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نلهم أفريقيا الكبرى

MEDIA RELEASE

2016/7 Brand Africa 100: Africa's Best Brands Non-African brands entrench positions in Africa.

Highlights - Most Admired Brands in Africa:

- Samsung rises to #1 Most Admired Brand in Africa.
- MTN drops from top spot to #9 overall, but retains top rank as Most Admired African Brand.
- Non-African brands are the Top 3 brands in all markets, except in Nigeria (with Glo at #3), Kenya (with Safaricom/Mpesa #2 and Tusker #3) and Tanzania (with Azam #2).
- African brands' share among most admired brands drops from 23% to 16%.
- Europe leads the table with 42 of the Top 100 most admired brands. USA leads all countries with 25/100. South Africa leads Africa with 6/100.
- Lacoste (+52) made the most gains. Levi's (-68) lost the most ground.

Highlights - Most Valuable brands in Africa:

- Google valued at \$109bn, is #1 Most Valuable Brand in Africa 100.
- MTN valued at \$2,975m is the Most Valuable African brand.
- African brands represent 0.75% share of the value of the Top 100.

JOHANNESBURG, SOUTH AFRICA – 3 March 2017: Brand Africa today released the annual *Brand Africa 100: Africa's Best Brands* – an annual survey and valuation of the Top 100 brands in Africa. In a representative survey across 19 countries covering every political and economic region, overall, it doesn't bode well for African brands which have lost ground to their non-African rivals.

Despite its recent crisis with its Galaxy Note 7 model, which notably was never launched in Africa, Samsung takes the #1 spot as the Most Admired Brand in Africa, displacing perennial leader MTN. However, MTN has retained its ranking as the Most Admired African Brand despite challenges particularly in Nigeria, which have knocked some shine off Africa's leading brand.

As recently reported in the annual Brand Finance 500, Google, which is valued at \$109bn globally, has displaced Apple as the Most Valuable Brand in Africa. MTN, valued at \$2,975m, retains its position as the Most Valuable African Brand, with a 15% rise y/y following a 36% decline in the 2014/5 rankings.

Non-African brands have entrenched their positions in Africa, growing their share of the Top 100 Admired brands from 77% in 2014/5 to 84% in 2016/7. In a country by country review, non-African brands rank the Top 3 brands in every market, except for Nigeria (with Glo at #3), Kenya (with Safaricom/Mpesa #2 and Tusker #3) and Tanzania (with Azam #2). Samsung is the #1 brand in 8

countries, Nike in 4 countries, Coke in 3 countries, Adidas in 3 countries and Airtel in one country. Non-African brands represent 99.25% share of the value of the Top 100 Valuable brands in Africa.

Among the Top 100 Most Admired Brands in Africa, Europe leads all regions with 42/100, followed by North America (25/100), Asia (17/100) and Africa (16/100). The United States leads the top countries of origin with 25/100, followed by the UK (8/100), Japan (6/100), Germany (6/100), South Africa (6/100), France (5/100) and China (5/100), Italy (4/100), Nigeria (3/100), Ireland (3/100), Netherlands (3/100) and Spain (3/100).

The Top 100 Admired brands are distributed among 11 categories across apparel (19%), consumers (13%), electronics (13%), telecommunications (12%), auto manufacturers (11%), alcoholic beverages (10%), food (6%), non-alcoholic beverages (5%), media (4%), sports & fitness (4%), retail (2%) and cosmetics (1%).

Between the 2014/5 and 2016/7 survey periods, a majority of the leading brands have retained their presence in the Top 100, with 31 new brands, notably South Africa's Shoprite and Pick n Pay, Morocco's Marwa, Ethiopia's Anbessa Shoes and Nigeria's Lady Care, entering the Top 100 in 2016/7 compared to 34 between 2014/5. A resurgent Lacoste (+52) made the most gains on the table and Levi's (-68) lost the most ground.

Because of the categories transformational impact in Africa, Brand Africa also conducted a separate parallel survey to determine the Most Admired Brands in Media and the Most Admired Brands in Financial Services. In the financial services category, Nigeria's GTB Bank leads the overall rankings in Africa and Barclays retains its position as the number 1 non-African financial services brand. In the media category, BBC and DSTV retain their positions as the top non-African and African media brands respectively.

