

INTERNATIONAL GROWTH TRANSFORMATION

EFFECTIVELY **DRIVING SUSTAINED GROWTH**
ACROSS MULTIPLE GEOGRAPHIES



Integration

Together, for the change you need



For FMCG multinationals, **achieving international growth** isn't just a matter of having the right global go-to-market strategy – it's about making that strategy work **across vastly different local realities**.

In this report, we explore how companies can operationalize this global-local balance to unlock consistent performance across markets. It presents a people-driven growth model capable of balancing centralized strategic direction with strong local market execution – integrating strategy and execution, global alignment with local relevance and the empowerment of teams via the right tools, structures and incentives.

- I.** **Context:** What makes scaling global growth so challenging – between central control & local autonomy?
- II.** **Approach:** How can you create a growth framework that's truly replicable?
- III.** **Segmentation:** When you can't tackle every market individually, how do you map a manageable path to success?
- IV.** **Implementation:** How do you get global-local synergies to take root on the ground, for perpetuity?
- V.** **Outlook:** What matters beyond the technical when executing transformation?

I. Context



What makes scaling global growth so challenging – between central control & local autonomy?

CEOs of FMCG multinationals have started prioritizing the task of securing profitable, sustainable growth across diverse global markets.¹ **The central challenge? Scaling global go-to-market strategies while adapting for local realities and operating models.**

Centralized efforts bring consistency and performance tracking but often fail to account for cultural nuance, market dynamics and local execution needs.

On the other hand, decentralized strategies improve local team buy-in but can weaken alignment with the overall international growth strategy.

Companies often respond by setting up central growth or sales excellence offices. Yet too often, these teams can be seen as stakeholders who are disconnected from the specific realities of each geography – viewed more as reviewers than enablers that provide value-adding support.

What makes the difference? In our experience, **successful companies turn these global teams into value-adding partners providing structured support, strategy frameworks and decision-making tools that make sense in-market.**

More than just alignment, they foster real global-local synergy grounded in a deep understanding of the dynamics, cultures and capacities across each market.

When done right, we've seen this create a scalable international growth engine – anchored in consistency and powered by local execution.

¹ Gartner 2024

II. Approach



How can you create a growth framework that's truly replicable?

FMCG companies accelerating international expansion can greatly benefit from applying a **consistent go-to-market approach** that supports both localized strategy models and global comparability. Each market may require a unique commercial model, but **using a structured decision-making process** – based on core pillars such as cost-to-serve, portfolio placement, channel consumption patterns and more – **creates a scalable growth engine**.

Why is this essential? A well-structured growth methodology provides a framework for navigating the commercial and marketing complexities of different geographies.

It standardizes the critical discussions that must happen in each market, guiding local teams

through the same core steps and questions – from analyzing cost-to-serve per channel to understanding consumption distribution patterns.

This approach ensures decisions are based on a common analytical foundation, while still allowing local teams to adapt the outcomes to their realities.

**STRATEGIC
CONFIDENCE**

Each country will have a different go-to-market model – but applying the same framework globally ensures confidence that every local model was built on a robust, structured process. This brings peace of mind to the global team: **even with different models, they can trust that each one is the "right" model for its context.**

COMPARABILITY

A shared framework allows markets to be measured (and supported) against common indicators – both outcome KPIs like revenue & market share as well as execution KPIs such as drop size per store or merchandiser. Beyond measuring performance, this enables **informed decision-making via reference KPIs that support in the definition of the local model.**

