Private Label Foods and Beverages in the U.S., 8th Edition

Description:

Private Label Foods & Beverages in the U.S., 8th Edition

The market for private label foods and beverages – the so-called store brands – has hit a flat patch.

Private label products have come a long way from a past reputation as being lesser quality, albeit cheaper, alternatives to name-brand foods and beverages. Hurt by the recession, consumers began to turn to store brands as a way of saving money. The stores, in turn, invested in improving the quality, packaging and breadth of their private label collections, which in turn made them credible competitors to nationally known products. Some retailers have store products that rival the national brands in terms of reputation – Costco's Kirkland brand, Wegman's brand are good examples. Whole Foods' 365 brand and company Aldi are two of the most aggressive and successful private label marketers that have, much like Costco, extremely loyal customers. Private label products, accounting for more than 80% of products sold in their stores, help cement that loyalty. Trader Joe's and Whole Foods private label products gain additional prestige from being based in the natural foods channel.

Despite all this, The author has found that retail sales of the overall private label food and beverage market were $102 billion in 2013, up about 2% over 2012 (compared to 1.4% growth for the total food and beverage market). Food, with sales estimated at $80 billion compared to $22 million for beverages, accounts for nearly 80% of overall private label dollar and unit sales. Overall private label penetration of the total market was about 20% in dollars and units in 2013.

Packaged Facts' report, Private Label Foods & Beverages in the U.S., examine these and other trends that are affecting the private label market. For example, making healthier eating more affordable is a major trend in the U.S., and many consumers feel eating healthier is too expensive. Manufacturers and retailers have tried to address consumer concerns with more affordable healthy food options and several retailers have built private label brands around a position of affordable healthy eating. Retailers launched natural, organic private label brands years ago promoting value and product attributes. More recently several leading retailers have launched new private label brands that evolve natural and organic to more modern wellness positions that shift focus to lifestyle enhancement. Kroger's Simple Truth, Target's Simply Balanced, and Aldi's Simply Nature all attempt to provide consumers with easy solutions for taking care of themselves and their families. The brands cross many food and beverage categories with affordable, nutritious products that are natural or organic, and free of artificial ingredients. Kroger in particular has been extremely successful with Simple Truth, investing heavily to build the brand which the company expects to reach sales of $1 billion in 2014.

Scope of Report

Private Label Foods & Beverages in the U.S., 8th Edition analyzes the U.S. market for foods and beverages that retailers market themselves under their own private label brands. The analysis includes private label products (often called store brands) sold in all retail outlets. The report outlines key issues and trends affecting the overall market and analyzes virtually all product categories including shelf-stable, refrigerated, and frozen items. The report also discusses major players and brands and analyzes their key activities and performance. Market size data are provided for 2012 and 2013, and projections for 2013â€“2018.

Product Definitions

For the purpose of this report Packaged Facts divides products into two broad markets: foods and beverages. Within the food market, we have established categories based on traditional supermarket departments within which there are several segments and product classes. The six formal food departments/categories broken out in this report are: Bakery Products; Center Store; Dairy Food; Frozen Food; Refrigerated Food; Meat, Poultry and Seafood. The beverage market is categorized by beverage type rather than store department. For the beverage market, the six categories are: Dairy Beverages; Juices; Carbonated Beverages; Water; Coffee & Tea; and Sports & Energy Drinks. There is also a grouping called Other which is really a group of miscellaneous products that donâ€™t readily fit into the main categories.

Methodology
The information in this report was obtained from both primary and secondary research. Primary research included consultation with industry sources and on-site examination of retail stores. Secondary research entailed gathering data from relevant trade, business and government sources, as well as company promotional literature and annual reports.

Our estimates of market size and company performance are based on various sources including reported revenues of product manufacturers and retailers; IRI, which tracks data in mass retail outlets; publications and other market research sources.

Our analysis of consumer trends relies on data from several sources including national online consumer usage surveys conducted in June 2013 and January/February 2014, and Simmons National Consumer Surveys for Fall 2004 through Fall 2013, from Experian Marketing Services. The national online consumer surveys conducted in June 2013 and January/February 2014 reflects a panel of 2,000 U.S. adults (age 18+) that is balanced to the national population on the primary demographic measures of gender, age bracket, race/ethnicity, geographic region, marital status, presence or absence of children in the household, and household income. On an ongoing basis, Experian Marketing Services conducts booklet-based surveys of a large and random sample of consumers (approximately 25,000 for each 12-month survey compilation) who in aggregate represent a statistically accurate cross-section of the U.S. population.

