PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

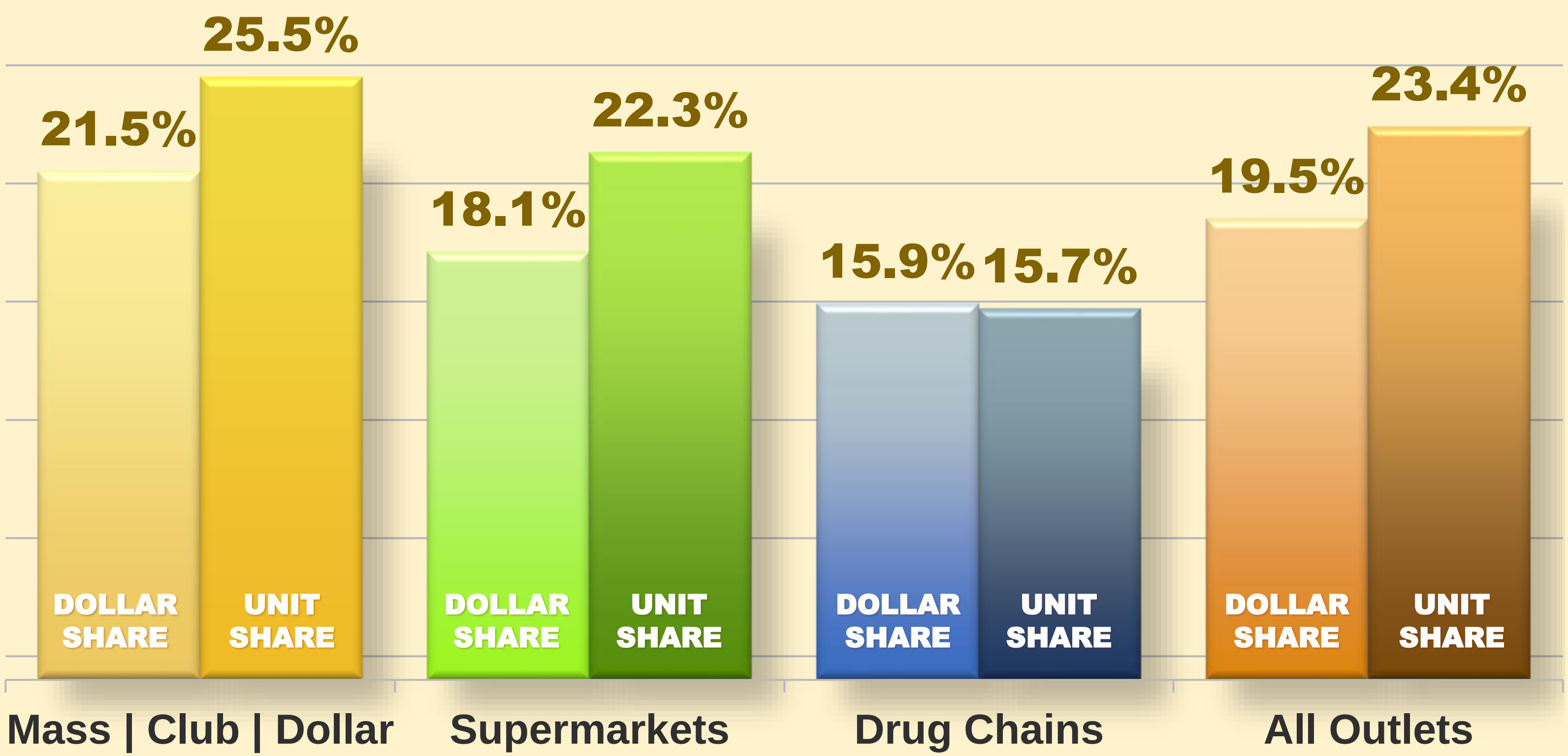
Store brands appeal for U.S. shoppers was unfazed by effects of the pandemic in 2020

The pandemic brought unprecedented volatility to U.S. grocery purchasing in 2020, but consumers continued to favor store brands for about one of every four purchases across all major food and nonfood categories. Retailers' private brands accounted for 23.4% of all units sold in NielsenIQ's calculation for all outlets combined, which includes total U.S. supermarkets, mass, club, and dollar channels, as well as drug chains. About one out of every five dollars spent by shoppers in all outlets, or 19.5%, was for the retailer's store brand. Both figures were equal to the market shares reported for the full year prior to the pandemic.

