – Urban 4 & Rural

Vietnam ranking

Dairy & Dairy Substitutes – Urban 4 Key cities and Rural

Urban 4

2022 Rank	Brand	CRP (M)	Penetration% 2022	Consumer Choice 2022
1	Vinamilk	40.0	90.4	14.0
2	Th True	16.0	57.0	7.9
3	Ngoi Sao Phuong Nam	11.0	46.9	7.2
4	Milo	8.0	50.2	5.5
5	Ong Tho	8.0	59.2	4.7
6	Dutch Lady	5.0	37.8	4.7
7	Fami	5.0	35.8	4.4
8	Yakult	5.0	25.1	5.1
9	Lif/Lif-KUN	3.0	17.5	4.3
10	Susu	2.0	19.7	4.1

Rural

2022 Rank	Brand	CRP (M)	Penetration % 2022	Consumer Choice 2022
1	Vinamilk	115.0	72.3	8.8
2	Fami	56.0	47.1	6.6
3	Ong Tho	43.0	45.8	5.2
4	Th True	30.0	36.9	4.6
5	Ngoi Sao Phuong Nam	30.0	26.6	6.2
6	Milo	29.0	33.9	4.7
7	Lif/Lif-KUN	27.0	28.6	5.2
8	Susu	17.0	21.3	4.4
9	Moc Chau	15.0	18.3	4.7
10	Dutch Lady	10.0	20.9	2.8

KANTAR 26 BRAND FOOTPRINT 2023

8 out of 10 Dairy & Dairy substitutes brands in Urban remain the same positions of last year. In both Urban 4 and Rural, **Vinamilk maintains its reign as the most beloved household name in the Dairy and Dairy Substitutes sector**, having been purchased a staggering 155 million times by consumers in Vietnam in the past year.

However, it'd be remiss to not mention **TH True's spectacular performance,** being the only dairy brand in the top 5 to gain more purchase occasions and recruit over 130,000 households last year. TH True's recipe for success lies in the brand's relentless efforts in innovation, deep understanding of consumer needs and bold exploration of new flavour combinations. This approach helps the brand capture consumer attention and establish itself as a leading brand in the FMCG market.

Yakult and LiF-Kun are two other Dairy brands that were able to gain double digit CRP growth in Urban 4, alongside TH True. Notably, these three brands are also the only ones to gain penetration uplift in Urban 4, proving penetration is still king.

LiF-Kun has been a rising star since last year for its ability to introduce a range of products that fulfill the needs of various young consumer segments. This year, **LiF/LiF-Kun finally breaks into the Top 10 in Urban** and jumps two places to consolidate its 7th position in Rural. Part of its success lies in its continuous advocacy for children's wellbeing and development through various sponsorship programs in sports and schools.

Sweetened condensed milk remains a staple in many Vietnamese families, regardless of their geographical location, with both Vinamilk-owned brands**, Ngoi Sao Phuong Nam and Ong Tho, making it to the Top 5 most chosen Dairy & Dairy Substitutes brands for the 3rd consecutive year**.

KANTAR

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

4. Top 10 most chosen brands in Health & Beauty – Urban 4 & Rural

Vietnam ranking

Health & Beauty – Urban 4 Key cities and Rural

Urban 4

2022 Rank	Brand	CRP (M)	Penetration% 2022	Consumer Choice 2022
1	Diana	10.0	61.7	4.1
2	P/S	7.0	68.7	3.5
3	Lifebuoy	4.0	59.8	3.5
4	Colgate	4.0	52.2	2.8
5	Sunsilk	4.0	29.5	3.6
6	Kotex	3.0	34.4	3.1
7	Clear	3.0	28.6	2.9
8	Close-Up	2.0	38.4	2.1
9	Pantene	2.0	22.1	2.8
10	Dove	2.0	22.9	2.6

Rural

2021 Rank	Brand	CRP (M)	Penetration% 2021	Consumer Choice 2021
1	P/S	59.0	80.5	4.1
2	Sunsilk	33.0	38.0	4.9
3	Clear	28.0	38.3	4.1
4	Diana	26.0	38.3	3.7
5	Lifebuoy	25.0	42.3	3.3
6	Dove	15.0	23.4	3.6
7	Colgate	14.0	35.4	2.2
8	Rejoice	14.0	16.0	4.7
9	Close-Up	13.0	29.8	2.4
10	Kotex	13.0	20.5	3.4

KANTAR 28 BRAND FOOTPRINT 2023

The **Health & Beauty sector is reigned by Unilever-owned brands** with 6 out of 10 personal care brands in both rankings belonging to the consumer goods giant. But they aren't where they are without trying.