**BEST
PRACTICES
ACCELERATION**

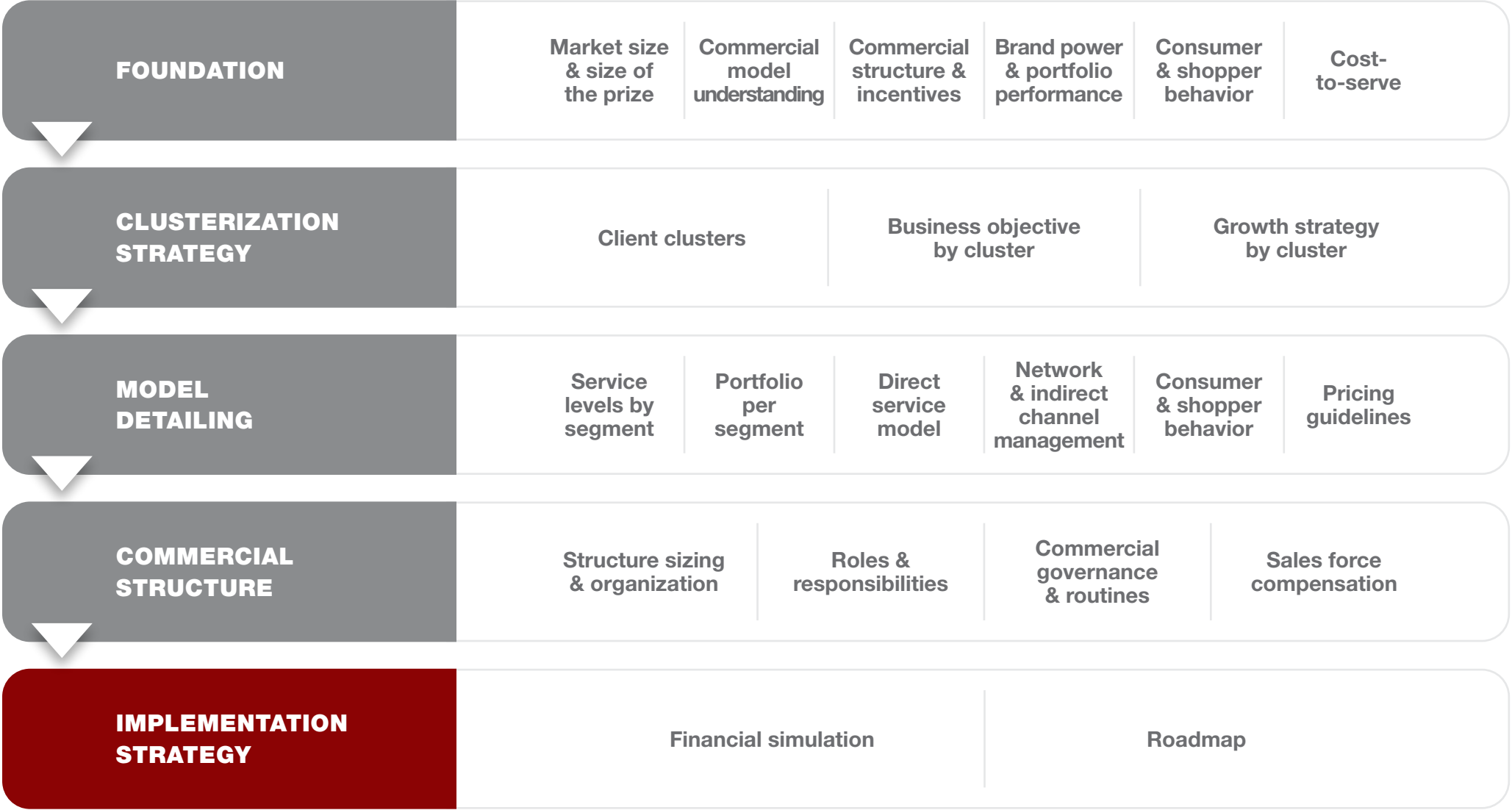
It also enables best-practice transfer across countries. Beyond exchanging experiences informally, structured comparability can help identify which countries excel in specific topics, making it easier to replicate successful approaches elsewhere. In short, the framework acts **as a catalyst for faster and more effective learning across the organization.**

A replicable and adaptable growth methodology allows companies to establish a robust framework that can be applied across many geographies – recognizing that no trade landscape has the same contours or cultural nuances.

The following are the core elements considered in Integration's growth methodology. The approach that is ultimately best suited for each company will, of course, need to be adapted to its over all strategic objectives.



INTEGRATION'S GROWTH
FRAMEWORK



III. Segmentation



When you can't tackle every market individually, how do you map a manageable path to success?

Expanding globally presents immense opportunities – but not all markets should be approached in the same way. We find that a fundamental first step in an international growth strategy is segmenting geographies into distinct groups.

Why is this essential? Segmentation allows companies to tailor their go-to-market (GTM) strategies, prioritize investments and allocate resources more effectively. Without it, businesses risk deploying a one-size-fits-all approach that fails to reflect local realities, limiting growth potential.