The year 2020 saw COVID-related retail impacts that ranged from panic buying early on to the near doubling of online purchases over 2019 sales. Yet store brands sales saw an increase of +12% for the year, keeping pace with national brands and maintaining market share, despite a number of supply chain interruptions affecting high demand categories, and a major shift of purchasing from foodservice to grocery channels as consumers everywhere were forced to adjust their lifestyles around remote schooling and work, and many households were confronted with the loss of income or livelihood.

The 2020 sales figures provided exclusively to PLMA by NielsenIQ reflect the strength of store brands in the major grocery channels as American families learned to cope with the pandemic. Combining socially distanced shopping in stores with online purchases for curbside pickup and home delivery, consumers spent $16.5 billion more (+11.6%) on store brands and $86 billion more (+12.8%) on all brands in the country's retail stores compared to the year prior. Contributing to the increase was the impact of traditional restaurant and other foodservice dollars

Store Brands Market Share Today



Private label shares continue to rise in the mass retail channel, which includes mass merchandisers, club and dollar store channels. Mass now leads supermarkets and drug chains for private label market share in dollars as well as in units.

Source: PLMA/NielsenIQ

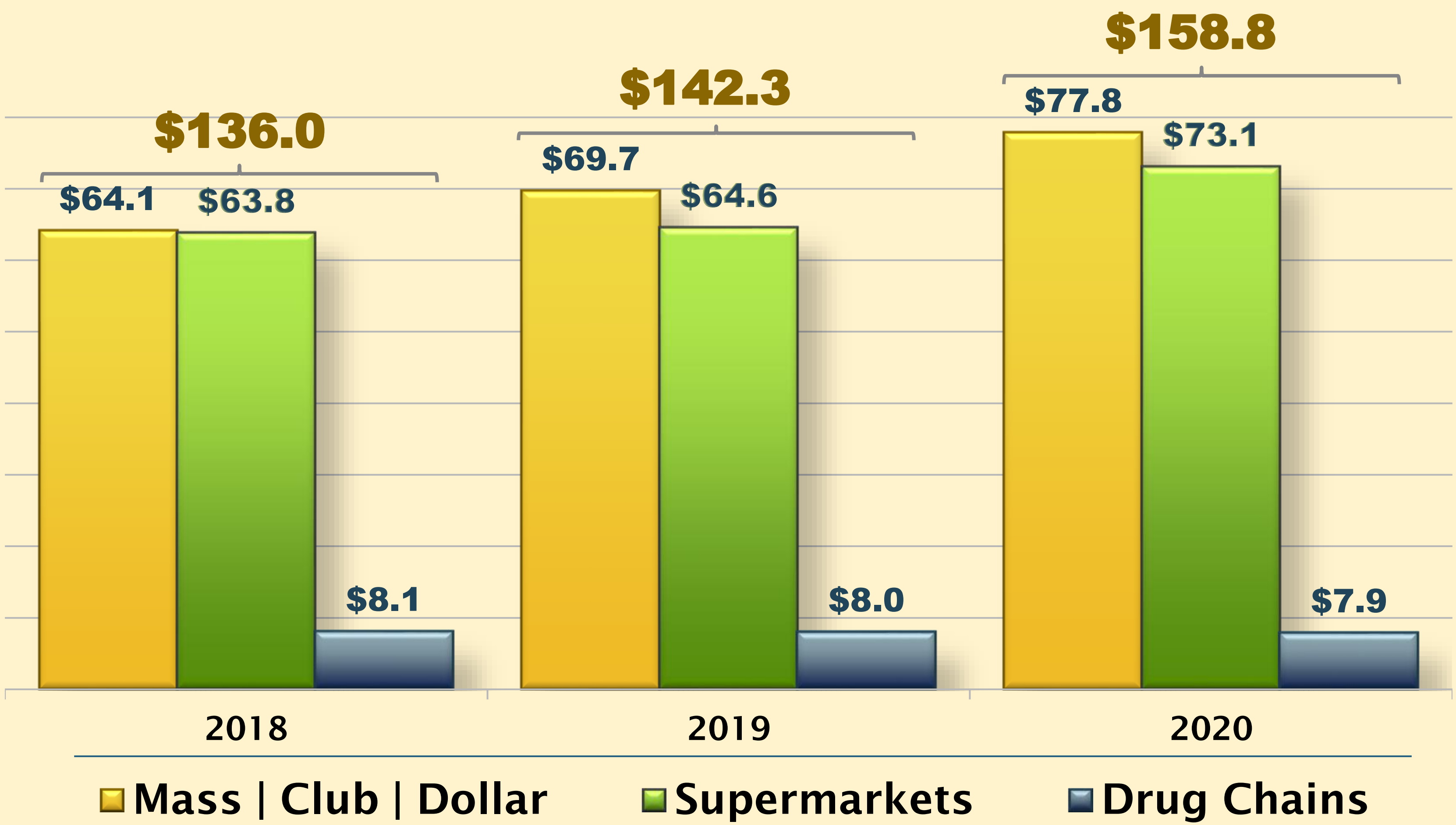
that flowed into the grocery space, whether due to outright closures of bars and restaurants, restrictions on dining out, cancelled vacations and travel, or the need to substitute in-home for daily commuter and office meals, as well as school lunches. The National Restaurant Association says restaurant and foodservice industry sales fell by $240 billion in 2020 from an expected level of $899 billion and that 110,000 eating and drinking establishments closed for business—temporarily or permanently. Diverted foodservice dollars were welcomed by the grocery industry, but they also posed a massive challenge for its distribution systems, as did considerable stocking up by panicked shoppers, particularly in the first quarter of 2020. Such overbuying also contributed to the swelling of last year's grocery sales total.

