



Most Penetrated FMCG Brands Western Europe

1st Edition – July 2026

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Report Details

Countries

- Seven markets:
 - France
 - Germany
 - Great Britain
 - Italy
 - Portugal
 - Spain
 - Switzerland

Categories

- Total FMCG exc non-barcoded products:
 - Alcoholic Beverages
 - Confectionary & Snacks
 - Ambient Foods
 - Frozen Foods
 - Fresh Foods
 - HBA
 - Healthcare
 - Homecare
 - Non-Alcoholic Beverages
 - Paper Products
 - Pet Food

Brands

- Analysis based on the Top 1000 brands in Western Europe based of value sales
 - Represent 35% of FMCG sales
 - Grew collectively at +2.7%
 - vs FMCG industry at +3.2%
 - vs Private Label at +4% (representing 42% of sales)

The above data based on full calendar year 2025 vs 2024

Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT

Buyer Based Revenue Decomposition

Penetration/Buyers

- The number (or%) of household who bought your brand at least once
- Your brand's reach / buyer base
- "How many people are buying?"

Occasions per Buyer

- The average number of occasions a brand is purchased per shopper
- Your brand's frequency of purchase
- "How often do buyers buy?"

Value per Occasion

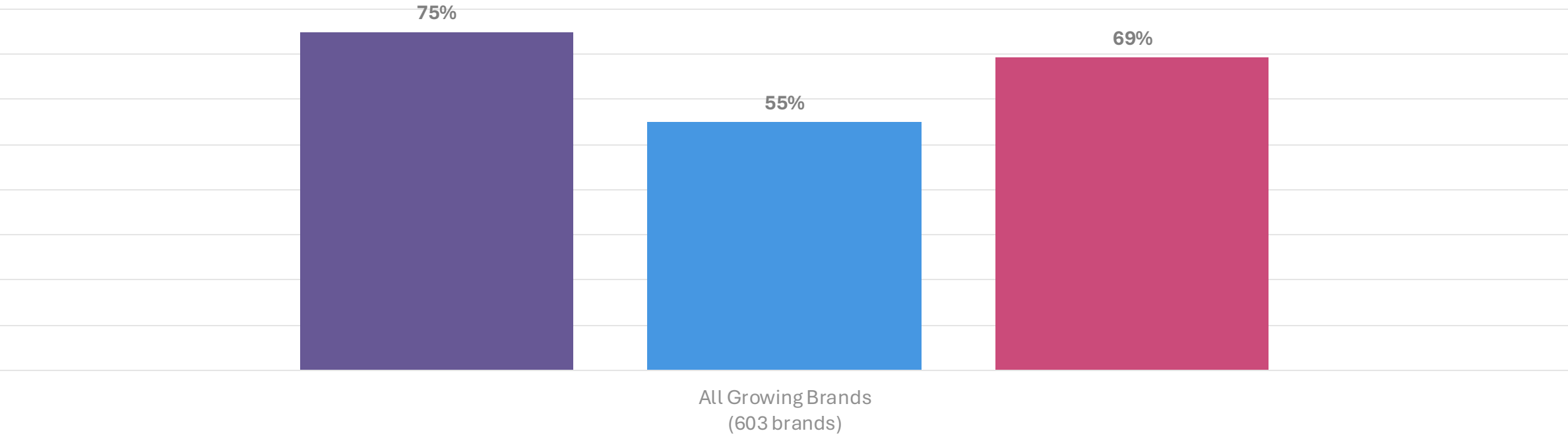
- The average value spent on a brand each time a buyer buys it
- Your brand's spend per trip
- "How much do buyers spend each time?"

In 2025, 60% of brands grew across Europe, with 3 in 4 seeing an increase in the buyer base

Based on Calendar Year 2025 vs 2024

% of Growing Brands increased their:

