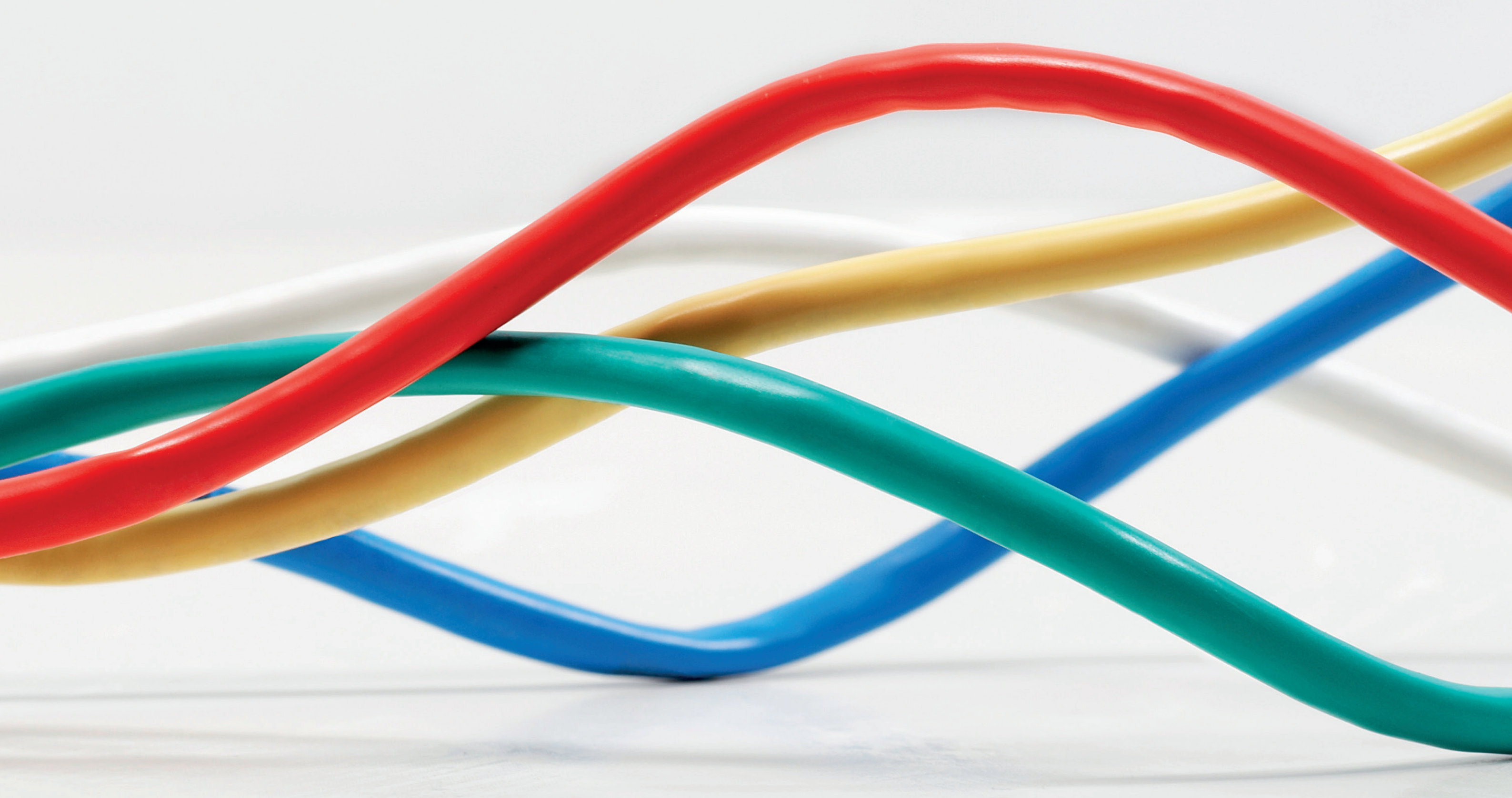
# WINNING OMNICHANNEL

## FINDING GROWTH IN REINVENTED RETAIL

ISSUE 2 | JUNE 2018



OVERCOMING ZERO GROWTH

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KANTAR WORLDPANEL

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# OVERCOMING 'ZERO': FINDING GROWTH IN FMCG

There's no way of hiding it: growth has become more difficult for fast-moving consumer goods (FMCG) brands and retailers.

Just 1.9% was added to the global value of the FMCG industry last year, and there's a disconnect between its growth and that of gross domestic product (GDP)—which saw an increase of around 4% during the same period.

As such, 'zero' has become the watchword for the FMCG industry globally.

Zero-based growth – on the assumption that growth will remain generally flat in volume in the coming years – is the starting point for many.

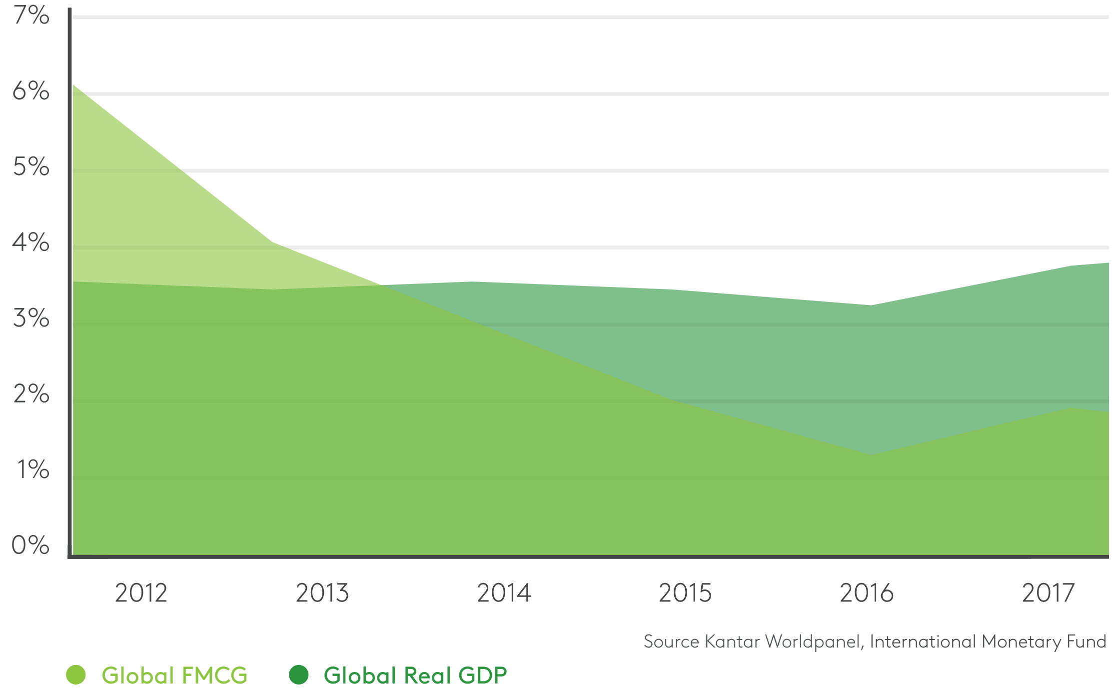
Growth is at the heart of brands' and retailers' strategies.