"Analysis needs to take these anomalies of the 2020 data into account," cautioned PLMA president Peggy Davies, "but comparisons to pre-pandemic trends and projections notwithstanding, store brands maintained their strength in the marketplace as retailers and private label manufactures succeeded in supplying the country with critical food and essential non-food products in the face of extreme volatility. The 2020 sales figures bear that out."

The NielsenIQ scan data show retailers' store brands surged across all outlets for a record $158.8 billion in private label, even as sales for all brands reached a record $816 billion. Private label units also saw an increase of +7.2%, matching the growth of all brands. Private label's market share for all outlets remained steady at 19.5% of sales volume and 23.4% of all units sold.

In the mass channel, consisting of mass merchandisers, club and dollar stores, PLMA calculates that store brands sales increased by $8.1 billion (+11.7%) to a total of $77.8 billion, and store brands unit volume was up +8.2%. Both measures outpaced the mass channel overall, where manufacturers brands saw gains of +8.5% in dollars and

Store Brands Dollar Volume in Billions



Source: PLMA/NielsenIQ

+4.9% in units. Store brands shares increased as a result to 21.5% (+0.5 percentage points) of total dollar sales and 25.5% (+0.6 percentage points) of all units sold. In U.S. supermarkets, which for a number of years had only moderate, mostly inflationary sales growth and declining unit volumes, 2020 brought a reversal of trends and store brands factored significantly in the turnaround. Private label sales increased by $8.5 billion to a record $27.3 billion (+13.2%), while units were up +7.1%. Manufacturers brands did somewhat better however, as the channel overall captured a +16% sales increase to a record $403.6 billion overall in tandem with a unit volume gain of +9.4%. Private label had lower annual shares in the channel, at 18.1% of dollars (-0.4 percentage points) and 22.3% of units (-0.5 percentage points). The drug channel fared less well than others, reporting $130 million lower store brands sales (-1.7%) against a loss of more than -6% unit volume for all brands sold in the channel vs a year ago. National brands sales increased +0.8%—an indication that price inflation may have been a factor as private label market share for units remained unchanged at 15.7%, while dollar share declined -0.3 percentage points to 15.9%.

NielsenIQ's Kara Sheesley, vice president retail engagement and U.S. industry relations, cited household panel data for 2020 as proof that purchasing private label is ingrained in U.S. consumers' behavior: "Fully 99% of households told us they bought private label last year." Of note, the panel research placed store brands market share for 2020 at 23% of all grocery dollars and 25% of units, by taking into account sales at retailers not counted within the point-of-sale scan data universe. The figure includes additional private label sales of approximately $40 billion annually from consumer purchases at leading club, discount retailers and others with extensive private brand programs.