MODELS FIT FOR LOCAL REALITIES

Local differences matter. Factors such as market maturity, competitive landscape and consumer behaviors differ widely across countries. Even structural elements, like distribution models (e.g., heavy distributor reliance in some locales vs. direct-to-retail models in others) demand tailored approaches.

Segmentation enables companies to adapt their GTM models to fit each context – ensuring that strategic ambitions, channel structures & execution standards are aligned with local needs.

COMPARABILITY & CROSS-MARKET LEARNING

Segmenting also enables companies to group countries with similar characteristics, allowing for relevant benchmarking and knowledge exchange.

By comparing like markets, e.g. those facing similar conditions and challenges, businesses can identify what works and replicate successes across countries. It also ensures that KPIs in countries with different contexts are being compared accordingly, allowing for the right decisions to be made. This shared learning drives faster, more efficient improvement across their network of geographies.

PRIORITIZATION OF GLOBAL RESOURCES

Not every market demands the same level of global attention. Segmentation provides a structured way to prioritize markets – be it by growth potential, operational feasibility, strategic importance or other factors. It helps companies define where to allocate leadership time, where to invest resources and where to intensify or reduce engagement efforts.

In short, segmentation introduces a more disciplined and impactful approach to global expansion.

FOUNDATIONAL ELEMENTS OF MARKET SEGMENTATION

Successfully driving international growth means understanding distinct realities & needs and approaching these in different, appropriate ways. Segmentation is key for avoiding a one-size-fits-all solution.

Numerous variables can come into play, generally across two key dimensions:

1. **internal considerations** specific to each company and
2. **external factors** specific to each market.

The following are some of the most common ones we use as a starting point – yet each business may need to consider additional ones based on its own context.



Internal

company-specific variables



SIZE OF THE PRIZE

How much value is available for the company in a given market?

TYPE OF COMMERCIAL SUPPORT

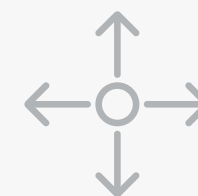
What level and type of support is needed from Global to unlock potential?

CURRENT OPERATING MODEL

How capital-intensive are operations today and what is the balance between direct sales vs. third-party distribution partners?

External

market-specific variables



RETAIL LANDSCAPE

How is the market organized between modern and traditional trade?

DISTRIBUTION CHANNEL STRUCTURE

How structured and formal is the distribution channel ecosystem?

MACROECONOMIC CONTEXT

What are the market's structural conditions?

Internal: company-specific variables



SIZE OF THE PRIZE

How much value is out there for the business to capture in a given market?

Besides market size, this means considering how much potential exists growing distribution (taking products to more POS), increasing portfolio placement (having more than 1 product at each POS), boosting product sell-through (to sell more quickly at the POS) and more.

To prioritize, executives must identify how large the opportunity is as well as how far is the company from capturing it. This will allow for focusing on markets with greater growth potential, recognizing segmentation still needs to consider factors beyond pure size.

CURRENT OPERATING MODEL

How capital-intensive are operations today and what is the balance between direct sales vs. third-party distribution partners?

Answering this requires gaining a clear view of operations in each – from those operating directly with their own teams to those using an indirect, asset-light approach via distributors.

Recognizing differences up front will allow the company to 1) prioritize markets based on invested capital and 2) segment for better comparability, grouped efforts and ensuring the same strategy isn't applied across countries with fundamentally different setups.

Example of current operating model segmentation

OPERATING MODEL	SALES	LOCAL ASSETS
Asset light	operates only via distributors	none
Sales office	operates mostly via distributors	sales office with few other functions, some logistics/production
Subsidiary & heavy distribution	established direct operations, significant share via distributors	subsidiary structure, with support functions and often production
Mainly direct subsidiary	mostly direct operations	full subsidiary structure, with support functions and often production