■ Penetration/Buyers ■ Occasions per Buyer ■ Spend per Occasion



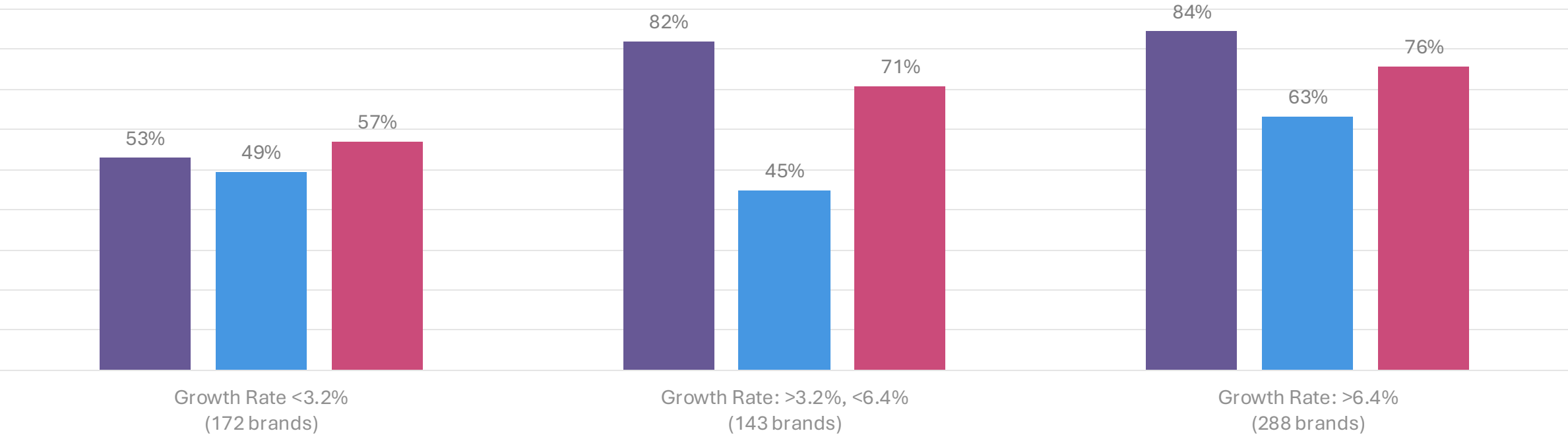
Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | FY 2025 v 2024

Over 80% of the brands that grew above the FMCG-industry average increased their buyer base

Based on Calendar Year 2025 vs 2024

% of Growing Brands increased their:

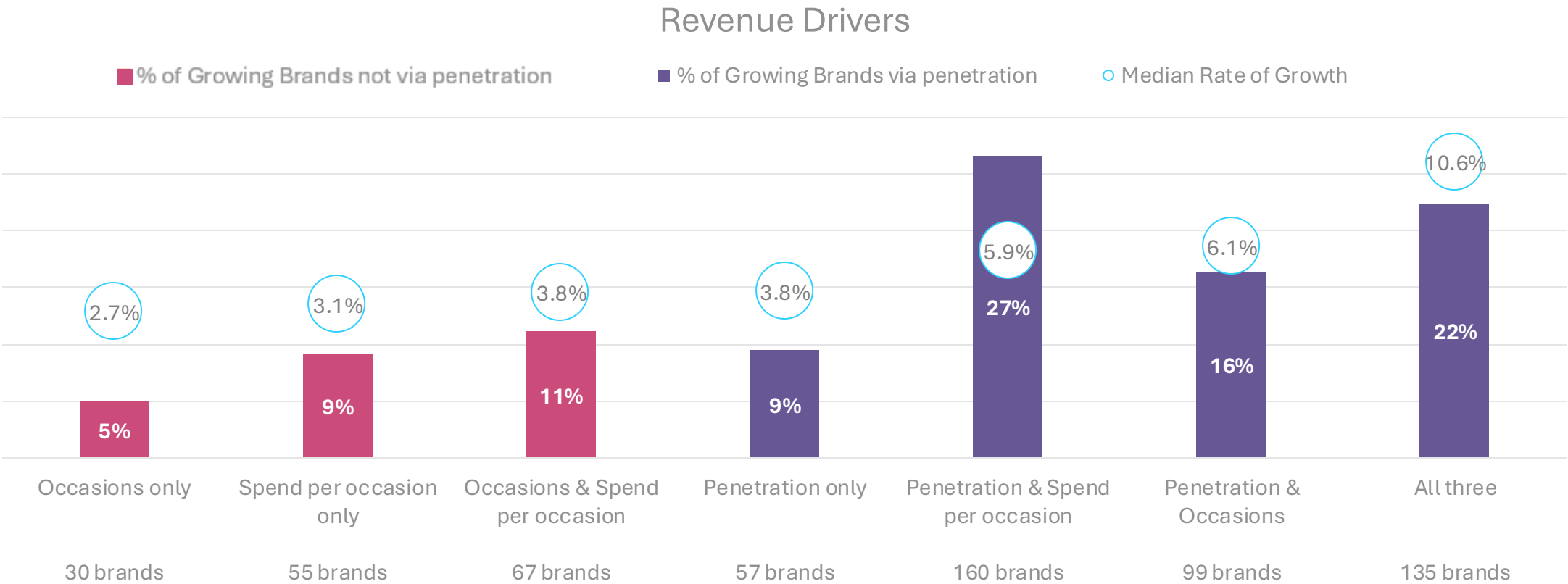
■ Penetration/Buyers ■ Occasions per Buyer ■ Spend per Occasion



Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | FY 2025 v 2024

Penetration-led growth leads to stronger growth whether it's the only lever or a mix

Based on Calendar Year 2025 vs 2024



Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | FY 2025 v 2024

Some key facts about the Top 1000 brands across Western Europe

Based on Calendar Year 2025 vs 2024

Top 1000 Brands
Average Penetration

7.6%

Small vs Large brands

783 brands
<10%
penetration

48 brands >20%
penetration

Penetration Growers

510
Brands

Average Penetration
Gain

+0.4%

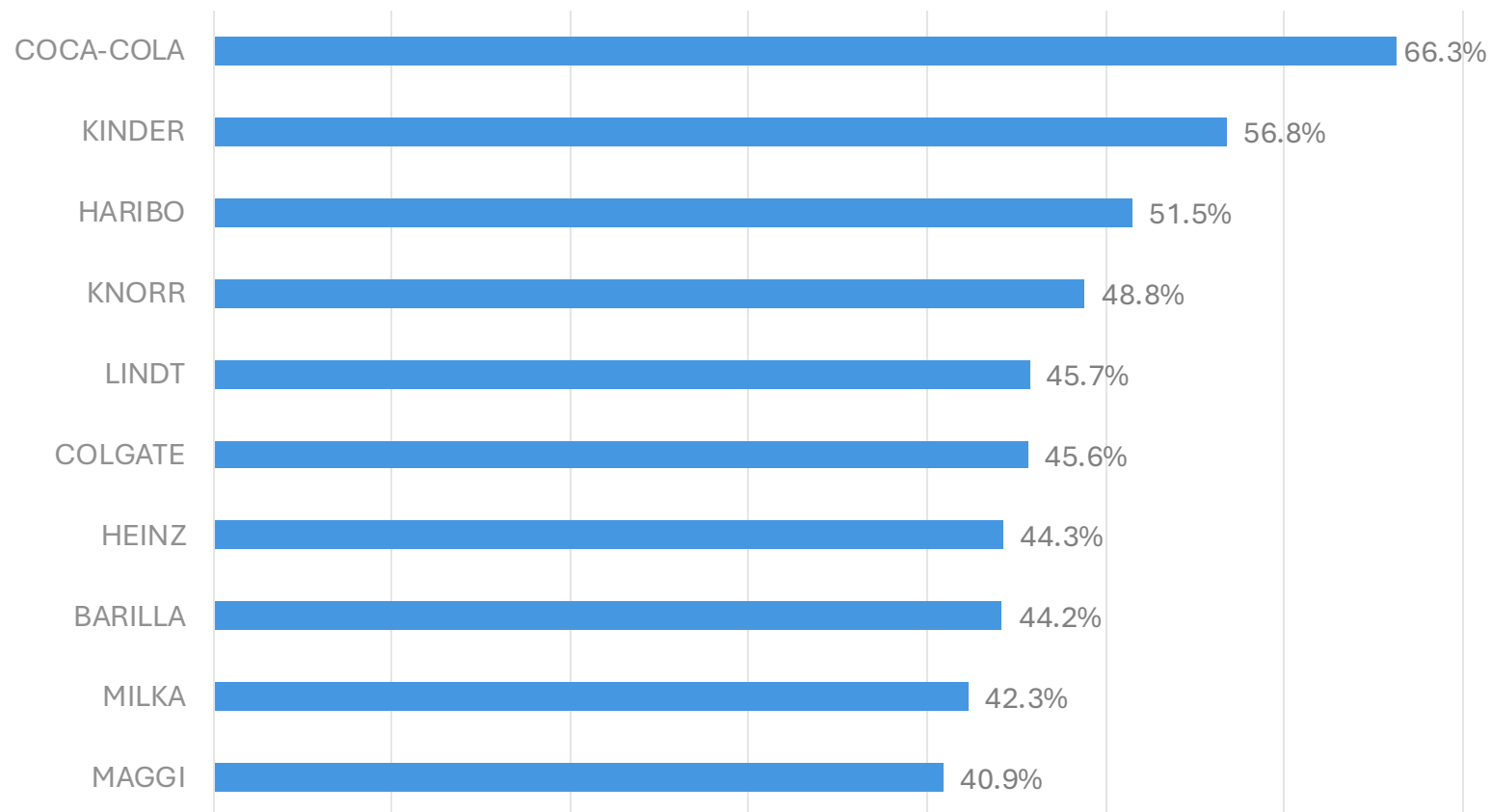
Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | FY 2025 v 2024