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – ALL OUTLETS COMBINED

CHART 1

DOLLAR VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	$816.0	Billion	$729.7	Billion	11.8%
Total Private Label	$158.8	Billion	$142.3	Billion	11.6%
Total Brands	$657.2	Billion	$587.4	Billion	11.9%

CHART 2

UNIT VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	224.6	Billion	209.6	Billion	7.2%
Total Private Label	52.5	Billion	49.0	Billion	7.2%
Total Brands	172.1	Billion	160.6	Billion	7.2%

CHART 3

DOLLAR MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	19.5%	19.5%	0.0
Total Brands	80.5%	80.5%	0.0

CHART 4

UNIT MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	23.4%	23.4%	0.0
Total Brands	76.6%	76.6%	0.0

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – ALL OUTLETS COMBINED

CHART 5

PRIVATE LABEL MARKET SHARE TREND IN DOLLARS AND UNITS

	DOLLARS	UNITS
2018	19.0%	22.8%
2019	19.5%	23.4%
2020	19.5%	23.4%

CHART 6

DOLLAR VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	$714.4	Billion	$136.0	Billion
2019	$729.7	Billion	$142.3	Billion
2020	$816.0	Billion	$158.8	Billion

CHART 7

UNIT VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	210.2	Billion	47.9	Billion
2019	209.6	Billion	49.0	Billion
2020	224.6	Billion	52.5	Billion

Data for PLMA's 2021 Private Label Yearbook were compiled by Nielsen for the 52 weeks ending December 26, 2020. Numbers and percentages have been rounded off by Nielsen where necessary and totals may exceed 100% in some instances.

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – ALL OUTLETS COMBINED

CHART 8

TOP 20 PRIVATE LABEL CATEGORIES BY DOLLAR VOLUME

		PRIVATE LABEL DOLLAR VOLUME		CATEGORY DOLLAR VOLUME		PRIVATE LABEL DOLLAR SHARE
1	Household Paper & Plastics	$10.7	Billion	$28.7	Billion	37.4%
2	Dairy Cheese	$8.5	Billion	$19.5	Billion	43.5%
3	Milk Products	$7.5	Billion	$13.1	Billion	56.8%
4	Fresh Vegetables	$7.4	Billion	$21.5	Billion	34.5%
5	Beverages	$6.5	Billion	$57.9	Billion	11.3%
6	Fresh Meat	$5.5	Billion	$9.2	Billion	60.0%
7	Frozen Seafood	$4.2	Billion	$6.9	Billion	61.0%
8	Eggs	$3.8	Billion	$6.6	Billion	57.6%
9	Vitamins & Supplements	$2.7	Billion	$11.1	Billion	24.5%
10	Upper Respiratory	$2.5	Billion	$8.8	Billion	28.3%
11	Salty Snacks	$2.4	Billion	$27.1	Billion	8.9%
12	Processed Meat	$2.4	Billion	$15.3	Billion	15.8%
13	Frozen Prepared Foods	$2.3	Billion	$20.7	Billion	11.1%
14	Frozen Desserts	$2.3	Billion	$13.6	Billion	16.8%
15	Deli Prepared Foods	$2.2	Billion	$5.6	Billion	38.7%
16	Bakery Desserts	$2.0	Billion	$3.0	Billion	67.4%
17	Pet Food	$2.0	Billion	$18.0	Billion	11.1%
18	Prepared Foods (Grocery)	$2.0	Billion	$16.3	Billion	12.0%
19	Fresh Fruit	$1.9	Billion	$15.7	Billion	12.3%
20	Nuts & Seeds	$1.9	Billion	$4.7	Billion	40.4%

