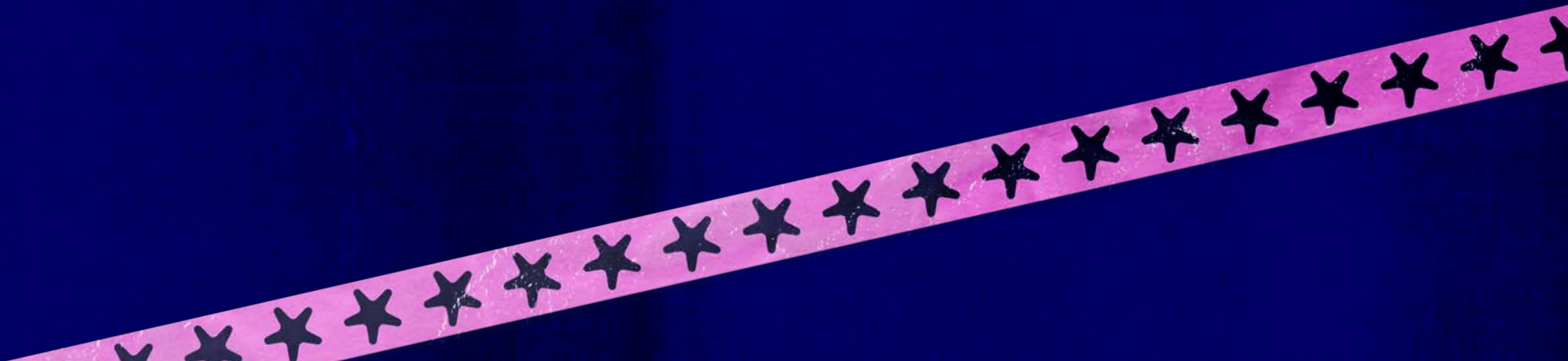


# BRANDS OF 2025

*\* Rival 50 \**

**RIVAL PRESENTS THE TOP 50 CHALLENGER BRANDS OF 2025**

**RIVAL'S MISSION:  
UNDERSTAND AND  
DOCUMENT THE  
CHALLENGER PLAYBOOK.**



*\*Rival 50\**

**WHY RIVAL 50?**

<b>4</b>	<b>10K</b>	<b>3K+</b>
<b>YEARS</b>	<b>HOURS</b>	<b>CMO'S</b>

*Rival 50\* \*Rival 50\* \*Rival 50\* \*Rival 50\* \*Rival 50\* \*Rival 50\**

*\*Rival 50\**

# WHAT IS THE RIVAL 50?

- \* Annual ranking of 50 global brands rewriting the rules of modern marketing
- \* Highlights brands succeeding through bold ideas, cultural relevance, and creative conviction
- \* Focuses on brands redefining growth in a fast-changing digital landscape with too much noise

**FULL REPORT**



*Rival*  
*\*50*

*\*Rival 50\**



# APPROACH

- ★ Celebrates challengers, not just the biggest or most familiar brands
- ★ Rewards those who break conventions and take creative risks
- ★ Built on a data-driven rubric developed with Imperial College Business School
- ★ Merges analytics and creativity to identify brands driving real impact
- ★ Weighted index

**IMPERIAL**  
BUSINESS SCHOOL



# METHODOLOGY

**NOMINATIONS**

**MOMENTUM**

**SCORING**

**JUDGING**

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# 3 CORE PILLARS

## DIFFERENTIATION

- ★ Visual Identity
- ★ Messaging
- ★ Beliefs

## TALKABILITY

- ★ Human Resonance
- ★ Cultural Alignment
- ★ Community Activation

## RELEVANCE

- ★ Earned Attention
- ★ Cultural Participation
- ★ Momentum

# THE RIVAL 50:

1. BULDAK
2. HYROX
3. LIQUID DEATH
4. REPRESENT
5. CHATGPT
6. OWALA
7. GROCS
8. NOTHING PHONE
9. SURREAL CEREAL
10. ON RUNNING
11. LIGHT PHONE
12. NEW BALANCE
13. LADDER
14. FROMSOFTWARE
15. RAMP
16. POPPI

17. BLANK STREET
18. OURA
19. SALOMON
20. ASICS
21. PLAYTOMIC
22. DAVID PROTEIN
23. MID-DAY SQUARES
24. FEASTIBLES (MR.BEAST)
25. YETI
26. SKIMS
27. GRAZA
28. TOO GOOD TO GO
29. FENTY
30. PIP & NUT
31. RHODE SKIN
32. BLOOM & WILD
33. THE ORDINARY

34. FISHWIFE
35. WHOOP
36. SWORD HEALTH
37. BANDIT RUNNING
38. WINGSTOP UK
39. NOTION
40. ALDI UK
41. CELSIUS
42. TONIES
43. RIVIAN
44. CHEWY
45. NANDOS
46. BYD
47. TONY'S CHOCOLONELY
48. LOVEABLE AI
49. PRENUVO
50. SATISFY RUNNING



**\*Rival 50\***

**TOP 10 BRANDS:**

**BULDAK  
HYROX  
LIQUID DEATH  
REPRESENT  
CHATGPT  
OWALA  
CROCS  
NOTHING PHONE  
SURREAL CEREAL  
ON RUNNING**



**CATCH THE FINAL  
LIST ON OUR  
WEBSITE [HERE.](#)**



**crocs**<sup>™</sup>

**Differentiation:**

Crocs lent into being polarising and “ugly”

**Relevance:**

Gen Z want the thing that is “not cool”, this desire for comfort over form has elevated the brand.

**Talkability:**

Microcultures have taken this brand to the stratosphere: Collabs with Post Malone, Cinnamon Toast Crunch, KFC & Minecraft.



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# SURREAL™

## Differentiation:

Not focussed on health claims, focussed on nostalgia (Coca Pops, Frosted Flakes)

## Relevance:

They move with cultural set pieces, collaborating with GRIND for a Tiramisu cereal.

## Talkability:

They launched a campaign all about “famous people loving their cereal”. I.e. Dwayne Johnson loves Surreal. Lawyers hated it, internet loved it.



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# NOTHING

## **Differentiation:**

Lent into design as a differentiator, working with Teenage Engineering

## **Relevance:**

Nothing taps into a cultural shift toward legible, human-first technology, and also providing exceptional products at a mid-tier/budget price point.

## **Talkability:**

Nothing leans into community and co-creates with their community across hardware and software.

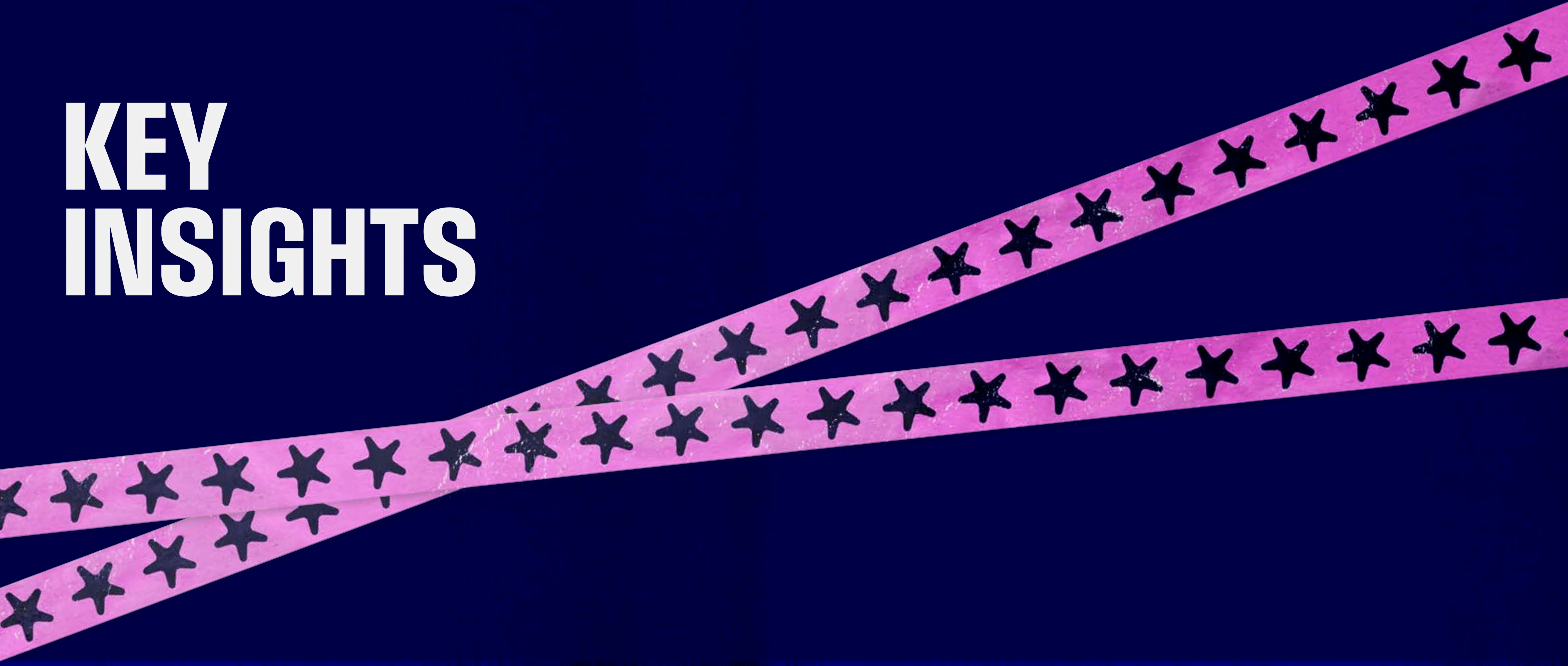
*Rival 50 \* \*Rival 50 \* \*Rival 50 \**



*\*Rival 50\**



# KEY INSIGHTS



# TREND 1: BELONGING AS A BRAND ECOSYSTEM

- ★ The most effective challenger brands no longer aim to “build audiences” — they build environments people live inside and co-create with them.
- ★ People don’t trust claims — they trust collective behavior. Brands that create genuine community structures see up to 2.5x higher engagement and retention (WARC, 2024).
- ★ Nothing Phone has redefined what it means to “own” a brand. With 139,000+ self-moderated subreddit members, community-designed SKUs selling out instantly.



# TREND 2: IDEOLOGICAL POLARITY AS DIFFERENTIATION

- ★ When products look, function, and cost the same, ideology becomes the last real differentiator. Challenger brands aren't defined by what they sell — but by the worldview they commit to.
- ★ The fastest-growing challengers pick a lane and stay in it, sharpening their stance with conviction. “They are not trying to be right for everyone
- ★ On Running vs. New Balance: Same Score, opposite Ideologies



Worn by supermodels in London  
and dads in Ohio.



# TREND 3: MEDIA-MINDED AMPLIFICATION

- ★ Across the Rival 50, the brands showing the strongest Talkability and sustained Cultural Participation do not rely on classic campaign models.
- ★ The brands that win now don't interrupt culture; they broadcast culture continuously. The question is no longer "What campaign are we launching?" but "What are we airing next?"
- ★ Surreal - acts like a tabloid newspaper



*\*Rival 50\**



# KEY TAKEAWAYS FOR CMOS

**COMMUNICATE A POINT  
OF DIFFERENCE, NOT A  
VALUE PROPOSITION**

**SHIFT FROM  
COMMUNITY TO  
CO-CREATORS**

**ACTIVATE  
MICROCULTURES,  
NOT AUDIENCES**

**THINK AND ACT LIKE A  
MEDIA COMPANY NOT A  
MARKETING FUNCTION**

Presented by  
**RIVAL**

# RIVAL 50

**BRANDS TO WATCH**

**2026 REPORT**

**THE CHALLENGER BRANDS BUILDING THE FUTURE**



*\*Rival 50\**

# THANK YOU



**CATCH THE FINAL LIST  
ON OUR WEBSITE  
HERE.**