"These rankings are an important metric of the progress Africa is making in creating competitive world-class brands that respond to African conditions, needs and ambitions," says Thebe Ikalafeng, Founder and Chairman of Brand Africa and Chairman of Brand Finance Africa. "It is a great concern that the share of African brands is so low and even declining. African entrepreneurs ought to know their consumers better than anyone. It is a wake-up call for African governments to create enabling environments to support these entrepreneurs to build Made in Africa brands which in turn will enable the governments to fund and drive their own development agenda."

Brand Africa 100 was developed by pan-African branding and reputation advisory firm, Brand Leadership Group supported by Kantar TNS the globally respected consumer knowledge and information company, GeoPoll, the leading mobile survey platform with a database of over 300m users in emerging markets and Brand Finance, the world's leading independent valuation consultancy.

Brand Africa 100 is a two-phase process that starts with a comprehensive consumer research across 19 countries in Africa to establish a consumer generated list of admired brands. These 100 most admired brands are then valued and re-ranked according to value by Brand Finance.

GeoPoll used their sophisticated mobile SMS technology to identify the most admired brands in Africa among a representative sample of African consumers in 19 African countries. These countries collectively represent an estimated 74% of Africa's population.

"Because of its high penetration across Africa, the mobile phone is a valuable tool in its ability to collect data from diverse geographical areas. GeoPoll's method of collecting data through mobile surveys demonstrates the power and reach of mobile technology in its delivery of real-time, actionable data" says Steve Gutterman, CEO – GeoPoll.

Kantar TNS then collated this vast dataset and analysed the data to create a weighted consumer admiration score that reduced over 11,000 brand mentions to the Top 100 Most Admired Brands in Africa. With such diverse populations between countries and regions, the weighted index ensured the results are representative of the population within each country and Africa overall to reflect a unique ranking of the Top 100 Most Admired Brands in Africa.

"Success for brands is about establishing an emotional connection, creating intimacy and being more present in consumers everyday lives. This survey is a timely assessment of the various brands that play a vital role in Africa," says Karin Du Chenne Kantar TNS Chief Client Officer Africa Middle East

In conclusion Brand Finance used the royalty relief methodology which is compliant with International Valuation Standards Authority as a basis for determining the fair market value of brands to establish the Top 100 Most Valuable Brands.

"African brands have an important role in helping to build the African continent," concluded Oliver Schmitz, Managing Director - Brand Finance Africa. "As Africa builds competitive and valuable brands it helps to tell a positive story of the continent."

The Brand Africa 100 results will be published in African Business on sale globally from 3 March 2017 and online to subscribers on www.africanbusinessmag.com and www.brandafrica.org.

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MOST-ADMIRED BRANDS IN AFRICA

2016/7 RANK	2015 RANK	BRAND	CATEGORY	COUNTRY OF ORIGIN	CHANGE
1	2	Samsung	Electronics / Computers	South Korea	+1
2	4	Nike	Sport and Fitness	USA	+2
3	5	Adidas	Sport and Fitness	Germany	+2
4	3	Coca-Cola	Non-alcoholic Beverages	USA	-1
5	11	Apple	Electronics / Computers	USA	+6
6	9	LG	Electronics / Computers	South Korea	+3
7	6	Nokia	Electronics / Computers	Finland	-1
8	8	Toyota	Auto Manufacturers	Japan	-
9	1	MTN	Telecommunications	South Africa	-8
10	7	Airtel	Telecommunications	India	-3

Most Admired African Brands

	OVERALL 2016/7 RANK	BRAND	CATEGORY	COUNTRY OF ORIGIN
1	9	MTN	Telecommunications	South Africa
2	16	Glo/Globacom	Telecommunications	Nigeria
3	24	Dangote Group	Consumer, Non-Cyclical	Nigeria
4	26	Anbessa Shoes	Apparel	Ethiopia
5	28	Safaricom/Mpesa	Telecommunications	Kenya
6	38	Tusker	Alcoholic Beverages	Kenya
7	45	Mukwano Products	Consumer, Non-Cyclical	Uganda
8	47	DStv/Gotv/Multichoice	Media	South Africa
9	53	Shoprite	Retail	South Africa
10	55	Tiger Brands	Consumer, Non-Cyclical	South Africa