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – ALL OUTLETS COMBINED

CHART 9

TOP 20 PRIVATE LABEL CATEGORIES BY UNIT VOLUME

		PRIVATE LABEL UNIT VOLUME		CATEGORY UNIT VOLUME		PRIVATE LABEL UNIT SHARE
1	Beverages	3.6	Billion	22.7	Billion	16.0%
2	Milk Products	2.8	Billion	4.4	Billion	63.4%
3	Dairy Cheeses	2.8	Billion	5.7	Billion	49.4%
4	Fresh Vegetables	2.7	Billion	7.9	Billion	33.6%
5	Household Paper & Plastics	2.5	Billion	5.3	Billion	47.8%
6	Canned Vegetables	1.8	Billion	3.6	Billion	49.0%
7	Eggs	1.7	Billion	2.5	Billion	68.5%
8	Prepared Foods (Grocery)	1.3	Billion	9.9	Billion	13.1%
9	Salty Snacks	989.9	Million	9.1	Billion	10.9%
10	Frozen Vegetables	977.1	Million	1.9	Billion	52.7%
11	Pasta, Rice, Dry Beans & Grains	895.9	Million	2.5	Billion	35.4%
12	Bread	883.1	Million	3.6	Billion	24.8%
13	Fresh Meat	790.3	Million	1.4	Billion	56.5%
14	Frozen Prepared Foods	763.7	Million	5.9	Billion	12.9%
15	Sauces, Gravies & Marinades	738.1	Million	3.4	Billion	21.8%
16	Frozen Desserts	693.8	Million	3.4	Billion	20.6%
17	Canned Fruit	686.7	Million	1.6	Billion	42.3%
18	Rolls & Buns (Grocery)	681.4	Million	1.8	Billion	37.9%
19	Baking Staples	673.0	Million	2.1	Billion	32.1%
20	Cookies & Crackers	641.3	Million	4.6	Billion	13.9%

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – ALL OUTLETS COMBINED

CHART 10

BREAKDOWN BY DEPARTMENT: VOLUME AND MARKET SHARES IN DOLLARS AND UNITS

	DEPARTMENT DOLLAR VOLUME		DOLLAR SHARE		DEPARTMENT UNIT VOLUME		UNIT SHARE	
			TODAY	CHANGE			TODAY	CHANGE
Bakery	$6.6	Billion	70.4%	-0.4	1.9	Billion	74.9%	0.6
Dairy	$79.1	Billion	33.4%	0.0	27.5	Billion	36.6%	0.0
Deli	$15.8	Billion	36.2%	-1.4	3.4	Billion	39.4%	-0.2
Frozen	$64.9	Billion	24.2%	0.7	16.4	Billion	24.7%	0.6
Grocery	$272.1	Billion	14.3%	-0.3	105.7	Billion	18.9%	-0.1
Meat	$31.8	Billion	29.6%	-0.7	7.0	Billion	24.5%	-0.3
Produce	$38.5	Billion	24.7%	1.7	13.3	Billion	24.5%	1.6
Seafood	$877.7	Million	20.5%	1.0	137.4	Million	20.7%	-0.2
Alcohol	$43.9	Billion	0.7%	0.0	4.0	Billion	1.0%	0.0
Total Food	**$553.6**	**Billion**	**20.0%**	**-0.1**	**179.3**	**Billion**	**23.4%**	**0.0**
Baby Care	$16.2	Billion	14.2%	-0.6	2.4	Billion	19.4%	-0.9
General Merchandise	$46.4	Billion	15.9%	0.4	6.7	Billion	27.2%	0.6
Health and Beauty Care	$98.8	Billion	17.2%	-0.5	16.0	Billion	20.6%	-0.8
Household Care	$67.6	Billion	25.2%	-0.4	13.4	Billion	31.7%	-0.7
Pet Care	$23.4	Billion	15.4%	-0.2	5.4	Billion	14.3%	0.7
Tobacco & Alternatives	$10.1	Billion	6.3%	0.2	1.4	Billion	2.1%	0.1
Total Non-Food	**$262.5**	**Billion**	**18.3%**	**0.0**	**45.3**	**Billion**	**23.5%**	**-0.1**
All Departments	**$816.0**	**Billion**	**19.5%**	**0.0**	**224.6**	**Billion**	**23.4%**	**0.0**

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. MASS | CLUB | DOLLAR

CHART 1A

PRIVATE LABEL DOLLAR VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	$362.8	Billion	$332.3	Billion	9.2%
Total Private Label	$77.8	Billion	$69.7	Billion	11.7%
Total Brands	$284.9	Billion	$262.6	Billion	8.5%

CHART 2A

PRIVATE LABEL UNIT VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	93.4	Billion	88.4	Billion	5.7%
Total Private Label	23.9	Billion	22.1	Billion	8.2%
Total Brands	69.6	Billion	66.3	Billion	4.9%