The leading brands continue to reinforce their leading positions by constant innovations in their range of products, introducing new formats, scents and pack sizes. They also boost their presence across all important retail channels, especially online, to be able to cater to more consumers and fulfill their increasingly sophisticated preferences.

In **Urban 4, P/S toothpaste has ceded its first place to Diana**, the Japanese-owned hygiene and feminine care brand, **while still retaining the No. 1 position in Rural**, trusted by 80% of families.

Diana, impressively advancing one place in each ranking, **is the only Health & Beauty brand that managed to gain CRPs in Rural**. The brand successfully reached more buyers across regions in Vietnam thanks to the brand's commitment to pushing innovation and omnipresence across retail formats.

Notably, **Pantene, a Procter & Gamble brand, moved up one place to No. 9 in Urban**, achieving the highest CRP growth out of all the Top 10 Health & Beauty brands.

KANTAR

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

5. Top 10 most chosen FMCG brands in Home Care – Urban 4 & Rural

Vietnam ranking

Home Care – Urban 4 Key cities and Rural

Urban 4

2022 Rank	Brand	CRP (M)	Penetration% 2022	Consumer Choice 2022
1	Sunlight	10.0	70.9	4.3
2	Omo	7.0	56.1	3.7
3	Comfort	4.0	38.2	3.3
4	Downy	4.0	34.4	3.3
5	Ha Noi (Tien Hieu)	4.0	23.8	4.6
6	Vim	3.0	45.7	2.2
7	Surf	3.0	31.0	2.5
8	Lix	2.0	27.3	2.5
9	Gift	2.0	32.2	2.0
10	My Hao	2.0	21.7	2.2

Rural

2022 Rank	Brand	CRP (M)	Penetration% 2022	Consumer Choice 2022
1	Sunlight	51.0	68.5	4.1
2	Omo	41.0	59.6	3.8
3	Comfort	30.0	44.0	3.8
4	Lix	23.0	25.9	4.9
5	Aba	19.0	27.2	3.9
6	Downy	17.0	29.4	3.1
7	Net	12.0	18.1	3.6
8	Thanh Ha	11.0	11.7	5.4
9	My Hao	11.0	20.4	3.0
10	Vim	8.0	24.6	1.8

KANTAR 27 BRAND FOOTPRINT 2023

The Top 3 most chosen Home Care brands in Vietnam continue to be led by three Unilever-owned brands: Sunlight, Omo, and Comfort, albeit with slightly declining CRPs.

Sitting at No. 4 in the top 5 most purchased homecare brands in Urban 4, **Downy succeeded in gaining 8% CRP growth** and increasing its consumers' purchase frequency plus maintaining its buyer base.

Vim and Gift, while keeping their respective positions in the ranking, were able to grow in CRPs and boost their penetration rates, by attracting an increment of approximately 42,000 buyers each.

Unilever's affordable laundry detergent brand, Surf, was last year's rising star for making its debut into the top 10. This year**, Surf continues to climb one more place in the ranking**, boasting a 7% CRP growth.

In Rural areas, the Vietnamese laundry detergent brand Net is the only home care brand in Rural areas that managed to grow in CRP, gaining two places to become an increasingly popular low-cost option for consumers in a budget-constrained period.

KANTAR

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

6. Top 5 Most Chosen Brand Owners

Vietnam's Top 5 Most Chosen Brand Owners

Vinamilk and Masan retain their respective No.1 Most Chosen Brand Owner spots in Urban 4 and Rural Vietnam.

Urban 4

2022 Rank	Brand	CRP (M)
1	Vinamilk	60.8
2	Unilever	51.4
3	Masan	39.9
4	Nestle	28.6
5	Suntory-PepsiCo	27.2

Rural

2022 Rank	Brand	CRP (M)
1	Masan	335.2
2	Unilever	294.6
3	Vinamilk	217.2
4	Calofic	106.0
5	Acecook Vietnam	99.6

KANTAR 29 BRAND FOOTPRINT 2023

The Top 5 most chosen brand owners in 2022 in both urban 4 and rural regions remain unchanged from the year before.