In this publication we will explore global FMCG and retail trends, looking at how to drive growth through different lenses: geographies, targets, and type of brands, whether local or global, branded or private.

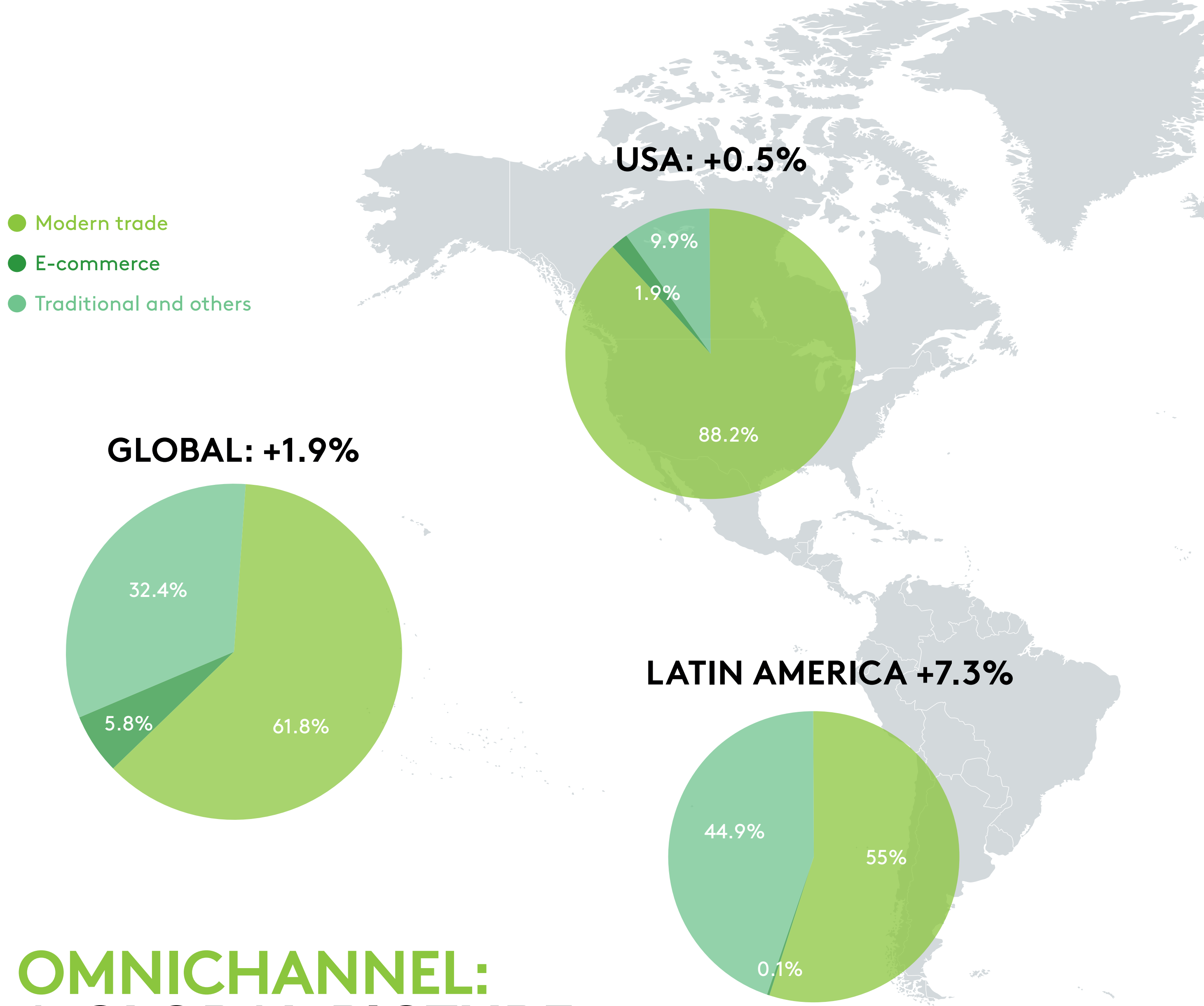
We will assess the impact of channels including e-commerce and discounters —the two fastest-growing channels last year. We will provide an extended vision of areas including out-of-home (OOH), and how the FMCG trade will continue to change in the coming years with the 'O+O' (online and offline) proposition.

At Kantar Worldpanel, we provide a complete picture of FMCG performance across all channels; a unique understanding of where to find growth.

Global GDP versus Global FMCG value growth




Source Kantar Worldpanel, International Monetary Fund




# OMNICHANNEL: A GLOBAL PICTURE

The retail industry continues to undergo significant changes. The impact of technology is clear for all to see, and shopper behaviour has become more difficult to predict.

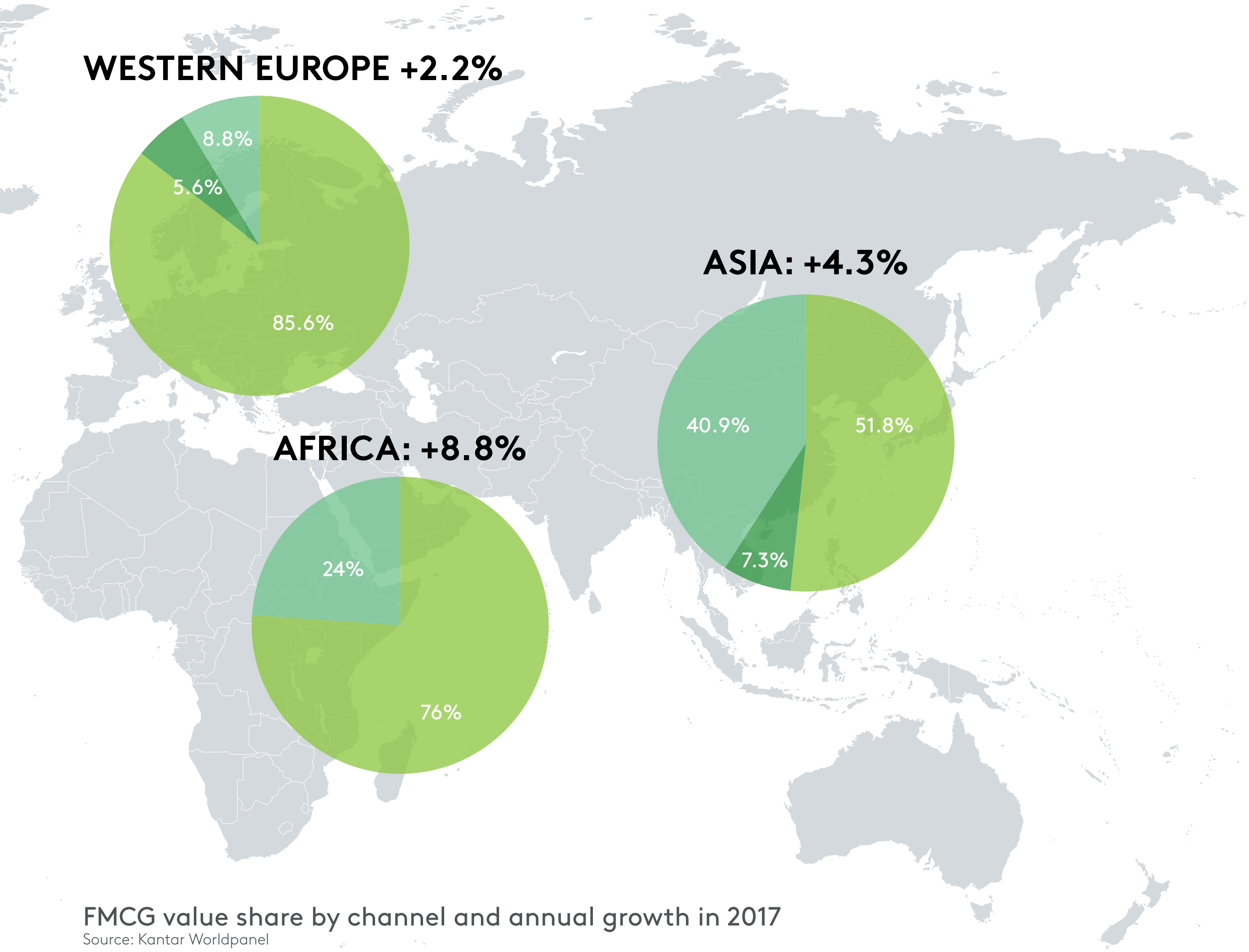
Retailers and manufacturers have been forced to reinvent themselves to remain relevant in this new environment.