TYPE OF COMMERCIAL SUPPORT

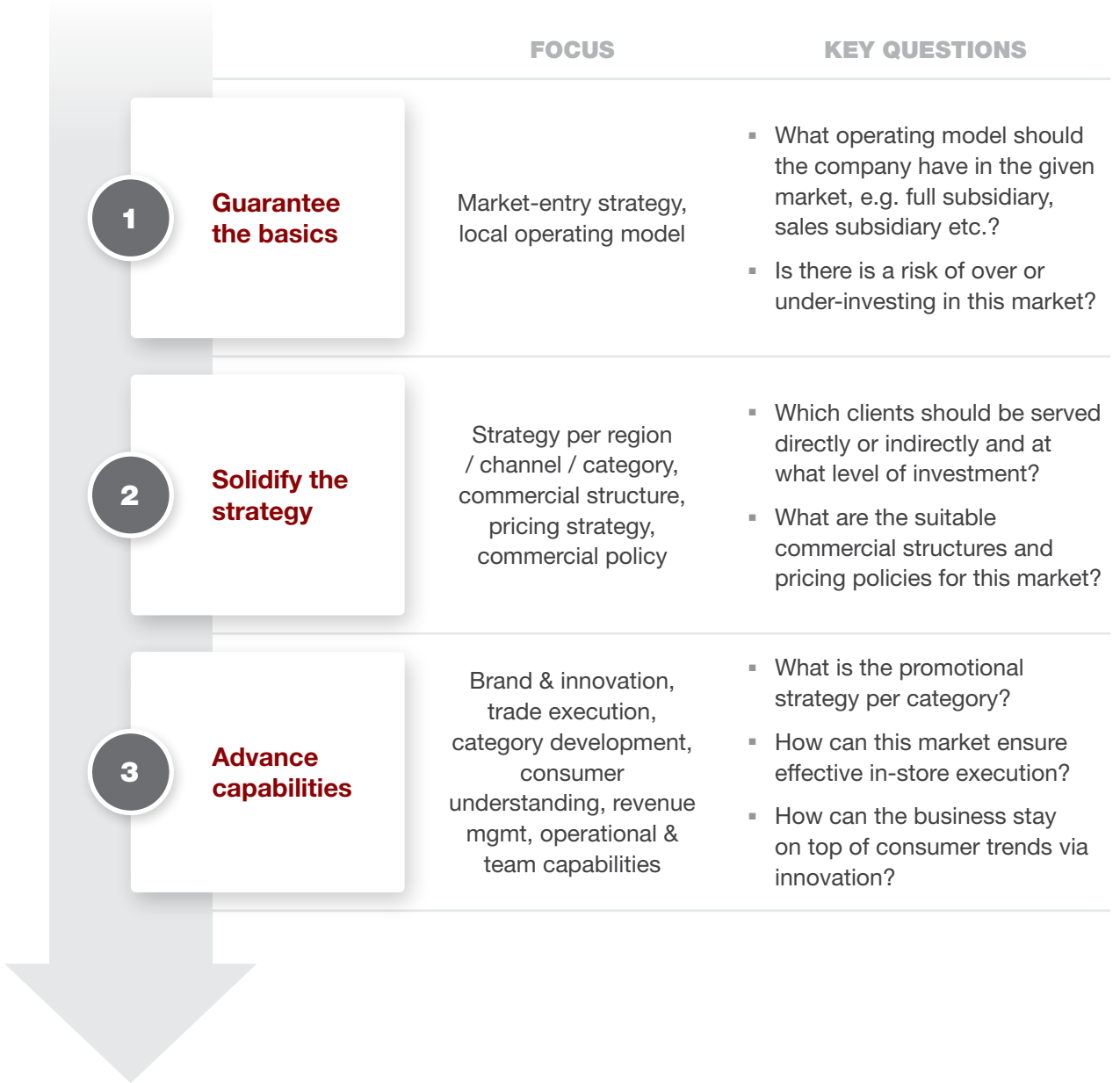
What level and type of support is needed from Global to unlock potential?

To unlock its respective potential, each market will demand a certain degree of commercial support from Global – so the right type of support is provided based on where each stands:

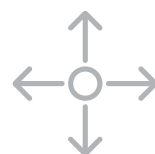
1. **Guarantee the basics:** Some markets may require a broader review of local presence, commercial strategy and structure, from top to bottom, based on highly strategic discussions.

2. **Solidify the strategy:** Some may already have the right model in place but still need to build out operations via specific adjustments and improvements to capture appropriate returns.

3. **Advance capabilities:** Others may have a well-functioning strategy and benefit from advancing existing capabilities to maximize revenue and profitability via specific initiatives.



External: market-specific variables



RETAIL LANDSCAPE

How is the market organized between modern and traditional trade?

The answer will have key implications for what's required of point-of-sale (POS) execution in each reality.



DISTRIBUTION CHANNEL STRUCTURE

How structured and formal is the distribution channel ecosystem?

