

Store brand sales trends

Supermarket private label unit and dollar share reached 23.4% and 19.4%, respectively, according to Nielsen data for the 52-week period ending Nov. 23, 2013. In supermarkets, dollar sales increased 1.6% to \$60.6 billion. Fresh meat was the fastest-growing category in dollar

sales, climbing 45% to \$1 billion. Other top gainers included coffee, dairy dips/spreads, nuts and frozen dessert.

SOURCE: Nielsen/PLMA, based on data from the 52 weeks ending Nov. 23, 2013, vs. the previous year, in U.S. supermarkets with more than \$2 million in sales, and drug chains with more than \$1 million in sales.

Drugstore chains witnessed the largest private label dollar volume growth of all food channels, increasing **4%** to **\$8.3 billion.**

SUPERMARKET DOLLAR PERFORMANCE

Top Private Label Dollar Gains

| CATEGORY | DOLLAR SALES | % CHANGE |
|--------------------|--------------|----------|
| FRESH MEAT | \$1B | 45 |
| COFFEE | \$494M | 17 |
| DAIRY DIPS/SPREADS | \$228M | 14 |
| NUTS | \$703M | 10 |
| FROZEN DESSERTS | \$477M | 9 |

Top Private Label Dollar Losses

| CATEGORY | DOLLAR SALES | % CHANGE |
|-------------------------|--------------|----------|
| DETERGENTS | \$150M | -11 |
| CARBONATED BEVERAGES | \$773M | -10 |
| DIAPERS | \$136M | -9 |
| SUGAR/SUGAR SUBSTITUTES | \$773M | -8 |
| ICE | \$181M | -6 |

SUPERMARKET PRIVATE LABEL DOLLAR VOLUME

52 weeks ended Nov. 23, 2013 **\$60.6 billion**

52 weeks ended Nov. 23 2012 **\$59.6 billion**

% CHANGE
1.6%

SUPERMARKET UNIT PERFORMANCE

Top Private Label Unit Gains

| CATEGORY | UNIT SALES | % CHANGE |
|----------------------|------------|----------|
| PAIN REMEDIES | 64M | 7 |
| PREPARED SALADS | 414M | 7 |
| MEDICATIONS/REMEDIES | 94M | 6 |
| ORAL HYGIENE | 51M | 6 |
| FROZEN PIZZA/SNACKS | 200M | 6 |

Top Private Label Unit Losses

| CATEGORY | UNIT SALES | % CHANGE |
|----------------------|------------|----------|
| FROZEN JUICES/DRINKS | 58M | -13 |
| DETERGENTS | 49M | -11 |
| ICE | 76M | -10 |
| CARBONATED BEVERAGES | 656M | -9 |
| CANNED FRUIT | 326M | -6 |



Supermarket unit sales of pain remedies increased **7%** to 64 million.

ALL-OUTLET PERFORMANCE

Private Label Dollar Volume

| OUTLET | DOLLAR SALES | % CHANGE |
|--------------|--------------|----------|
| SUPERMARKETS | \$61.0B | 1.6 |
| DRUG | \$8.3B | 4.0 |
| ALL OUTLETS* | \$112.0B | 2 |

Private Label Unit Volume

| OUTLET | UNIT SALES | % CHANGE |
|--------------|------------|----------|
| SUPERMARKETS | 26.8B | 0.1 |
| DRUG | 2.0B | 3.4 |
| ALL OUTLETS* | 43.8B | -0.1 |

** All outlets include U.S. supermarkets with annual sales over \$2 million; drug chains with sales over \$1 million; mass merchandisers, including Walmart; the club channel, dollar stores and military exchanges. Based on data from the 52 weeks ending Nov. 23, 2013, vs. the previous year.*