Growth is harder than ever before.

While we saw a slight recovery in 2017, with growth at 1.9%, the long-term trend since 2012 has been a slowing down of growth for the FMCG industry—and we forecast that this will continue in 2018 and beyond.

FMCG growth outpaced that of GDP for many years, but the scenario we now face is one where the former is far below the latter. In fact, GDP grew almost twice as quickly as the FMCG industry in 2017, and the gap is likely to grow.

> Since 2012 the FMCG industry has been slowing down—and we forecast that this will continue in 2018 and beyond.




FMCG value share by channel and annual growth in 2017
Source: Kantar Worldpanel

### DEMAND GENERATION IS A GLOBAL PROBLEM

Undoubtedly, the industry is under pressure—the cause of which can be grouped into three equally challenging areas:

**A changing global population**

- Population growth is slowing globally. And this will continue—to the extent that, by 2030, growth is predicted to be just 0.9%.

- On top of this, we have an ageing population. There were 600 million people aged over 60 in 2000, 900 in 2015 – a 50% increase – and more than two billion global citizens are predicted to be over 60 by 2050.

**Trading down**

- People are spending less on FMCG. As we will explore in this paper, discounters are growing in popularity, while promotions are prevalent across markets.

- Private label brands are also being chosen over established counterparts more often—especially in the USA and Western Europe.

**Frequency**

- On average, shoppers around the world are making fewer trips to purchase FMCG products. We can see that this figure is decreasing rapidly in all regions every year. Globally, in 2015, shoppers made an average of 185 trips per year—today, that figure has fallen to 178.

The result of all of this is 'stagflation' —with demand for FMCG goods remaining stagnant.

### FLAT EVOLUTION IS THE NORM

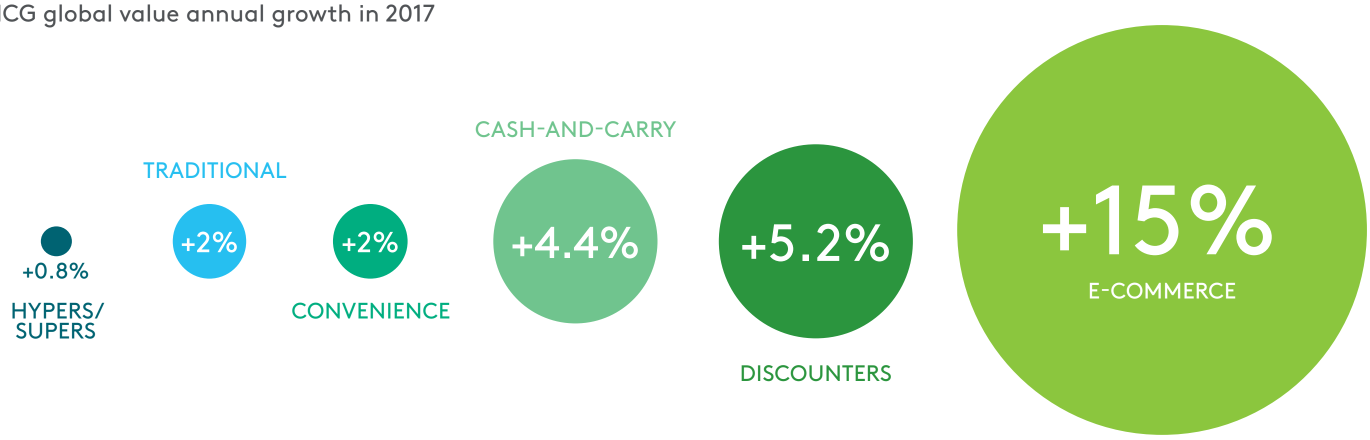
Western Europe's 2.2% growth, compared with 2016's 0.3% figure, appears at first glance to be an impressive turnaround —but the number is skewed by inflation increases that can be in large part attributed to the consequences of Brexit in the UK.

The USA – the biggest contributor to FMCG spend in the world – also saw flat growth in 2017 (0.5%). It has a very mature FMCG market, eight times the size of that in the UK and France, and retailers here rely heavily on promotions—while discounters are rising to prominence and therefore private label brands are growing quickly.

Asia's growth (4.3%) is boosted by the performance of local brands in India and China – as we saw in our most recent *Brand Footprint* publication – and its strength in e-commerce. As we'll see later in this publication, brands in Asia are successfully merging online and offline experiences.

Latin America's 7.3% growth shows a slowdown in comparison with its 13% increase in 2016. And, like the UK, this growth is skewed by inflation—as is the case in Africa and the Middle East, too.

FMCG global value annual growth in 2017




Source: Kantar Worldpanel

# DEFINING CHANNEL STRATEGY

Despite global FMCG growth remaining slow in 2017, retailers and manufacturers that flex their strategies to meet macro-economic changes and shopper needs can still find ways to grow.

The three fastest-growing channels globally are e-commerce (+15%), discounters (+5.2%) and cash-and-carry (4.4%). But these figures won't be surprising to the FMCG industry, as we have seen a growing trend towards better shopping experiences, value for money and proximity—factors that can be addressed most effectively through these growing channels.

