

VALICON »TOP25 REGIONAL BRANDS 2016«

Coca-Cola is the new leader on the “VALICON TOP25 REGIONAL BRANDS” ranking in the Adriatic region. Regional brands are closing the gap towards the global brands in “VALICON TOP25 REGIONAL BRANDS” ranking.

Coca-Cola has switched the position with the former leader Milka which now comes in as the second strongest brand. The third place belongs to Cedevita, which switched its position with Vegeta, according to last year's ranking. Chipsy chips, Kiki candies and Sprite soft drink are newcomers in “VALICON TOP25 REGIONAL BRANDS” ranking. **Chipsy and Colgate are the brands that gained the most in 2016.**

Among others here are some of the most outstanding stories of the 2016:

- **Coca-Cola took the number one position after many years of Milka's reign.** However, Coca-Cola doesn't appear as number one on any of the five markets forming the TOP25 brands ranking. It holds number two position in all markets except for Macedonia where it is number three.
- **Chipsy**, the original Serbian brand of chips has improved its position in Slovenia and Croatia and therefore strengthening its regional success. The result is **the largest jump among all of the measured brands** from position no. 26 to position no. 13.
- **Another brand has managed a large jump namely Colgate toothpaste.** Last year on position no. 21, this year no. 11.
- **Almost half of the TOP25 brands are now of regional origin.** Last year the score was 15:10 for the global brands, this year the score is tightened to 13:12 for global brands.

It is important to know that there are really tiny differences among the brands on positions from no. 3 to no. 9. One should have in mind this when talking about the "decline" or "growth" of a particular brand. Already next year the situation between the two brands within this circle may change.

»TOP25 REGIONAL BRANDS«



If we take a look at the specific markets that form the regional ranking all the local leaders maintain their position. Argeta is the only brand to hold number one position in two markets. Regional and local brands remain very strong in each country - there are only two (Slovenia, Croatia and Serbia) or three (Bosnia and Herzegovina) global brands among top 10 ranking per market, except for Macedonia where there are five.

Here are some of the most interesting stories of 2016, by country:

BOSNIA AND HERZEGOVINA. New year brought significant shifts in Bosnia and Herzegovina, though **Argeta remained first-seated**. Bosnia and Herzegovina can represent the whole Adria region, as several regional trends can be traced in B&H. **The biggest change** is, of course, two brands that are among top 10 for the first time - **Chipsy** (jumped in at 5th place) and **Pardon** (8th place). New regional leader, Coca-Cola improved its position in B&H and now takes second place - while Milka took third. **Most interesting brand story of B&H is Violeta**, the only local brand among top 10, now takes seventh place (fifth last year - Vegeta and Chipsy took fifth and sixth positions). Violeta is specific as **for many years it was the only toilet paper brand among top 10 brands of any of the local market**. Now, Violeta is accompanied by Paloma, that took 10th place in Macedonia.

CROATIA. **Jana** remains the leader in Croatian market as **the only brand of bottled still water represented among TOP25 regional brands**. There are as much as four brands retaining their position as last year: the above mentioned **Jana, Milka, Gavrilović and Nivea**. **Cedevita, Vegeta and Jamnica** are holding positions from three to five. **Domaćica** is the newcomer among top 10 on position number eight, as a result of a consistent investment within last few years into widening the brand portfolio and co-branding within the company. **Franck** remains within the top 10's strong competition also by years of investment in brand consistency, innovations and widening its brand portfolio. The new regional leader **Coca Cola** has made the largest jump from position number five to position number two.

MACEDONIA. **Argeta** remains the leader in this market. **One of the most notable jump into the top 10 was achieved in this market by Colgate toothpaste**, entering the top 10 ranking and already at the position number 4. **Another new entry in top 10 is taken by Paloma tissues**. **Bitola yoghurt also jumped by five ranks to the position number two**, followed by the new regional leader **Coca-Cola**. The number of local brands has shrunked this year to two of them, beside **Bitola yoghurt** also **Stobi** flips. **Macedonia is the country with the largest share of global brands among top 10**.

SERBIA. **Moja kravica is the only brand in the region to won local top 10 position with two categories**. Both **Moja kravica milk and Moja kravica yoghurt** are among top 10 in Serbia. The new year in Serbia brought changes mostly in the lower part of the top 10 ranking where **Serbian brands Moja kravica milk, Najlepše želje entered the list and Jaffa cakes returned**. On the upper part of the list there are no changes and **Plazma is still the strongest brand in Serbia** while the next six places are occupied by the same brands as previous years but in somewhat different order. The **new regional leader Coca-Cola is now on the second place**, which is a two positions jump in comparison to the year 2015, the next one on the list is **Smoki**, last year second place, and **Moja kravica yoghurt** (no. 6 in 2015). The fifth place belongs to another regional brand - **Milka**, while the next two positions are occupied by local brands **Knjaz Miloš and Dijamant**.

SLOVENIA. **Barcaffè** remains the number one brand in Slovenia. **Donat Mg** has entered the top 10 ranking in Slovenia. **For the first time a premium brand has entered top 10 ranking in any of the five markets**. Although there is only one

newcomer within top 10 in Slovenia, namely Donat Mg in tenth place, all other rankings shuffled significantly. The largest jump was achieved by Cedevida, from ninth to third place, and Fructal, from eighth to fourth. Seven out of ten brands of the top 10 are originally Slovenian brands, one is Croatian and two are global. Slovenia is the only market with two brands of mineral water among top 10, Radenska and Donat Mg.

»TOP10 COUNTRY BRANDS«



ABOUT »TOP25 BRANDS« AND VALICON

»TOP25 brands« is an independent, survey based ranking of FMCG brands in the Adriatic region including five markets: Slovenia, Croatia, Serbia, Bosnia and Hercegovina and Macedonia. The first ranking was published in 2012.

Valicon is one of the biggest marketing consulting and research companies in the region. Originally from Slovenia Valicon became a fully operating regional company in 2005. Valicon offices may be found in Ljubljana, Zagreb, Sarajevo and Belgrade.

TOP25 BRANDS METHODOLOGY - QUICK FACTS

Brand strength is the criteria for rankings. Brand strength is calculated on the basis of brand recognition, experience and usage of a brand within a specific category. Results are weighted by country population size.

Rankings are based on representative surveys conducted in five biggest regional markets Serbia, Croatia, Bosnia and Herzegovina, Macedonia and Slovenia.

Survey methodology: conducted in September-October 2016; n=1000-1500 per country; sample representative on gender, age, education, region for population 15-65 years of age; mix-mode computer assisted interviewing, combined face-to-face and web interviewing.

CONTACTS

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