Most Penetrated FMCG Brands Western Europe

2025 Top 10

Top 10 Most Penetrated Brands 2025

Total FMCG – CY2025
Household Penetration (%)
Western Europe



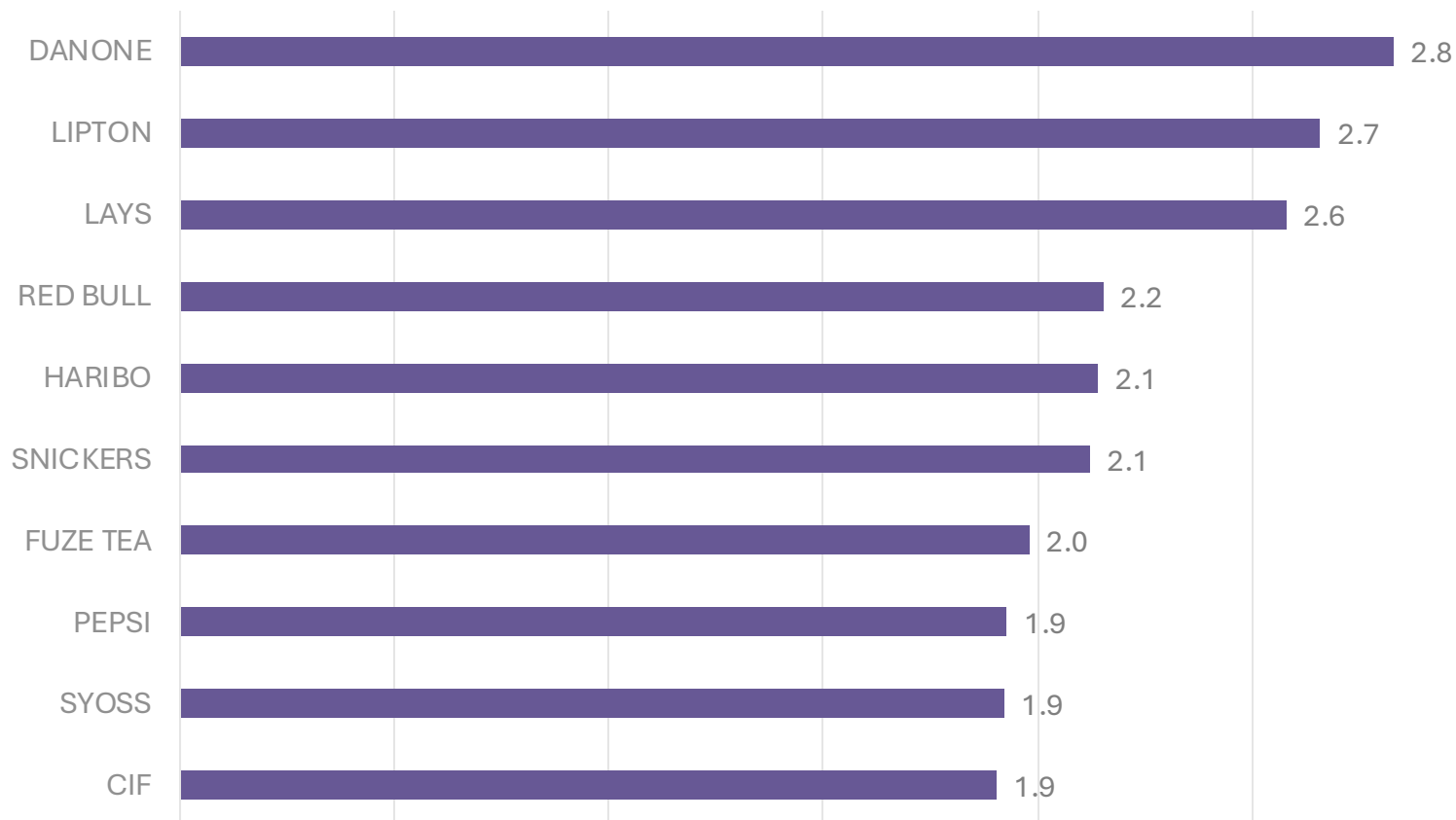
Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | FY 2025