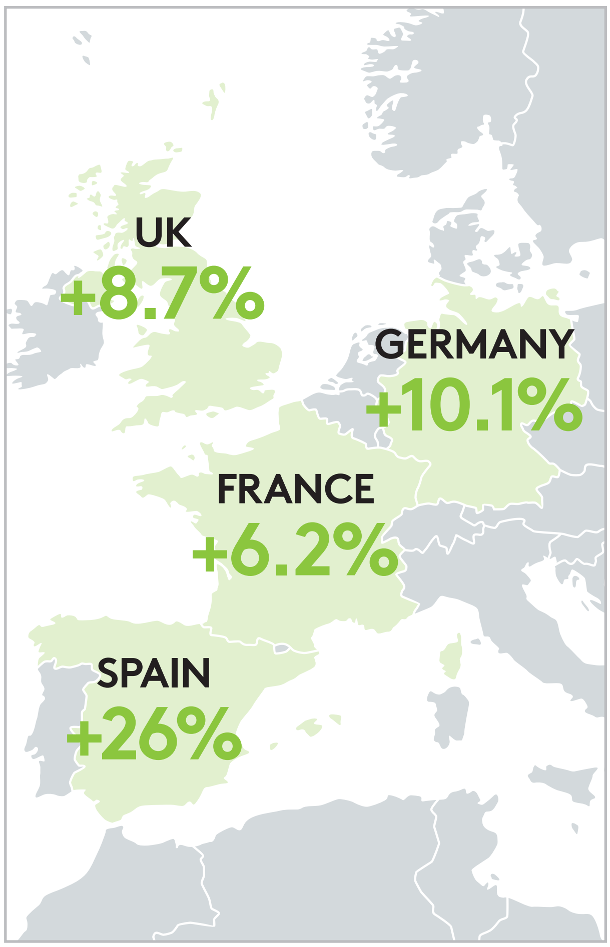
**New categories: Healthy living**
Around the globe, consumers are becoming more health-conscious. With people living longer and having more information at their fingertips, there has been heightened demand for FMCG products that promote healthy living or deliver added health benefits.

As a result, there has been a noticeable trend towards fresh produce. Global avocado sales, for example, climbed 11% in the past 12 months. Sales of fresh berries – including strawberries, blueberries and raspberries – increased by 8% over the same time period.

Fresh seafood is another burgeoning area—especially in Europe and the USA. Sales of fresh seafood grew by 5.9% in Germany, faster than anywhere else in the world. Spain (+5.4%) and France (+5.2%) also displayed strong growth in this category—driven by the likes of Pescanova in Spain and Petit Navire in France, two of the fastest-growing brands in Europe according to our most recent *Brand Footprint* ranking. The UK (4.7%) and the USA (2.8%) saw positive growth here, too.

The organic food trend is still a niche market globally. However, it has broadened its appeal over the past 12 months. Organic products in Germany, France, Spain and the UK all gained share against fresh food—with Spain growing the fastest at 26% growth since 2014.

Organic food value growth since 2014




Source Kantar Worldpanel, Europanel

**Local versus global brands**
In this year's *Brand Footprint* publication, we highlighted the continued march of local brands as they once again won share from their global counterparts in 2017. Local brands adapt more easily to market needs and trends, allowing them to cater to local tastes—and we now know that every 0.1% share gained by local brands is worth $500m to the global FMCG industry.

This highlights the importance of establishing strong partnerships with local brands. It also shows the power of putting local residents at the heart of the retail experience.

In Asia, smaller neighbourhood store formats are bridging the gap between modern and traditional trade, serving as community hubs where shoppers can pay utility bills, buy travel tickets, book concerts and attend social gatherings. As a result, many are delivering strong growth and outpacing hyper- and supermarkets.

We see that shoppers generally value local brands for consumables, with an increased desire for locally sourced products at affordable prices. However, it is possible for global brands to connect with local tastes.

Lay's is currently the fifth-most chosen brand on the planet, and its growth in 2017 showcased exactly how the brand satisfies local consumers. It launched specific flavours in Indonesia – Fried Chicken, Spicy Lobster, Pepper & Lime, and Steak variants – which helped add five million new shoppers to the brand. This was the strongest example we saw in 2017 of global brands adapting to local needs.

The beverages sector also sees global brands perform well—with global brands winning share from local rivals consistently for the past few years.

**Reaching the right target**
The behaviour of millennials has become a point of fascination for many FMCG brands—especially those aggressively targeting this demographic for growth. And, while it's common knowledge that their shopping behaviour differs greatly from older generations, the importance of Millennial shoppers for FMCG growth is less understood.

In reality, shoppers aged 35 and under represented just 14% of total FMCG spend in 2017—showing that the bulk of business is still down to older generations. In fact, the 45-64 age group contributes the most value to FMCG growth in Western Europe, suggesting that retailers and manufacturers should direct more of their marketing budgets to attracting this demographic.

However, this of course depends on which channels you are playing in. As we can see in Western Europe, different age groups tend to shop using different channels. Taking the two fastest-growing channels in this market as examples, millennials here are great targets for e-commerce and 35-44-year-olds are the best targets for discounters.

**Importance of out-of-home**
In Kantar Worldpanel's *Out of Home: Out of Mind?* publication, released earlier this year, we outlined the huge importance of out-of-home (OOH). Across the markets we analysed, we saw that $4 out of every $10 spent on non-alcoholic drinks and snacking is for OOH consumption—almost doubling the size of the addressable market globally.

And yet OOH trends vary significantly in different markets—influenced by local customs and cultures, by climate, or simply by the channels available to shoppers. Therefore, retailers and manufacturers in these sectors must recognise and consider OOH purchases if they are to gain a complete market understanding.

For many categories, we see that shoppers are increasing OOH spend while that of take-home is decreasing—driven by the 'nomadism' trend that has seen hyper- and supermarkets begin providing additional experiences and options such as in-store cafés.

But this is not incremental for OOH spend. Rather, it is shopper choice moving from one channel to another—something that needs to carefully considered by FMCG players when designing their growth strategy.

# GLOBAL MARKET TRENDS

## UNITED KINGDOM: TOP-UP SHOPPING

**Ashley Anzie, Business Unit Director, Grocery Retail, Kantar Worldpanel**

Shopper behaviour in the UK is starting to change.

Discounters continue to switch spend away from supermarkets at a rate of £500 million ($675 million) per year. With a 12.7% combined market share in the 12 weeks to 22nd April 2018, Aldi and Lidl continue to make ground on their competitors.

But scratch the surface and we begin to see a slowdown in growth for this sector. Rates of shopper acquisition are slowing, in line with a slowdown in projected store openings. This presents discounters with a new challenge: how to increase shopper conversion and drive short-term penetration.

E-commerce growth has also slowed, from more than 8% in 2017 to under 6% today. Grocery sales online are worth £8 billion annually (7.6% of all UK sales), with 28% of the country making an online food purchase in the past year.

The existing 'weekly shop' fulfilment model may have reached a point of saturation, and any future growth will have to be delivered through speed and convenience. This helps explain one of the bigger shopper trends driving the take-home grocery market – top-up shopping – with nine in 10 shopping trips annually are now made to 'top up' on goods.

Top-up shopping also drove more growth in the market than bigger trips (3.9% versus 2.5%)—suggesting that this area would be a sensible place to look for brand and retailer growth potential.

With merger discussions ongoing between two of the 'big four' supermarkets, the next 12 months in the UK will be a very interesting time.