Contents:

Chapter 1 Executive Summary
Introduction
Scope of Report
Methodology
Product Definitions
Food Market
Beverage Market
The Market
Overall Sales Exceed $100 Billion in 2013
Figure 1-1 U.S. Retail Sales of Food & Beverage Products: Private Label and Total Market, 2012-2013 (dollars and units, in billions)
Sales of Food vs. Beverages
Table 1-1 U.S. Retail Sales of Food vs. Beverage Products: Private Label and Total Market, 2012-2013 (dollar and unit sales, billions; average unit price (AUP), $)
PL Dollar Growth Slightly Higher Due to Price Increases
Table 1-2 IRI-Tracked Sales of Food & Beverage Products: Private Label vs. Branded, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Center Store Food Largest Private Label Category
Private Label Penetration
Dairy Products Have Highest PL Penetration
Figure 1-2 U.S. Market Private Label Food & Beverage Product Shares of Total Category, 2013 (percent)
Sales by Retail Channel
Market Forecast
PL Food
PL Beverages
Figure 1-3 Projected U.S. Retail Sales of Private Label Food & Beverage Products, 2013–2018 ($, billions)
Trends & Innovations
PL Marketers Deliver Value on Current Trends
Making Healthier Eating More Affordable
Evolution to Wellness
Illustration 1-1: Kroger Simple Truth
Competition in the Retail Landscape
Private Label Brands Key Part of Retailer Strategy
Private Label Portfolios Evolve
Table 1-3 Private Label Store Brands of Selected Retailers, 2014
Marketing and Promotion
Price Still Important for Frugal Consumers
Aldi's Uses Circular to Promote Value of New Simply Nature PL Brand
Illustration 1-2: Aldi's Circular Promoting Simply Nature PL Brand
Branding of Private Label Portfolios Evolve
Safeway and Aldi Have Extensive Private Label Brand Portfolios
Illustration 1-3: Aldi's Private Label Brands
Illustration 1-4: Safeway' Private Label Brands
The Consumer
PL Store Brands Key Factor in Grocery Shopping Destination for 36% of Consumers
Consumers Rate Store Brands High in Value and Quality Compared to National Brands
Most Popular Private Label/Store Brand Products
Dairy Case: Strong Private Label Driver
Table 1-4 Use of Dairy Case Products in the U.S.: Private Label vs. Overall, 2013 (percent of adults)
Beverage Products: Low Private Label Penetration
Table 1-5 Use of Beverage Products in the U.S.: Private Label vs. Overall, 2013 (percent of adults)