CHART 3A

PRIVATE LABEL DOLLAR MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	21.5%	21.0%	0.5
Total Brands	78.5%	79.0%	-0.5

CHART 4A

PRIVATE LABEL UNIT MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	25.5%	25.0%	0.6
Total Brands	74.5%	75.0%	-0.6

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. MASS | CLUB | DOLLAR

CHART 5A

MARKET SHARE TREND IN DOLLARS AND UNITS

	DOLLARS	UNITS
2018	19.9%	23.5%
2019	21.0%	25.0%
2020	21.5%	25.5%

CHART 6A

DOLLAR VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	$322.1	Billion	$64.1	Billion
2019	$332.3	Billion	$69.7	Billion
2020	$362.8	Billion	$77.8	Billion

CHART 7A

UNIT VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	87.1	Billion	20.5	Billion
2019	88.4	Billion	22.1	Billion
2020	93.4	Billion	23.9	Billion

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. MASS | CLUB | DOLLAR

CHART 8A

BREAKDOWN BY DEPARTMENT: VOLUME AND MARKET SHARES IN DOLLARS AND UNITS

	DEPARTMENT DOLLAR VOLUME		DOLLAR SHARE TODAY	DOLLAR SHARE CHANGE	DEPARTMENT UNIT VOLUME		UNIT SHARE TODAY	UNIT SHARE CHANGE
Bakery	$2.5	Billion	89.6%	0.3	811.4	Million	91.6%	3.6
Dairy	$25.3	Billion	38.4%	1.5	8.8	Billion	41.7%	1.3
Deli	$4.2	Billion	50.4%	1.0	1.0	Billion	51.8%	2.1
Frozen	$24.4	Billion	29.5%	1.9	5.8	Billion	27.7%	2.1
Grocery	$109.3	Billion	15.1%	0.1	41.4	Billion	20.0%	0.4
Meat	$11.8	Billion	38.5%	-0.2	2.6	Billion	29.9%	-0.6
Produce	$11.8	Billion	22.8%	1.9	4.0	Billion	23.7%	2.5
Seafood	$209.3	Million	20.1%	2.0	37.3	Million	19.2%	-2.2
Alcohol	$10.2	Billion	1.8%	0.1	914.6	Million	2.6%	0.2
Total Food	**$199.8**	**Billion**	**22.7%**	**0.5**	**65.5**	**Billion**	**25.4%**	**0.7**
Baby Care	$11.1	Billion	16.8%	-0.6	1.4	Billion	24.0%	-1.0
General Merchandise	$38.2	Billion	16.3%	0.5	5.2	Billion	29.5%	1.2
Health and Beauty Care	$50.9	Billion	17.5%	-0.2	9.3	Billion	21.8%	-0.3
Household Care	$43.6	Billion	28.4%	0.1	8.3	Billion	33.5%	-0.2
Pet Care	$15.5	Billion	18.0%	-0.1	3.1	Billion	17.2%	1.3
Tobacco & Alternatives	$3.6	Billion	9.6%	0.3	604.5	Million	2.2%	0.0
Total Non-Food	**$163.0**	**Billion**	**20.0%**	**0.3**	**27.9**	**Billion**	**25.9%**	**0.4**
All Departments	**$362.8**	**Billion**	**21.5%**	**0.5**	**93.5**	**Billion**	**25.5%**	**0.6**

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. SUPERMARKETS

CHART 1B

PRIVATE LABEL DOLLAR VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	$403.6	Billion	$348.0	Billion	16.0%
Total Private Label	$73.1	Billion	$64.6	Billion	13.2%
Total Brands	$330.6	Billion	$283.5	Billion	16.6%

CHART 2B

PRIVATE LABEL UNIT VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	122.4	Billion	111.9	Billion	9.4%
Total Private Label	27.3	Billion	25.5	Billion	7.1%
Total Brands	95.1	Billion	86.4	Billion	10.1%

CHART 3B

PRIVATE LABEL DOLLAR MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	18.1%	18.6%	-0.4
Total Brands	81.9%	81.4%	0.4

CHART 4B

PRIVATE LABEL UNIT MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	22.3%	22.8%	-0.5
Total Brands	77.7%	77.2%	0.5