## CHINA: THE NEW RETAIL ERA

**Jason Yu, General Manager, Greater China, Kantar Worldpanel**

The Chinese FMCG market showed a clear improvement in 2017, with spend growing 4.3% year-on-year.

Modern trade remains the country's most significant channel (53% of the FMCG market), with the leading retailers getting stronger. E-commerce also reported 29% growth and contributed 8% of total spending in the market.

Tech giants Alibaba and Tencent are moving from online to offline. The Tencent/JD camp (including Yonghui, Carrefour, Walmart, WSL and BuBuGao) recently reported 14.6% share – higher than the 11.1% recorded by Alibaba (including Sun Art and BaiLian) – and the integration of the two brands is set to help accelerate recovery of modern trade by directing consumer traffic back to physical stores and using store networks to deliver to consumers faster and more efficiently.

Large-format stores in China are no longer attractive to young, middle-class shoppers. While the Hema model (the supermarket offers fresh food, in-store dining, on- and offline delivery) has been duplicated, unmanned stores are the new favourites with investors.

At regional or provincial level, the FMCG market has remained more fragmented than at national level. This indicates that there is plenty of room for cross-provincial expansion and acquisition. On top of its investment in WSL and Hongqi, Yonghui was able to expand its own presence into adjacent provinces where local market leaders currently dominate.

### Alibaba and Tencent alliance and acquisition

## AFRICA & MIDDLE EAST: COMPLEX NEEDS

**Idriss El Ganari, Business Development Director, AME, Kantar Worldpanel**

FMCG is growing in Sub-Saharan markets, but we have to keep in mind that inflation and population growth is high. The situation is even more complex in Saudi Arabia, where external elements – including the oil market and new laws and taxes – are influencing shoppers to purchase less.

Retail landscapes in Middle Eastern and Sub-Saharan markets aren't comparable. Modern trade is still close to non-existent in Nigeria and Ghana, while it accounts for between 30% and 50% of trade in Kenya and Saudi Arabia—where Panda dominates with its hypermarkets. In the Ivory Coast, Mauritanian shops are still by far the leading FMCG channel, with close to 50% of the market.

Households are shopping at least daily in Ghana, Nigeria and Ivory Coast (between 406 and 468 trips per year for only 35 FMCG categories), with 249 trips per year in Saudi Arabia and 223 in Kenya.

Understanding local shoppers is critical. In each market, local and informal retailers answer shoppers' challenges and expectations. In Sub-Saharan markets, for example, shoppers are looking for smaller pack sizes, to help tackle inflation.



## LATIN AMERICA: GROWING CONVENIENCE

**Cecilia Alva, Clients & New Business Director, LATAM, Kantar Worldpanel**

FMCG growth was slow in Latin America last year, with volume increasing by just 1.7%.

In fact, growth declined across the region. Colombia, Chile, Mexico, Argentina and Peru – which collectively account for 35% of regional GDP – experienced between -4.5% and -6.0% decline. Brazil (4.5%), Bolivia (3.3%) and Central America (1.1%) were the only markets that recorded steady growth.

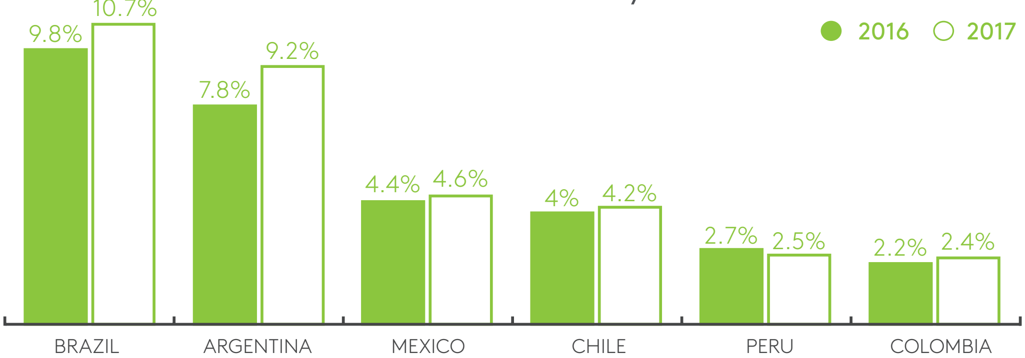
However, some categories are finding growth opportunities under these conditions. Packaged food and home cleaning products are growing above expectations—3.3% and 5.5% respectively. Local brands also won share, growing 0.3% to claim a 62.3% share of spend.

There is also a trend in Latin America for value and convenience. As a result, cash-and-carry (C&C) increased its share of spend from 7.4% to 8.2% in 2017 —outperforming discounters by being chosen by more than half of Latin American families at least once per month.

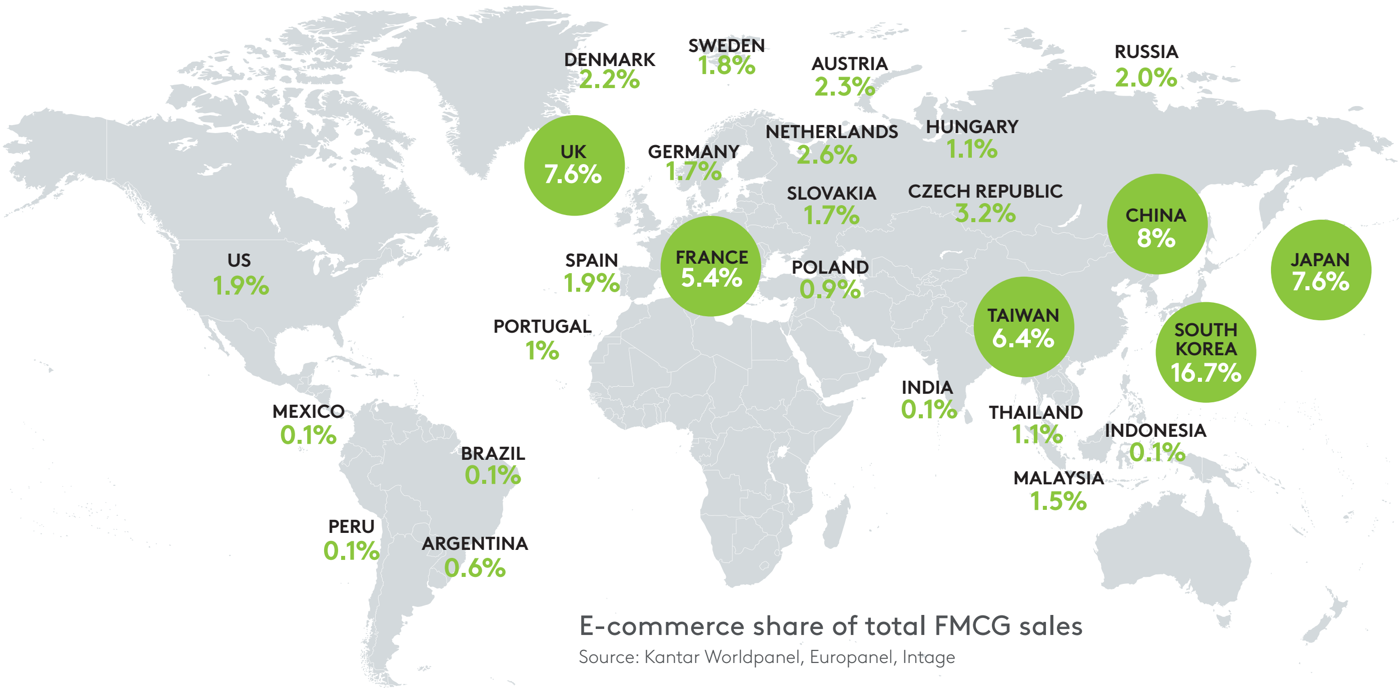
C&C's success can be attributed to more than just the slow growth environment. A range of retail innovations have also contributed, including branded shelves, advertising to end consumers, engagement through loyalty cards, and enhanced digital experience.

