

RIVAL 50: 2026 REPORT
THE CHALLENGER BRANDS BREAKING CONVENTION

CONTENTS

RIVAL FIFTY

FOREWORD 03

EXECUTIVE SUMMARY 04

METHODOLOGY 06

TRENDS & INSIGHTS 09

THE FULL LIST 19

MEET THE TOP 20 21

CONCLUSION 75

FOREWORD

Our mission, here at Rival, is to document the playbook of successful challenger brands. We're fascinated by how companies with much less budget and resource can gain market share from those with so much more.

We believe these brands show us the future of marketing that's already here, but not evenly distributed yet — just as they say about technological innovation. The same constraints that limit the ability of challengers to compete with the incumbent playbook (reach, repetition, consistency) are what force them to innovate and refine the playbook of modern marketing effectiveness.

Being a challenger is a choice, not a position. The principles and practices of successful challengers are not limited to small, young, disruptive businesses. They are simply the next iteration of tried and true marketing fundamentals and human truths adapted to the competitive, cultural, and technological landscape of today. Our fascination with challenger brands comes from the power and potential of what we discover to be applied to any business, as long as there's a willingness to think, act, and build differently.

This second edition of the Rival 50 follows the same North Star as our first: to map our observable universe of challenger brands and quantify their effectiveness so that we can further our understanding of the modern marketing playbook. Our research this year analyzed over 2,000 brands — more than four times what we covered in 2025.

And while some principles and practices have carried over year to year, there were many new findings and some surprising names on the list (and not on the list!).

Our mission will never be finished — the playbook of successful challengers will, by definition, always evolve. But efforts like this from an integrated team of researchers, academics, strategists, writers, and engineers moves us one giant step forward on our journey. Thank you for being here with us. And our hope, as always with all our research, is that you can take and apply some of the insights from this report to drive challenger thinking and growth in your own business.

Eric Fulwiler
Co-Founder & CEO, Rival

EXECUTIVE SUMMARY

THE FRONTIER KEEPS MOVING. THE PRINCIPLES DON'T.

The challenger playbook is not new news: earn attention, borrow it from creators, drop, collaborate, put the founder front and center, and build a community that does the selling for you. These moves still work, which is exactly the problem. When everyone runs the same play, it stops being an advantage and becomes the price of entry.

That's the mission of the Rival 50 and why each year brings new brands, new plays, and new ideas to learn from. The principles behind challenger success haven't changed in 2026. Brands still win by being different, being relevant and being worth talking about, because those principles rest on human truths. People notice what stands out. They gravitate to what reflects who they are and the groups they belong to. They share what gives them something to say. Those truths are psychological, social, cultural and economic, and they're as old as marketing itself.

What changes is how brands act on them. The frontier of marketing effectiveness moves every year, and challengers are the ones moving it. Last year, the leading challengers were thinking like media companies, publishing content to earn attention. This year's leaders have gone further. They don't just make content; they own the characters, the worlds and the IP. Last year's edge is this year's standard, and the brands that stay ahead are the ones that keep finding the next one.

WHY IT MATTERS NOW

Marketers are being asked to do more with less. Gartner's 2026 CMO Spend Survey put marketing budgets at 7.8% of company revenue, barely changed from the year before, and more than half of CMOs said they lacked the budget or people to deliver their own strategy. Spend is shifting toward short-term results that are easier to defend this quarter. But budgets can't buy a point of view, and technology can't supply one. When resources are tight, the brands that win are the ones that get more out of every pound and dollar, and challengers have always been the experts at that.

HOW WE FOUND THEM

After open nominations, Rival Intelligence, Rival's own AI platform, screened 2,039 brands for signs of momentum and challenger behavior, including brands that nominations alone would have missed. Every source used in an assessment was checked by a person, and the top 200 brands were each scored by at least two independent, human reviewers on Differentiation, Relevance and Talkability. The research was developed in partnership with Imperial Business School, and an advisory panel of six leading industry experts

WHAT WE FOUND

Seven moves separate this year's Rival 50 from the rest:

1. **Flip the category's emotional code.** Sunscreen has always sold fear. Vacation sells leisure.
2. **Start inside a microculture.** Bandit grew out of the run-club scene before it asked anyone for attention.
3. **Run the brand like a franchise**. Liquid Death's fans join its Country Club by signing over their soul.
4. **Move marketing into the product brief.** Graza's squeeze bottle turned olive oil into its own ad.
5. **Ship the brand unfinished.** HOKA let New York City runners write its campaign, one Strava mile at a time.
6. **Sell what you take away.** Slate took the touchscreen out of the pickup truck.
7. **Design for disagreement.** Duolingo's "unhinged" voice turns indifference into reaction.



RIVAL FIFTY

WHAT IT MEANS FOR MARKETERS

None of this is a formula. Not every brand needs to be provocative, invent a fictional world or turn its customers into creators. The point is that the same investment works harder behind a distinctive idea than behind another version of what the category already does. A competitor can copy a single stunt. It can't easily copy a system of moves that are activated together.

The principles of challenger marketing are timeless. The frontier isn't. The brands in this report show where it is now, and why the brands that stand still will soon find themselves behind it.

METHODOLOGY

METHODOLOGY

RIVAL FIFTY

YOU CAN'T CHALLENGE A CATEGORY WITHOUT KNOWING WHAT HOLDS IT IN PLACE.

How are challenger brands identified? Are they defined by growth or budget size? Or is it that one distinctive campaign? That momentary surge in attention? To truly define a brand as a challenger the real test becomes whether a brand breaks from the conventions of its category and turns that difference into meaningful relevance and momentum.

That's the thinking behind the Rival 50.

Developed in partnership with Imperial Business School, London, the 2026 Rival 50 assessed more than 2,000 brands to identify businesses challenging category conventions and creating outsized impact on growth.

BEYOND THE USUAL SUSPECTS

The search began with expert nominations and Rival Intelligence-assisted discovery. Alongside nominated brands, Rival Intelligence identified businesses showing signs of momentum, including search activity, new funding, and retail launches. Through this it also surfaced similar brands, extending the search beyond what would be deemed the usual suspects.

Every candidate had to meet three criteria:

- **Growing:** Showing clear momentum against its competitors, supported by evidence such as revenue growth, share gains, expanding distribution or rising demand.
- **Evolving:** Bringing something new to its category within the past two years, through a new product, a new model, a new audience or a meaningful reinvention of how it shows up, regardless of the brand's age.
- **Known:** Having a genuine presence and market recognition among customers.

Qualified brands were grouped by industry, with the five largest incumbents in each category establishing the benchmark. Their positioning, visual identities, and beliefs provided the reference point for assessing what a challenger was actually challenging.

DIFFERENTIATION AS THE ENTRY FEE

Before scoring began, every candidate faced a differentiation gate: did it meaningfully break from at least one established convention in its words, look, or beliefs? Because a brand can't challenge convention if it follows the category playbook.

Brands that failed to demonstrate a genuine departure didn't progress, regardless of their size, popularity, or performance elsewhere.

Those that passed were assessed across three equally weighted pillars:

- **Differentiation:** Did the brand break category conventions in its positioning, visual identity, or beliefs?
- **Relevance:** Did it connect meaningfully with people and culture in the present moment?
- **Talkability:** Did it earn organic attention, conversation, and participation beyond what it paid to reach an audience?

Each pillar was scored on a five-point scale, informed by its underlying assessment dimensions. The three pillar scores were averaged to produce the final score. A five was reserved for exceptional performance, while scores of four or five required a specific evidence note. When a reviewer was torn between two scores, the lower score applied.

THE HUMAN ELEMENT

Rival Intelligence helped identify candidates, gather research, and organize evidence at scale. But discovery alone wasn't the verdict.

Every source used to support an assessment was checked by a human reviewer. Unverified claims couldn't be used as evidence, and AI wasn't used to simulate consumer opinions or make final judgments about which brands deserved recognition.

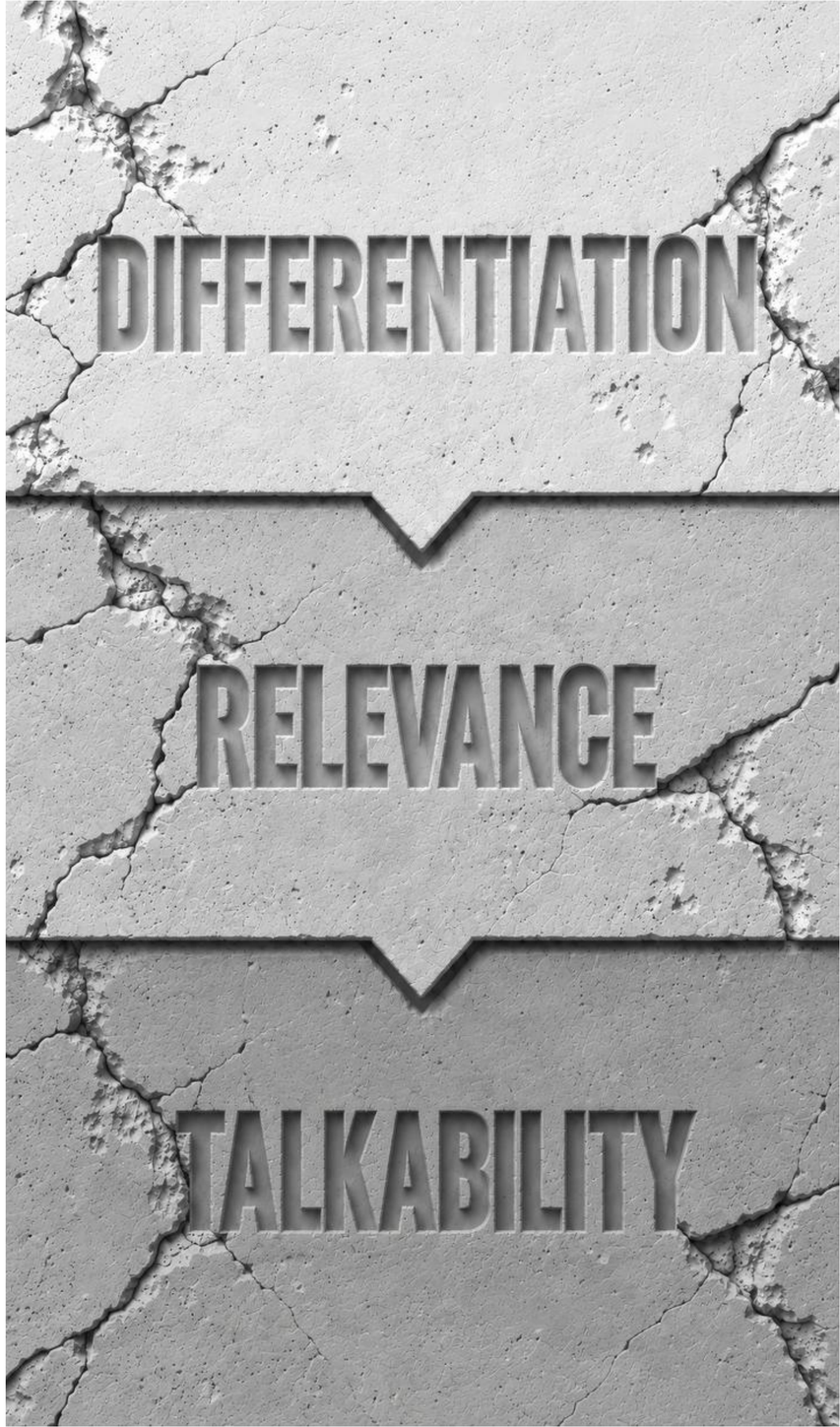
Approximately 200 brands progressed to full human scoring.
Each received two independent reviews against the same framework, ensuring that no single reviewer determined a brand's outcome.

Once scoring was complete, the advisory panel reviewed the top 20, contributing expertise on current brand standing and commentary on the leading candidates. The advisory panel was built intentionally — selecting six leaders from different corners of the industry, covering the challenger perspective (**Sadira Furlow**, ex CMO of Tony's Chocolonely), incumbent perspective (**Marcela Melero**, Chief Growth Marketing Officer of Dove), agency perspective (**Tom Denford**, CEO of ID Comms), industry body perspective (**Paul Coxhill**, CCO of Informa; **Dagmara Szulce**, EVP of the ANA) and academic perspective (**Rajesh Bhargave** of Imperial College).