The sophistication of distribution infrastructure varies dramatically across markets and fundamentally shapes go-to-market strategy.



MACROECONOMIC CONTEXT

What are the market's structural conditions?

The macroeconomic environment shapes strategic choices by determining which go-to-market models are economically viable. Income levels, growth trajectories and demographics don't just influence demand – they guide critical resource allocation decisions.



Emerging markets

These markets combine rapid growth with structural challenges: expanding consumer bases meet fragmented retail landscapes. Lower income levels demand affordable portfolios, while millions of small outlets drive up cost-to-serve. Companies must balance growth ambitions against profitability, often accepting lower margins initially to achieve critical mass coverage.



Developed markets

These markets present an inverse challenge: mature category dynamics mean growth must come from share-stealing rather than market expansion. This competitive intensity demands higher marketing investments, more sophisticated trade programs, and patience for longer-term returns. The concentration of retail power in these markets also shifts negotiating dynamics, often requiring dedicated resources for managing key accounts and structured planning processes.

Tailored growth strategy through market-specific segmentation

At a multinational food company supported by Integration, segmenting markets based on internal and external factors helped the Global team organize its growth strategy.

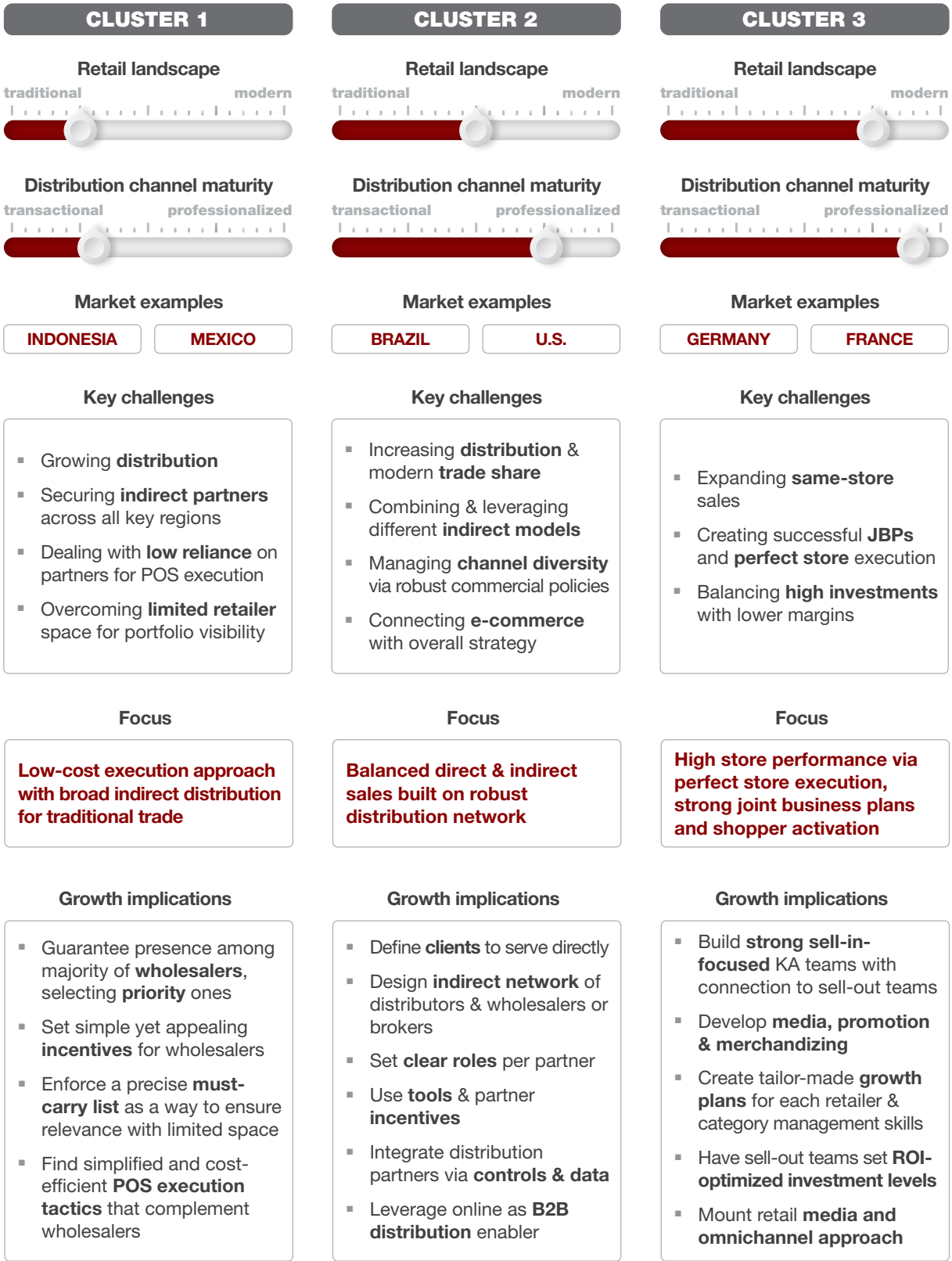
Each of its markets presented a unique set of external dynamics shaping commercial challenges and the levers available to drive growth. Based on the segmentation variables presented above, the project teams needed to adopt the GTM model to these respective contexts.