We predict that retailers will combine a dual relationship: supporting C&C to grow together, while dealing with hard price negotiations to deliver value to shoppers. Brand portfolio and pack sizes will also continue to be key components for growth in the coming years.

Cash-and-carry value share in Latin America




Source: Kantar Worldpanel




E-commerce share of total FMCG sales

Source: Kantar Worldpanel, Europanel, Intage

# NEW GROWTH FORMATS: E-COMMERCE

While growth across FMCG sales has become fragmented, the continued rise of e-commerce can be explained by its fulfilment of one vital shopper need: convenience.

In 2017, e-commerce significantly outpaced other channels—growing by 15%. The online grocery market now accounts for nearly six cents in every dollar spent on FMCG worldwide. Meanwhile, the percentage share of hyper- and supermarkets has continued to fall.

More shoppers are turning from bricks to clicks, and growth in e-commerce is being enjoyed across all markets and categories.

**A fragmented world**

China, Japan and the US collectively represent 70% of global FMCG value in e-commerce. The UK (12%), France (8%) and South Korea (8%) are also important players—however, these developed markets do not always display the fastest growth.

In e-commerce, East and Southeast Asia have seen some of the biggest growth globally. China's online FMCG sales grew faster than any other developed country (29%) in 2017, with $15 billion in total e-commerce sales.

Future growth is likely to be driven by performance in India, as well as in Indonesia. Walmart's recent acquisition of digital pure player Flipkart in India demonstrates that global brands and retailers are focusing their efforts on emerging markets.

Eastern Europe and Latin America remain the smallest markets by e-commerce share, with Poland (0.9%) and Argentina (0.6%) the only markets to reach more that 0.1%. They are achieving growth, but more slowly than other markets.

In the past three years, we have seen big changes in the US market—including Amazon's increased presence in major cities and the introduction of online grocery delivery companies like Peapod. We have also seen the reaction from traditional players like Walmart, which launched its 'drive-thru' service to strengthen its on- and offline offering.

While the US e-commerce market remains relatively small (1.9%), its 29% growth in 2017 makes it the fastest-growing market outside of Asia.

In Western Europe, e-commerce growth has slowed—especially in the UK and France, where growth was in double digits as recently as 2015.

**Targeting the right categories**

The most notable success story is undoubtedly in Health and Beauty—where global online sales have grown from 6.9% in 2015 to 10.5% in 2017.

Beyond convenience, e-commerce also adds easy access to products in countries where they may not be readily available in physical stores.

And specialist retailers display significant growth by offering experiences. E-commerce beauty businesses, such as Cult Beauty in the UK, are attracting customers by offering personalised products and advice online—alongside good value.

Despite having the smallest share of online FMCG sales, at 4%, the Food category's share has grown 16% since 2016. And this should continue, thanks to the activity of high-profile players.

Amazon has pledged to disrupt the grocery industry through its AmazonFresh service, and racked up $650 million in US FMCG food sales in the first quarter of 2018.

But, as we'll see on the next page, Amazon is struggling to replicate this success in other markets.

**Prepare ground in emerging markets**

"Fail to prepare; prepare to fail." It's a well-worn phrase, but it rings true in markets where current e-commerce value share is expected to rocket.

In Mexico, where e-commerce share is just 0.1%, Walmart launched its first "omnichannel" store in Tlalnepantla de Baz (close to Mexico City). The store is the first of its kind in the market, offering both a more traditional click-and-collect service and a drive-through area to pick up online orders.

Walmart has ambitions to roll the concept out to all stores in the market, and it has adapted more than 260 existing locations for e-commerce. Other retailers in similar markets would do well to follow its lead, increasing capability before demand hits its peak.

With a lack of existing e-commerce functionality, consumers in Indonesia (0.1% e-commerce share) have created their own mobile purchase journeys across multiple applications.

From browsing products on Instagram or similar social network sites, mobile users will add vendors on messaging apps such as Line or WhatsApp. There, they will directly negotiate and confirm purchases with vendors, and subsequently arrange delivery via services such as Go Jek.

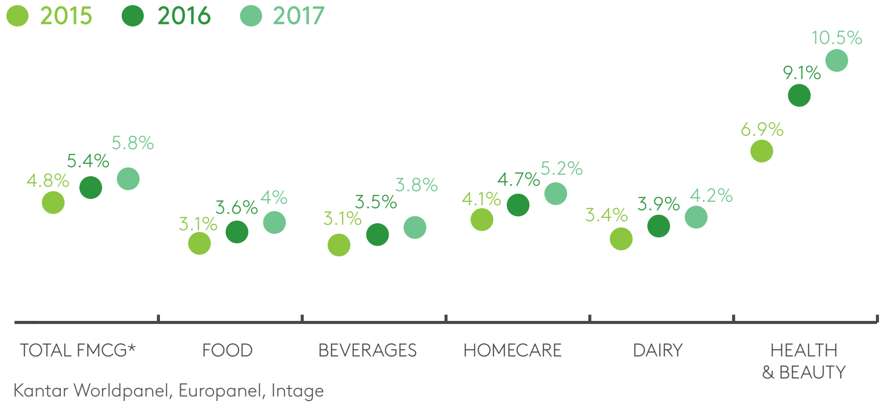
Brand owners can leverage this burgeoning mobile purchase journey by playing into shoppers' behaviour—setting up customer service channels on messaging apps and exploring purchasing fulfilment and partnership opportunities.

**On- and offline integration is a must-have**

Creating a strategy that truly integrates on- and offline offerings is crucial for growth. Look at recent acquisition activity within the retail sector: Alibaba's alliance with Sun Art, Walmart with Flipkart, and US retailer Kroger's partnership with UK technology firm Ocado.

In each case, retailers are seeking to create a more complete shopping experience and attract shoppers who are still reluctant to shop online. Just 25% of the global population made at least one FMCG purchase online last year.