Chapter 2 Trends & Innovations
PL Marketers Deliver Value on Current Trends
Health and Nutrition
FDA Proposes New Nutrition Label Rules
Illustration 2-1: Current and Proposed Nutrition Facts Label
Food Industry Develops Own Nutrition Label
Illustration 2-2: Facts Up Front Label
Consumers Want Products Free of Harmful Ingredients
Illustration 2-3: Roche Bros. 100% Natural Chicken
Making Healthier Eating More Affordable
Organic and Natural Evolution
Stater Bros. Introduces Wholesome Goodness
Illustration 2-4: Stater Bros. Wholesome Goodness
H-E-B Enters Organic Market
Illustration 2-5: H-E-B Organics
Walmart Takes Different Route to Make Organics More Affordable
Illustration 2-6: Wild Oats Organic Products at Walmart
Evolution to Wellness
Aldi's Simply Nature
Illustration 2-7: Aldi's Simply Nature
 Kroger's Simple Truth
Illustration 2-8: Kroger Simple Truth
Target's Simply Balanced
Illustration 2-9: Target's Simply Balanced
Some Retailers Carry Sustainability Efforts to PL Products
Illustration 2-10: Ahold's Simply Enjoy Sustainability Certifications
PL Brands Highlight Local Product Benefits
Wegmans Locally Sourced Organic Eggs
Illustration 2-11: Wegmans Organic Eggs
Wegmans Sourcing More Cheese Locally
Illustration 2-12: Wegmans PL Cheddar Cheese
Illustration 2-13: Giant (Stop & Shop) PA Preferred PL Milk
Raley's Local Farm Fresh Free Range Organic Chicken
Illustration 2-14: Raley's Local Farm Fresh Free Range Organic Chicken
A&P Rebrands Seafood Department as "So Fresh, So Healthy and So Easy"
Illustration 2-15: Great Atlantic Seafood Market
Whole Foods Designs PL Brand for Brooklyn Store
Illustration 2-16: Whole Foods PL Design for Brooklyn Store
Gluten Gone Mainstream
Aldi Introduces Gluten-Free PL Brand
Illustration 2-17: Aldi LiveGFree
Walmart Launches Gluten Free Great Value Line
Illustration 2-18: Walmart Great Value Gluten Free
"Healthier" Carbonation
Retailers Jump on Sparkling Water Craze with PL Products
Illustration 2-19: PL Sparkling Waters
Better For You Drinks
Illustration 2-20: PL Better For You Drinks
Taste and Experiences
Harris Teeter Reserve Angus PL Beef USDA Certified Very Tender
Illustration 2-21: Harris Teeter PL Beef Certified Very Tender
Hy-Vee Cool Chicken
Illustration 2-22: Hy-Vee Cool Chicken
Artisanal More Mainstream
Illustration 2-23: PL Artisan Brands and Products
Premium PL Chocolate Bars Growing
Illustration 2-24: PL Premium Chocolate Bars
PL Brands Leverage Success of Liquid Water Enhancers
Illustration 2-25: PL Water Enhancers
Targeting Ethnic Consumer Tastes with PL Products
Safeway Store Brand Taps into Hispanic Culture, Tastes
Illustration 2-26: Safeway's Marcela Valladolid Brand
Kroger Taste of México PL Products
Illustration 2-27: Kroger Taste of México PL Products
Convenience
Retailers Leverage Coffee K-Cup Trend with Own Brands
Retailers Source from Others or Partner with Keurig for PL Brands
Illustration 2-28: Private Label K-Cup Products
Target's Archer Farms Mix & Match Meals
Illustration 2-29: Target's Archer Farms Mix & Match Meals
Chapter 3 Overall Private Label Food & Beverage Market
Introduction
Scope of Report
Methodology
Product Definitions
Food Market
Beverage Market
Private Label Food & Beverage Sales Exceed $100 Billion in 2013
Figure 3-1 U.S. Retail Sales of Food & Beverage Products: Private Label and Total, 2012–2013 (dollars and units, in billions)
Food About 80% of Overall PL Sales
Figure 3-2 Dollar and Unit Shares of U.S. Retail Sales of Private Label Products: Food vs. Beverage, 2013 (percent)
Sales of PL Food $80 Billion, PL Beverages $22 Billion in 2013
Table 3-1 U.S. Retail Sales of Food vs. Beverage Products: Private Label and Total, 2012-2013 (dollar and unit sales, billions; average unit price (AUP), $)
Overall PL Penetration at 19%-21%
Figure 3-3 Dollar and Unit Shares of U.S. Retail Sales of Food & Beverage Products: Private Label vs. Branded, 2013 (dollars and units, percent)
PL Dollar Growth Slightly Higher Due to Higher Price Increase
Table 3-2 IRI-Tracked Sales of Food & Beverage Products: Private Label vs. Branded, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Center Store Food Largest Private Label Category
Figure 3-4 Share of U.S. Retail Sales of Private Label Food & Beverage Products by Category, 2013 (percent)
Meat, Bottled Water Have Stand-Out Performance in 2013
Table 3-3 IRI-Tracked Sales of Private Label Food & Beverage Products by Category, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Private Label Penetration by Category
Dairy Products Have Highest PL Penetration
Figure 3-5 Private Label Food & Beverage Product Shares of Total Category, 2013 (percent)
Largest PL Segments
Table 3-4 IRI-Tracked Sales of Private Label Food & Beverage Products: By Leading Segments, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Table 3-4 IRI-Tracked Sales of Private Label Food & Beverages Products: By Leading Segments, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Table 3-5 Overview of Leading Private Label Food & Beverage Product Segments
Fastest Growing PL Segments in 2013
Table 3-6 IRI-Tracked Sales of Private Label and Total Market Food & Beverage Products: By Selected Segments with Largest Sales Growth, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Table 3-7 Overview of Private Label Food & Beverage Product Segments with Highest Sales Growth, 2012-2013
PL Segments with Largest Sales Declines in 2013
Table 3-8 IRI-Tracked Sales of Private Label and Total Market Food & Beverage Products: By Selected Segments with Largest Sales Declines, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Table 3-9 Overview of Private Label Food & Beverage Product Segments with Largest Sales Declines
Prices Spike for Eggs, Meat, Fresh Fruits, Fish and Seafood
Table 3-10 Changes in Food at Home Price Indexes by Category, May 2013 to May 2014 (percent)
Price Differences Between PL and Branded Categories Vary Widely
Table 3-11 IRI-Tracked Average Unit Prices for Private Label Food & Beverage Products: By Category, March 2014 (average unit price (AUP), $)