THE POINT ISN'T TO REWARD THE BIGGEST PLAYERS

The Rival 50 was never designed to rank the brands with the greatest visibility or reward growth in isolation. It was built to identify businesses changing the expectations their competitors must meet.

By combining broad discovery, category-specific benchmarks, verifiable evidence, and independent human assessment, the methodology gave every brand the same test: is it genuinely challenging its category, and has it earned its place among the 50?




TRENDS
&
INSIGHTS



TRENDS & INSIGHTS

Every brand calls itself a challenger these days. At Rival, the term “challenger” isn’t seen as a position: small, new or number two in the category.

It’s considered a mindset, and any ambitious marketing leader can adopt it by prioritizing the three things that the Rival 50 scores every brand on: differentiation, relevance and talkability. That’s why Rival’s annual index includes start-ups alongside household names. What these brands share isn’t their size; it’s how they compete.

This year, using Rival Intelligence, Rival’s proprietary AI tool, 2,039 brands were screened to identify momentum signals and look-alike brands that nominations alone would have missed. Every source was then checked by a human, and the top 200 brands were each scored by a minimum of two independent reviewers.

The 2026 Rival 50 confirms what is already known. Challengers put their money into earned attention, creators and content. They’re often funny and always bold. They drop, they collaborate, they stage, they put their founders front and center, and they build communities that do the proselytizing for them. It works. But everyone has read that playbook now. It’s become table stakes, not an advantage.

So Rival went looking for what the Rival 50 are doing that most brands aren’t. Seven distinctive moves emerged, moves that go further, harder, braver and are more interesting than anything on the standard list. Some experts would argue that some of these moves aren’t new. Emotional advertising, owned characters and distinctive packaging have decades of research behind them. Those experts are right. But challengers grab these principles and use them in ways that disrupt their categories, and in doing so, they remind everyone why the principles mattered in the first place.

TREND 01: FLIP THE CATEGORY'S EMOTIONAL CODE

Every category runs on one feeling, and it has for decades. Incumbents keep repeating it because their research says that's what customers expect. Every ad that repeats the feeling deepens the link in people's minds between the category and that emotion, until it becomes what customers expect from every brand in it.

The brands at the top of this year's list find that feeling and turn it upside down. Sunscreen sells fear of sun damage, but Vacation sells the freedom to enjoy it. Footwear sells looking good, so Crocs leaned into "ugly." Running brands sell superstars, yet HOKA tells the stories of everyday runners.

They don't say something new inside the category's emotional frame. They change the frame entirely.

Some brands go further. Instead of reversing the category's emotion, they find the one it never served. Fenty offered affirmation to people prestige beauty had never represented: made for who you already are. Knix offered honesty to a category that spent decades talking around periods, leaks and postpartum bodies. Feeld offered belonging to people the major dating apps ignored. Sometimes the white space isn't the opposite feeling; it's the feeling nobody bothered to offer.

The best flips are anchored in something real. Goodles' 14g of protein gives adults permission to eat mac and cheese. Fenty launched with 40 foundation shades and, unlike the brands that later expanded their ranges, put its deepest shades front and center, making affirmation something you could see on the shelf. These brands didn't out-shout the incumbents. They made the incumbents' promise feel dated.

Why it works: Emotion is the biggest lever marketing has. Les Binet and Peter Field's analysis of the IPA effectiveness databank found that emotional campaigns produce more brand and business effects than rational ones, and are almost twice as likely over the long term to deliver top-box profit growth. In their words, "Feelings towards brands outlast memories of facts and figures about the brand." But there's a trap for challengers. Run emotional ads in the category's default register and you're building the leader's brand, because the leader owns that feeling. Flip the code, or find the feeling the category never offered, and you get all the power of emotion, pointed at a feeling only you own.

Steal this: *Write down the emotion your category has leaned on for 20 years. Ask what it would mean to sell the opposite, and which emotional need your category has never addressed. Then find the product truth that makes your answer believable. That's where white space starts. Anything else is just a louder version of what your competitors are already saying.*

TREND 02: START INSIDE A MICROCULTURE, THEN LET IT CARRY YOU OUT

Rival defines microcultures as communities of like-minded people connected by identity-defining interests and passions. The most powerful challengers on this year's list don't target audiences. They earn their way into these communities and grow outward from there.

Bandit was born in the run-club scene, Sidemen emerged from the worlds of UK YouTube, gaming and football, and Lomography built a society around analog photography. Elsewhere, Cactus Plant Flea Market occupies the intersection of toy collecting and streetwear, while Liquid Death borrows the codes of metal, punk and skate culture.

The data backs up the strategy. Brands built around or actively leveraging microcultures averaged 4.37 on relevance, compared with 4.17 across the top 50 as a whole. Four of the five brands with perfect relevance scores were microculture-led: Sidemen, Bandit, Buldak and Telfar. The same pattern holds for differentiation. Ten of the 14 brands in the top 50 with perfect differentiation scores were microculture-led. Serving a specific community gives a brand something harder to replicate than a broad appeal: a reason to matter to the people it wants to reach.

None of them marketed their way in. They started inside, spoke the language and gave the community something to rally around. They don't feel like they're invading the microculture because they work to its calendar, use its language and send its signals. Bandit's community runs fit the rhythm of the running week and race season. Lomography gave analog shooters a shared vocabulary in its Ten Golden Rules ("Don't think, just shoot"). Cactus Plant Flea Market releases on streetwear's drop cadence, announced through the cryptic hints that collectors know to look for. Sidemen built in-jokes that only fans get. When a brand gets the details right, the community treats it as one of its own rather than a brand trying to sell to it.

But belonging doesn't automatically translate into wider influence. Microculture-led brands vary considerably on talkability, which measures public conversation. Much of a community's influence starts in private spaces such as group chats, Discord servers and collector forums before becoming visible more widely. The brands that break out give that influence a way to travel: something to forward, show off or bring a friend to, wherever the conversation happens.

Belonging also takes time. The brands that last find the connection between what the community needs and what the brand can uniquely contribute, then keep showing up. Bandit didn't just sponsor runners. Through its Unsponsored Project, it backed more than 60 athletes without brand deals at the USATF championships, solving a real problem in the sport its community cares about. The biggest brands can build on that foundation by connecting with adjacent communities without losing what made them matter in the first place. Crocs brings together Jibbitz collectors, collaboration chasers, fashion fans and healthcare workers, while Sidemen spans gaming, football and music. Their growth comes from adding communities that fit the brand, not watering down the one that got them there.

Why it works: The mainstream is fragmenting. 79% of Gen Z say they feel a stronger sense of belonging in niche digital communities than in local communities or traditional institutions, while 45% of Gen Z, Millennial and Gen X Americans feel more connected to niche communities than mainstream culture. Nearly half (46%) prefer brands that cater to specific interests over mass-market ones, and half of Gen Z now create content about their fandoms. The opportunity for challengers is clear: the mainstream still exists, but it's made up of a thousand smaller centers of gravity. The brands that win don't try to pull people into their orbit. They find the orbits people already live in and earn a place there. As Cecelia Parrish, Principal and Microcultures Lead at Rival, puts it, brands can't buy their way in: "Communities can spot a tourist from a mile away. The brands that belong show up on the community's calendar, use its language correctly and give more than they take. Do that, and the community starts doing your marketing for you."

Steal this: *Stop focusing only on which demographic to target and start asking which community you could genuinely serve. Earn your way in with tools, rituals and respect, not ads, and find what your brand can uniquely contribute. Then give what the community creates a way to travel, from private spaces to public ones. That's how a brand grows from a microculture into the wider culture.*

TREND 03: RUN YOUR BRAND LIKE A FRANCHISE, NOT A CAMPAIGN

Last year, the Rival 50 identified challenger brands were thinking like media companies, publishing content to earn attention. This year's leaders go a step further. They think like franchises: they don't just make content, they own the characters, the world and the IP.

Vacation invented an entire fictional 1980s company, Vacation, Inc., while Liquid Death has built its identity around the same "murder your thirst" platform since its 2019 launch, extending the world through its irreverent Country Club, where more than 225,000 fans had signed up by 2023 to "sell" their souls for entry. Duolingo turned its owl mascot, Duo, into a character whose staged death became a story millions joined, while Cactus Plant Flea Market built a fandom around a four-eyed cactus. Others are investing in worlds that deepen with time. MINISO is moving from licensing other people's characters to developing its own, including YOYO, while Lomography's society and rules have shaped how its fans shoot and share photographs for more than 30 years. Sidemen and Bandit have taken that world-building into live experiences, creating their own recurring formats rather than sponsoring someone else's. The Sidemen Charity Match filled Wembley with 90,000 fans and drew 2.2 million live viewers, while the Bandit Grand Prix brought 3,000 runners from 21 countries to race a Formula 1-style course through a Brooklyn warehouse. Returning each year, both events add another chapter to the brands' lore. Across the Rival 50, the strongest brands are building characters, rituals, membership and fiction that can outlive any single campaign.

A world gives fans something to follow between purchases. And it changes how the brand's work adds up: every new piece builds on what came before, while a campaign starts from scratch each time. Plenty of the Rival 50 lean on famous founders, but the most lasting worlds belong to brands that built their own characters.

Why it works: Owned characters are one of the most proven tools in marketing, and one of the most neglected. System1's Orlando Wood calls them "fluent devices." His research with the IPA found that campaigns with a fluent device are 73% more likely to report a large profit gain than those without. He also found that brand-owned characters were nearly twice as effective as celebrity endorsements at driving market share growth. Yet only 7% of brands use a fluent device character, and their use has been falling for years despite being as effective as ever. Staying power compounds it: Binet and Field found that business effects rise steadily the longer a campaign runs.

Steal this: *Think like a showrunner, not a campaign planner. Define your brand world's characters, rules and running jokes, then commit to them for years, not until the next agency review. Build a character you own before you rent a famous face.*

TREND 04: MARKETING MOVES INTO THE PRODUCT BRIEF

RIVAL FIFTY

For the brands at the top of the Rival 50, the biggest marketing decisions were made before a single campaign existed, in the product and packaging brief.

Graza put olive oil in a chef's squeeze bottle, a first for the category, transforming an everyday kitchen staple into something instantly recognizable. As co-founder Andrew Benin put it, choosing the bottle meant "everything changed in terms of the visual appeal." Vollebak's founders, both former advertising creatives, design every garment to work as its own ad, while Tony's Chocolonely built its mission into the product itself through its deliberately unequal chocolate bar. Slate's bare truck serves as a blank canvas designed to be customized and filmed. Owala's distinctive colorways invite collecting and showing off, while Crocs turned its clog, holes and all, into a canvas for self-expression.

In every case the product is the brand's main media channel, so every sale is also an ad. And those design choices become assets the brand owns outright. When the big olive oil brands copied Graza's squeeze bottle, they only made Graza look more like the original.

Why it works: Marketing science has long treated packaging and product design as media the brand already owns. Ehrenberg-Bass research, led by Jenni Romaniuk, shows that distinctive assets such as pack shape and color are how brands get noticed, remembered and chosen. Design a product to be seen, shared and filmed, and every unit sold earns a new impression. Reach grows with sales, not with spend.

Steal this: *Get marketing into the product and packaging brief. Add one question to every development review: "What will this look like on someone's phone?" If the product can't market itself, your media budget is compensating for a design problem.*

TREND 05: SHIP THE BRAND UNFINISHED

RIVAL FIFTY

Incumbents ship finished products: sealed, complete and controlled. The brands at the top of the Rival 50 deliberately leave the last part undone and hand it to customers, fans and partners to complete.

What looks like an unfinished product turns out to be one of the most powerful growth strategies on the list, because every customer who finishes the brand becomes its marketer.

Crocs made its clog a canvas for self-expression. About three in four customers buy Jibbitz charms to customize their shoes, and Jibbitz generated $271 million in 2024. Every decorated pair becomes an ad the brand never had to pay for. Slate takes the same principle further, shipping a deliberately bare truck with more than 100 accessories and a do-it-yourself content hub. No two owners finish it the same way, turning each custom build into content worth sharing.

Other brands invite customers to shape the brand itself. When Duolingo staged the death of its owl mascot, Duo, it challenged users to earn 50 billion XP to bring him back. They surpassed the target, generating 50.9 billion XP, roughly five billion lessons, in just two weeks. Millions of learners became co-authors of the campaign. Figma makes participation an ongoing part of its platform: community files and plugins created by designers expand what the product can do, turning users into contributors to the ecosystem that attracts others. The Rival 50 data reinforces the pattern: 10 of the 12 brands identified as using this strategy rank in the top 30. When brands leave room for participation, customers become more than an audience.