Most Valuable African Brands

	OVERALL BRAND VALUE RANK	2016/7 ADMIRATION RANK	BRAND	CATEGORY	COUNTRY OF ORIGIN	BV 2017 (US\$ M)	BRAND STRENGTH RATING 2017
1	47	9	MTN	Telecommunications	South Africa	2,975	AA+
2	67	53	Shoprite	Retail	South Africa	999	AA-
3	69	55	Tiger Brands	Consumer, Non-Cyclical	South Africa	883	AA-
4	72	28	Safaricom/Mpesa	Telecommunications	Kenya	691	AA-
5	73	47	DStv/GOTv/Multichoice	Media	South Africa	623	A+
6	74	93	Pick n Pay	Retail	South Africa	576	A+
7	76	24	Dangote	Consumer, Non-Cyclical	Nigeria	491	AA-
8	77	16	Glo/Globacom	Telecommunications	Nigeria	427	A-
9	79	38	Tusker	Alcoholic Beverages	Kenya	201	A+
10	82	89	Sasko	Food	South Africa	154	A+

BRAND AFRICA

Brand Africa is a non-profit intergenerational movement to inspire a great Africa through creating a positive image of Africa, celebrating its diversity and driving its competitiveness.

Brand Africa mobilises African and diaspora decision makers, thought leaders, influencers and future leaders to engage with, shape and drive an African agenda catalytic for creating an enabling environment for driving Africa's growth, reputation, competitiveness and unity.

Brand Africa is an independent Non-Profit Organisation registered in the Republic of South Africa (NPC 2013/146300/08) and a signatory to the *Independent Code of Governance for Non-Profit Organisations in Africa* (www.governance.org.za).

BA 100 PARTNERS

Brand Leadership

Brand Leadership is a pan-African brand development, activation and measurement firm and a strategic partner for global and African decision-makers and brand builders interested in and/or invested in Africa. Established in 2002, Brand Leadership has over the years delivered brand-led solutions that respond to African conditions, needs and ambitions for over 100 African and non-African brands in Africa across diverse industries and markets in the private and public sectors.

www.brandleadership.com

Kantar TNS

Kantar TNS advises clients on specific growth strategies around new market entry, innovation, brand switching and stakeholder management, based on long –established expertise and market –leading solutions. With a presence in over 80 countries, Kantar TNS has more conversations with the world's consumers than anyone else and understands individual human behaviour and attitudes across cultural, economic and political regions of the world. Kantar TNS is part of the Kantar group, one of the world's largest insight, information and consultancy groups, with 28,500 employees across 100 countries encompassing the whole spectrum of research and consultancy disciplines, enabling the group to offer clients business insights at each and every point of the consumer cycle. www.kantar.com

GeoPoll

GeoPoll is the world's largest mobile survey platform, with a network of over 300 million users in Africa, Asia and Middle East. By asking people questions on their mobile phones without the need for data plans or internet access, GeoPoll is able to help customers understand trends, preferences, and conditions in countries where data has traditionally been difficult and expensive to obtain.

Through their relationships with Mobile Network Operators, GeoPoll connects researchers directly to their audiences, making it faster and more cost effective than any other method of data collection. GeoPoll's multi-modal platform administers remote surveys through SMS, voice, or

mobile web, and delivers results in near real-time, giving anyone the ability to make data-driven decisions.

GeoPoll works with Fortune 500 companies, non-profit organisations, and governments to provide insights on everything from food security to brand preference. Their services include both custom research and subscription data products which deliver daily data on media measurement, fast-moving-consumer-goods tracking, and more.

GeoPoll is a division of Mobile Accord Inc., a mobile platform company powering communication for social good. Mobile Accord's products and services empower major non-profit, organizations, universities and government entities to benefit from the power of mobile technology.

www.geopoll.com

Brand Finance

Brand Finance is the world's leading brand valuation consultancy. Brand Finance advises strongly branded organisations on how to maximise their value through the effective management of their brands and intangible assets. Brand Finance has conducted thousands of brand valuations for clients of all sizes and across most sectors. Brand Finance's clients include international brand owners, tax authorities, lawyers, government bodies and investment banks. Brand Finance publishes Global 500 – the world's most valuable brands and Global Nation Brands 100 – the most valuable nation brands leagues as well as regional tables in all regions annually.

www.brandfinance.com

African Business

African Business is the best-selling pan-African business magazine with an award-winning team widely respected for its editorial excellence. It provides the all-important tools enabling decision makers to maintain a critical edge in a continent that is changing the world. African Business special reports profile a wide range of sectors and industries including transport, energy, mining, construction, aviation and agriculture. **www.africanbusinessmagazine.com**

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