Markets with strong traditional trade demand a balanced direct and indirect sales strategy, while those dominated by modern trade necessitate greater focus in point-of sale execution.

This segmentation became the foundation of a global growth roadmap, guiding action with precision.

The following frame is an example of some clusters that were identified.

Sample of segmentation clusters



IV. Implementation



How do you get global-local synergies to take root on the ground, for perpetuity?

True transformation occurs when global frameworks translate into market-specific implementation plans. Achieving sustainable international growth means building global-local synergies, grounded in role clarity, shared KPIs and culturally aware transformation governance. In our experience, **five key non-technical factors** make the difference between strategies that remain on paper and those that take root across the business. Each one centers on aligning people around the transformation journey.

BALANCING GLOBAL & LOCAL VIEWS

Success hinges on defining distinct, yet complementary, roles between global and local teams. Rather than imposing top-down directives, global should provide frameworks, tools and shared

metrics – while empowering local teams to adapt and execute based on market reality.

Achieving this balance builds trust, increases ownership and ensures the strategy resonates in the field.



Global

DEFINE & GUIDE GROWTH METHODOLOGY

by providing structured steps and tools for local teams to follow

CHALLENGE WITHOUT BIAS

by questioning local conclusions via an external view that offers cross-market benchmarks

SHARE MARKET REFERENCES & BEST PRACTICES

by refining models via knowledge transfer across countries



Local

ADAPT METHODOLOGY LOCALLY

by drawing conclusions about the best model for respective market.

BRING COMMERCIAL & MARKETING LEVERS TO LIFE

by validating challenges against market reality, gauging resources & adjustments, creating customized execution plans

INTEGRATION LOCAL REALITY

by implementing best practices to market-specific conditions, ensuring practicality, and sharing success cases

SETTING ACTIVE TRANSFORMATION GOVERNANCE

Beyond just planning, a **growth strategy demands ongoing coordination.**

Local teams must track progress and flag roadblocks, while global should provide support through structured check-ins, on-site visits and peer exchanges across markets.

Cultural differences matter here: a flexible governance approach that adapts to local dynamics (e.g. more hierarchical vs. collaborative environments) is essential to maintaining momentum.

BUILDING A THRIVING GLOBAL COMMUNITY

One of the most powerful enablers of transformation is building a global community of leaders around the growth agenda.

By training leaders in the methodology, aligning terminology and facilitating regular quarterly or semi-annual forums to share successes, challenges and innovations, **companies create a culture of engagement and mutual learning.**

This fosters horizontal visibility, cross-market collaboration and recognition for those driving change.

ANCHORING GROWTH IN A SINGLE SOURCE OF TRUTH

To scale internationally, companies need more than spreadsheets and one-off reports.

A centralized control platform with clearly defined KPIs – tracking progress across activities (e.g., distribution build-out) as well as outcomes (e.g., sales uplift) – ensures visibility and alignment across all levels.