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. SUPERMARKETS

CHART 5B

MARKET SHARE TREND IN DOLLARS AND UNITS

	DOLLARS	UNITS
2018	18.6%	22.8%
2019	18.6%	22.8%
2020	18.1%	22.3%

CHART 6B

DOLLAR VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	$342.5	Billion	$63.8	Billion
2019	$348.0	Billion	$64.6	Billion
2020	$403.6	Billion	$73.1	Billion

CHART 7B

UNIT VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	113.4	Billion	25.8	Billion
2019	111.9	Billion	25.5	Billion
2020	122.4	Billion	27.3	Billion

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. SUPERMARKETS

CHART 8B

BREAKDOWN BY DEPARTMENT: VOLUME AND MARKET SHARES IN DOLLARS AND UNITS

	DEPARTMENT DOLLAR VOLUME		DOLLAR SHARE TODAY	DOLLAR SHARE CHANGE	DEPARTMENT UNIT VOLUME		UNIT SHARE TODAY	UNIT SHARE CHANGE
Bakery	$4.1	Billion	58.4%	-0.3	1.0	Billion	62.0%	-0.2
Dairy	$53.3	Billion	31.2%	-0.7	18.4	Billion	34.4%	-0.7
Deli	$11.5	Billion	31.1%	-2.3	2.4	Billion	34.2%	-1.2
Frozen	$39.8	Billion	21.3%	0.0	10.4	Billion	23.2%	-0.2
Grocery	$154.3	Billion	14.0%	-0.6	60.8	Billion	18.8%	-0.6
Meat	$20.0	Billion	24.4%	-0.8	4.4	Billion	21.4%	-0.1
Produce	$26.7	Billion	25.6%	1.6	9.3	Billion	24.8%	1.3
Seafood	$668.3	Million	20.7%	0.7	100.1	Million	21.3%	0.6
Alcohol	$31.0	Billion	0.3%	0.0	2.8	Billion	0.5%	0.0
Total Food	**$341.2**	**Billion**	**19.0%**	**-0.5**	**109.7**	**Billion**	**22.7%**	**0.5**
Baby Care	$4.1	Billion	7.5%	-0.2	830.6	Million	11.2%	-0.3
General Merchandise	$6.1	Billion	12.3%	-0.1	1.2	Billion	17.4%	-0.4
Health and Beauty Care	$19.3	Billion	12.4%	-0.9	3.4	Billion	15.8%	-1.4
Household Care	$21.2	Billion	19.6%	-1.1	4.5	Billion	29.2%	-1.9
Pet Care	$7.5	Billion	9.8%	-0.5	2.2	Billion	10.2%	0.0
Tobacco & Alternatives	$4.3	Billion	1.4%	0.0	561.8	Million	1.2%	0.1
Total Non-Food	**$62.4**	**Billion**	**13.5%**	**-0.4**	**12.8**	**Billion**	**18.7%**	**0.8**
All Departments	**$403.6**	**Billion**	**18.1%**	**-0.4**	**122.4**	**Billion**	**22.3%**	**0.5**

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. DRUG CHAINS

CHART 1C

DOLLAR VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	$49.6	Billion	$49.4	Billion	0.4%
Total Private Label	$7.9	Billion	$8.0	Billion	-1.6%
Total Brands	$41.7	Billion	$41.4	Billion	0.8%

CHART 2C

UNIT VOLUME TODAY VS YEAR AGO

	TODAY		YEAR AGO		% CHG
Total Channel	8.7	Billion	9.3	Billion	-6.1%
Total Private Label	1.4	Billion	1.5	Billion	-6.2%
Total Brands	7.4	Billion	7.8	Billion	-6.1%

CHART 3C

DOLLAR MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	15.9%	16.2%	-0.3
Total Brands	84.1%	83.8%	0.3

CHART 4C

UNIT MARKET SHARE TODAY VS YEAR AGO

	TODAY	YEAR AGO	CHG
Total Channel	100.0%	100.0%	—
Total Private Label	15.7%	15.7%	0.0
Total Brands	84.3%	84.3%	0.0