Global e-commerce share by sector




Kantar Worldpanel, Europanel, Intage

*Excluding fresh food

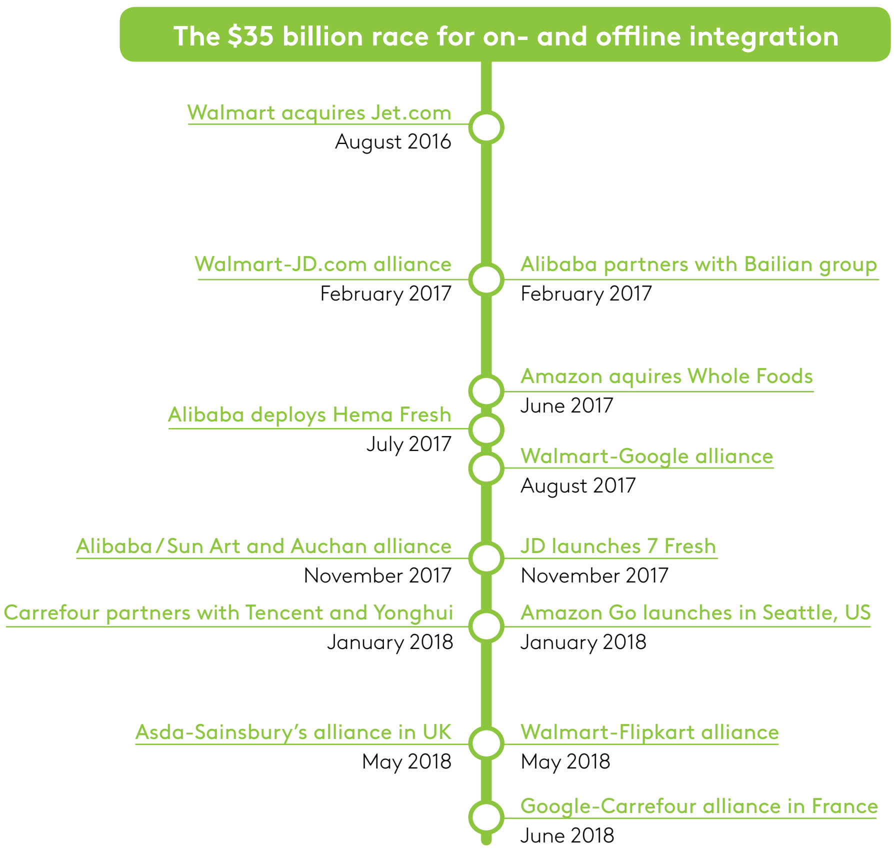
## AMAZON'S FMCG STRUGGLES

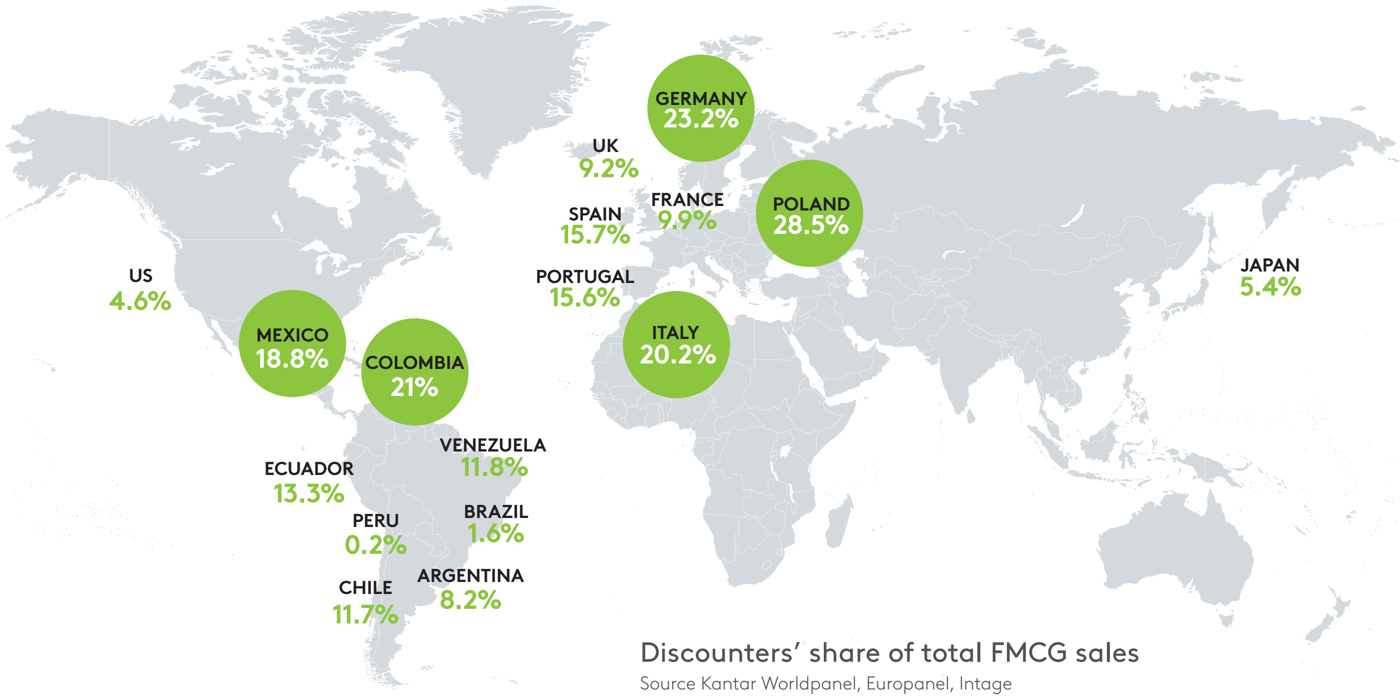
**Frédéric Valette, Retail Director, France, Kantar Worldpanel**

France is an interesting example of a market where it pays to understand the full category picture.

Amazon is ranked number one in non-FMCG business online—and by some margin. The e-commerce giant controls 18.9% of total non-FMCG value share, a long way ahead of its closest rival, C Discount (8.2%).

But when it comes to FMCG, E. Leclerc – the French co-operative and hypermarket chain – has an online value share seven times larger than Amazon's. Just 6% of Amazon's revenue in France comes from FMCG categories—and, of this, 56% comes from health and beauty.






Discounters' share of total FMCG sales

Source Kantar Worldpanel, Europanel, Intage

# NEW GROWTH FORMATS: DISCOUNTERS

## EASTERN EUROPE

Eastern Europe continues to be the most developed region for discounters, with the channel making up 27.4% of FMCG sales. This is a continuation of an impressive, decade-long growth story in the region, with discounters having had a 13% share in 2007 —lower than in Western Europe at the time.

Poland is the market with the highest discounter share of any country, at 28.5%, driven predominantly by the extremely fast-growing Biedronka.

## LATIN AMERICA

Latin America is a region where discounters enjoy high share of spend – especially in Colombia, where discounters are growing the fastest globally – but growth opportunities remain.

While markets such as Mexico (18.8%) have seen discounters becoming the go-to channel for consumers, Brazil – at 1.6% – remains underdeveloped, as cash-and-carry (C&C) continues to outpace the channel (10.6%).

In Brazil, pricing in hypermarkets is similar to that in discounters, and instead of launching discount channels, hypermarkets are adapting their formats towards C&C—such as with Carrefour's Atacadão concept.

## THE USA

The USA has seen discounter activity escalate over the past few years, with German discount giants Aldi and Lidl driving activity in the market.