Food Segments with Highest PL Penetration
Figure 3-6 Private Label Food & Beverage Product Shares of Total Segment: By Segments with Highest Penetration, 2013 (percent)
Table 3-12 Overview of Food Product Segments with Highest Private Label Penetration
Beverage Segments with Highest PL Penetration
Figure 3-7 Private Label Beverage Product Shares of Total Segment: By Segments with Highest Penetration 2013 (percent)
Table 3-13 Overview of Beverage Product Segments with Highest Private Label Penetration
Food and Beverage Segments with Lowest PL Penetration
Figure 3-8 Private Label Food & Beverage Product Shares of Total Segment: By Segments with Lowest Penetration, 2013 (percent)
Sports and Energy Drinks Have Lowest PL Penetration
Candy and Gum
Soft Drinks
Milk Substitutes
Baby Foods
Coffee and Tea
Refrigerated Juices
Sales by Retail Channel
Figure 3-9 Share of Private Label Food & Beverage Product Sales by Retail Channel, 2014 (percent)
Table 3-14 Sales of Private Label Food & Beverage Products by Retail Channel, 2013 vs. 2014 (billions)
Market Forecast
PL Food
PL Beverages
Figure 3-10 Projected U.S. Retail Sales of Private Label Food & Beverage Products, 2013–2018 ($, billions)
Chapter 4 The Private Label Food Market
Food Market Defined
Private Label Food Sales Reach $80 Billion in 2013
Figure 4-1 U.S. Retail Sales of Food (Excluding Beverage) Products: Private Label and Total Market, 2012–2013 (dollars and units, in billions)
Private Label Food About 19% of Total Food Dollar Sales
Figure 4-2 Dollar and Unit Shares of Retail Sales of Food (Excluding Beverage) Products: Private Label vs. Branded, 2013 (percent)
Center Store Foods Largest Private Label Category
Figure 4-3 Share of Retail Sales of Food (Excluding Beverage) Products by Category: Private Label vs. Total Market, 2013
Dairy Has Highest Private Label Penetration in Food Market
Figure 4-4 Private Label Food (Excluding Beverage) Product Share of Sales by Category: Dollars vs. Units, 2013 (percent)
Meat, Poultry, and Seafood Has Stand-Out Performance in 2013
Table 4-1 IRI-Tracked Sales of Private Label Food (Excluding Beverage) Products by Category, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Private Label vs. Branded Food Sales
Product Segment Sales: Center Store
Table 4-2 IRI-Tracked Sales of Food (Excluding Beverage) Products by Category: Private Label vs. Branded, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Figure 4-5 Share of Center Store Private Label Food (Excluding Beverage) Product Sales by Segment, 2013 (percent)
Shelf-Stable Fruit Has Highest Private Label Penetration in Center Store Food
Figure 4-6 Private Label Shares of Food (Excluding Beverage) Product Sales by Segment, 2013 (percent)
Center Store Segments
Snacks
Condiments, Sauces, Spices and Spreads
Baking and Cooking Products
Breakfast Foods
Dinners and Side Dishes
Vegetables, Tomato Products and Beans
Shelf-Stable Meats & Seafood
Fruit (Canned, Bottled and Dried)
Candy and Gum
Ethnic Foods
Baby Foods
Table 4-3 IRI-Tracked Sales of Center Store Food (Excluding Beverage) Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Product Segment Sales: Dairy Food
Figure 4-7 Share of Dairy Food (Excluding Beverage) Private Label Product Sales by Segment, 2013 (percent)
Eggs Have Highest Private Label Penetration in Dairy Food
Figure 4-8 Private Label Shares of Dairy Food (Excluding Beverage) Market Sales by Segment, 2013 (percent)
Dairy Food Segments
Natural Cheese
Eggs and Egg Substitutes
Cultured Dairy
Butter & Butter Substitutes
Processed Cheese
All Other Dairy Foods
Table 4-4 IRI-Tracked Sales of Dairy Food (Excluding Beverage) Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Product Segment Sales: Frozen Food
Figure 4-9 Share of Private Label Frozen Food (Excluding Beverage) Product Sales by Segment, 2013 (percent)
Fruits and Vegetables Have Highest Private Label Penetration in Frozen Food
Figure 4-10 Private Label Shares of Frozen Food (Excluding Beverage) Market Sales by Segment: Dollars vs. Units, 2013 (percent)
Frozen Food Segments
Meat, Poultry and Seafood
Frozen Desserts
Frozen Vegetables
Frozen Dishes
Frozen Fruit
Frozen Breakfast and Other Foods
Table 4-5 IRI-Tracked Sales of Frozen Food (Excluding Beverage) Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Product Segment Sales: Bakery Products
Figure 4-11 Share of Private Label Bakery Food Product Sales: Sweet vs. Non-Sweet, 2013 (percent)
Non-Sweet Bakery Products Have Highest Private Label Penetration Especially in Units
Figure 4-12 Private Label Shares of Non-Sweet vs. Sweet Bakery Product Sales: Dollars vs. Units, 2013 (percent)
Bakery Food Product Segments
Non-Sweet Bakery Food
Sweet Bakery Food
Table 4-6 IRI-Tracked Sales of Bakery Food Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Product Segment Sales: Meat, Poultry & Seafood
Figure 4-13 Share of Private Label Meat, Poultry & Seafood Product Sales by Segment, 2013 (percent)
Fresh Meat and Poultry Has Highest Private Label Penetration
Figure 4-14 Private Label Shares of Meat, Poultry & Seafood Market Sales by Segment, 2013 (percent)
Meat, Poultry & Seafood Product Segments
Fresh Meat & Poultry
Breakfast Meats
Processed Dinner Meat
Fresh Seafood
Table 4-7 IRI-Tracked Sales of Meat, Poultry & Seafood Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Product Segment Sales: Refrigerated Food
Figure 4-15 Share of Refrigerated Private Label Food (Excluding Beverage) Product Sales by Segment, 2013 (percent)
Refrigerated Dishes, Dough and Baked Goods Have Highest Private Label Penetration
Figure 4-16 Private Label Shares of Refrigerated Food (Excluding Beverage) Market Sales by Segment, 2013 (percent)
Refrigerated Food Product Segments
Refrigerated Lunchmeats
Refrigerated Dishes
Refrigerated Dough and Baked Goods
Other Refrigerated Foods
Table 4-80 IRI-Tracked Sales of Refrigerated Food (Excluding Beverage) Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)