Top 10 Penetration Gains 2025

Total FMCG – CY2025 v
CY2024

Household Penetration (%)

Western Europe



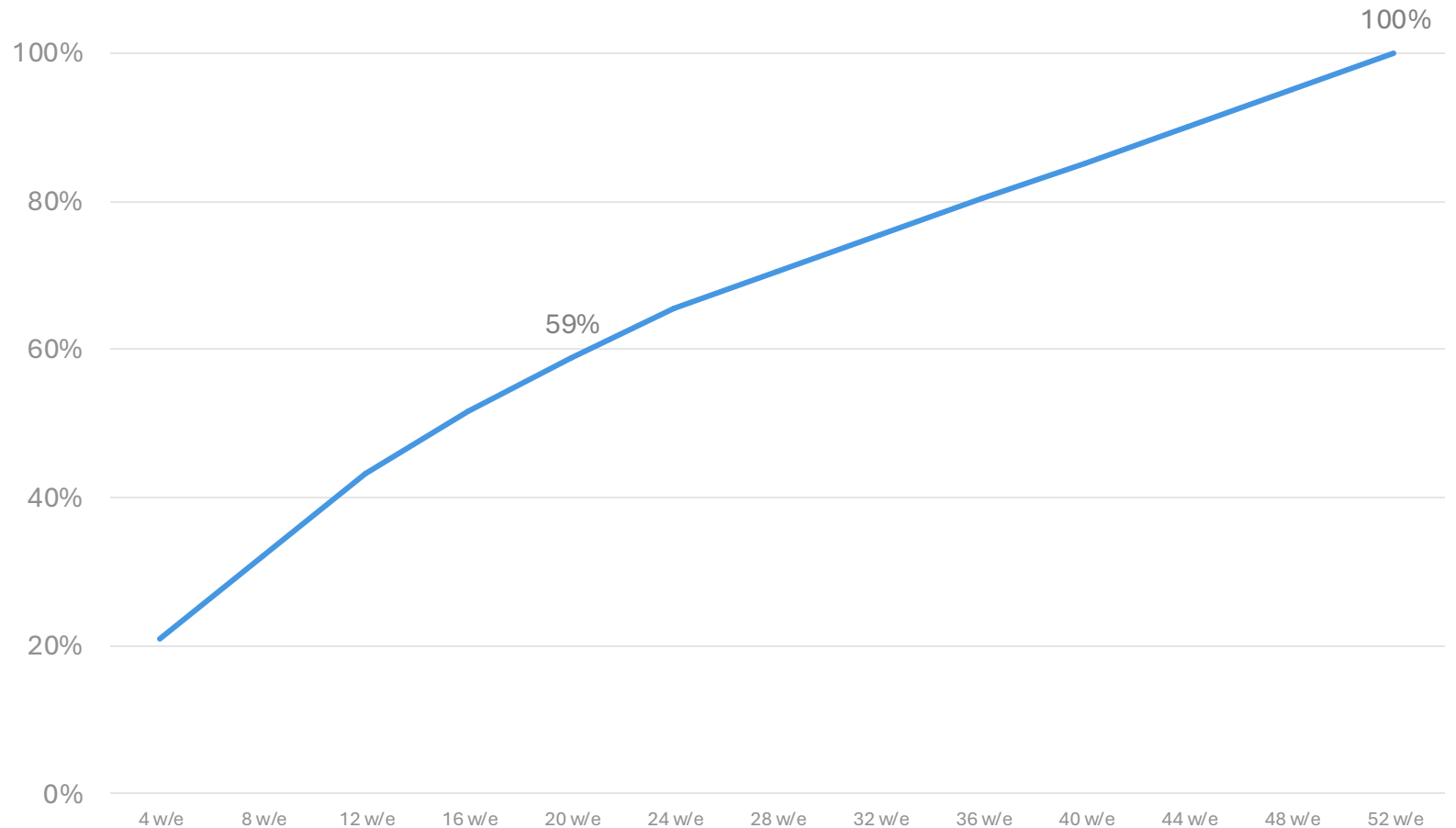
Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | FY 2025 v 2024