They become co-creators with a stake in sharing, promoting and defending what they've helped build.

Why it works: The behavioral science is clear. In Norton, Mochon and Ariely's research on the "IKEA effect," people valued their own amateur creations about as highly as experts' work, and expected others to agree. A 2026 meta-analysis of 55 studies confirmed the effect: people value products more when they've helped make them, and they feel greater liking, ownership and connection to their identity. For a brand, that means co-creation builds attachment and turns customers into advocates.

There's one catch: labor leads to love only when the task is successfully completed. Half-finished and abandoned is frustrating, not empowering. That's why Slate pairs its bare truck with how-to videos and Crocs makes adding a Jibbitz charm effortless. The winners make taking part easy, satisfying and worth showing off.

Steal this: *Find the last 10% of your product, platform or campaign that you could hand over: a customization layer, a collective challenge, or real creative control for a collaborator. Then design for success, so taking part feels like an achievement rather than a chore. Leave space for others, and they won't just buy your brand. They'll build it, and they'll do much of your marketing for you.*

TREND 06: SELL WHAT YOU TAKE AWAY

Every category has a reflex: when in doubt, add. Brands add more features, more choice and more notifications, with each new version promising to do more than the last. Incumbents compete in that arms race because their customers, analysts and product roadmaps all reward it.

A growing group of the Rival 50 have done the opposite, making removal the selling point. Slate sells an electric pickup with no touchscreen, no paint and manual windows. Light Phone sells a phone designed to be used as little as possible, stripping away the browser, email, app store and social media. Vollebak removes seasonal collections, logos and lifestyle marketing, telling a single story about the material behind each garment. Mullvad takes the same principle to privacy, removing the need for an account, an email address or personal details. Customers receive only a number.

Around them is a cluster of analog and opt-out brands that sell what the algorithm took away. Lomography sells imperfection, Hobonichi sells the paper planner, Numero Group sells vinyl box sets, Chase Bliss sells physical controls, and Playdate sells a handheld with a crank and a fixed season of games. Each one tells its customers what they don't have to deal with anymore. The data suggests that this kind of restraint resonates particularly strongly with human reviewers. Slate ranked just #187 in Rival Intelligence's AI estimate, but human reviewers lifted it into the top 10, awarding it a score of 4.20. Vollebak earned a perfect 5.0 for differentiation. In 2025, Light Phone stood largely alone in this territory; in 2026, restraint and analog brands have emerged as one of the index's most distinctive groups.

These brands aren't cheap versions of the category leaders. Restraint takes discipline, and these brands charge for it. Slate charges extra for the accessories that put features back, and Vollebak prices its experiments as premium products. The thing that's missing is the product.

Why it works: Subtraction is a blind spot, and that's exactly why it's an opening for challengers. In research published in Nature, Adams, Converse, Hales and Klotz showed that people systematically default to searching for additive changes, consequently overlooking subtractive ones. As co-author Ben Converse explained, subtractive ideas require more cognitive effort, so when people move fast, they add. Category leaders, with their roadmaps and feature checklists, are especially prone to this bias.

Meanwhile, demand for less is growing: a 2025 YouGov survey found that 47% of Americans under 30 were striving to reduce their screen time, compared with 32% of older Americans. In a separate 2025 Harris Poll survey for Quad, 81% of Gen Z adults said they often wished they could disconnect from digital devices more easily. When the whole category is adding, the brand that subtracts stands out.

Steal this: *Run a subtraction audit. List every feature, option and message in your product and marketing, then ask which ones your customers would pay you to remove. Look for the one thing you could take out that would become the story. If competitors would never dare remove it, that's probably the one.*

TREND 07: DESIGN FOR DISAGREEMENT

Most marketing is built to avoid rejection. Concepts are tested until nobody objects, scripts are softened until nothing is left to dislike, and brand voices are sanded down to inoffensive. The brands at the top of the Rival 50 accept that a strong reaction is the goal, whatever its direction.

Liquid Death turned negative reviews and comments into content with Greatest Hates, a series of albums made from its critics' words, including a third volume in 2023. Crocs stopped defending its looks and leaned into them; as one Wharton marketing lecturer described the shift, the message became, in effect, "we know we're ugly, but that's why you should love us." Duolingo built an "unhinged" social voice that some find excessive, while Who Gives A Crap made toilet humor its calling card in a category more accustomed to feathers and puppies. Cactus Plant Flea Market and Vollebak take a different route, making products that can leave people baffled, from cartoon doodles on expensive streetwear to jackets made with graphene. The confusion is part of the appeal, separating those who get it from those who don't. The Rival 50 scores bear out the link between provocation and performance: a brand nobody could object to is unlikely to earn a perfect 5.0 for differentiation, and the brands willing to polarize also command attention. Crocs (4.65), Liquid Death (4.30) and Duolingo (4.26) are among the most talked-about brands in the index. They would rather be loved by some and mocked by others than ignored by everyone. Indifference is the real threat.

The best of these brands polarize people's views of the brand, never of their customers. They make fun of the category, its conventions and themselves. Being polarizing doesn't mean being cruel. It means having a point of view sharp enough that some people will push back.

Why it works: Polarization works because brand fans defend what they love. Researchers Xueming Luo, Michael Wiles and Sascha Raithel studied the issue for Harvard Business Review and found that "some companies succeed by intentionally antagonizing brand detractors," which can create buzz and strengthen the brand's connection with its most enthusiastic customers, because people feel compelled to defend a favorite product under attack. They point to a Kraft campaign for Miracle Whip that raised sales by 14%.

Duolingo offers rare public evidence of what happens when a brand flinches. In its Q3 2025 shareholder letter, the company said user growth was slightly slower than the previous quarter, in part because it posted less "unhinged" content on its English-language social accounts. On the earnings call, the company put it bluntly: without the unhinged posts, its posts were much less likely to go viral, and that did have an impact on user growth. The company has since brought the voice back.

Steal this: *Decide who you're willing to lose. Write down the customers or critics whose disapproval you can live with, and the conventions you're willing to mock. Then test creative for strength of reaction, not just for absence of complaints. And once you've found your edge, don't sand it down at the first sign of backlash. Duolingo learned what that costs.*



ONE MOVE GETS YOU NOTICED. A STACK MAKES YOU HARD TO BEAT.

RIVAL FIFTY

NONE OF THESE SEVEN MOVES STANDS ALONE.

The brands at the top of the Rival 50 combine them, and each move strengthens the others.

- **Liquid Death** flips water's emotional code from purity to heavy-metal satire. It borrows the codes of a microculture, builds a world with a Country Club fans join by selling their soul, and designs for disagreement by turning hate comments into albums.
- **Slate** sells what it takes away, puts its marketing into the product brief with a truck built as a blank canvas, and leaves the brand for owners to finish with more than 100 accessories.
- **Tony's** builds its mission into the product with the unequal bar, owns a color so completely that Pantone standardized its red, and designs for disagreement by taking on Mondelēz with lookalike bars.
- **Crocs** turned "ugly" into a point of pride, handed customers the canvas through Jibbitz, and grew by serving several microcultures at once.

The pattern holds across the index. Brands in our top 20 use an average of 2.8 of these seven moves, against 1.65 for brands ranked 31st to 50th. Every brand using four or more moves sits in our top 25. That's what makes these brands so hard to copy. A competitor can borrow one move, such as a stunt, a character or a limited drop. It can't easily copy a set of moves that grew up together and reinforce one another.

The real lesson isn't to pick one trend from this list, but to work out which combination fits your brand, then build a system where each move makes the others stronger.

THE CHALLENGER'S EDGE

The standard playbook gets a brand noticed. These seven moves are what change categories. And not one of them needs a bigger budget. They need a braver brief.

ABOUT THE DATA

Scores, rankings and archetypes cited in this report come from the 2026 Rival 50 database: 2,039 brands screened using Rival Intelligence, with the top 200 each scored by two independent human reviewers on differentiation, relevance and talkability. Analysis of which brands are microculture-led, and of how many of the seven moves each top-50 brand uses, is based on Rival's editorial classification of each brand against the moves described in this report.

THE FULL LIST

THE RIVAL 50

RIVAL FIFTY

01. HOKA	4.06
02. OWALA	4.02
03. LIQUID DEATH	3.98
04. DR. BRONNER'S	3.97
05. WHO GIVES A CRAP	3.97
06. FENTY BEAUTY	3.94
07. SIDEMEN	3.93
08. SLATE AUTO	3.91
09. TONY'S CHOCOLONELY	3.90
10. CROCS	3.90
11. MINISO	3.88
12. VACATION	3.88
13. DUOLINGO	3.85
14. VOLLEBAK	3.84
15. LOMOGRAPHY	3.82
16. GRAZA	3.82
17. GOODLES	3.76
18. BANDIT RUNNING	3.75
19. FEELD	3.72
20. CACTUS PLANT FLEA MARKET	3.72
21. PLAYDATE	3.72
22. KNIX	3.69
23. BULDAK	3.67
24. DROPOUT	3.66
25. TELFAR	3.63
26. WISPR FLOW	3.63
27. LIGHT PHONE	3.63
28. FIGMA	3.60
29. CHASE BLISS	3.60
30. HOBONICHI	3.59
31. BACK MARKET	3.58
32. BUTTERNUT BOX	3.58
33. POLYMARKET	3.58
34. LOOP EARPLUGS	3.56
35. NEW BALANCE	3.56
36. INEOS GRENADIER	3.54
37. JARRITOS	3.54
38. NUMERO GROUP	3.54
39. COTOPAXI	3.53
40. SUPER73	3.53
41. STASHER	3.52
42. FAIRPHONE	3.52
43. DAZED	3.51
44. THE FARMER'S DOG	3.51
45. SALOMON	3.51
46. BUC-EE'S	3.50
47. MULLVAD	3.50
48. NINJA CREAMI	3.50
49. DR. SQUATCH	3.50
50. MSCHF	3.49


MEET
THE
TOP
20



MEET THIS YEAR'S BRANDS

The brands featured in this report come from the top 20 of this year's Rival 50, each with something worth examining beyond its score. Some are rewriting their categories' emotional codes, turning conventions on their heads to make familiar products feel entirely different. Others are proving that staying distinctive takes just as much conviction as breaking through in the first place, returning to this year's rankings with their challenger credentials intact.

Together, they bring the bigger picture into focus. The strongest challengers don't rely on a single clever campaign or a moment of attention. They combine moves that reinforce one another, from building worlds their audiences want to be part of to turning the product itself into a marketing channel. These brands show what happens when companies stop following the category playbook and start writing their own.



HOKA

RIVAL FIFTY

MOVES

Flip the category's emotional code • Start inside a microculture • Marketing moves into the product brief • Ship the brand unfinished

In 2009, the running industry stripped shoes back to almost nothing. HOKA built the biggest midsole anyone had ever seen. It won the argument so completely that everyone now makes shoes that look like HOKA's, and that's the problem.

In 2009, the running shoe was disappearing. "Natural" running was the industry's big idea, and every brand was racing to strip out foam until runners could feel the ground. HOKA went the other way. Its founders, athletes in the French Alps who wanted to run downhill faster, built a shoe with an oversized midsole and a rocker shape that looked, to most people, ridiculous. But it wasn't a fashion statement. It was a performance answer.

Minimalism asked runners' legs to absorb every impact; HOKA put the protection back underfoot. Ultrarunners, who had the most to gain, adopted it first. Once they did, the strange shape had a reason to exist.

Seventeen years later, HOKA is a $2.6 billion brand that shows up at race starts, in designer collaborations and in a Foot Locker spot with Gucci Mane. It's number one in this year's Rival 50 for a simple reason: its product did the challenging before its marketing had to.

BY THE NUMBERS

2026 RANK

#1

Growth signal:
Net sales up 15.9% to $2.587 billion in fiscal 2026.

Rival 50 Score	4.06
Differentiation	4.0
Relevance	4.0
Talkability	4.24



SCORING

DIFFERENTIATION

The category default: lighter, thinner, closer to the ground. The whole industry agreed on what a running shoe should be.