Sales by Retail Channel

Figure 4-17 Share of Private Label Food (Excluding Beverage) Product Sales by Retail Channel, 2014 (percent)

Table 4-9 Private Label Food (Excluding Beverage) Product Sales by Retail Channel, 2012 and 2013 (dollars and units, percent)

Market Forecast

Figure 4-18 Projected U.S. Retail Sales of Private Label Foods (Excluding Beverages), 2013–2018 ($, billions)

Chapter 5 The Private Label Beverage Market

Beverage Market Defined

Private Label Beverage Sales Reach $22 Billion in 2013

Figure 5-1 U.S. Retail Sales of Beverage Products: Private Label and Total Market, 2012–2013 (dollars and units, in billions)

Private Label Beverages 20% of Total Beverage Dollar Sales

Figure 5-2 Dollar and Unit Shares of Retail Sales of Beverage Products: Private Label vs. Branded, 2013 (dollars and units, percent)

Dairy Beverages Largest Private Label Category

Figure 5-3 Share of Retail Sales of Beverage Products by Category: Private Label vs. Total Market, 2013 (percent)

Dairy Has Highest Private Label Penetration in Beverage Market

Figure 5-4 Private Label Beverage Product Share of Sales by Category: Dollars vs. Units, 2013 (percent)

Bottled Water Has Stand-Out Performance in 2013

Table 5-1 IRI-Tracked Sales of Private Label Beverage Product Sales by Category, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)

Private Label vs. Branded Beverage Sales

Table 5-2 IRI-Tracked Sales of Beverage Products by Category: Private Label vs. Branded, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)

Product Segment/Class Sales: Dairy Beverages

Figure 5-5 Share of Private Label Dairy Beverage Products by Segment, 2013 (percent)

Refrigerated Milk Has Highest Private Label Penetration in Dairy Beverages

Figure 5-6 Private Label Shares of Dairy Beverage Product Sales by Segment, 2013 (percent)

Dairy Beverage Segments/Product Classes

Refrigerated Milk

Other Milks

Creams and Creamers

Milk Substitutes

Table 5-3 IRI-Tracked Sales of Dairy Beverage Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)

Product Segment Sales: Bottled Water

Figure 5-7 Share of Private Label Bottled Water Product Sales by Segment, 2013 (percent) Jug/Bulk Segment

Has Highest Private Label Penetration in Bottled Water

Figure 5-8 Private Label Shares of Beverage Product Sales by Segment: Dollars vs. Units, 2013 (percent)

Bottled Water Segments

Table 5-4 IRI-Tracked Sales of Bottled Water Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)

Product Segment Sales: Juices

Figure 5-9 Share of Private Label Juice Product Sales by Segment, 2013 (percent)

Frozen Products Have Highest Private Label Penetration in Juices

Figure 5-10 Private Label Shares of Beverage Product Sales by Shelving Classification: Dollars vs. Units, 2013 (percent)