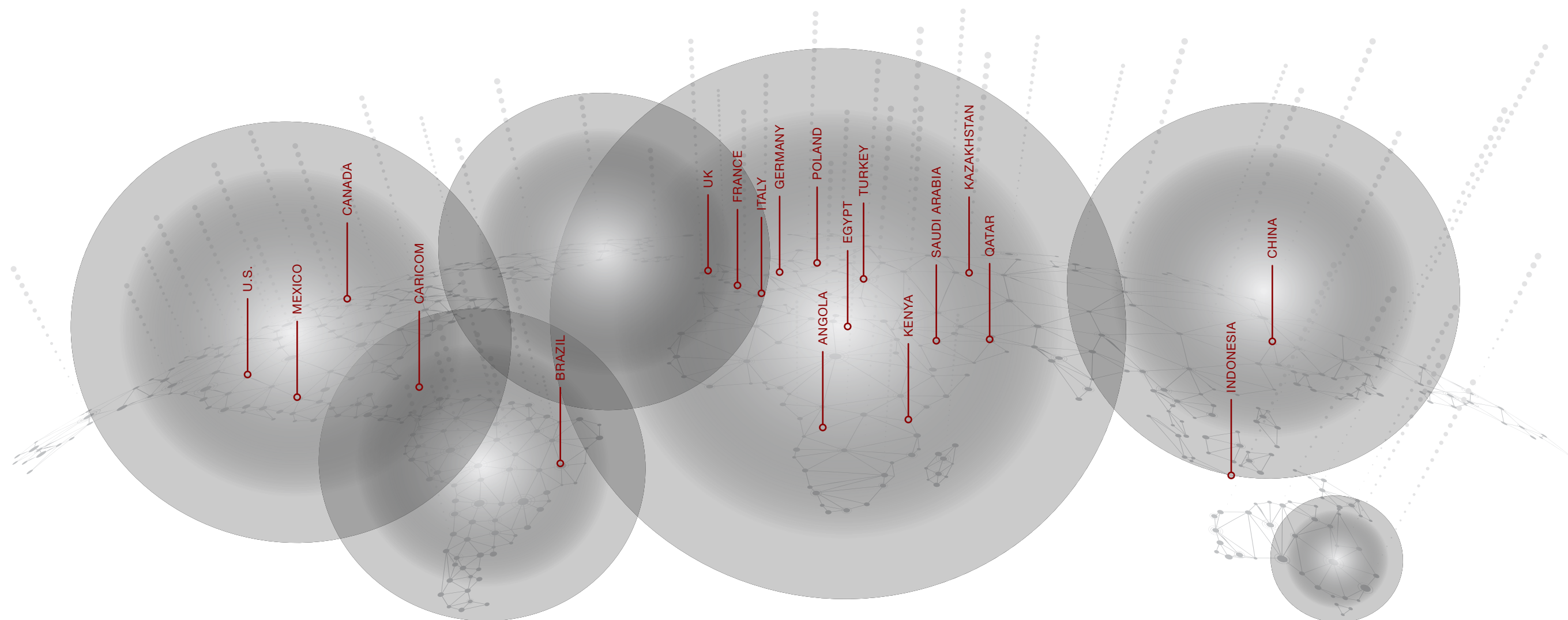
Local teams input the data while global gains a clear, consolidated view of performance and progress that's all-encompassing and manageable.

TURNING TALENT INTO A STRATEGIC ALLY

Growth transformation is a people transformation.

HR plays a critical role in identifying and developing key talent to lead implementation locally.

By assigning high-potential leaders to visible roles in the transformation, companies not only strengthen execution but also increase engagement and retention through recognition, growth opportunities and career progression.



V. Outlook



What matters beyond the technical when executing transformation?

Engaging local markets in meaningful, value-adding conversations is an essential for achieving international growth. But it's just the first step.

While many multinationals have strong technical foundations in place, **what can limit their**

global growth potential is the difficult task of engaging local teams as core enablers. For a global GTM strategy to take root, it must be built around local reality – and led by people who own execution in-market.



One important lesson we've learned together with clients is the following: **a strong technical foundation sets the direction, but it's the people who make it real.**

Growth happens when global and local come together – not just in structure, but in mindset. It happens when the strategy speaks the language

of the field and when teams feel part of the journey, not subject to it.

Our work across more than 70 countries has shown that real, sustainable growth is often hiding in plain sight. The opportunity isn't always about expanding into new territories or launching new brands. It's about doing what you already do: better, together and at scale.