What HOKA did: built the opposite, with maximal cushioning, a rocker shape and a silhouette nobody could mistake. Today it takes that difference into fashion without giving it up. In March 2026, designer John Elliott reworked HOKA's carbon-plated Rocket X 3 racing shoe in a muted coastal camouflage. He changed how it looked and who might wear it, and left the racing shoe underneath untouched.

So what: HOKA's shoes looked different because they worked differently, which is why nobody could dismiss them as a gimmick. The Elliott collaboration shows how a performance brand should do fashion: change the look, never the purpose.

RELEVANCE

The category default: a race sponsorship means a logo on the finish line.

What HOKA did: in its first year as title sponsor of the 2026 Hackney Half Marathon, it built its presence around the neighborhood itself. A live mural on Mare Street grew across race weekend with the names of local runners and clubs. HOKA branded 250 Lime bikes, used Citymapper to guide people to its community hubs, and sent finishers home in free branded black cabs.

So what: every touchpoint did a job. The mural honored the people who make the race matter. The bikes and cabs solved the problem every finisher has: getting home on legs that have stopped working. HOKA didn't sponsor the race. It became part of it.

TALKABILITY

The category default: a new running shoe launches with performance claims and a famous athlete.

What HOKA did: launched the Bondi 7 Stealth Tech with Foot Locker through "Right Shoe, Wrong Gucci," built on the internet's long-running joke that rapper Gucci Mane looks like NBA referee James Williams. Gucci Mane walks in to buy the shoe and is served by two lookalikes, Williams among them, who speak only in his signature ad-libs.

So what: the joke arrived with recognition already built in, so nobody had to care about a shoe launch before pressing play. It carried HOKA's most cushioned shoe into music and sneaker culture, a room no performance claim could have opened.

OUR TAKE



HOKA won its argument so completely that maximal cushioning is now a staple of every major running brand. Competitors pile foam into their own midsoles, and the silhouette that once stopped people in the street now looks familiar. HOKA has become the convention it broke.

How it got there is the real lesson. HOKA didn't win by out-shouting the giants. It won by getting the order right. It started with a product that solved a real problem, then proved it where the stakes were highest, with ultrarunners who had the most to gain. Their trust gave everyday runners, and later walkers and people on their feet all day, a reason to try a shoe that looked strange. Only then did HOKA step fully into fashion and pop culture, and it did so without leaving its purpose behind. John Elliott reimagined a carbon-plated racing shoe without abandoning its technical purpose. Gucci Mane took the Bondi, HOKA's most cushioned shoe, into sneaker culture. Hackney and New York put runners, not celebrities, at the center. At every stage, the product earned the next audience.

That's what makes HOKA's next chapter so delicate. As the category catches up, the brand's culture moves will carry more of the weight its product once carried alone. HOKA's original insight was that the category had confused less with better. Its risk now is a quieter version of the same mistake: confusing being seen with being chosen.

MARKETER TAKEAWAYS

1. EARN CREDIBILITY BEFORE YOU SPEND IT.

HOKA's license in fashion and culture was built on the trails. A collaboration can extend a reputation; it can't replace one.

2. LET YOUR AUDIENCE WRITE THE CAMPAIGN.

The Hackney mural and New York's Strava borough challenge made runners the content. Give people something to add, and they'll carry the brand for you.

3. BE USEFUL BEFORE YOU'RE VISIBLE.

Bikes and recovery rides earned HOKA a real role in race weekend. A banner never could have.

4. PLAN FOR THE DAY YOU WIN.

Breaking a convention creates a new one. A challenger's next job is staying ahead of the version of itself everyone else is now copying.



ADVISOR COMMENTARY

RIVAL FIFTY

HOKA topped the 2026 Rival 50, and advisor Dagmara Szulce pointed to what set it apart:

"HOKA does what category leaders initially wouldn't: it made comfort the hero of performance," growing from "roughly $350 million in revenue in 2020 to more than $2 billion by 2025, proving that what started as an ultrarunning niche could become a mainstream movement."



DAGMARA SZULCE

Group Executive Vice President
Association of National Advertisers



owala®

RIVAL FIFTY

MOVES

Flip the category's emotional code • Marketing moves into the product brief

Last year, Owala showed that a water bottle could become something people collect. This year it climbed to #2, and its strategy has barely changed, which is the point.

Stanley and Hydro Flask built recognition around their own design codes: muted tones, wellness minimalism and the look of something serious. Owala built recognition around color. Its FreeSip bottle is easy to spot, but scheduled Color Drops, licensed collaborations and limited editions do as much work as the design. Instead of running campaigns to create demand, Owala keeps giving fans a new colorway to wait for and a reason to come back. Limited editions continue to sell out, and some resell for more than $200.

The product is simple; the demand cycle around it isn't. The question for 2027 is whether the drops keep their pull as the brand grows, because scarcity only works while the brand stays easy to get and the drops stay hard to get.

BY THE NUMBERS

2026 RANK

#2

Up from #5 in 2025

Rival 50 Score	4.02
Differentiation	4.0
Relevance	4.0
Talkability	4.2



ADVISOR COMMENTARY

RIVAL FIFTY

When reviewing the Rival 50 2025 alum, 2026 advisor Rajesh Bhargave highlighted how Owala:

“[Owala] treats the product as a means of self-expression.”



RAJESH BHARGAVE
Associate Professor of Marketing
Imperial Business School



Liquid Death

RIVAL FIFTY

MOVES

Flip the category's emotional code • Start inside a microculture • Run the brand like a franchise • Design for disagreement

Liquid Death's original bet was that water didn't have a hydration problem: it had a personality problem.

It sold a commodity with heavy-metal imagery, irreverent humor and counterculture packaging, and became one of the best-known challengers in the world. This year, it kept pushing that identity rather than softening it for a wider audience. It also grew its physical reach, with new distribution agreements across Southern California, Seattle, Alaska and Southern Oregon. The irreverence still gets people talking, and online fans still argue about it, but the distribution growth puts the product in front of people who've never seen the brand's stunts at all. That's the tension to watch. Liquid Death's growth has reportedly slowed, and a brand built on online notoriety now has to win shoppers who meet it for the first time on a shelf. The joke got Liquid Death famous. The next stage is whether it can keep selling once the joke has already been heard.

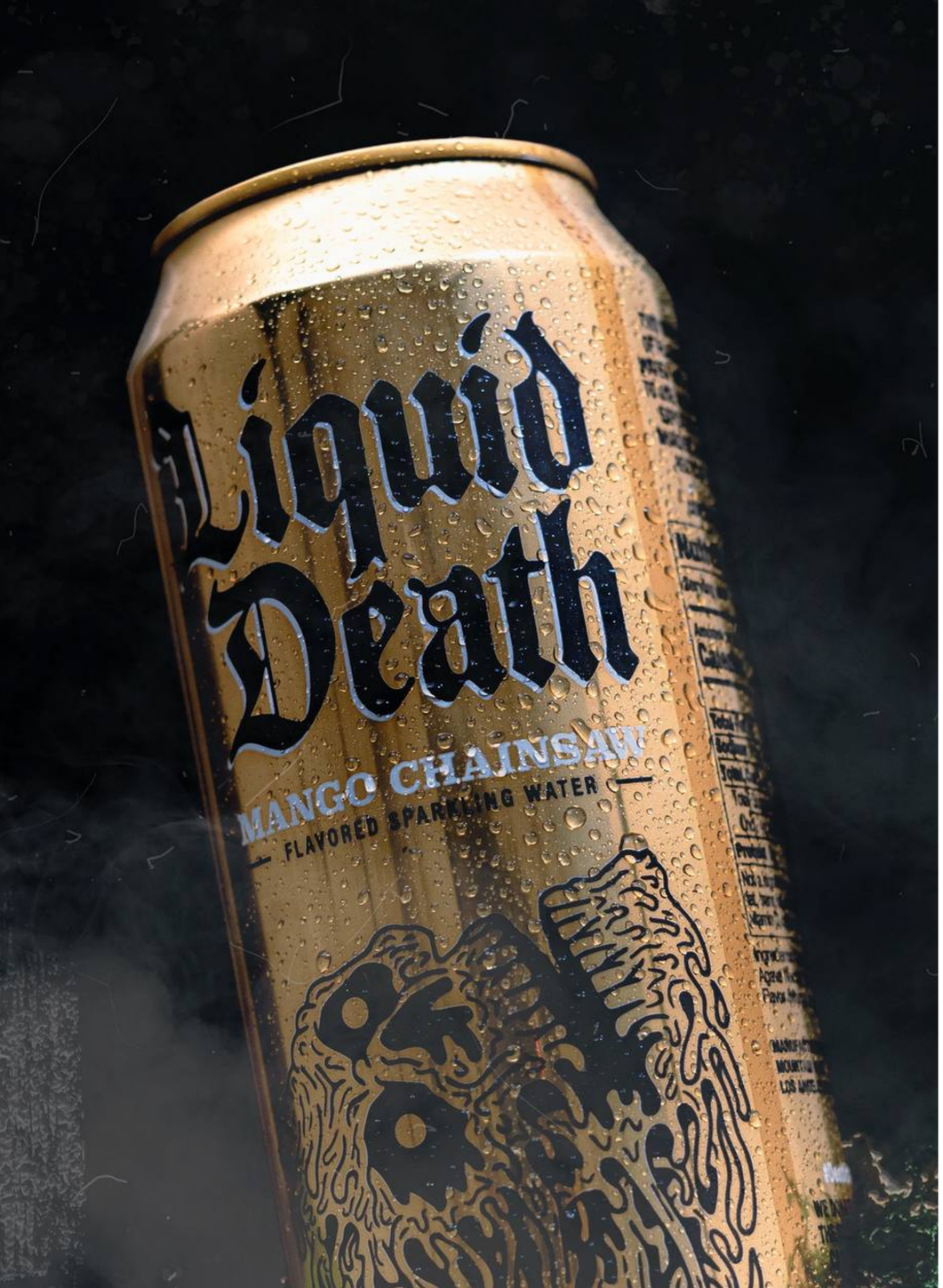
BY THE NUMBERS

2026 RANK

#3

Consistent with #3 in 2025

Rival 50 Score	3.98
Differentiation	5.0
Relevance	4.3
Talkability	4.30



ADVISOR COMMENTARY

RIVAL FIFTY

For 2026 advisor Marcela Melero, Liquid Death's appeal comes down to how it plays with category conventions:

"Liquid Death took water to the dark side – and made it impossible to ignore. It turns death into a joke, category rules into targets, and fans into co-conspirators."



MARCELA MELERO
Chief Growth Marketing Officer
Dove



DR. BRONNER'S ALL-ONE!®

RIVAL FIFTY

MOVES

Marketing moves into the product brief • Design for disagreement

Dr. Bronner's walked away from the badge its category hides behind. The question is whether a standard it wrote itself can mean more than the certification it left.

Most soap brands put a product name on the label and stop. Dr. Bronner's covers every inch of the bottle with a dense manifesto on unity and peace. Almost nobody reads it to the end, and that's the point. The density says this company has something to say before a single word is read.

The family-owned company backs the label with structure. Executive pay is capped at five times what the lowest-paid fully vested employee earns. In a category where one castile soap is much like another, belief is the one ingredient a competitor can't reformulate.

BY THE NUMBERS

2026 RANK

#4

Growth signal:
About $209.8 million in net revenue in 2024, with more than $8 million given to causes that year.

Rival 50 Score	**3.97**
Differentiation	5.0
Relevance	4.0
Talkability	3.82



SCORING

RIVAL FIFTY

DIFFERENTIATION

The category default: purpose-led brands collect certifications and display them on pack.

What Dr. Bronner's did: left B Corp in February 2025, arguing that admitting large multinationals without strong supply-chain accountability had emptied the badge of meaning. It then co-founded the Purpose Pledge with LIFT Economy and One Step Closer, launched publicly in 2026 with ten commitments on wages, governance, supply chains and the environment. Sixteen companies signed on at launch.

So what: walking away from a standard leaves a brand with nothing to point to, unless it builds something better. By hosting a pledge instead of holding someone else's badge, Dr. Bronner's moved from following a standard to setting one.

RELEVANCE

The category default: sourcing claims live in sustainability reports nobody reads.

What Dr. Bronner's did: put its sourcing on the bottle. Its 2025 packaging update labels its Pure-Castile Magic Soaps as made with Regenerative Organic Certified oils, and its All-One International Initiative, launched in 2019, has supported projects in 14 markets.