Juice Segments

Shelf-Stable

Refrigerated

Frozen

Table 5-5 IRI-Tracked Sales of Juice Products by Segment: Private Label vs. Total Market, 2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)

Product Segment Sales: Coffee and Tea

Figure 5-11 Share of Private Label Coffee and Tea Product Sales by Segment, 2013 (percent)
Figure 5-12 Share of Private Label Coffee and Tea Sales by Product Type, 2013 (percent)
Whole Coffee Beans Have Highest Private Label Penetration in Dollars; Refrigerated Tea Highest in Units
Figure 5-13 Private Label Shares of Coffee and Tea Product Sales by Segment, 2013 (percent)
Coffee and Tea Product Segments/Product Classes
Coffee
Tea
Table 5-7 IRI-Tracked Sales of Coffee and Tea by Product Type: Private Label vs. Total Market, 2012-2013
dollar and unit sales, millions; average unit price (AUP), $)
Product Segment/Product Class Sales: Carbonated Beverages
Figure 5-14 Share of Private Label Carbonated Beverage Product Sales by Segment, 2013 (percent)
Seltzer, Club Soda and Tonic Water Have Highest Private Label Penetration
Figure 5-15 Private Label Shares of Carbonated Beverage Product Sales by Segment: Dollars vs. Units, 2013
(percent)
Carbonated Beverages Product Segments/Classes
Table 5-8 IRI-Tracked Sales of Carbonated Beverages Products by Segment: Private Label vs. Total Market,
2012-2013 (dollar and unit sales, millions; average unit price (AUP), $)
Product Segment/Class Sales: Sports & Energy Drinks
Figure 5-16 Share of Private Label Sports & Energy Drink Sales by Segment, 2013 (percent)
Energy Drink Mixes Have Highest Private Label Penetration
Figure 5-17 Private Label Shares of Sports & Energy Drink Sales by Segment, 2013 (percent)
Sports & Energy Drinks Product Segments/Classes
Virtually All Private Label Product Classes Have Declining Sales
Table 5-9 IRI-Tracked Sales of Sports & Energy Drinks by Segment: Private Label vs. Total Market, 2012-2013
dollar and unit sales, millions; average unit price (AUP), $)
Sales by Retail Channel
Figure 5-18 Share of Private Label Beverage Product Sales by Retail Channel, 2014 (percent)
Table 5-10 Private Label Beverage Product Sales by Retail Channel, 2013 and 2014 (billions)
Market Forecast
Figure 5-19 Projected U.S. Retail Sales of Private Label Beverage Products, 2013–2018 ($, billions)
Chapter 6 Competition in the Retail Landscape
Retail Overview
Cross-channel Shopping the Norm
Figure 6-1 Type of Store(s) Shopped on Most Recent Grocery Shopping Trip, 2014 (percent of grocery
shoppers)
Walmart Largest U.S. Retailer of Food and Beverages
Table 6-1 Estimated U.S. Food and Beverage Sales of Selected Major Retailers ($, billions)
Mergers, Acquisitions, and Divestitures
Private Label Brands Key Part of Retailer Strategy
Private Label Portfolios Evolve
Table 6-2 Private Label Store Brands of Selected Retailers, 2014
Private Label Sales by Retail Channel
Private Label Food
Figure 6-2 Share of Private Label Food (Excluding Beverage) Product Sales by Retail Channel, 2014 (percent)
Table 6-3 Private Label Food (Excluding Beverage) Product Sales by Retail Channel, 2013 and 2014 (billions)
Private Label Beverages
Figure 6-3 Share of Private Label Beverage Product Sales by Retail Channel, 2014 (percent)
Table 6-4 Private Label Beverage Product Sales by Retail Channel, 2013 and 2014 (billions)
Grocery Stores/Supermarkets
The Kroger Co.
Private Label Key to Kroger’s Strategy
Safeway, Inc.
Safeway Has Extensive Private Label Portfolio
Table 6-5 Safeway’s Portfolio of Private Label Brands
Aldi Inc.
90% of Aldi Products Are Private Label
Illustration 6-1: Aldi Private Label Brands
Natural Supermarkets
Whole Foods Market, Inc.
Private Label Part of Whole Foods Differentiation Strategy
Trader Joe’s Co., Inc.
80% of Trader Joe’s Products Are Private Label
Supercenters/Mass Merchandisers
Walmart Stores, Inc.
Private Label Fills Value Gaps for Walmart
Target Corporation
Simply Balanced New Target Private Label Brand
Warehouse Club Stores
Costco Wholesale Corporation
Costco Co-Brands with Kirkland
Illustration 6-2: Selected Kirkland Co-branded Products
Sam's Club
Illustration 6-3: Sam's Club Private Label Brands
Convenience Stores (C-Stores)
7-Eleven's 7-Select
Illustration 6-4: 7-Eleven Private Label Line
Kwik Trip Keeps It Fresh
Illustration 6-5: Kwik Trip Glazers Donuts
Dollar Stores
Dollar General
Illustration 6-6: Dollar General Clover Valley Brand
Family Dollar
Illustration 6-7: Family Dollar Family Gourmet Brand
Drugstores
Walgreens
Illustration 6-8: Walgreens Private Label Brands
CVS' Gold Emblem Private Label Brand
Illustration 6-9: CVS Gold Emblem Brand
Internet Sales
Kroger Buys Online Retailer Vitacost
Illustration 6-10: Vitacost Private Label Food
Ethnic Grocery Chains Proliferate
Private Label Products Not as Popular With Hispanics and Asians
Table 6-6 Selected Ethnic Grocery Chains, 2014
Chapter 7 Marketing & Promotion
Marketing and Promotion Trends
Consumers Still Shopping Frugally
