Euromonitor International

Beyond Affordability: Turning Consumer Polarisation into Growth in Fragmented Markets

July 2025

EXECUTIVE SUMMARY

Why read this report?
Key findings

INTRODUCTION

One size fits no one anymore

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Consumers are splitting, growth follows the fault lines
Deconstructing the Consumer Landscape Polarisation Index

HOUSEHOLD STRUCTURE SPLIT

Polarised household types reshape demand across markets
Capri Sun from Kraft Heinz targets families and singles via different formats
Mars Wrigley targets solo and social snackers with format strategy
Household spending looks similar, but preferences vary widely
Unlocking growth through tailored strategies

INCOME DIVIDE

Social Class E surges, deepening global income divides
Economic volatility to intensify the income divide globally
H&M enters premium childrenswear market with affordable, durable styles
Danone adopts dual-track pricing strategy
Strategies for navigating income-based consumer divides

BEHAVIOURAL CONTRAST

Mapping the contrasting consumer behaviours
Conflict markets require flexible but authentic value propositions
Lessons from the Coca-Cola boycott
Starbucks balances mobile innovation and social spaces
Navigating behavioural contrasts with authenticity, adaptability and alignment

CONCLUSION

Turning consumer polarisation into growth: How to win
Evolution of “Consumer Landscape Polarisation”
Questions we are asking

APPENDICES

Key pillars and indicators of Consumer Landscape Polarisation Index
Consumer Landscape Polarisation Index: Rankings

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/beyond-affordability-turning-consumer-polarisation-into-growth-in-fragmented-markets/report.