So what: shoppers can see the claim at the moment of purchase, without having to take the company's word for it. At a time when shoppers are skeptical of purpose claims, putting the proof at the point of sale does more than any campaign.

TALKABILITY

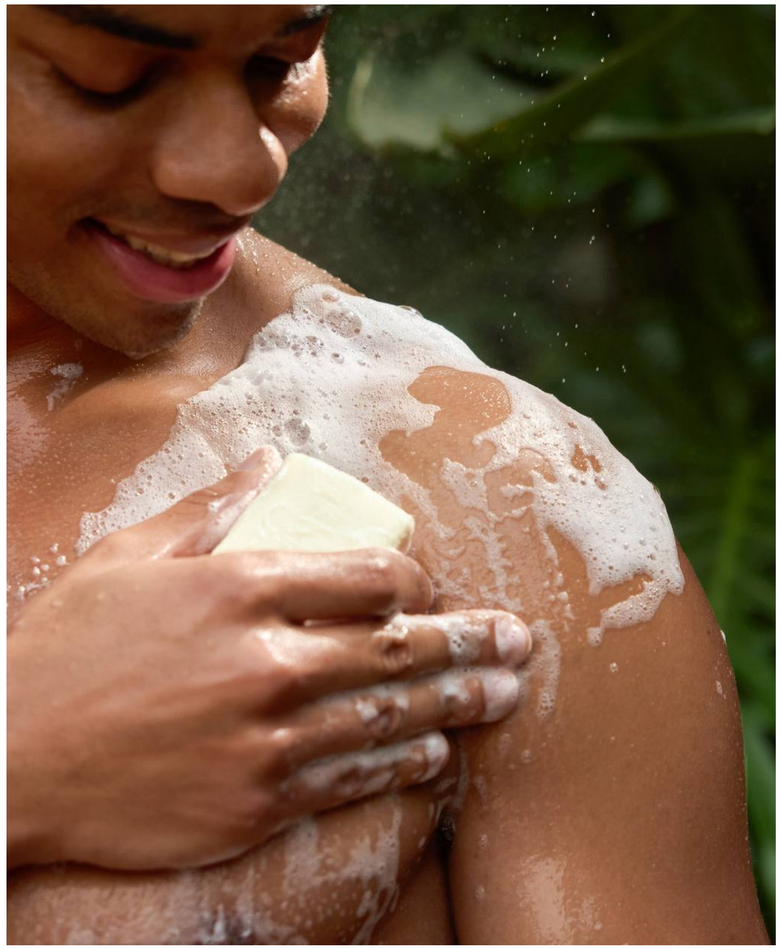
The category default: household cleaning products are bought on autopilot and never discussed.

What Dr. Bronner's did: made one bottle do the job of a cupboard full of products. Its loyal users swap ways to use the same soap for laundry, dishes, floors and skin, in communities built around reducing waste.

So what: the conversation that keeps Dr. Bronner's in people's homes isn't about its activism; it's about usefulness. The brand's most engaged fans already share its dislike of waste. They're talking about how, not why.

DR. BRONNER'S ALL-ONE!

OUR TAKE



Leaving B Corp was one of the boldest moves a purpose-led brand has made. Dr. Bronner's said openly what others only whispered: once a certification includes the multinationals you're positioned against, it stops telling shoppers much. But leaving was the easy part. The harder part is making the Purpose Pledge count. It has to attract companies that don't need to sign it, keep them committed and hold them to account when they fall short.

There's also a bigger opportunity. Much of the everyday conversation about Dr. Bronner's isn't about its activism at all. It's about practical use: one bottle replacing half the cleaning cupboard, and fans swapping tips on how to use it up. Those users may never read about the brand's stands, but they already live a version of its values, especially its dislike of waste. Dr. Bronner's has long taught people how to use its soap. The opportunity is to connect that everyday usefulness more clearly to what the company believes, so its convictions show up in people's routines, not just in the headlines.

MARKETER TAKEAWAYS

RIVAL FIFTY

1. BUILD THE BELIEF INTO THE BUSINESS MODEL.

A pay cap and sourcing decisions carry more weight than copy, because competitors can't fake them.

2. REPLACE THE STANDARD YOU REJECT.

Leaving a certification only means something once you've built a better alternative others can join.

3. PUT THE PROOF WHERE THE PURCHASE HAPPENS.

A claim on the bottle beats a claim in a report.

4. FIND THE COMMUNITY THAT ALREADY EXISTS.

The most loyal users often gather around how they use a product, not what the company stands for. Build with them.



ADVISOR COMMENTARY

RIVAL FIFTY

**"Dr. Bronner's started out good.
It hasn't had to reinvent its way into goodness"**

— 2026 advisor Sadira E. Furlow on what makes the brand endure.



SADIRA E. FURLOW

Former CMO
Tony's Chocolonely



who gives a crap

RIVAL FIFTY

MOVES

Flip the category's emotional code • Marketing moves into the product brief

Who Gives A Crap made toilet paper worth talking about by delivering it to the door. In the supermarket, where nobody unboxes anything, the joke has to work on the front of a pack.

Nobody chooses a toilet paper brand. People grab whatever's soft enough and cheap enough, and the category sells to them accordingly: puppies, clouds and the occasional cartoon bear. Who Gives A Crap turned the most forgettable product in the house into one people talk about.

It started with a stunt that summed up the brand. In 2012, co-founder Simon Griffiths sat on a toilet in a warehouse and refused to get up until pre-orders covered the first production run. Fifty hours later, he'd raised more than $50,000.

BY THE NUMBERS

2026 RANK

#5

Growth signal:
UK turnover up 17% to £45.5 million in the year to June 2024; more than $20 million donated to clean water and sanitation.

Rival 50 Score	3.97
Differentiation	4.3
Relevance	4.0
Talkability	3.93



SCORING

The joke opened the door, but the operating model is what makes Who Gives A Crap different. Half of its profits go to clean water and sanitation projects: not a percentage of sales or a one-off donation, but half of what the business makes. Instead of fighting for shelf space, it built a direct-to-door business, shipping bulk boxes of rolls straight to customers' homes, often on subscription. The products are made from recycled paper or bamboo, and every roll comes wrapped in paper rather than plastic, in bright prints that turn a household staple into something worth unpacking. The humor, the mission and the model reinforce each other: the name gets attention, the giving gives the joke a reason to exist, and the delivery box puts the brand in people's homes every few months.

DIFFERENTIATION

The category default: sell reassurance. Softness, strength and value, in near-identical packs.

What the brand did: built the cause into the business model and wrapped it in a joke. Half of its profits go to sanitation projects, and the brand's name, tone and printed wrappers make that mission impossible to miss.

So what: in a category where one roll is much like another, personality and purpose are the only real points of difference, and Who Gives A Crap owns both. The humor makes the cause approachable; the cause gives the humor a reason to exist.

RELEVANCE

The category default: a charity milestone gets a press release and a big, abstract number.

What the brand did: marked $20 million in donations in July 2026 with "Thank You for Giving a Crap," which included 84 consecutive posters along Swan Street in Melbourne naming all 847 local customers who had helped get there.

So what: most people are skeptical of corporate giving. A neighbor's name on a wall is harder to dismiss than a headline figure. The posters gave customers proof that their purchases mattered, and the pun kept it unmistakably the brand's own.

TALKABILITY

The category default: a product people grab on reflex, with no reason to look twice.

What the brand did: launched "Feel Good Toilet Paper" in the UK in 2026, sending a giant talking toilet roll onto the streets of Bristol and Manchester to hand out compliments and free samples.

So what: a giant roll of toilet paper paying people compliments is impossible to ignore and easy to share. It turned the least glamorous product in the house into a street event.

OUR TAKE



Who Gives A Crap already owns a media channel most brands would pay for. Every roll arrives in a printed wrapper, so every delivery puts the brand straight into someone's home. Limited editions and collaborations change the wrapper the way a magazine changes its cover, and customers reuse the wrappers as gift wrap. Run deliberately as a series, the packaging becomes a publication no competitor can buy its way into.

That advantage disappears in the supermarket. As the brand moves into Whole Foods in the US and Tesco in the UK, it loses the unboxing, the wrapper reveal and the subscription habit. A shopper gives the shelf a few seconds and the front of a pack. That's where the brand's next challenge lies: compressing a personality built on the doorstep into a pack that has to win in the aisle, next to products that have been chosen out of habit for decades.

MARKETER TAKEAWAYS

1. BUILD THE BELIEF INTO THE BUSINESS, THEN LET HUMOR CARRY IT.

The jokes work because there's a real commitment behind them.

2. SHOW CUSTOMERS THEIR IMPACT.

Naming 847 people on a street did more than another big number ever could.

3. TREAT PACKAGING AS A PUBLICATION.

A wrapper that reaches every customer at home is a media channel. Run it like a series.

4. MAKE SURE THE BRAND SURVIVES WITHOUT ITS BEST MOMENTS.

Retail removes the context that built the brand, so it has to work in a few seconds on a shelf.



ADVISOR COMMENTARY

RIVAL FIFTY

Tom Denford, a Rival 50 2026 advisor, sees Who Gives A Crap cleverly trying to own an unfashionable category —

“arguably the only challenger brand within it.”



TOM DENFORD
CEO
ID Comms



FENTY BEAUTY

RIVAL FIFTY

MOVES

Flip the category's emotional code • Marketing moves into the product brief

Fenty Beauty launched in 2017 with a direct challenge to an industry that treated inclusive shade ranges as a specialty offering rather than a basic requirement. Its 40 foundation shades, with the deepest shades front and center, changed what customers expected from every beauty brand.

This year, rather than coasting on that original disruption, Fenty took the idea into new markets and categories: China, India, a bigger presence in the UK, and a further push into hair care. It remains a fixture of beauty conversations well beyond its own channels. But Fenty is also the clearest example in this year's index of what happens after a challenger wins. Its founding idea has become the industry standard, and its momentum has slowed. With LVMH reportedly looking to sell its stake, the brand's next chapter will decide whether inclusivity remains a living strategy or becomes a story about 2017.

BY THE NUMBERS

2026 RANK

#6

Up from #30 in 2025

Rival 50 Score	3.94
Differentiation	4.3
Relevance	4.0
Talkability	4.19



ADVISOR COMMENTARY

RIVAL FIFTY

Rival 50 2026 advisor Sadira E. Furlow made a case for Rival 50 alum Fenty Beauty's return to the 2026 list:

"This isn't simply a celebrity beauty brand that has survived. It's a Black female-founded brand that has built a substantial business alongside LVMH, challenging assumptions about who gets to build a business of this scale."



SADIRA E. FURLOW
Former CMO
Tony's Chocolonely



SIDEMEN XIX

RIVAL FIFTY

MOVES

Start inside a microculture • Run the brand like a franchise • Ship the brand unfinished

Seven friends built a media business from their YouTube channel. In 2026, the best known of them stepped back, and the business now has to prove it can thrive without its full original cast.

The Sidemen are a group of seven British YouTubers who started making videos together as friends. Most brands start with a product and then look for customers. The Sidemen did the opposite: they spent years building an audience through weekly videos, then started selling to it. Today, a fan who discovered them through a challenge video can eat at their Sides fried chicken restaurants, watch their reality show Inside on Netflix and join 90,000 other fans at Wembley Stadium for their annual charity football match. Most creators make money by promoting other companies' products. The Sidemen kept control of their audience and built their own businesses around it instead. Their combined channels now have more than 155 million subscribers, and they're one of only five brands in this year's top 50 with perfect scores for both differentiation and relevance.

BY THE NUMBERS

2026 RANK

#7

Growth signal:
The Charity Match raised £6.2 million in 2026, up from £4.7 million in 2025.

Rival 50 Score	3.93
Differentiation	5.0
Relevance	5.0
Talkability	3.98



SCORING

DIFFERENTIATION

The category default: creators build a following, then get paid to appear in other companies' ads, products and TV shows.

What the Sidemen did: launched their own production company, Sidemen Productions, in January 2026. It makes shows for streaming platforms, starting with the third season of Inside on Netflix and a spin-off called Outside in August.

So what: by owning the shows rather than just starring in them, the Sidemen turn their personalities into intellectual property they control. A show format can also run with new cast members, so it can outlast any one person in the group.

RELEVANCE

The category default: creators launch on one platform and ask their audience to follow them there.