Price Promotion for Own Brands Still Powerful
Illustration 7-1: Hy-Vee Brand Sale
Illustration 7-2: Food Lion Store Brand Super Sale
Comparison to National Brands
Illustration 7-3: Target PL Brand Compare & Save Promotion
Illustration 7-4: Stop & Shop Our Brand Challenge
Retailers Link PL Brand Promotions to Successful Loyalty Programs
Whole Foods Tests PL Brand Loyalty Program
Illustration 7-5: Whole Foods 365 Brand Loyalty Program
Walgreens Links PL Brand Nice! to Loyalty Program
Illustration 7-6: Walgreens PL Brand Nice! Linked to Loyalty Program
Aldi's Uses Circular to Promote Value of New Simply Nature PL Brand
Illustration 7-7: Aldi's Circular Promoting New Simply Nature PL Brand
IGA Features PL Products for Cause Marketing
Illustration 7-8: IGA Wounded Warrior Project Co-Brand Promotion
Contests Integrate PL Brands
Trader Joe's Master-at-Miso Recipe Contest
Illustration 7-9: Trader Joe's Master-at-Miso Recipe Contest
Food Lion's You Name It Contest
Illustration 7-10: Food Lion's You Name It Contest
Smart & Final's Our Brands, Your Pics Contest
Illustration 7-11: Smart & Final Our Brands, Your Pics Contest
Wawa's Parched Madness Tournament Features PL Drinks
Illustration 7-12: Wawa's Parched Madness Tournament
Events Highlight PL Brands
Food Lion Frugal Cook Off
Illustration 7-13: Food Lion's Frugal Cook Off
Target's Archer Farms at the Food Network South Beach Wine & Food Festival
Illustration 7-14: Target's Archer Farms at Food Network South Beach Wine & Food Festival
Walgreens Good & DeLish Featured In All-Star Celebrity Apprentice
Illustration 7-15: Walgreens Good & DeLish Featured In All-Star Celebrity Apprentice
Winn-Dixie's Cone Crew Promotes PL Soda and Ice Cream
Illustration 7-16: Winn-Dixie's Cone Crew
Branding of Private Label Portfolios Evolve
Table 7-1 Private Label Store Brands of Selected Retailers, 2014
Safeway and Aldi Have Extensive Private Label Brand Portfolios
Illustration 7-17: Aldi's Private Label Brands
Illustration 7-18: Safeway Private Label Brands
Illustration 7-19: Walmart's Redesigned Sam's Choice
Walmart Also Tests Extreme Value PL Brand
Illustration 7-20: Walmart's Extreme Value Price First
Kroger Goes Against Trend with New PL Value Brands
Illustration 7-21: Kroger's New Value PL Brands
Packaging Key Marketing and Merchandising Tool
Packaging Helps CVS's Gold Emblem Abound Stand Out
Illustration 7-22: CVS Gold Emblem Abound
Safeway's Primo Taglio Redesign
Illustration 7-23: Safeway's Primo Taglio Redesign
Target's Archer Farms Modernized
Illustration 7-24: Target's Archer Farms Redesign
Retailers Invest in Marketing Campaigns to Build PL Brands
Kroger Builds PL Brand Simple Truth with Heavy Marketing Support
Illustration 7-25: Kroger Simple Truth Marketing Campaign Elements
Fresh & Easy Private Brand Stars in New Marketing
Illustration 7-26: Fresh & Easy TV Commercial
H-E-B PL Brand Commercials Feature San Antonio Spurs Players
Illustration 7-27: H-E-B PL Brand Commercials with San Antonio Spurs
PL Marketers Use Social Media
Social Media Key to AWG's Clearly Organic Relaunch
Illustration 7-28: Clearly Organic Website
Trader Joe's iPhone App
Illustration 7-29: Trader Joe's New iPhone App
Walgreens Creates YouTube Series to Promote PL Brands
Illustration 7-30: Walgreens' “Mom's Cool Things” You Tube Series
Chapter 8 The Consumer
Sources
Store Brands Key Factor in Grocery Shopping Destination for 36% of Consumers
Figure 8-1 Product Types Most Important in Deciding Where to Shop for Groceries, 2013 (percent of adults)
Consumers Rate Store Brands High in Value and Quality Compared to National Brands
Figure 8-2 Percent Strongly/Somewhat Agreeing With Statements About National and Store Brands, 2013 (percent of adults)
Demographic Characteristics of Consumers Who Prefer National Brand Name Groceries
Table 8-1 Demographic Characteristics of Those Who Strongly/Somewhat Agree, “I Prefer to Buy National Brand Name Groceries,” 2014 (percent of adults)
Most Popular Private Label/Store Brand Products
Table 8-2 Percentage of U.S. Households That Most Often Use Private Label: Leading Food and Beverage Products, 2004-2013 (percent)
Dairy Case: Strong Private Label Driver
Table 8-3 Use of Dairy Case Products: Private Label vs. Overall, 2013 (percent of adults)
Demographic Focus: Natural/Imported Cheese
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-4 Demographic Characteristics of Natural and Imported Cheese Consumers: Kraft vs. Store Brands, 2013 (index)
Slices and Shredded Most Purchased Forms of Store Brand Cheese
Figure 8-3 Forms of Store Brand Cheese Purchased Within the Last 3 Months, 2014 (percent)
Condiments: Relatively Low Private Label Penetration
Table 8-5 Use of Condiment Products: Private Label vs. Overall, 2013 (percent of adults)
Demographic Focus: Salad or Cooking Oil
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-6 Demographic Characteristics of Salad/Cooking Oil Consumers: Wesson vs. Store Brands, 2013 (index)