Vinamilk and Masan successfully defend their No. 1 positions as the most bought brand owners, owning multiple top-ranking household brands. **Unilever continues to dominate the home care and personal care fronts, holding the No. 2 position in Vietnam's urban 4 and rural rankings.**

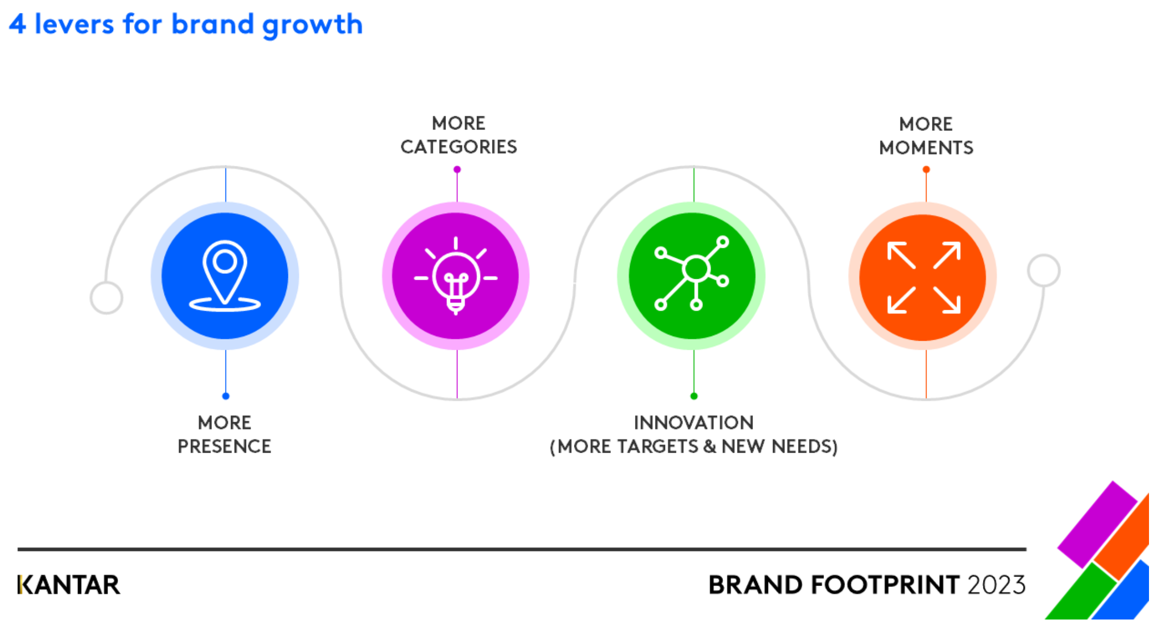
Suntory-PepsiCo is the only one brand owner in Urban 4 to gain incremental purchase occasions among a group of other consumer goods giants. By swiftly adapting to the in-home demand during the Covid-19 pandemic, the owner of Tea Plus and Sting achieved notable success through robust integrated marketing campaigns. These campaigns enabled them to effectively reach a wider consumer base, contributing to the recovery of the Beverages sector in a year marked by resilience.

The majority of brand owners in the top 5 rankings experienced a decline in CRP due to the transition from an in-home lifestyle to the new normal in 2022. This shift is accompanied by increased competition from smaller, local brands and low-cost options which are gaining appeal in a time of budget constraints.

In the landscape of heightened competition, winning consumer choice calls for the need for brands to pull on one or more levers for growth: more presence, more categories, more innovation, and more moments.

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn



To read the full Vietnam Brand Footprint 203 report, explore the data itself, and request more information please visit **www.kantar.com/brandfootprint**

***** CRPs: Consumer Reach Points*
***Total FMCG includes gifts*
****Urban include 4 key cities: HCMC, Ha Noi, Da Nang and Can Tho*

Worldpanel Division
58 Vo Van Tan
District 3
Ho Chi Minh City
Vietnam

T +84-28 3930 6631
F +84-8 3930 6632
worldpanelvietnam@kantar.com
www.kantarworldpanel.com/vn

About Kantar
Kantar is the world's leading marketing data and analytics company. We have a complete, unique and rounded understanding of how people think, feel and act; globally and locally in over 90 markets. By combining our people's deep expertise, data resources and benchmarks, and innovative analytics and technology, we help our clients understand people and inspire growth.

About Kantar Brand Footprint
Kantar's annual Brand Footprint study is based on the real shopping behaviour of over 550,000 households around the world, representing a total of 1.2 billion households across in 53 markets across five continents—covering 87% of the global GDP. As part of the study, we track more than 37,000 brands across beverages, food, dairy, health and beauty and homecare.

**The Brand Footprint 2023 data was collected over a 12-month period between November 2021 and October 2022.*

Visit us at

Website www.kantarworldpanel.com/vn

Contact us

Hà Huy Thiên Thư
Senior Marketing Manager
M +84 (0)912506898
E **jane.Ha@kantar.com**