What the Sidemen did: released their 2026 cooking competition, Sidemen Presents: SideMenu, on both YouTube and Prime Video, with episodes appearing on YouTube first and Prime Video a day later.

So what: existing fans watched on YouTube as usual, while new viewers discovered the show on Prime Video. Releasing on both lets creator-led shows reach a mainstream TV audience without losing the fans who built the brand.

TALKABILITY

The category default: a celebrity charity event gets a day of headlines and is quickly forgotten.

What the Sidemen did: filled Wembley Stadium with 90,000 fans for the 2026 Charity Match, attracted 2.2 million people watching live at its peak, and raised a record £6.2 million.

So what: fans don't just watch; they buy tickets, donate, stream the match and share their own highlight clips, spreading the event far beyond the stadium. Because the Sidemen own the event and run it every year, it keeps growing rather than starting from scratch.



OUR TAKE

The Sidemen's most valuable asset is the chemistry between seven specific people. That's also the one thing that can't be bought, owned or replaced. In May 2026, KSI, the group's best-known member, announced he would stop appearing in Sidemen videos to improve his work-life balance. For a brand built on a friendship, losing a founding member is a serious test.

Sidemen Productions is the strongest answer so far. Shows like Inside and Outside can run with new casts and launch in new countries, so the business no longer depends on any one person. The Sidemen already proved that you can build an audience before you have a product. Now they need to prove that what they've built can outlast the original group.

MARKETER TAKEAWAYS

RIVAL FIFTY

1. BUILD THE AUDIENCE BEFORE THE PRODUCT.

Years of content gave every Sidemen launch a ready-made customer base, though each product still had to earn its place.

2. MAKE THE ROUTINE THE BRAND.

Regular weekly videos turned viewers into a habit, and habits are harder to replace than one-off hits.

3. RELEASE WHERE PEOPLE ALREADY WATCH.

Launching on more than one platform reaches different audiences on their own terms.

4. GIVE THE COMMUNITY A REAL ROLE IN THE OUTCOME.

The Charity Match turns watching into participation, from tickets to donations to fan-made highlights.

5. BUILD THINGS THAT DON'T DEPEND ON ONE PERSON.

Shows, formats and events keep a brand going when the people at the center change.



SLATE

RIVAL FIFTY

MOVES

Marketing moves into the product brief • Ship the brand unfinished • Sell what you take away

Every carmaker is racing to add a bigger screen. Slate is betting its whole business on a truck that doesn't have one.

For a decade, the car industry has turned vehicles into rolling smartphones: bigger screens, longer feature lists and prices that keep climbing. The average new car in the US now costs close to $50,000. Slate went the other way. Its electric pickup starts at $24,950 and comes with almost nothing: no paint, no central touchscreen and windows you wind by hand. Everything else is optional.

Buyers choose from a catalog of accessories, wrap the truck in any color they like, and can even convert it from a two-seat pickup into a five-seat SUV. The bet is that plenty of drivers are tired of paying for features they never asked for. And restraint is something a bigger competitor can't simply add to its options list. In a category racing to add, Slate made taking away the product.

BY THE NUMBERS

2026 RANK

#8

Growth signal:
More than 160,000 reservations since its April 2025 reveal, with deliveries expected from late 2026.

Rival 50 Score	3.91
Differentiation	4.7
Relevance	3.7
Talkability	3.85



SCORING

RIVAL FIFTY

DIFFERENTIATION

The category default: compete on range, software and an ever-longer list of features, with the price rising to match.

What Slate did: stripped the truck back to the essentials, and stripped the marketing back too. Slate deliberately doesn't lead with the fact that it's electric, because every new car brand says that. It leads with price and customization instead.

So what: Slate can't outspend Ford or Tesla on features, but it can stand for the opposite. Removing things is a choice incumbents are built to avoid, which makes it the one advantage they can't easily copy.

RELEVANCE

The category default: a car is one big, fixed purchase, followed by years of dependence on the dealer for servicing.

What Slate did: lets buyers start with a basic truck and add accessories as their needs and budget change. It offers free do-it-yourself repair and upgrade guides through Slate University, and backs them with a national network of independent repair shops.

So what: buying a car usually means a large upfront commitment and a long relationship with a dealer. Slate removes both. At a time when household budgets are stretched, it turns one of the biggest purchases most people make into something they can grow into.

TALKABILITY

The category default: car launches run through auto shows, dealer events and motoring press.

What Slate did: before its official reveal, it parked disguised trucks around Los Angeles, dressed up as quirky local businesses, and let people discover and photograph them before the brand had even introduced itself.

So what: a truck that looks unlike any other pickup is best discovered on the street, where the design does the explaining. Slate earned a news cycle without needing a big automaker's ad budget.



OUR TAKE

So far, Slate's story has been a series of moments: a street stunt, a price reveal and a rush of reservations. Then comes the longest and riskiest stretch for any new carmaker: the wait between reserving and receiving. Attention fades, competitors respond, and, for a brand built on a low price, every change to the economics gets scrutinized.

Reservation holders are keeping the conversation going themselves, swapping build ideas and pricing out accessories for trucks they don't own yet. Slate already has what it needs to lead that conversation: an accessory catalog that makes every truck personal and how-to content that turns owners into builders. Running those as an ongoing series would keep momentum alive until delivery day.

Then comes the real test. Slate's whole argument is that less can be worth more. That holds up only if the truck is reliable, the price stays within reach and the ownership experience is as simple as the pitch. A promise built on restraint has no extra features to hide behind.

MARKETER TAKEAWAYS

RIVAL FIFTY

1. MAKE RESTRAINT THE BELIEF.

What a product leaves out can say more about a company than anything it adds.

2. SELL RELIEF, NOT JUST A PRODUCT.

Letting customers buy in stages makes a big purchase feel manageable.

3. LET CUSTOMIZATION BUILD THE COMMUNITY.

Accessories turn one product into thousands of personal versions, and owners end up doing part of the marketing.

4. PLAN FOR THE WAIT.

The gap between buying and receiving is where attention fades. Fill it with content that keeps customers involved.



ADVISOR COMMENTARY

RIVAL FIFTY

Tom Denford, a Rival 50 2026 advisor, sees Slate Auto doing things differently in a category that tends to compete on features. The brand has

"realized that the 'clean space' in the auto industry is actually in simplifying and allowing the customer to put their own imagination to use to create the product that they need," and is "making a feature out of their lack of features and are willing to make fun of themselves along the way."



TOM DENFORD
CEO
ID Comms



TONY'S CHOCOLONELY

RIVAL FIFTY

MOVES

Marketing moves into the product brief • Design for disagreement

Tony's takes on the chocolate industry with its marketing while helping to fix it through its sourcing program. Doing both at once is its biggest balancing act.

Most chocolate brands sell a moment of pleasure and stop there. Tony's, a Dutch brand founded in 2005, wants people to think about what that pleasure costs the farmers who grow the cocoa. Its whole identity is built on a fact the industry would rather not talk about: chocolate is a highly profitable business, yet poverty, child labor and deforestation are still common in its supply chain.

Tony's makes that problem hard to ignore. Its bars are divided into unequal pieces to represent the unequal way money is shared along the supply chain. Its bright, bold wrappers stand out on any shelf. Neither choice is decoration. Both keep the issue in front of shoppers, even when they're just buying a treat.

BY THE NUMBERS

2026 RANK

#9

Growth signal:
Revenue up 20% to €240 million in the year to September 2025, with US revenue up 50%.

Rival 50 Score	3.90
Differentiation	5.0
Relevance	4.7
Talkability	3.47



SCORING

RIVAL FIFTY

DIFFERENTIATION

The category default: chocolate brands use color to signal comfort and indulgence, and protect it for decades. Milka's soft purple is the classic example.

What Tony's did: chose red for the opposite reason. Since its first bar in 2005, Tony's has used red as a warning sign: the brand calls it "an alarming loud red," chosen because the chocolate industry's problems are too urgent for subtlety. In November 2025, it worked with Pantone to make the shade official as "Tony's Only Red," then celebrated with a one-day pop-up in Soho, London's red-light district, that played up red's other meaning: pleasure.

So what: most brand colors say one thing. Tony's red says two. It's an alarm about exploitation in cocoa and an invitation to indulge, the same tension that runs through everything the brand does. Competitors can choose a color, but they can't easily choose one that carries a mission. Behind the red sits a sourcing model that pays farmers more, traces where cocoa comes from and monitors for child labor, which Tony's openly invites competitors to copy.

RELEVANCE

The category default: brands announce their good intentions, and shoppers respond with skepticism.

What Tony's did: ran its first-ever TV campaign in February 2026. "There's Fight in Every Bite" shows cocoa exploitation as a wrestling match between Tony and an opponent called X-Ploitation. Tony's didn't pay for the £500,000 of airtime; it won it through Sky's Zero Footprint Fund.

So what: a supply-chain problem most people never see gets a face and a body to fight. For the first time, Tony's reached a mass TV audience, without paying for the media and without softening its message.

TALKABILITY

The category default: cause marketing is serious and kept separate from the fun of the product.

What Tony's did: teamed up with artist CJ Hendry on a three-day pop-up in New York selling $1 mystery boxes, so buyers didn't know which chocolate they'd get until they opened them.

So what: the mystery box makes the brand's point in a playful way. In the cocoa industry, shoppers usually can't see what's behind what they're buying. In Tony's box, the only surprise is the flavor.

OUR TAKE



Tony's runs two strategies at once. Its marketing takes on the industry head-on. When it made lookalike bars in Milka's signature purple to make a point about cocoa sourcing, Milka's owner, Mondelēz, took legal action. Meanwhile, its Tony's Open Chain program gives other companies a blueprint for cleaning up their own cocoa sourcing. It's confronting the industry and collaborating with it at the same time.

That combination is what makes Tony's distinctive, and it's also its biggest risk. The louder its marketing gets, the more closely people examine its own supply chain. As Tony's grows, especially in the US, it has to keep proving that its sourcing delivers real progress, not just a good story. A memorable wrapper gets attention, but it doesn't prove anything. Tony's greatest achievement is refusing to make shoppers choose between enjoying chocolate and caring how it's made.

MARKETER TAKEAWAYS

1. MAKE THE MISSION VISIBLE, NOT JUST READABLE.

A strong visual like the unequal bar communicates the belief before anyone reads a word.

2. GIVE A HARD SUBJECT A WAY IN.

Entertainment works when it makes a serious problem easier to understand, not easier to ignore.

3. LET COMPETITORS COPY THE PART THAT MATTERS.

Sharing your solution can spread your mission further than keeping it to yourself.

4. MAKE SURE THE BUSINESS BACKS UP THE MARKETING.

A purpose-led brand earns the right to be loud only when its sourcing supports its claims.



crocs™

RIVAL FIFTY

MOVES

Flip the category's emotional code • Start inside a microculture • Ship the brand unfinished • Design for disagreement

Crocs turned a shoe many people once considered impossible to love into a recognition engine.

Rather than disguise its looks or chase approval, the brand built its identity on the fact that people argue about them, and made the clog a canvas fans personalize with Jibbitz charms. It has the highest talkability score in this year's top 10. This year, it extended that with "Wonderfully Unordinary," a new global brand platform, and Niles, a mascot leading a more character-driven approach. Crocs is moving from relying on one-off collaborations toward building a world around the product.

That shift matters. Crocs' growth slowed sharply in 2025, a sign that collaborations alone may be losing their power. A mascot and a lasting brand world are the kind of owned assets that can keep the conversation going between drops. Crocs never needed everyone to like it. Now it needs a reason for people to keep talking.

BY THE NUMBERS

2026 RANK

#10

Down from #6 in 2025

Rival 50 Score	3.90
Differentiation	4.0
Relevance	4.0
Talkability	4.65



ADVISOR COMMENTARY

RIVAL FIFTY

For 2026 advisor Marcela Melero, Rival 50 alum Crocs doesn't

"run away from being called 'ugly.'" Instead they make that "the beginning of the story. They turned a shoe into a way of self-expression and built a community around having fun and being unapologetically yourself."



MARCELA MELERO
Chief Growth Marketing Officer
Dove



MINISO

RIVAL FIFTY

MOVES

Start inside a microculture • Run the brand like a franchise

MINISO became a global retailer by renting the world's favorite characters. Its future depends on whether shoppers will fall for characters it creates itself.