Aldi has quickly expanded to 1,600 stores in the US and plans to open another 900 over the next five years. Lidl was slower off the mark, only opening its first store in the USA in 2017. Yet its ambitions remain high —at the time of writing, the retailer is part-way through its plan to have 100 stores opened by summer 2018. In 2017, discounter value share in the country reached 4.6%.

## DISTINCTIVE MARKET STRATEGIES

While discounters in Europe continue to appeal to the middle classes by offering value instead of simply the lowest price, in Latin America the stores showing the greatest growth are the ones that have focused on aggressive pricing over shopper experience.

Discounters have not yet made their presence felt in Asia but, with the likes of Aldi and Lidl looking for global expansion, they may yet turn their gaze Eastwards.

In European markets, discounters have begun to expand their ranges to appeal to more discerning consumers. In comparison, Colombian discounter D1 – which, despite only opening its first store in 2010, now has over 600 throughout the country – maintains a 'single brand, single product' rule in its stores. For instance, shoppers will only find one brand of coffee on sale compared to wider ranges in its supermarket competitors.

# FORECAST FOR FUTURE GROWTH

So far, we've seen how the e-commerce and discounter channels are changing the nature of FMCG growth worldwide. We've also seen how less-developed markets are taking up the mantle to drive global growth. But what could this cause the global FMCG picture to look like in the future?

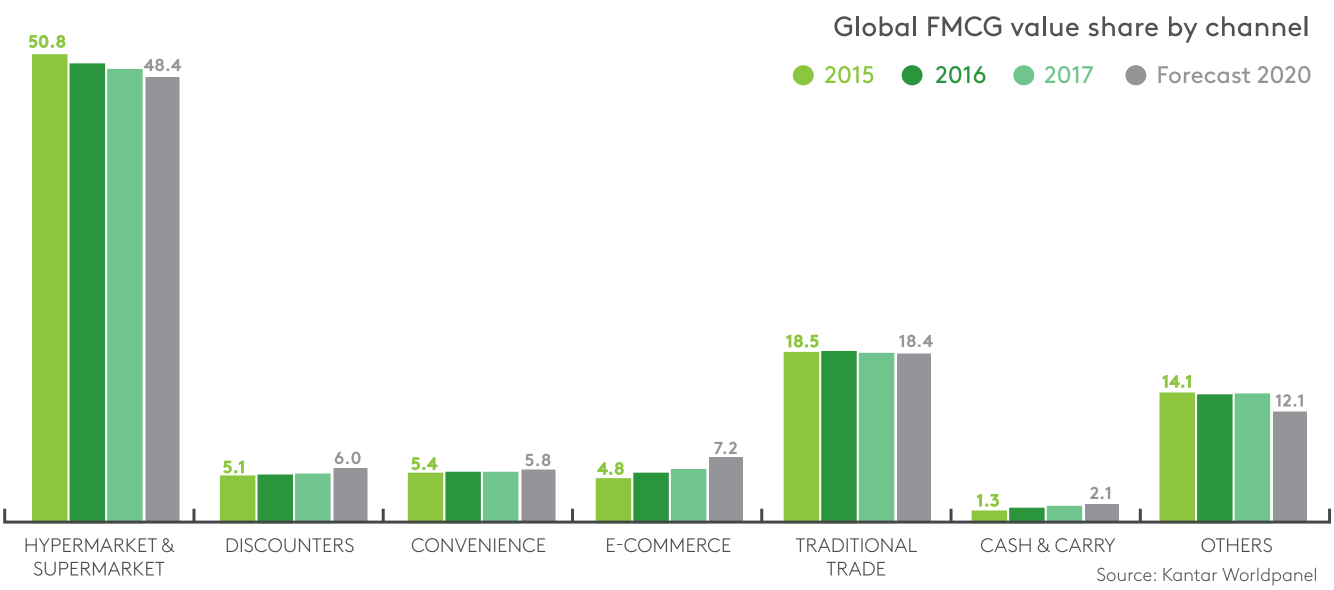
Over the next three years, there will be a major slowdown in hyper- and supermarket spend, falling to 48.4% in 2020. This should be no huge surprise. Having made up 50.8% of global value share as recently as 2015, the channel has tumbled over the course of consecutive years—reaching 49.2% in 2017.

Growth will continue at pace in the channels where it is currently seen.

By 2020 we will see:

- Cash-and-carry grow to 2.1%
- Convenience grow to 5.8%
- Discounters grow to 6%
- E-commerce grow to 7.2%

With over 5 billion people expected to have access to the internet by 2020, and penetration in less developed markets such as Africa (with current internet penetration of 10%) and Asia (25%) set to grow exponentially, online FMCG sales are worth a closer look.




Source: Kantar Worldpanel

# WHERE TO FIND GROWTH

**Stéphane Roger**
Global Shopper & Retail Director
Kantar Worldpanel

With growth coming from e-commerce, discounters, cash-and-carry (C&C) and convenience – even if less quickly than last year – the latter provides great opportunities for brands and retailers.

Shoppers are giving a clear message: they want convenience and value for money. But it is safe to say that the emergence of these formats is not a comfortable trend for FMCG incumbent players:

- Brands need to cope with unknown digital pure-players—which, in many cases, will require a re-tooling of marketing teams and a re-training of sales forces.
- Discounters, by definition, are more difficult for brands to break into—with 80% of the range typically comprising private label goods.
- Similarly, the C&C model relies on a specific assortment of goods and aggressive pricing.
- Bricks-and-mortar businesses are obliged to reinvent their hyper- or supermarket model, but are cannibalised by pure players that are quickly providing shoppers with an integrated on- and offline experience.

However, e-commerce is at a crossroads. It is still growing quickly (+15% in 2017), but this is its slowest pace for five years (where growth has averaged +30% annually).

This is predominantly due to a slowdown in penetration growth in Asia, a saturation in drive-through growth in France, and stagnant penetration in the UK.

In this environment, there are two key ways brands and retailers can find growth by winning new shoppers:

1. **Adding presence in new markets.** India, Indonesia, Brazil, Mexico and Africa – where there are a huge number of potential shoppers – offer major growth opportunities.
2. **Creating more on and off propositions.** In the past 18 months, $35 billion has been invested in alliances and acquisitions in the retail industry. A great way to attract offline shoppers to online, these partnerships will help bring in new shoppers—beyond millennials and families with children.

This is the only way to make the current 25% global online penetration grow—the unique answer for bricks and mortar players to maintain their position.

In 2017, 76% of FMCG value growth came from channels outside of hyper- and supermarkets. Taking advantage of this growth should be central to every strategy—but successfully doing so means having an advanced understanding of their makeup.

# ABOUT US

**About Kantar Worldpanel**
Kantar Worldpanel is the global expert in shoppers' behaviour.
Through continuous monitoring, advanced analytics and tailored solutions, Kantar Worldpanel inspires successful decisions by brand owners, retailers, market analysts and government organisations globally.

With over 60 years' experience, a team of 3,500 and services covering 60 countries directly or through partners, Kantar Worldpanel turns purchase behaviour into competitive advantage in markets as diverse as FMCG, impulse products, fashion, baby, telecommunications and entertainment, among many others.

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