



**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

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

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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](http://www.euromonitor.com/beyond-affordability-turning-consumer-polarisation-into-growth-in-fragmented-markets/report).