Baking Products: Strong Penetration For Commodity Products
Table 8-7 Use of Baking Products: Private Label vs. Overall, 2013 (percent)

Demographic Focus: Sugar
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-8 Demographic Characteristics of Sugar Consumers: Domino vs. Store Brands, 2013 (index)

Meal Products: Vegetables Have Highest Private Label Penetration
Table 8-9 Use of Meal Products: Private Label vs. Overall, 2013 (percent of adults)

Demographic Focus: Frozen Vegetables
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-10 Demographic Characteristics of Frozen Vegetable Consumers: Birds Eye vs. Store Brands, 2013 (index)

Breakfast and Bakery Products: Opportunity for Growth
Table 8-11 Use of Breakfast and Bakery Goods: Private Label vs. Overall, 2013 (percent of adults)

Demographic Focus: Bread
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-12 Demographic Characteristics of Bread Consumers: Nature's Own vs. Store Brands, 2013 (index)

Snacks: Relatively Low Private Label Penetration
Table 8-13 Use of Snacks Products: Private Label vs. Overall, 2013 (percent of adults)

Dairy Demographic Focus: Ice Cream
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-14 Demographic Characteristics of Ice Cream Consumers: Breyers vs. Store Brands, 2013 (index)

Beverage Products: Low Private Label Penetration
Table 8-15 Use of Beverage Products: Private Label vs. Overall, 2013 (percent of adults)

Dairy Demographic Focus: Orange Juice Bottles/Cans/Cartons
Gender
Age
Household Income
Educational Attainment
Region
Race
Children in Household
Table 8-16 Demographic Characteristics of Orange Juice Consumers: Tropicana vs. Store Brands, 2013
(index)

Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Private Label Foods and Beverages in the U.S., 8th Edition
Web Address: http://www.researchandmarkets.com/reports/2974939/
Office Code: SCWPOKVY

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF)</td>
<td>Single User:</td>
<td>USD 3595</td>
</tr>
<tr>
<td></td>
<td>Enterprisewide:</td>
<td>USD 7990</td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:  Mr  □  Mrs  □  Dr  □  Miss  □  Ms  □  Prof  □
First Name:  ____________________________  Last Name:  ____________________________
Email Address:  ____________________________
Job Title:  ____________________________
Organisation:  ____________________________
Address:  ____________________________
City:  ____________________________
Postal / Zip Code:  ____________________________
Country:  ____________________________
Phone Number:  ____________________________
Fax Number:  ____________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Account number</th>
<th>833 130 83</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: __________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp