GLOBAL MARKETERS

SHANGHAI

Frank Braeken
Unilever
PAGE S-2

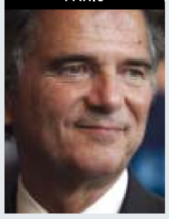
MONTREAL

Michael Brossard
Rona
PAGE S-5

BEIJING

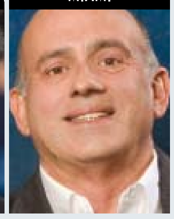
Ian Chapman-Banks
Motorola
PAGE S-4

PARIS



Alain de Pouzilhac
France 24
PAGE S-2

MIAMI



Eddie Gonzalez
Y&R Brands, Bravo
PAGE S-5

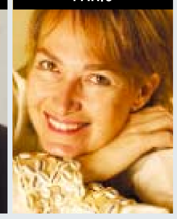
ATLANTA

Jonathan Mildenhall
Coca-Cola
PAGE S-4

LONDON

Mark Read
WPP Group
PAGE S-2

PARIS



Marie Laure Sauty de Chalon
Aegis Media France
PAGE S-5

TOP 100 GLOBAL MARKETERS

Procter & Gamble
Leads all spenders
PAGE S-6

Special Report

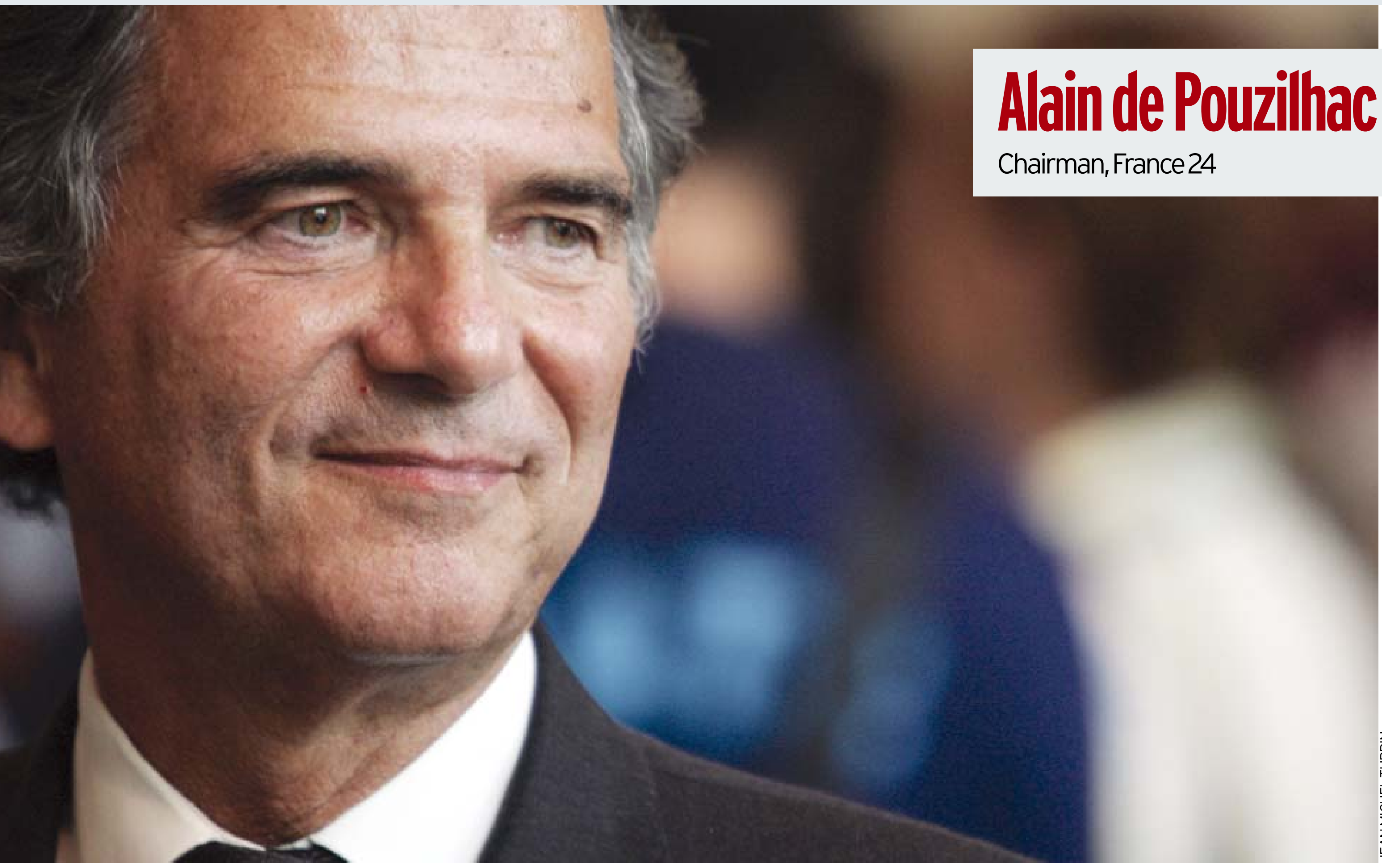
GLOBAL PLAYERS

A select group of stars are challenging media and marketing tenets around the world. As they explore new media, social networking, packaging, video gaming, news delivery and retailing—and grow through acquisitions and adaptation to local economies—here are nine who have some answers

LONDON

Sophie Gasperment
L'Oreal U.K.
PAGE S-4

Special Report GLOBAL MARKETERS



JEAN MICHEL TURPIN

Alain de Pouzilhac

Chairman, France 24

PARIS

- Making comeback after Havas exit
- "CNN à la française" launches next month via satellite, cable, broadband

Alain de Pouzilhac is in charge of carrying out French President Jacques Chirac's mission to create a "CNN à la française." The former Havas chairman-CEO, who left the group in June 2005 after losing a boardroom battle against Havas' largest investor, Vincent Bolloré, is chairman of the international news channel France 24.

"We are talking about French influence in the world," Mr. de Pouzilhac says. "France 24 will rival CNN, BBC World, Fox News and Al Jazeera."

Although Mr. de Pouzilhac says he firmly believes the world's opinion leaders and business community are seeking an alternative point of view and source of information, he faces a tough challenge. France 24 is owned jointly by state-owned broadcaster France Television and commercial TV group TV1, and has just a $100 million budget for its first year. Only international ads will be sold, and little ad revenue is expected, between $1.2 million and $3.6 million in the first year.

And since not everyone speaks French, France 24 will have a second channel that will broadcast 75% in English. The goal is to add Arabic in 2007 and Spanish a year or two later.

France 24 is scheduled to start telecasting early next month to satellite, cable and broadband networks in Europe, the Middle East and Africa, and will have limited distribution on the East Coast of the U.S. Projected reach: 200 million-plus viewers, 90% of whom are outside France.

"Our mission is to cover international news with a French perspective and to convey all around the world French views and values [including] diversity and the French 'art de vivre,' " Mr. de Pouzilhac says.

France 24's slogan will be "Everything about what you're not supposed to know," he says.

The new job is a big change for Mr. de Pouzilhac, 61, who spent almost 30 years at Havas after joining its French agency, Havas Conseil, as chief operating officer in 1976.

"I have the same enthusiasm and ambition," he says. "I have never been so happy in my life. Working in media with 170 bilingual young people from 27 countries with an average age of 31 who cover broad, passionate subjects is a fantastic experience."

—ISABELLE MUSNIK

Mark Read

Director-strategy, WPP Group, and CEO, WPP.com

LONDON

- Right hand to WPP chief Martin Sorrell
- Leads holding company reviews and digital operations

WPP Group insiders call Mark Read one of CEO Martin Sorrell's right-hand men. As chief executive of WPP.com, the umbrella overseeing the ad holding company's digital and dot-com interests, Mr. Read is in charge of a crucially important endeavor.

Digital media are growing at "explosive levels" in most markets, Mr. Sorrell has said. In the past year alone, WPP.com has bought stakes in digital entities including LiveWorld, a creator of message boards, blogs and social networking sites; online-game publisher WildTangent; and, most recently, Spot Runner, an Internet ad agency. "You'll see us continuing to do more of it," Mr. Sorrell told analysts in August.

Mr. Read is also director of strategy for the holding company and is well-known to top executives and new-business chiefs at each of the 200-plus entities within the WPP empire. He acts as the quiet hand that coordinates teams on holding-company reviews such as HSBC, Intel and Samsung. "Mark's a player," says Avi Dan, global executive director at Havas' Euro RSCG Worldwide and former managing partner at WPP-owned Berlin Cameron United. "He possesses a rare combination: knowing the intricate details of WPP and having a global view."

According to another ex-WPP employee who worked with Mr. Read on the successful HSBC pitch: "He knows what Martin wants to achieve, and he knows how to deliver the goods." An executive at a WPP operating company adds: "Nothing slips through the cracks with Mark."

Mr. Read, who wouldn't be interviewed for this article, joined WPP straight out of the University of Cambridge and stayed for six years—five handling investor relations and business development at the parent company and one at Ogilvy & Mather. During that time he got his M.B.A. at business school INSEAD, then left to work at consultancy Booz Allen Hamilton in the entertainment and media practice. In 1999, he founded WebRewards, a web-based consumer-affinity company (ultimately sold to Bertelsmann), then returned to WPP in 2002 in his current roles. He joined WPP's board in 2005.

Described as bright, thoughtful, buttoned-down and "very British," Mr. Read, 39, bears watching because, as one former WPP executive says, he's "someone Martin believes in."

—LISA SANDERS

Frank Braeken

Group VP-China, Hong Kong and Taiwan, Unilever

SHANGHAI

- "Operational brilliance" needed to realize China potential
- Experience in emerging markets back to 1987

To turn around its underperforming operation in China, Unilever last year tapped Frank Braeken as group VP in charge of China, Hong Kong and Taiwan, a pivotal role where a fresh perspective was sorely needed.

Mr. Braeken, 46, is the "right man to turbocharge Unilever's huge potential in China," says Tom Doctoroff, JWT's area director-Northeast Asia and CEO-China. "He's operationally brilliant while still maintaining an underlying appreciation of the role of brands in maximizing profit."

When Mr. Braeken, who is Belgian, arrived in Shanghai in August 2005, the Anglo-Dutch company was finally overcoming one of its biggest obstacles in China: extricating itself from a string of messy joint ventures that didn't work well, tying Unilever in operational knots.

"This is a new episode in Unilever history," Mr. Braeken says. "It's not a secret that we've had ups and downs in China. But now we're completely in charge of our own destiny, and we put … ice cream, food, and home and personal care together to better leverage the business."

But other problems remained. Unilever had fallen behind Procter & Gamble Co. and Colgate-Palmolive Co. in areas like adapting local insights to new product formulations and developing localized communication.

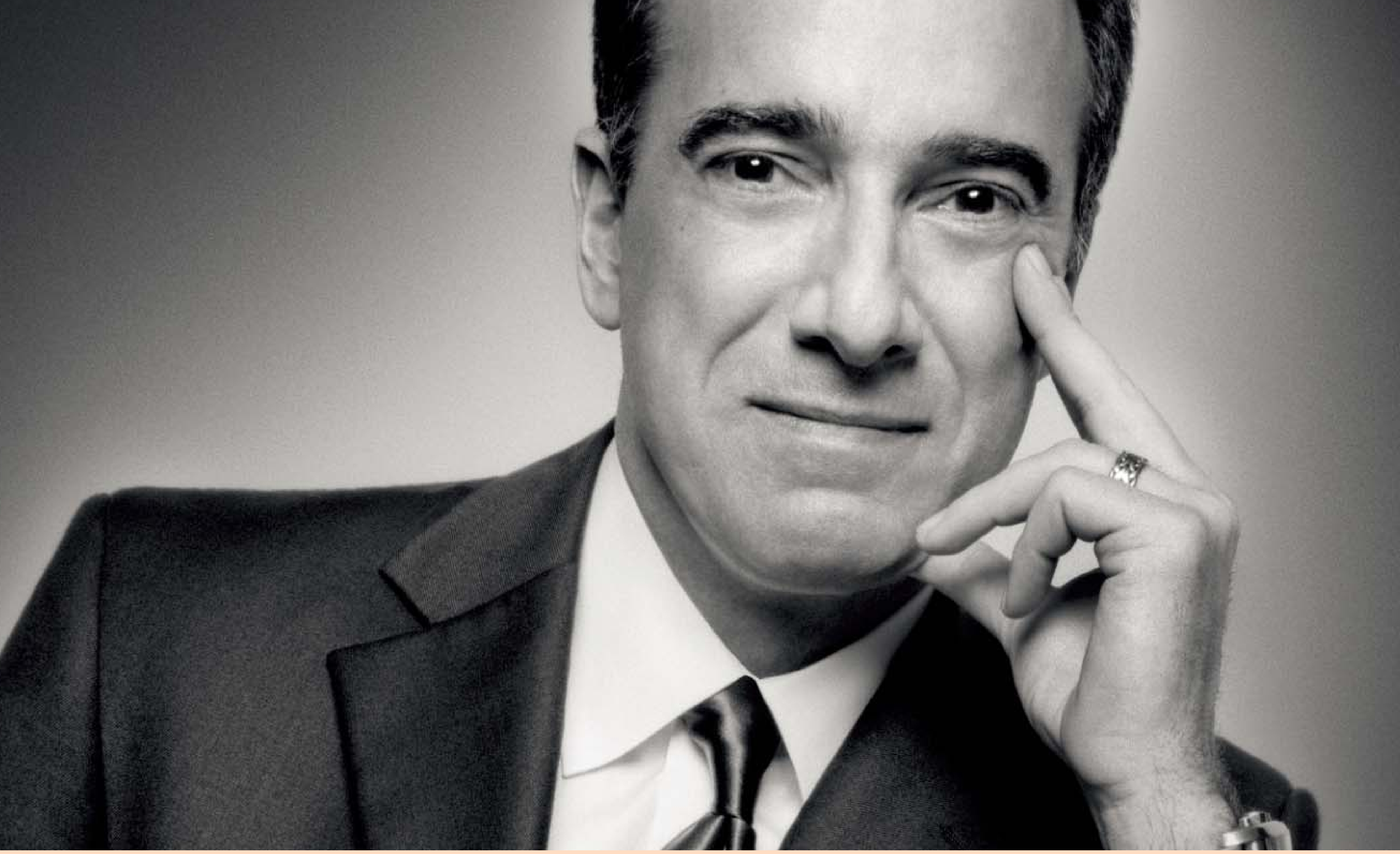
For example, Unilever struggled to alter its product mix to meet differences in China's geography—a hot and humid southern coast and dry, cold northern provinces.

Unilever and its global rivals find it tough to compete against local marketers, particularly in the dynamic personal-care category. The company also had strained relationships with its creative agencies in China.

Resolving such issues fell to Mr. Braeken, and Unilever is already showing signs of a rebound. Sales growth doubled to 30% in the second half of 2005, thanks in part to successful product extensions for the Pond's and Lux brands.

"My goal when I arrived in China was to transform the company from laggard into a winner by transforming the teams, the culture and not the strategy but our execution of the strategy," Mr. Braeken says. He predicts growth will near 30% this year too, as Unilever gets more products into distribution and leverages the benefits of its new organization and global-brand development structure.

—NORMANDY MADDEN



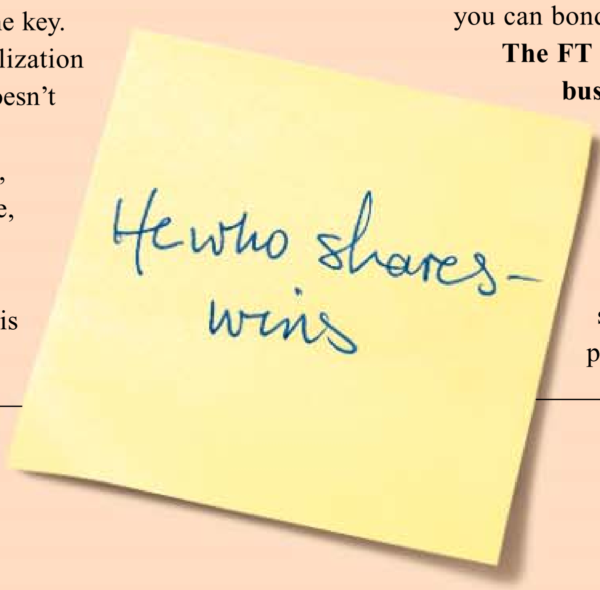
THE ART OF BEING GLOBAL *– Jim Speros – Sr.VP & CMO, Marsh & McLennan Companies*

He's an innovator known for getting things done. He makes this happen by bringing the right people together at the highest levels of collaboration. Here he shares his thoughts on big picture thinking, and what he carries in his wallet.

Being international doesn't make you global. Being global is more about influencing attitudes and behaviors versus location. It also implies a two-way street: the influences born from one culture are shared or diffused to another.

The big challenge for any global company is in following through on ideas. Marsh & McLennan Companies are dedicated to offering the best services and people from across our individual companies. The way to succeed globally is to create big innovative strategies with a die-hard focus on execution. Teamwork makes this happen; understanding people is the key.

Face to face is critical. Globalization may bring markets closer, but it doesn't necessarily bring them together. Technology, as impressive as it is, can only get you so far. So people, especially those with different cultures, need to dedicate time to understanding one another. It is this understanding that bridges gaps.



I travel a lot, visiting our offices and clients around the world. No matter where I go, I have found that there is nothing more real, or important, than 'being there'.

You still need to remember where home is. No matter how much I travel, I'm still a family guy. My wife and I have two beautiful daughters and I take memories of them wherever I travel. They remind me of the important things. Business leaders from other parts of the world feel the same way when we talk; the most important thing in your wallet should be your family. On that level you can bond with anyone, anywhere.

The FT offers a perspective premised on 'global first, business second'. I get from it the most relevant and up-to-date global perspective on everything that influences business, politics, and international finance. It helps guide my thinking because their starting point is 'global first', so the issues are always offered in context of the big picture, as opposed to simply presenting me with a local view. And 'big picture' thinking is what being global is all about.

This is one in a series of reflections by leading marketers, who are also regular readers of the FT. The series can also be found at FT.com/toolkit/globalview

A global view for a global world

FT FINANCIAL TIMES .com

Special Report GLOBAL MARKETERS

Jonathan Mildenhall

VP-global marketing strategy and creative communications, Coca-Cola Co.

ATLANTA

- New global post oversees agencies' work
- Ex-director of strategy at Mother hits Atlanta next January

When Jonathan Mildenhall takes up Coca-Cola Co.'s new worldwide marketing post next January, he will ascend to the top rank of global players.

Mr. Mildenhall, as VP-global marketing strategy and creative communications, will be based at Coca-Cola's headquarters in Atlanta. He heads to the U.S. from his current position as strategy director at one of Coke's most innovative agencies, Mother, in London.

His new role will be to ensure that Coca-Cola's agencies around the world deliver exceptional work on time and on budget. Mr. Mildenhall will oversee global output from a strategic, creative and operational point of view for all the company's brands, reporting directly to Chief Creative Officer Esther Lee.

To get the job, Mr. Mildenhall started as a wild card, underwent rigorous interviews and won over the Coke bosses with his intellect, enthusiasm and creative credentials.

Mother handles 85% of Coca-Cola's U.K. business, so Mr. Mildenhall, 39, has deep experience with the soft-drink giant. He also worked earlier at Lowe Worldwide on two pivotal global accounts: Smirnoff vodka and General Motors Corp.'s Vauxhall/Opel.

"Jonathan is one of the most passionate people I've met when it comes to the work—his involvement is complete," says Matthew Bull, Lowe chief creative officer. "He's the most positively infectious individual I've worked with."

Mr. Mildenhall knows the agency world well. He's worked at six London shops and managed TBWA there before joining Mother.

He almost moved to the U.S. in 2004 to run TBWA's New York office. But when that didn't work out, he quit and went to Harvard Business School for four months.

Back in London, Mr. Mildenhall almost went into the music business but turned down a job at Sony BMG because he decided that, while music is his passion, record companies aren't terribly creative places. Instead, he joined Mother as strategy director in October 2005.

The opportunity at Coca-Cola comes at the right time, Mr. Mildenhall has told friends. A confident individual, he's nonetheless preparing for the new challenge by talking to his past and current clients about their decision-making processes.

—EMMA HALL

Sophie Gasperment

Managing director, L'Oréal U.K.

LONDON

- Mission: Incorporate Body Shop into L'Oréal portfolio
- Works in U.K. market where L'Oréal tops even P&G

Sophie Gasperment faces perhaps her biggest challenge yet: The managing director of L'Oréal in the U.K. has to make the $1.2 billion acquisition of the Body Shop chain fit into L'Oréal's extensive portfolio.

Ms. Gasperment's track record since taking over the L'Oréal operation in the U.K. has been impressive. She oversaw the launch of the Men's Expert line in 2005 and watched the male skincare market grow by 50%. L'Oréal went from a 23% share of the market to a 32% share in 2006, making the U.K. L'Oréal's leading country for the Expert line.

She helped make Maybelline Dream Matte Foundation the U.K.'s best-selling foundation and extended it into blush and body shimmer. "When we first saw the product, we thought, 'What the hell is that?' " Ms. Gasperment recalls, calling the packaging "a bulky glass pot with light mousse inside." She says that "When we put it into test, people loved the fact that it was different. The results were outstanding."

She will now play a key role in making the Body Shop deal work. However, the retail chain is still a stand alone business of the L'Oréal Group, and as the acquisition was only completed last July, Ms. Gasperment says it's too early to go into detail about the company's plans.

Ms. Gasperment, 41, stumbled across L'Oréal 20 years ago when she arrived early for an interview with a management consultancy. With 2 hours to kill, she wandered into a L'Oréal presentation to graduates. She loved the speakers' "passion, energy and decisiveness"; interviewed; and had a job a few hours later.

After 13 years at L'Oréal's Paris headquarters, Ms. Gasperment moved to London with her banker husband and their son and daughter, now 13 and 15, when he was offered a job there. (The couple had another daughter, now 1 year old, in London.) Ms. Gasperment became general manager of the L'Oréal Paris brand and was promoted to her current role three years ago.

"Sophie is a great combination—she's smart as hell and demanding but utterly charming," says Rupert Howell, president of McCann Erickson Europe, Middle East and Africa. "People will do anything for her. She has built up a fantastic team around her and is very good at delegating."

"I put together teams of people with different nationalities and different thinking," Ms. Gasperment says. "It generates the best creative thinking in all areas."

—EMMA HALL

Ian Chapman-Banks

General manager-marketing for mobile devices in North Asia, Motorola

BEIJING

- Has helped Motorola double share to 22%
- Goal: To be No. 1 in time for Beijing Olympics

The challenge Ian Chapman-Banks faced in China when he arrived at Motorola in May 2005 was painfully clear.

Motorola once controlled half of China's handset market, but by early last year it trailed Nokia and was barely keeping pace with Asian brands such as Samsung, Sony, TCL and Bird.

Motorola was the preferred brand only among consumers older than 55 and was shunned by young, urban Chinese who establish trends and who are the big spenders on extras such as downloading ringtones.

Motorola turned to Mr. Chapman-Banks, who's comfortable with new technology and hip brands. Now general manager-marketing and business development for mobile devices in North Asia, he previously ran Microsoft Corp.'s Asia/Pacific home and entertainment division. Before that, he was regional marketing director for Apple Computer.

"China is different from the rest of the world," says Mr. Chapman-Banks, 45. And not just because of its huge size. In China, people pay almost full retail price for phones.

"There is very little subsidizing," he says. "So consumers need a deep emotional bond with a phone brand when they are paying $400, which is easily 10% of their annual income."

He staked out territory left vacant by other brands such as Nokia, which bet heavily on the popularity of games.

"The biggest change was deciding on a brand platform—fashion, entertainment and especially music," says Mr. Chapman-Banks, a charismatic U.K. native.

To turn Moto phones into devices that are experience-driven, earlier this year he launched Motomusic (motomusic.com.cn), the largest legal music-download site in mainland China.

Last August, Mr. Chapman-Banks tapped Asian pop star Jay Chou as Motorola's brand ambassador in Greater China.

"He has a fantastic ability to understand youth culture and hook that into the mobile-phone business so Moto's technology connects with young people and the way they want to use phones," says Keith Smith, Hong Kong-based president-international of TBWA Worldwide, who's worked with Mr. Chapman-Banks.

Motorola also turned out a series of eye-catching campaigns by Ogilvy & Mather that show striking individuals using Moto phones. At the retail level, the company is improving consumer experiences in more than 2,800 cities.

—NORMANDY MADDEN

Michael Brossard

Senior VP-marketing and development, Rona

MONTREAL

- Staying ahead of Home Depot and Lowe's
- Linked with Olympics to target the 2010 Games in Vancouver

WITH HOME DEPOT already in Canada and Lowe's about to make a major entry with its first stores, the marketing chief of Canada's biggest hardware and home-renovation chain is plotting strategy.

Michael Brossard's game plan for Rona includes developing still-secret specialized stores to cater to specific market segments such as women and environmentalists.

With 600 stores and about $5 billion in sales, Rona has the biggest share—15%—of a fragmented market that's still 61% controlled by independent businesses. Another part of Mr. Brossard's growth strategy is to buy up as many of those independents as possible, staying ahead of his rivals from the U.S.

"They only have big-box stores, while we have a combination," says Mr. Brossard, 52. "We can offer great prices through mega-buying, a product mix that's mainly Canadian and most of all, services. We're the 'how-to people.' "

Unlike many big-box stores in North America, Rona sources 90% of its products from Canadian. To keep Rona ahead of the competition in the eyes of Canadians, Mr. Brossard started an eight-year sponsorship of the Olympics in 2006, with special efforts behind the 2010 Olympics in Vancouver.

The "Rona Growing With Our Athletes" program is providing financial support for training to 100 athletes for five years. Each athlete is associated with six or seven nearby Rona stores that display "their" athlete's name, sport, background and updates on their progress. The athletes participate in community and in-store events.

Mr. Brossard is spreading awareness of the Rona brand via his staff of 75 and a $115 million marketing budget, including $89 million for advertising with creative handled by BCP and media by Carat Strategém, both Montreal. Part of that goes to sponsor popular Canadian reality TV show "Ma Maison Rona" in which two families compete to renovate two houses.

Started by a group of Quebec hardware merchants in 1939, Rona went public in 2002, two years after Mr. Brossard joined following a career with other marketers, sports teams, ad agencies and a TV network.

"Brossard is a passionate guy," says Robert Dutton, Rona's president. "He motivates everyone around him and is a real team player with creative ideas."

—GAIL CHIASSON

Eddie Gonzalez

Chairman-CEO, Young & Rubicam Brands Latin America and Bravo Group

MIAMI

- Combines Latin America, U.S. Hispanic jobs
- Fixed Brazil problem by merging Y&R with Bates' Newcomm

It's often debated whether there could be more synergy between a company's U.S. Hispanic and Latin American operations. Young & Rubicam Brands is going to find out with the help of Eddie Gonzalez.

In July, Mr. Gonzalez, who's led Y&R's Latin American operation for the past three years, added the role of running Bravo Group, one of the top U.S. Hispanic agencies. In the past few years, the New York shop has lost both clients and managers; its last CEO was out after a year.

Mr. Gonzalez, 52, happens to be Hispanic himself. He started his Y&R career in his native Puerto Rico in 1982 and has worked for Y&R on four continents. "There are things both the Hispanic market and Latin America have in common," he says, "and we're in a unique position to take advantage of that."

He's already combined the Miami offices of Bravo, Y&R Advertising and Wunderman. And he got together in September with Mediaedge:cia's Latin America CEO, Michael Jones, whom Mr. Gonzalez hired for a China media job a decade ago when both men worked in Asia, to set up a U.S. Hispanic media unit, MEC Bravo. Unusually, it reports to Mr. Jones rather than a U.S. executive and is run by a manager brought in from Argentina.

"Those are two examples of common sense things to do," Mr. Gonzalez says. There are also opportunities to recruit talent that is scarce in the U.S. Hispanic market and to expand the responsibilities of people already working for the company, he says.

"Eddie's a longtime Y&R player," says Hamish McLennan, CEO of Y&R Advertising. "He's a guy who's a great leader. He's engendered amazing loyalty from his staff. ... He's trusted by clients and staff alike. He always delivers. He's got great senior relationships, and he's also committed to bringing young people up through the organization."

Y&R is a top network in Latin America, especially since Mr. Gonzalez turned the Brazilian operation from a perennial failure into one of the country's powers with a timely merger.

"It's killing me right now trying to be in two places—or three—at the same time, but once all the people are in the right place, we can handle it," he says. "I believe in putting together a team. I'd rather be a manager not of offices but of people and client situations."

—LAUREL WENTZ AND LISA SANDERS

Marie Laure Sauty de Chalon

CEO, Aegis Media France

MARC BERTRAND

PARIS

- Rebuilt Carat in France after CEOs, clients left
- Making digital a priority after being tapped to run Aegis Media France

MARIE LAURE SAUTY DE CHALON is best-known as the woman who pulled Carat France back from the abyss after the departure of Eryck Rebbouh and Bruno Kemoun.

When "the twins" (as they are known) stepped down as joint chief executives of Aegis Media Europe after 18 years with the group—taking significant business and a formidable reputation to their new, WPP Group-backed competitor—Ms. Sauty de Chalon stepped up to the challenge of stemming client losses and reinventing Aegis' devastated Carat unit in France.

That was December 2004. Looking back, Ms. Sauty de Chalon describes 2005 as the "best year of my professional life," though she admits that during that year she often said to her husband, "This is the worst year of my life."

Carat fought its way through 34 pitches representing 70% of its business, including Renault's $600 million pan-European review, in a little more than a year. "We were under siege," Ms. Sauty de Chalon recalls, adding, "I said to clients that I knew they weren't happy, and I promised to do things differently, to stop working in silos and bring all the media together."

Her reward for success was a promotion from CEO of Carat France to CEO of Aegis Media France last January. She's now in charge of Vizeum, Isobar and new projects as well as Carat.

Ms. Sauty de Chalon, 44, is putting digital "at the core" of Aegis' offering and launching Aegis Group companies such as a French office of Ammo Marketing, the San Francisco-based word-of-mouth marketing company that Aegis acquired in February.

"She has transformed Carat France into a lively, up-to-date, modern agency," says Robert Lerwill, Aegis Group CEO.

Ms. Sauty de Chalon worked in newspaper sales and TV before joining Carat in 1997. She moved to New York with her husband and three children just a week before Sept. 11, 2001. She was CEO of Consodata, then owned by Aegis, but its offices closed for a month after 9/11 and business fell by 50%. "I turned it around, but Carat was easy by comparison," she says.

The experience drove Ms. Sauty de Chalon to yoga, still a passion; she returned to France in 2003 and was back at Carat in 2004. Under Ms. Sauty de Chalon, Carat never lost its No. 1 position in France, though its share of the media-buying market slipped from the low 20s to the high teens. It's now at 25%.

"We were impressed by her resilience," Mr. Lerwill says. "She is a doer and an influencer, and she is so well-connected that we don't need to appoint a chairman."

—EMMA HALL

Top 100's media outlay hits $98 billion globally

P&G leads all marketers; China pushes up Asia gains; personal care category increases 7.8%

By R. CRAIG ENDICOTT
cendicott@crain.com

THE WORLD'S Top 100 marketers generated a collective $98.27 billion in global media in 2005, capturing a quarter of the world's media pie as the group's expenditures hit a modest 4.5% growth, according to the 20th annual Global Marketers report.

Procter & Gamble Co. again finished No. 1, at $8.19 billion, its media spending almost double that of runner-up Unilever, at $4.27 billion, whose 21.9% rise pushed it past last year's No. 2 General Motors Corp., at $4.17 billion.

The totals for these marketers are in large part gross media expenditures without the discounts applied to most media, and represent spending collected by *Advertising Age* from media-tracking services from 84 countries. For a marketer to qualify for the global Top 100, it must have ad spending on three continents, and in this report, reach a spending level of $274.1 million, the amount recorded by No. 100 Joh. A. Benckiser (Coty).

P&G set the spending tone for the group by applying the skids to its media budget, paring it to 2.6% growth from 17.6% in 2004, the latter representing a first-year fusion of ad spending from P&G and its acquisition Gillette Co. Advertising in the second year of such mergers typically cools off as non-core brands are sold and economies of scale achieved.

Overall, the Top 100's pace dipped dramatically from the set's 2004 growth mark of 12.1%. The group also fell slightly under the 5.1% growth in media spending recorded worldwide by ZenithOptimedia for 2005. The media specialist company counted global media spending in 2005 at $401.53 billion vs. $382.1 billion in the previous year; the media operation collects information for all marketers' media investments.

The drop-off was predictable, since 2005 lacked the big ad generators of an Olympics, a European football championship and a major U.S. election—all present in 2004. The sporting events, besides attracting these Top 100 marketers, also drive up media prices by tightening the supply of inventory.

Additionally, all Top 100 global marketer charts reflect ad dynamics in the U.S. for obvious reasons. This year there were 46 fully U.S.-based companies on the list, and these marketers have a propensity to spend more freely in the States.

In 2005, the Top 100 spent $47.46 billion, or 48.2% of its global total, in U.S. media; that's down from 49.9% in 2004. Europe attracted $30.17 billion from the group, or 30.7% of the total, and Asia, powered by China where media spending grew about 39% year-to-year, gleaned $15.57 billion, or 15.8% of the total.

Among the five dominant ad categories, only Top 100 spending in personal care showed resiliency. The category, which claimed nine of the Top 100 (marketers are slotted into categories that reflect their most-advertised segment), hit $19.49 billion in spending, up 7.8%—growth propped up by Unilever's 21.9% and No. 44 Colgate-Palmolive's 22.9% boost in spending.

Automotive, the largest category at $22.76 billion in spending from 17 marketers, grew only 2.3% in media outlays, a sign of the global slowdown. Global vehicle unit sales grew only 3.7% to 64.7 million in 2005, down from 5.9% growth in 2004. The U.S. portion advanced only 0.9% to 17.5 million units vs. 2% growth in 2004.

Entertainment & media, attracting $11.03 billion in spending, advanced only 1.1%. The category's 10 marketers, largely U.S.-based, were victims of a 5.8% decline in U.S. box-office receipts. U.S.-only spending declined 29.4% in 2005 at No. 12 Walt Disney Co.'s Buena Vista unit, and an aggregate 12.9% at No. 31 Viacom's Paramount and DreamWorks SKG studios.

Food, pulling $8.13 billion in spending from eight marketers, grew only 1.5%, representing a range from 6.3% growth at No. 37 Kellogg Co. to an 11.6% decline in spending at No. 53 General Mills.

The Top 100 is poised to break the $100 billion barrier this year. One indication it is on track is the aggregate 6.2% growth in revenue through the first three quarters of 2006 recorded by the world's top five advertising holding companies whose agencies handle the accounts of most of the Top 100.

More on AdAge.com

- Global Marketing pdf in DataCenter taps top spenders in 84 countries; Global Accounts pdf charts 544 global accounts at 22 ad networks.

ADAGE.COM

TOP 10 GLOBAL CATEGORIES

Ranked by measured media spending from 84 countries

CATEGORY	2005	2004	% CHG	% OF TOTAL	ADVERTISER COUNT
	MEASURED ADVERTISING EXPENDITURES				
Automotive	$22,761	$22,242	2.3	23.2	17
Personal care	19,491	18,086	7.8	19.8	11
Entertainment & media	11,029	10,903	1.1	11.2	10
Food	8,129	8,010	1.5	8.3	8
Drugs	7,470	7,448	0.3	7.6	9
Soft drinks	3,971	3,394	17.0	4.0	3
Restaurants	3,349	3,221	4.0	3.4	4
Computers	3,106	2,962	4.9	3.2	4
Telephone	3,104	2,412	28.7	3.2	3
Financial	3,000	2,737	9.6	3.1	5

Notes: Dollars in millions. Data are the Top 100. A marketer's total spending is placed in its most advertised category.

TOP 10 ADVERTISERS IN THE TOP 10 MARKETS OUTSIDE THE U.S.

By gross measured media spending in millions of U.S. dollars. Sources are shown beneath the country name.

Japan

Nikkei Adv. Research Inst. and Universal McCann

ADVERTISER	2005	2004	% CHG
Toyota Motor Corp.	$929	$760	22.2
Matsushita Electric Industrial Co.	715	680	5.2
Honda Motor Co.	678	566	19.9
American International Group	517	511	1.2
Kao Corp.	510	555	−8.1
Vodafone Group	478	210	127.7
Kirin Brewery Co.	463	480	−3.5
Canon	463	520	−11.1
Nissan Motor Co.	426	427	−0.2
Procter & Gamble Co.	370	407	−9.1

China

CTR Media Intelligence (TNS)*

ADVERTISER	2005	2004	% CHG
Procter & Gamble Co.	$891	$707	25.9
Hayao Group	382	318	20.4
Unilever	213	124	71.3
Stone Group Holdings	154	125	23.6
Colgate-Palmolive Co.	115	62	86.1
China Mobile Communications Corp.	115	89	28.2
Yum Brands	76	55	38.4
L'Oreal	75	53	43.1
Lafang Group	70	54	31.4
Arche Group	67	94	−28.5