Discount stores compete on price and convenience. Shoppers go in for something cheap, get it and leave. MINISO, founded in China in 2013, turned the discount store into a destination. A trip becomes a treasure hunt for a character plushie, a blind box or a limited-edition accessory nobody knew they wanted until they saw it.

The formula is simple and hard to copy. Licensed characters from franchises like Hello Kitty, Disney and Harry Potter pull people in. Low prices make collecting feel affordable. A constant stream of new drops gives fans a reason to come back. It has turned MINISO into one of the world's fastest-growing retailers, and it's now trying to turn borrowed attention into characters it owns.

BY THE NUMBERS

2026 RANK

#11

Growth signal:
Its own character YOYO reportedly generated more than RMB 1 billion in gross merchandise value in its first three quarters, across 53 countries and regions.

Rival 50 Score	**3.88**
Differentiation	4.0
Relevance	4.0
Talkability	4.42



SCORING

RIVAL FIFTY

DIFFERENTIATION

The category default: retailers license famous characters to sell products that are otherwise interchangeable.

What MINISO did: built MINISO LAND, immersive flagship stores where character merchandise makes up the large majority of sales. At the same time, it's developing original characters it owns outright, including YOYO, Kumaru and Carrot Street.

So what: licensed characters bring shoppers in, but the loyalty goes to the character, not the store. Owned characters are how a retailer turns other people's culture into something only it can sell.

RELEVANCE

The category default: fandom retail chases whatever franchise is trending, so its appeal fades when the trend does.

What MINISO did: priced collecting as a small daily treat. CEO Ye Guofu calls it "interest-driven consumption": shopping for what you love rather than what you need. It's a strategy MINISO is now taking around the world, including a rapid expansion in the US.

So what: a plushie costs about the same as a coffee, yet it offers the thrill of collecting and a stake in a fandom. For a generation feeling financial pressure, that's an affordable way to express who you are, and it works across borders.

TALKABILITY

The category default: a celebrity collaboration is a product line that disappears after one season.

What MINISO did: launched the LISA × MINISO global pop-up tour in Bangkok in September 2026, taking over more than 250 mall screens before moving through Tokyo, Beijing, Shanghai, Shenzhen and Jakarta, with the US next. The centerpiece is a blind box that pairs the BLACKPINK star with MINISO's own character, YOYO.

So what: most collaborations borrow fame and give it back when they end. This one uses LISA's fame to introduce YOYO to millions of her fans. When the tour ends, MINISO keeps a character that more people now love, and it's entirely MINISO's own.

OUR TAKE



MINISO's growth has always run on borrowed characters. Shoppers come in for Hello Kitty or Toy Story and leave with no particular attachment to MINISO. The company knows it, which is why its push into original characters is the most important bet in its strategy.

The stakes are clear across the industry. Toy and collectibles companies have shown that a single owned character can become a global craze worth more than any license, and that brands without one are always paying someone else for their popularity. Licensing buys access to affection that already exists. Creating a character means earning it from scratch.

The LISA tour shows the smartest way to bridge the two: use borrowed fame to launch owned characters, rather than choosing one or the other. If YOYO and its successors can hold fans' attention beyond a single drop or celebrity partnership, MINISO stops renting culture to drive store traffic and starts creating culture of its own.

MARKETER TAKEAWAYS

1. MAKE THE STORE WORTH THE TRIP.

Turn a shopping errand into an experience people seek out.

2. PRICE THE EMOTION, NOT JUST THE PRODUCT.

Affordable collectibles let people buy into a fandom without a big commitment.

3. USE BORROWED FAME TO BUILD OWNED ASSETS.

The best collaborations introduce something you own to an audience that already exists.

4. OWN WHAT COMPOUNDS.

Licenses deliver reach quickly. Characters you own build value that grows long after any campaign ends.



ADVISOR COMMENTARY

RIVAL FIFTY

Discount retail has always traded experience for low prices. 2026 advisor Sadira E. Furlow says MINISO broke that trade-off:

“it’s made discount retail something to be experienced, not just shopped.”



SADIRA E. FURLOW
Former CMO
Tony’s Chocolonely



Vacation®

RIVAL FIFTY

MOVES

Flip the category's emotional code • Run the brand like a franchise • Marketing moves into the product brief

Vacation sells sunscreen as a summer you never had. The test for a brand built on the past is whether it can create something worth remembering.

Sunscreen has always been sold as protection from danger: sun damage, premature aging, the dermatologist's slideshow. It's a product people use because they should, not because they want to. Vacation decided sunscreen should feel like a day off.

Launched in 2021, the brand wrapped SPF in an idealized 1980s summer: poolside nostalgia, retro packaging and a scent so good that putting it on became the point. Then it went further than any packaging exercise. It invented a fictional 1980s leisure company, brought back a forgotten cult tanning gel, and put sunscreen in a whipped-cream-style can. Vacation doesn't sell a product with a vibe. It sells a world, and the sunscreen is your way in.

BY THE NUMBERS

2026 RANK

#12

Growth signal:
Reported to be profitable, with sales projected to double to about $80 million.

Rival 50 Score	3.88
Differentiation	4.7
Relevance	4.0
Talkability	3.72



SCORING

RIVAL FIFTY

DIFFERENTIATION

The category default: new brands sell what's new. Heritage is something only old brands can claim, and it takes decades to earn.

What Vacation did: borrowed someone else's. In 2024, it revived Orange Gelée, a discontinued cult tanning gel, with a modern SPF 30 formula. In April 2026, it marked the product's 1926 origins with "100 Years of Gelée," a five-piece fragrance collection and a centennial party in Hollywood.

So what: a brand only five years old threw a 100th birthday party, and nobody minded, because Vacation never pretended the history was its own. It turned nostalgia from a visual style into a product pipeline: something to revive, relaunch and sell.

RELEVANCE

The category default: sunscreen is a chore, kept in the bathroom cabinet and remembered only when packing for a trip.

What Vacation did: launched at Sephora in June 2026 with its bestselling SPF and fragrances, selling sunscreen alongside perfume and skincare as "the world's best-smelling sunscreen."

So what: Vacation moved sunscreen from the pharmacy aisle to the beauty counter. People don't buy fragrance because they have to; they buy it because they want to. Selling SPF the same way turns a reluctant purchase into a year-round pleasure.

TALKABILITY

The category default: sunscreen ads show beaches, safety warnings and SPF numbers.

What Vacation did: made its first TV ad in May 2026 a parody of the category's own past: a spoof of 1980s sunscreen commercials, starring a "sunscreen sommelier" who opens a bottle with a corkscrew.

So what: Vacation's first move on mass media was to make fun of how sunscreen used to be sold. The joke only works if you know the category's clichés, which makes the brand's point for it: everyone else is still making those ads.

OUR TAKE



Every Vacation launch is an episode in the same story: the revival, the centennial, the TV parody. It's closer to how an entertainment studio plans its releases than how a sunscreen brand plans a summer, and it's working.

But nostalgia runs on borrowed material, and the supply isn't endless. Every revival makes the next one harder to land, and a joke loses its surprise once everyone knows the punchline. Vacation has proved it can mine the past brilliantly. Its real test is whether it can create something new that people will feel nostalgic about twenty years from now. If it can, Vacation becomes a lasting lifestyle brand. If it can't, it risks becoming a great joke that everyone has already heard.

MARKETER TAKEAWAYS

RIVAL FIFTY

1. SELL THE FEELING THE CATEGORY FORGOT.

Even a functional product can be reinvented by changing the emotion of using it.

2. MAKE THE WORLD THE PRODUCT.

A fictional universe that shapes what you sell is much harder to copy than a tone of voice.

3. PARODY THE CATEGORY, NOT THE CUSTOMER.

Mocking the clichés everyone else still uses makes your difference obvious without saying it.

4. BORROW THE PAST, BUT BUILD THE FUTURE.

Nostalgia can launch a brand. Lasting brands create things people will one day be nostalgic for.



ADVISOR COMMENTARY

RIVAL FIFTY

For Vacation, advisor Dagmara Szulce sees a brand selling the fantasy, not the fear:

"it makes sunscreen feel aspirational, collectible, and fun."



DAGMARA SZULCE
Group Executive Vice President
Association of National Advertisers



duolingo

RIVAL FIFTY

BY THE NUMBERS

2026 RANK

#13

Rival 50 Score	**3.85**
Differentiation	5.0
Relevance	5.0
Talkability	4.26



VOLLEBAK

RIVAL FIFTY

BY THE NUMBERS

2026 RANK

#14

Rival 50 Score	3.84
Differentiation	5.0
Relevance	4.3
Talkability	3.14



lomography

RIVAL FIFTY

BY THE NUMBERS

2026 RANK

#15

Rival 50 Score	3.82
Differentiation	5.0
Relevance	4.0
Talkability	3.78



GRAZA

RIVAL FIFTY

MOVES

Flip the category's emotional code • Marketing moves into the product brief

Graza put olive oil in a squeeze bottle and made a precious category laugh. In mayonnaise, the squeeze bottle is everyone's default, so the joke has to work harder.

Olive oil has always come in dark glass, dressed up with provenance and a story about a hillside in Italy. Graza put it in a bright green squeeze bottle and named it by what you do with it: Drizzle for finishing, Sizzle for cooking. It's easy to understand, easy to use and impossible to miss on a shelf full of bottles trying to look expensive.

Underneath the bottle is a belief: cooking shouldn't feel precious. Graza proves it with absurdist humor that makes food culture fun rather than aspirational. Its move into mayonnaise and aioli will test whether that belief can stand out in an aisle where the squeeze bottle is already standard.

BY THE NUMBERS

2026 RANK

#16

Growth signal:
Accounted for 24% of US olive oil category growth in 2025.

Rival 50 Score	**3.82**
Differentiation	4.3
Relevance	4.3
Talkability	3.62



SCORING

RIVAL FIFTY

DIFFERENTIATION

The category default: sell olive oil on origin and grade, in packaging designed to signal luxury.

What Graza did: launched in a chef's squeeze bottle, a first for the category, and replaced grades with two plain names based on use. As co-founder Andrew Benin put it, when they chose the squeeze bottle, "everything changed in terms of the visual appeal."

So what: the product became its own advertisement, on every shelf and in every kitchen video. When established brands started launching squeeze bottles of their own, they only made Graza look more like the original.

RELEVANCE

The category default: premium olive oil reaches its audience through Mediterranean heritage and chef credentials.

What Graza did: became the Official Olive Oil and Mayonnaise of NASCAR in August 2026, with a trackside food truck and the "Hot Lap Test," a campaign asking how many laps it takes for a car's hood to get hot enough to fry an egg.

So what: NASCAR takes Graza from coastal food culture to the tailgate: grilling, feeding a crowd and cooking outside. It reaches people premium food brands usually ignore, and it introduces them to the mayonnaise at the same time.

TALKABILITY

The category default: a new condiment launches on packaging and price promotions.

What Graza did: launched mayonnaise and aioli with "Seriously Serious," its biggest campaign so far. The deadpan spots are built around the more than 22,000 spoons it took to perfect the recipe, featuring a fictional employee who has tasted every one.

So what: the joke works because the commitment behind it is real. Graza can be playful about how it talks while being serious about the product, and that contrast is harder to copy than a bottle shape.



OUR TAKE

In olive oil, the squeeze bottle made Graza different. In mayonnaise, Graza comes in the same squeeze bottles and glass jars as everyone else on the shelf. The format that made it impossible to miss in one aisle blends in completely in the next.

That puts more weight on everything else. Without a packaging advantage, Graza's voice and its obsession with quality have to do the work the bottle used to do. "Seriously Serious" is the right first move: it makes the product's testing, not its packaging, the reason to choose it. NASCAR shows the humor can travel into an unlikely room without losing its tone.

The open question is whether a voice alone can carry a brand into a crowded aisle that's bought on habit. Graza's next challenge is to find the mayonnaise equivalent of the squeeze bottle: a truth about the product that's as visible on the shelf as the joke is in the ads.

MARKETER TAKEAWAYS

RIVAL FIFTY

1. MAKE THE PRODUCT DO THE TALKING.

A distinctive format markets itself every time it's used on camera.

2. MAKE THE PROCESS THE CONTENT.

A real operational detail becomes great creative when someone dramatizes it properly.

3. GO WHERE THE BEHAVIOR ALREADY HAPPENS.

An unexpected partnership works when the product has a credible job to do there.