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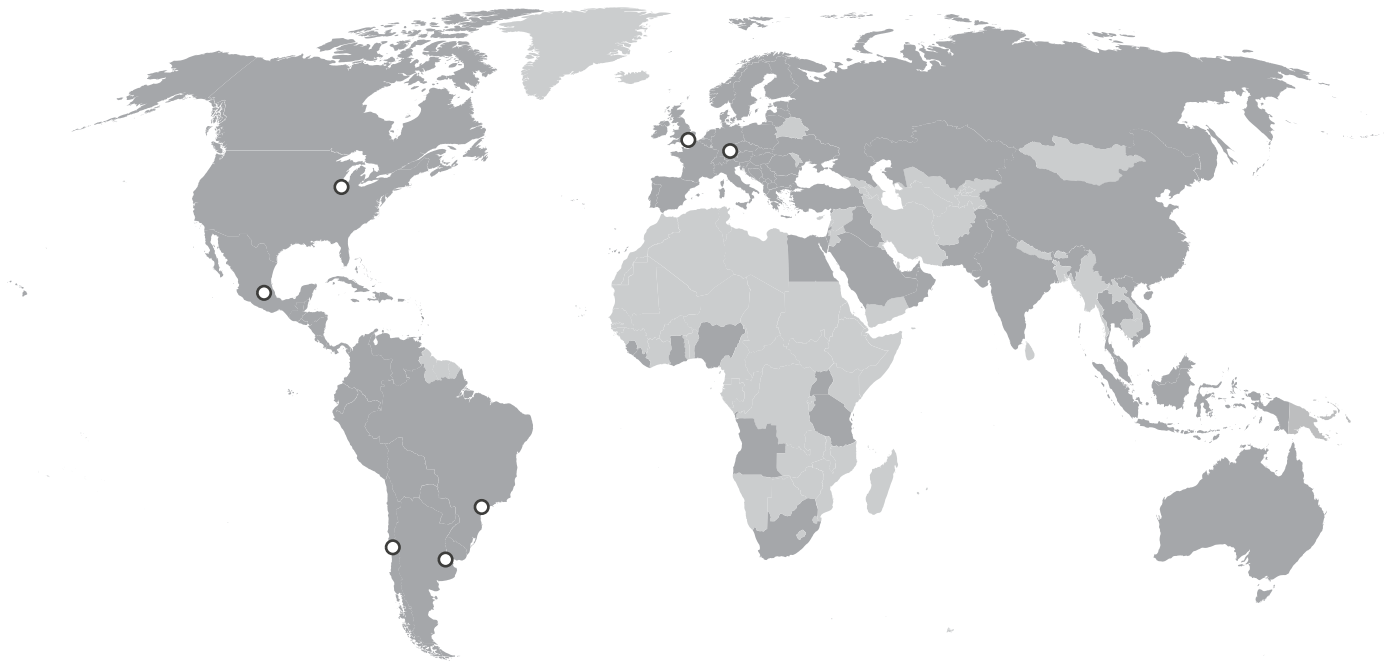
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About Integration

Integration is a **strategy & management consultancy** committed to realizing the change that our clients need. Founded in 1995, Integration has grown quickly to become an internationally recognized and award-winning consultancy firm operating from offices in **Buenos Aires, Chicago, London, Mexico City, Munich, Santiago and São Paulo**. To date, our teams have delivered thousands of projects for clients across virtually all industries in over 85 countries.

We work side by side with our clients to create customized solutions that match their business needs for change across all levels of the organization – always integrating our expertise with the client’s reality. The result of this for our clients is a unifying movement across the organization that creates a positive legacy of tangible change – always integrating people and business.



● Countries we've worked in (as of Dez. 2024) ○ Our offices

since
1995

offices
7

clients served
920+

projects delivered
3630+

countries worked in
85+

repurchase rate
87%

What we offer



GROWTH

SUPPLY CHAIN

EFFICIENCY

ORG. DESIGN

M&A

How we offer it

Our differential is an approach based on integrating teams – a transformation that’s only possible when working side by side

We believe in strategies that can be implemented

WE’RE PARTNERS IN YOUR TRANSFORMATION

Some of our clients – who are all available for references



We’re proud of the recognition received for our work



Best Change Management
Project in the Public Sector



Project of the Year
Best Project, 2017



International Project
Category



Commercial Impact
Category



Top Employers among Medium-Sized Companies from Focus magazine (2022 and 2023)



Best Supply Chain Consultancy Award from Inbrasc – the Brazilian Supply Chain Institute (2016, 2017, 2018 and 2020-2021)



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