United Kingdom

Nielsen Media Research

ADVERTISER	2005	2004	% CHG
Procter & Gamble Co.	$395	$447	−11.7
Unilever	385	357	7.6
COI Communications	303	305	−0.7
L'Oreal	207	195	5.9
Ford Motor Co.	191	207	−7.7
France Telecom	160	145	10.8
DFS Furniture Co.	156	128	21.8
General Motors Corp.	156	145	7.9
DSG International	156	173	−10.0
Volkswagen	155	149	4.6

Spain

Nielsen Media Research*

ADVERTISER	2005	2004	% CHG
Telefonica	$150	$136	10.8
El Corte Ingles	127	107	18.1
Procter & Gamble Co.	125	135	−7.1
Volkswagen	110	103	7.6
L'Oreal	106	100	5.8
Unilever	104	79	32.0
Danone Group	79	79	−0.1
PSA Peugeot Citroen	73	75	−3.6
Vodafone Group	70	51	39.3
Ford Motor Co.	67	59	13.5

Germany

Nielsen Media Research

ADVERTISER	2005	2004	% CHG
Metro Group	$332	$304	9.2
Lidl & Schwarz Stiftung & Co.	268	262	2.4
Deutsche Telekom	254	224	13.3
Procter & Gamble Co.	248	286	−13.2
Unilever	226	182	24.4
Volkswagen	223	202	10.6
Axel Springer Verlag	213	220	−3.3
Aldi Group	205	192	6.6
L'Oreal	196	187	4.9
Bertelsmann	181	194	−6.7

Canada

Nielsen Media Research

ADVERTISER	2005	2004	% CHG
Procter & Gamble Co.	$172	$170	1.3
Rogers Communications	106	100	6.9
General Motors Corp.	99	84	17.5
Telus Corp.	71	44	59.7
BCE	67	56	19.0
Wendy's International	61	56	9.1
L'Oreal	59	58	2.3
Sony Corp.	57	50	13.9
Toyota Motor Corp.	56	57	−1.0
Hyundai Motor Co.	54	47	14.9

France

TNS Media Intelligence*

ADVERTISER	2005	2004	% CHG
Vivendi	$474	$459	3.2
L'Oreal	347	339	2.3
France Telecom	336	352	−4.4
PSA Peugeot Citroen	311	295	5.4
Association Familiale Mulliez	278	282	−1.6
Renault	243	247	−1.6
Danone Group	224	325	−31.0
Nestle	222	229	−3.0
Carrefour	201	265	−24.2
Unilever	191	168	13.8

Australia

Nielsen Media Research

ADVERTISER	2005	2004	% CHG
Coles Myer	$261	$251	3.8
Harvey Norman Holdings	124	107	15.3
Woolworths	111	120	−7.6
Government of Australia	107	60	78.3
Telstra Corp.	94	112	−15.5
General Motors Corp.	89	74	19.7
Toyota Motor Corp.	84	77	9.0
Procter & Gamble Co.	81	79	2.9
Singapore Telecommunications	69	59	17.4
Ford Motor Co.	66	58	12.5

Italy

Nielsen Media Research*

ADVERTISER	2005	2004	% CHG
Unilever	$142	$137	3.9
Telecom Italia	142	143	−1.1
Procter & Gamble Co.	138	145	−4.8
Fiat	134	142	−5.5
Ferrero	106	111	−5.0
Vodafone Group	95	83	14.0
Barilla Holding	94	94	−0.5
L'Oreal	93	102	−8.2
Nestle	88	92	−5.0
General Motors Corp.	83	74	12.1

South Korea

Nielsen Media Research

ADVERTISER	2005	2004	% CHG
Samsung Group	$268	$253	5.6
LG Group	204	203	0.3
SK Group	148	161	−8.3
Lotte Group	134	138	−3.0
KT Corp.	132	173	−23.3
Hyundai Motor Co.	65	57	14.7
American International Group	56	30	85.4
Amore Pacific Corp.	50	57	−12.1
Kia Motors Corp.	46	51	−8.4
GS Holdings Corp.	45	17	167.0

Notes: Countries shown are the top 10 ad markets outside the U.S. *Data discounted by *Ad Age* to reflect the nation's ad power reflected in ZenithOptimedia's December 2005 media rankings by country. Download the free Global Marketing pdf file, which includes the top 10 advertisers in 84 countries and a separate report (referred to in the diminutive as the "Dots") detailing the global accounts handled by 22 multinational agency networks in 61 countries at **AdAge.com** in the **DataCenter.**