Most Penetrated FMCG Brands Western Europe

YTD 2026 Top 10

Penetration Build Average across Top 1000

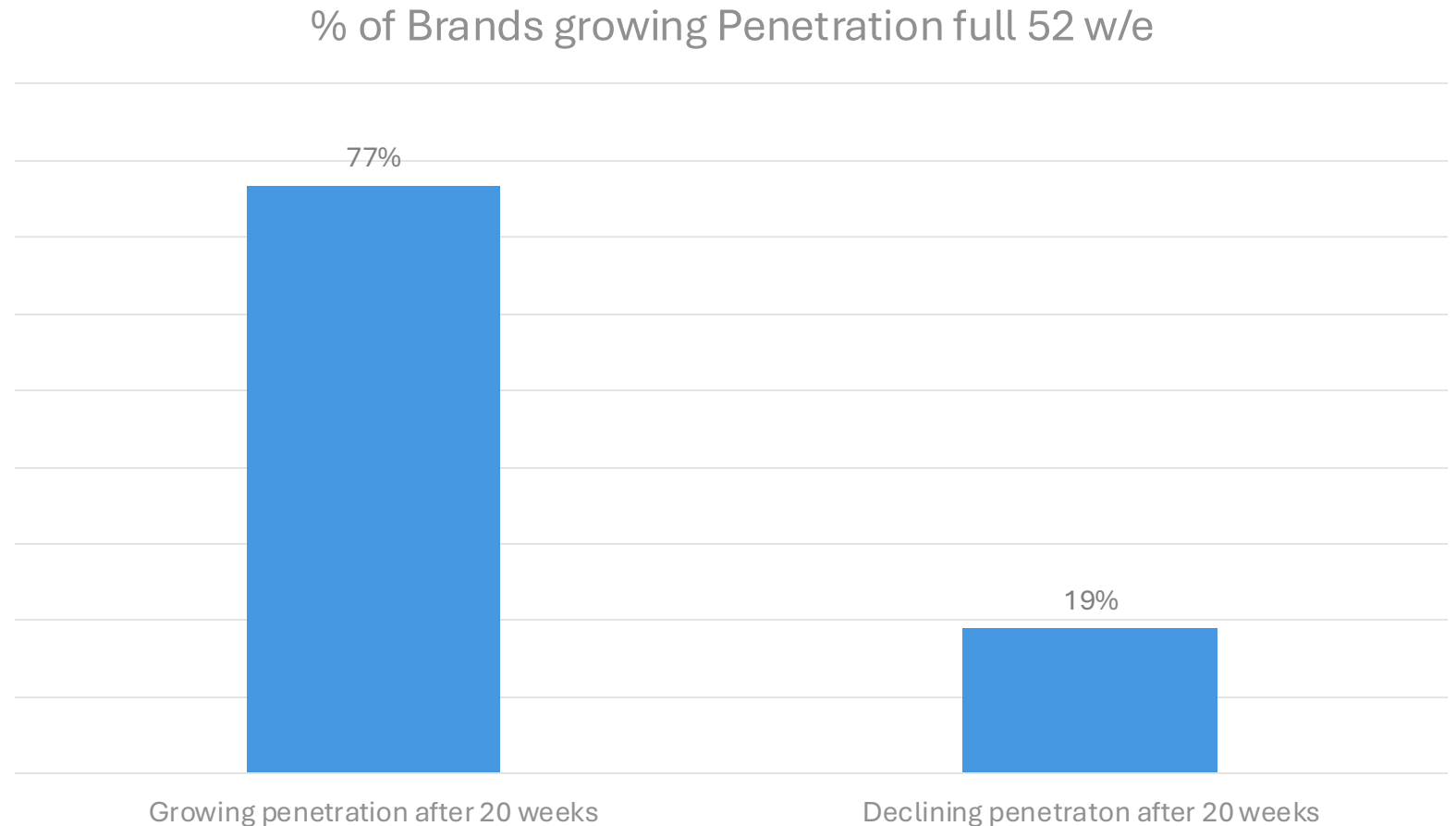
For the average FMCG brand
59% of buyers have bought
by 20 weeks into the year



Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT

% of Brands growing penetration full year

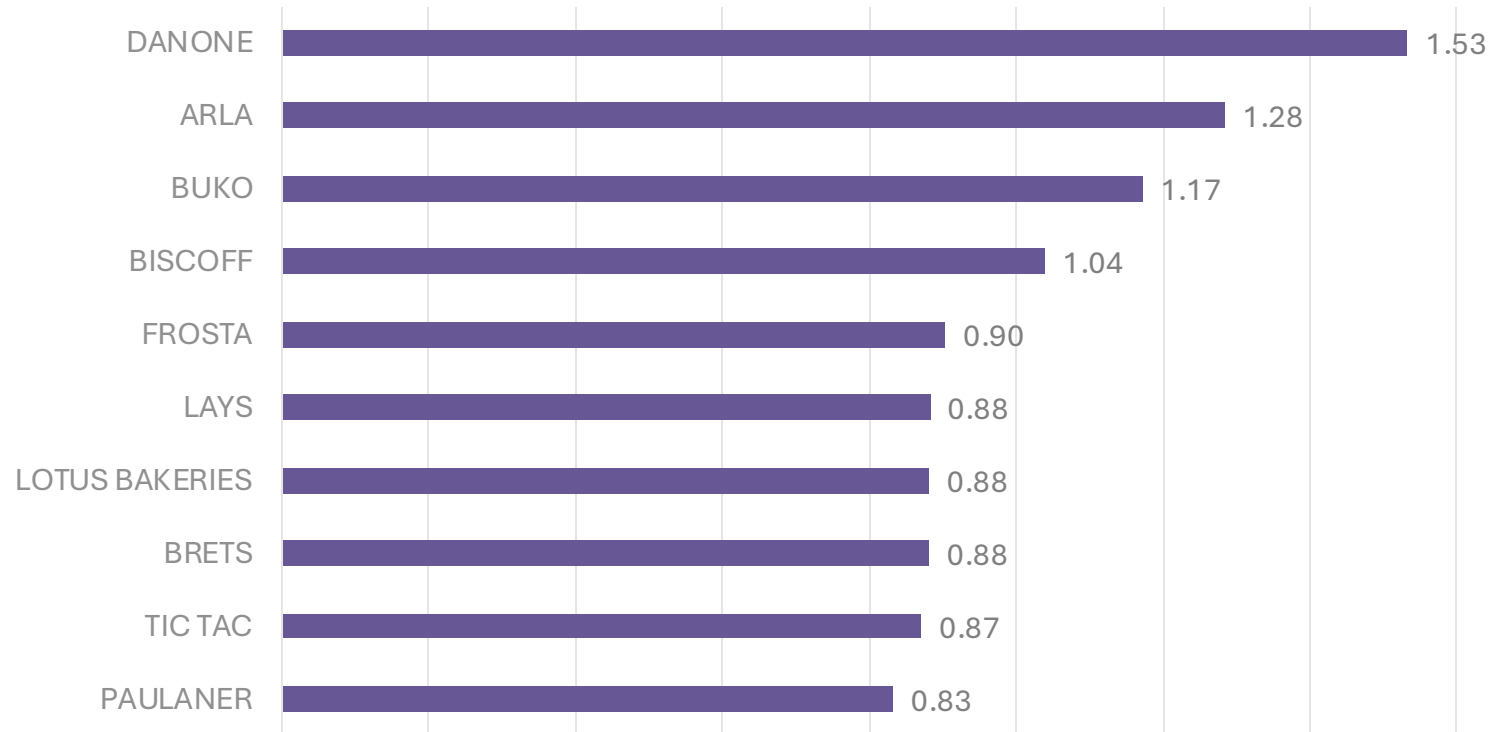
Less than 1/5 brands that have declining penetration after 20 weeks manage penetration growth by full year



Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT

Biggest Penetration Gains YTD 2026

Top 10 – Total FMCG
Household Penetration (%)
Western Europe
First 20 weeks



Source: NielsenIQ Panel On Demand Multi-Country | SPG MULTICOUNTRY - GB FR DE CH ES PT IT | YTD 20 w/e W20 Y26 v ya

Want to discuss how your Brand is performing in 2026?

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