4. KNOW WHEN YOUR ADVANTAGE WON'T TRAVEL.

An idea that's distinctive in one category can be the default in the next. Before expanding, find what will set you apart in the new aisle.



ADVISOR COMMENTARY

RIVAL FIFTY

Olive oil is an elite category. Graza isn't playing in it that way — 2026 advisor Dagmara Szulce says it's

"made olive oil feel everyday, not elite," creating "relentless relevance."



DAGMARA SZULCE
Group Executive Vice President
Association of National Advertisers



GOOBLES®

RIVAL FIFTY

BY THE NUMBERS

2026 RANK

#17

Rival 50 Score	**3.76**
Differentiation	4.3
Relevance	4.0
Talkability	4.36



BANDIT

RIVAL FIFTY

MOVES

Start inside a microculture • Run the brand like a franchise

There isn't a single picture of a runner on Bandit's mood board. Its next race is against its own success: taking a community built street by street in New York to cities that didn't build it.

Running apparel competes on technical claims, elite athletes and a visual language every brand shares: sweat, speed, the finish line. Bandit's co-founder Ardith Singh draws on art, architecture and New York fashion instead. The result is performance gear that looks like a culture brand first and sportswear second.

That isn't styling on top of the business. Bandit has built a community around the identity of being a runner, not just the act of running, and it gives that community real things to do. The Bandit Grand Prix turns a race into a spectator event. The Unsponsored Project backs elite athletes who have no brand deal at all. Running is the occasion. Belonging is the product.

Bandit is one of only a handful of brands in this year's top 50 with perfect scores for both differentiation and relevance.

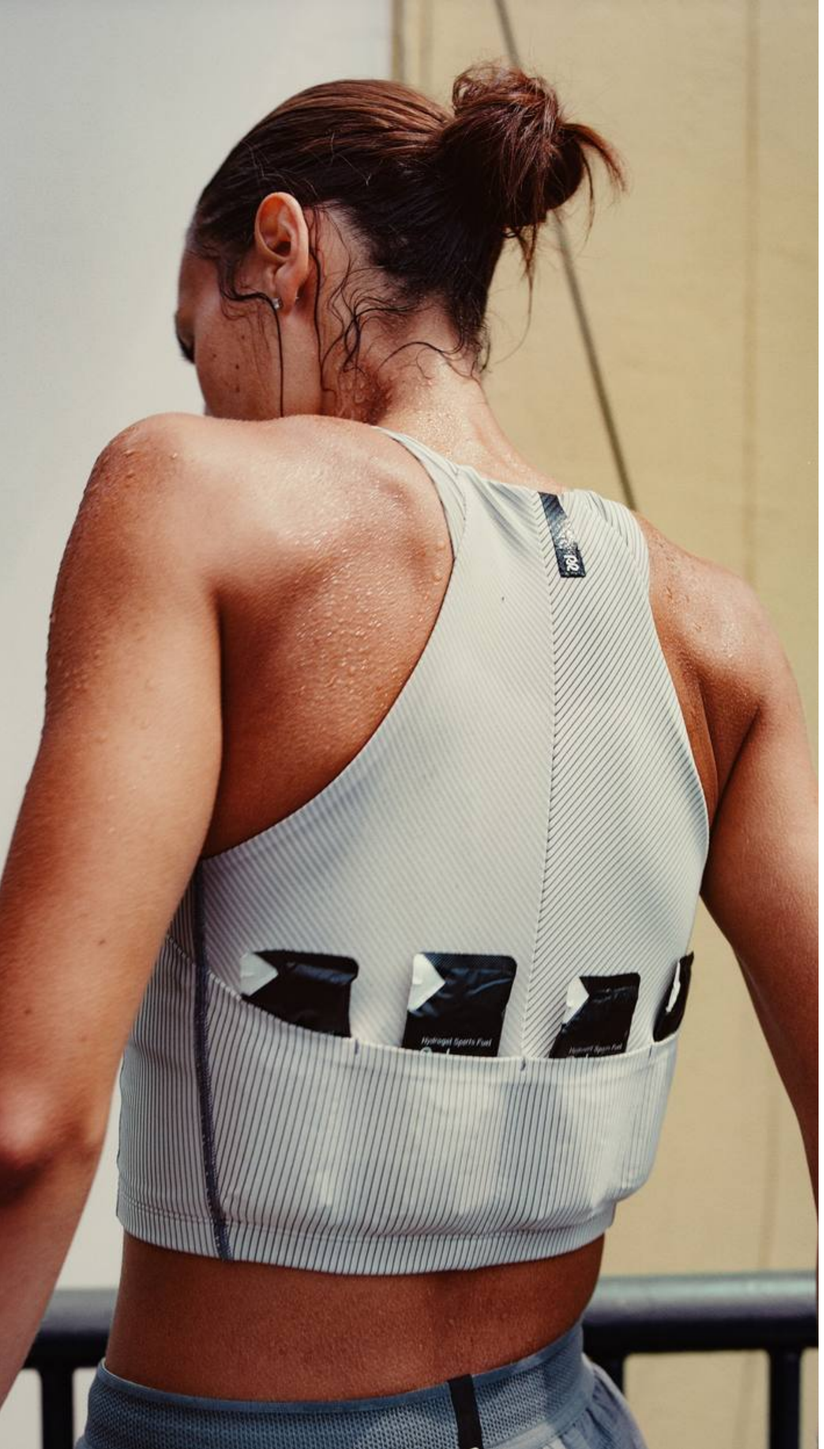
BY THE NUMBERS

2026 RANK

#18

Growth signal:
More than $30 million raised to date; the Bandit Grand Prix grew from about 1,200 runners in 2025 to 3,000 in 2026.

Rival 50 Score	**3.75**
Differentiation	5.0
Relevance	5.0
Talkability	3.71



SCORING

DIFFERENTIATION

The category default: build the brand from the sport's own codes: technical fabrics, performance imagery and athletic logos.

What Bandit did: built its look and its stores from New York's wider creative culture (art, architecture and fashion) and kept its Brooklyn roots as the identity rather than sanding them down for international growth.

So what: a runner no longer has to dress like the industry's idea of a runner. That's a belief about identity, not a styling choice, and it's much harder to copy than a fabric spec.

RELEVANCE

The category default: brands sponsor athletes who have already made it.

What Bandit did: launched the Unsponsored Project in 2023, giving unbranded race kits and direct financial support to elite track-and-field athletes with no backing. Its contracts let any athlete leave the moment a real sponsorship comes along. In July 2026, the project supported more than 60 athletes at the USA Track & Field Outdoor Championships.

So what: Bandit isn't competing for these athletes. It's funding the gap until someone else can sign them. That's a more credible definition of community than a word printed on a shirt.

TALKABILITY

The category default: a race is a competition, with spectacle as an afterthought.

What Bandit did: staged the second Bandit Grand Prix at Brooklyn's Storehouse in May 2026: a Formula One-style format on a nine-turn warehouse course for 3,000 runners from 21 countries, ending with a podium and an afterparty on the finish line.

So what: it's a cultural event that happens to involve running, and Bandit owns the format. Each year it returns, the event adds to the brand's lore instead of starting from scratch.

BANDIT

OUR TAKE



Bandit's biggest advantage is its specificity: a New York identity, a Brooklyn store on a running route and a race format nobody else runs. That specificity is also what's most at risk as the brand expands. It has grown deliberately, one city at a time: a second New York store, then Chicago, then a pop-up in Los Angeles.

Bandit's buzz also doesn't live where most metrics look. Its online footprint is modest next to a race that more than doubled in a year. Its influence spreads the way microcultures always have: in person, in group chats and on the start line. That's a strength, but it means growth has to be earned room by room.

The three parts of the model reinforce each other: the clothes give the community an identity, the Unsponsored Project gives that identity credibility, and the Grand Prix gives it somewhere to gather. The test is whether that system can be rebuilt in cities that didn't build it, without becoming a marketing claim.

MARKETER TAKEAWAYS

RIVAL FIFTY

1. STEAL FROM OUTSIDE YOUR CATEGORY.

A different source of inspiration creates a more distinctive identity than refining the category's own codes.

2. FUND THE BELIEF, DON'T JUST SAY IT.

A belief with a budget line is harder to copy than a tagline.

3. OWN THE EVENT, DON'T RENT IT.

A recurring format you control becomes an asset that grows every year.

4. MEASURE THE ROOM, NOT JUST THE FEED.

In-person momentum and online noise are different signals. Track both.



ADVISOR COMMENTARY

RIVAL FIFTY

Rival 50 2026 advisor Marcela Melero on Bandit Running:

“Community isn’t just what the brand talks about; it’s how the brand is built and behaves. That’s what makes ‘community-driven’ feel real.”



MARCELA MELERO
Chief Growth Marketing Officer
Dove



FEELD

RIVAL FIFTY

BY THE NUMBERS

2026 RANK

#19

Rival 50 Score	**3.72**
Differentiation	4.7
Relevance	4.7
Talkability	4.52



CPFM

RIVAL FIFTY

BY THE NUMBERS

2026 RANK

#20

Rival 50 Score	3.72
Differentiation	5.0
Relevance	4.3
Talkability	2.94

CONCLUSION

THE CHALLENGER'S EDGE IS A CHOICE.

The brands in this year's Rival 50 don't share a size, a sector or a budget. Some are start-ups; others are household names. What connects them is a refusal to accept that the rules of their category are the limits of what their brand can become.

Their success rests on principles that don't change. People notice what's different. They're drawn to what reflects who they are. They talk about what gives them something to say. Differentiation, relevance and talkability are human truths, and they're as old as marketing itself.

What changes is how the best brands act on them. This year, the Rival 50 flipped their categories' emotional codes, earned their way into microcultures, built worlds people want to be part of, designed products that market themselves, left room for customers to finish what they started, sold what they took away and accepted that a strong reaction beats indifference. The brands at the top didn't pick one move. They combined several, building systems competitors can't easily copy.

None of this needs a bigger budget. It needs a braver brief.

You don't have to be a challenger brand to think like one.

Being a challenger isn't a market position. It's a mindset, and any marketer can adopt it, whether they're leading a start-up or managing a portfolio brand inside a global business. Here are ways to start:

- **Audit your category's conventions.** List the things every brand in your category does: the feelings it sells, the claims it makes, the way it looks and the channels it uses. Then ask which ones your customers wouldn't miss. Every convention is an opening.
- **Find the emotion your category forgot.** Write down the feeling your category has sold for decades, then ask what it would mean to sell the opposite, or the feeling nobody has offered at all.
- **Map the communities around your brand.** Look for the microcultures already gathering around your product, your category or the problems it solves. Ask what you could genuinely contribute, not just what you could sell them.
- **Bring marketing into the product review.** Add one question to every product and packaging decision: "What will this look like on someone's phone?"
- **Run a subtraction audit.** List every feature, option and message, and find the one thing you could remove that would become the story.
- **Design for participation.** Identify the part of your product or campaign you could hand to customers or partners to finish.
- **Check your stack.** Look at which of the seven moves you already use, and which could reinforce them. The strongest brands don't run moves in isolation; each one makes the others stronger.

For marketing leaders, the mindset matters as much in how teams work as in what they make. Build briefs around the convention you're breaking, not just the message you're sending. Give teams room to test bolder ideas in smaller markets before scaling them. And measure what matters: whether your brand is becoming more different, more relevant and more talked about, not just more visible.

Why it matters: the commercial case

Challenger thinking isn't about being provocative for its own sake. Every move in this report earns its place because of what it does for the business: building the kind of difference that drives growth, the relevance that earns loyalty, and the talkability that makes every pound and dollar of marketing work harder. In a year when budgets are tight and expectations keep rising, that's the advantage that counts.

That's where Rival comes in. We help ambitious brands find the conventions holding them back, then break them to drive commercial growth. Our teams in London, Boston and Cape Town work alongside Rival Intelligence, our own AI platform, to spot where your category is stuck and where the openings are. Whether you want to understand your category's conventions, find the microcultures that could carry your brand, or turn these findings into a plan for your own team, we're ready to help.

The frontier of marketing keeps moving. The Rival 50 show where it is today. The question for every marketer is where you'll take it next.

THANK YOU

A massive thank you to all the incredible brands featured in this report, for pushing boundaries and inspiring creativity across the industry. All imagery is used for illustrative and editorial purposes only.