TOP 100 GLOBAL MARKETERS

Ranked by measured media spending from 84 countries in 2005

RANK 2005	RANK 2004	ADVERTISER	HEADQUARTERS	MEASURED MEDIA AD SPENDING 2005	2004	% CHG
1	1	Procter & Gamble Co.	Cincinnati	$8,190	$7,982	2.6
2	3	Unilever	London/Rotterdam	4,272	3,504	21.9
3	2	General Motors Corp.	Detroit	4,173	3,854	8.3
4	6	Toyota Motor Corp.	Toyota City, Japan	2,800	2,589	8.1
5	5	L'Oreal	Clichy, France	2,773	2,608	6.3
6	4	Ford Motor Co.	Dearborn, Mich.	2,645	2,624	0.8
7	7	Time Warner	New York	2,479	2,504	−1.0
8	8	DaimlerChrysler	Auburn Hills, Mich./Stuttgart, Germany	2,104	2,343	−10.2
9	11	Nestle	Vevey, Switzerland	2,033	1,967	3.3
10	10	Johnson & Johnson	New Brunswick, N.J.	1,968	1,971	−0.1
11	13	Honda Motor Co.	Tokyo	1,854	1,644	12.7
12	9	Walt Disney Co.	Burbank, Calif.	1,813	1,984	−8.6
13	12	Nissan Motor Co.	Tokyo	1,778	1,861	−4.5
14	16	Coca-Cola Co.	Atlanta	1,752	1,526	14.8
15	14	Altria Group	New York	1,690	1,643	2.8
16	20	PepsiCo	Purchase, N.Y.	1,644	1,332	23.5
17	21	GlaxoSmithKline	Brentford, Middlesex, U.K.	1,610	1,286	25.2
18	15	Sony Corp.	Tokyo	1,607	1,576	2.0
19	17	McDonald's Corp.	Oak Brook, Ill.	1,554	1,469	5.8
20	18	Volkswagen	Wolfsburg, Germany	1,547	1,430	8.2
21	22	Reckitt Benckiser	Slough, Berkshire, U.K.	1,408	1,279	10.1
22	30	Vodafone Group	Newbury, U.K.	1,329	945	40.6
23	26	Deutsche Telekom	Bonn, Germany	1,319	1,038	27.0
24	23	Danone Group	Paris	1,291	1,245	3.8
25	24	General Electric Co.	Fairfield, Conn.	1,282	1,126	13.9
26	19	Pfizer	New York	1,148	1,353	−15.2
27	29	News Corp.	New York	1,121	951	17.9
28	31	Dell	Round Rock, Texas	1,090	918	18.7
29	27	Yum Brands	Louisville, Ky.	1,083	998	8.5
30	28	PSA Peugeot Citroen	Paris	1,019	961	6.0
31	25	Viacom	New York	1,010	1,050	−3.8
32	33	Mars Inc.	McLean, Va.	939	900	4.3
33	32	Matsushita Electric Industrial Co.	Kadoma, Japan	909	904	0.6
34	37	Tchibo Holding	Hamburg	831	785	5.8
35	43	Hyundai Motor Co.	Seoul	829	710	16.7
36	35	Renault	Boulogne-Billancourt, France	825	828	−0.4
37	39	Kellogg Co.	Battle Creek, Mich.	816	768	6.3
38	42	Microsoft Corp.	Redmond, Wash.	810	719	12.6
39	34	Hewlett-Packard Co.	Palo Alto, Calif.	777	836	−7.1
40	44	Vivendi	Paris	739	702	5.2
41	40	Kao Corp.	Tokyo	728	757	−3.9
42	41	Wal-Mart Stores	Bentonville, Ark.	712	733	−2.9
43	36	Canon	Tokyo	707	822	−14.1
44	53	Colgate-Palmolive Co.	New York	699	568	22.9
45	61	American Express Co.	New York	694	487	42.5
46	48	SC Johnson	Racine, Wis.	693	656	5.6
47	46	Citigroup	New York	693	697	−0.6
48	38	Novartis	Basel, Switzerland	685	774	−11.5
49	51	Henkel	Duesseldorf, Germany	668	586	13.9
50	49	Samsung Group	Seoul	662	628	5.4
51	50	American International Group	New York	$659	$605	9.0
52	52	Anheuser-Busch Cos.	St. Louis	633	575	10.0
53	45	General Mills	Minneapolis	619	700	−11.6
54	47	Mazda Motor Corp.	Hiroshima, Japan	602	685	−12.1
55	54	Cadbury Schweppes	London	574	536	7.2
56	56	Ferrero	Alba, Italy	557	527	5.6
57	59	Wm. Wrigley Jr. Co.	Chicago	552	490	12.6
58	75	Bayer	Leverkusen, Germany	541	413	30.9
59	58	Clorox Co.	Oakland, Calif.	525	492	6.6
60	85	Nokia Corp.	Espoo, Finland	511	365	39.8
61	55	Wyeth	Madison, N.J.	508	535	−5.1
62	57	MasterCard	Purchase, N.Y.	489	494	−1.1
63	64	Kimberly-Clark Corp.	Irving, Texas	483	464	4.0
64	77	Suzuki Motor Corp.	Hamamatsu, Japan	480	397	21.1
65	67	Visa International	San Francisco	464	453	2.4
66	70	Telefonica	Madrid	456	429	6.3
67	62	Kia Motors Corp.	Seoul	456	475	−4.0
68	63	BMW	Munich, Germany	443	471	−5.9
69	68	SABMiller	London	441	447	−1.4
70	60	IBM Corp.	Armonk, N.Y.	429	488	−12.0
71	69	Fuji Heavy Industries	Tokyo	427	446	−4.3
72	73	Schering-Plough Corp.	Kenilworth, N.J.	417	416	0.3
73	72	Campbell Soup Co.	Camden, N.J.	399	418	−4.5
74	66	Fiat	Turin, Italy	398	460	−13.6
75	76	Mattel	El Segundo, Calif.	394	397	−0.9
76	65	Mitsubishi Motors Corp.	Tokyo	380	462	−17.8
77	74	Diageo	London	378	414	−8.6
78	84	Doctor's Associates	Milford, Conn.	376	367	2.3
79	78	LG Group	Seoul	369	396	−6.8
80	71	Bertelsmann	Guetersloh, Germany	364	422	−13.7
81	79	Sharp Corp.	Osaka, Japan	344	390	−11.9
82	82	Sara Lee Corp.	Chicago	342	369	−7.3
83	92	LVMH Moet Hennessy Louis Vuitton	Paris	340	304	11.6
84	80	Burger King Corp.	Miami	337	386	−12.9
85	81	Heineken	Amsterdam	332	372	−10.6
86	83	Carrefour	Paris	328	368	−11.1
87	88	Sanofi-Aventis	Paris	315	338	−6.9
88	96	Sony BMG Music Entertainment	New York	313	278	12.7
89	99	Nintendo Co.	Kyoto, Japan	309	264	16.8
90	90	InBev	Leuven, Belgium	308	318	−2.9
91	93	Philips Electronics	Amsterdam	301	295	2.1
92	91	United International Pictures	London	300	311	−3.7
93	95	Estee Lauder Cos.	New York	293	279	5.0
94	97	Molson Coors Brewing Co.	Denver/Montreal	292	271	7.9
95	103	Hitachi	Tokyo	291	241	20.8
96	87	Expedia	Bellevue, Wash.	286	354	−19.1
97	89	Nike	Beaverton, Ore.	283	319	−11.1
98	98	Shiseido Co.	Tokyo	282	267	5.5
99	86	Merck & Co.	Whitehouse Station, N.J.	278	361	−23.0
100	94	Joh. A. Benckiser (Coty)	Ludwigshafen, Germany/New York	274	286	−4.1

Notes: Figures are in millions of U.S. dollars and are *Advertising Age* estimates. Basic data represents gross media expenditures provided by Nielsen Media Research, TNS Media Intelligence, Ibope, Parc and others. Data compiled by Scott MacDonald, Kevin Brown, R. Craig Endicott, Maura Wall, Maureen Morrison, Laurel Wentz, Normandy Madden, Joyce-Ann Gatsoulis and Dagmar Mussey, with additional help from McCann Erickson Worldwide and JWT.