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. DRUG CHAINS

CHART 5C

PRIVATE LABEL MARKET SHARE TREND IN DOLLARS AND UNITS

	DOLLARS	UNITS
2018	16.3%	15.9%
2019	16.2%	15.7%
2020	15.9%	15.7%

CHART 6C

DOLLAR VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	$49.8	Billion	$8.1	Billion
2019	$49.4	Billion	$8.0	Billion
2020	$49.6	Billion	$7.9	Billion

CHART 7C

UNIT VOLUME SALES TREND

	TOTAL CHANNEL		PRIVATE LABEL	
2018	9.7	Billion	1.5	Billion
2019	9.3	Billion	1.5	Billion
2020	8.7	Billion	1.4	Billion

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. DRUG CHAINS

CHART 8C

BREAKDOWN BY DEPARTMENT: VOLUME AND MARKET SHARES IN DOLLARS AND UNITS

	DEPARTMENT DOLLAR VOLUME		DOLLAR SHARE TODAY	DOLLAR SHARE CHANGE	DEPARTMENT UNIT VOLUME		UNIT SHARE TODAY	UNIT SHARE CHANGE
Bakery	$4.4	Million	38.8%	5.3	1.7	Million	32.6%	8.2
Dairy	$531.5	Million	11.6%	1.5	179.9	Million	15.7%	0.8
Deli	$34.8	Million	14.4%	4.0	466.3	Thousand	81.0%	3.3
Frozen	$644.7	Million	9.7%	-0.2	157.3	Million	12.0%	-0.3
Grocery	$8.5	Billion	8.5%	-0.2	3.4	Billion	8.5%	-0.1
Meat	$55.3	Million	9.4%	1.2	14.0	Million	9.5%	1.6
Produce	$27.9	Million	32.7%	11.8	10.4	Million	31.7%	11.2
Seafood	$133.3	Thousand	21.2%	21.2	39.4	Thousand	28.9%	28.9
Alcohol	$2.8	Billion	0.8%	-0.1	268.9	Million	1.0%	0.0
Total Food	**$12.5**	**Billion**	**7.1%**	**-0.2**	**4.1**	**Billion**	**8.5%**	**0.0**
Baby Care	$1.1	Billion	11.9%	-1.8	129.1	Million	20.8%	-1.4
General Merchandise	$2.1	Billion	19.1%	-1.0	302.3	Million	26.1%	-2.1
Health and Beauty Care	$28.5	Billion	19.9%	-0.8	3.2	Billion	22.4%	-1.1
Household Care	$2.8	Billion	17.1%	0.5	630.9	Million	25.3%	1.2
Pet Care	$385.4	Million	21.3%	0.7	78.6	Million	15.0%	1.5
Tobacco & Alternatives	$2.2	Billion	10.6%	1.3	238.2	Million	4.1%	0.5
Total Non-Food	**$37.1**	**Billion**	**18.9%**	**-0.5**	**4.6**	**Billion**	**22.0%**	**-0.5**
All Departments	**$49.6**	**Billion**	**15.9%**	**-0.3**	**8.7**	**Billion**	**15.7%**	**0.0**

Source: NielsenIQ/PLMA

CHART 1D

PRIVATE LABEL MARKET SHARE — ALL OUTLETS COMBINED

	DOLLAR SHARE			UNIT SHARE		
	TODAY	YR AGO	CHG	TODAY	YR AGO	CHG
New England	18.3%	18.4%	-0.1	21.8%	21.8%	0.1
East North Central	19.9%	19.9%	0.0	24.4%	24.4%	0.0
East South Central	21.7%	21.7%	0.0	25.6%	25.7%	-0.1
West North Central	20.2%	20.2%	0.1	24.8%	24.6%	0.3
West South Central	19.6%	19.5%	0.1	23.9%	23.6%	0.3
Middle Atlantic	18.1%	17.9%	0.2	21.6%	21.3%	0.3
South Atlantic	19.7%	19.9%	-0.2	23.5%	23.9%	-0.4
Mountain	21.5%	21.6%	-0.1	25.3%	25.4%	-0.1
Pacific	17.3%	17.4%	-0.1	20.4%	20.3%	0.1

Nielsen IQ All Outlets Combined consists of total U.S. Supermarkets, Drug Chain, Mass Merchandisers Channel including Walmart, Club Channel, Dollar Stores and Military Exchanges.

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. REGIONAL DIVISION PROFILES

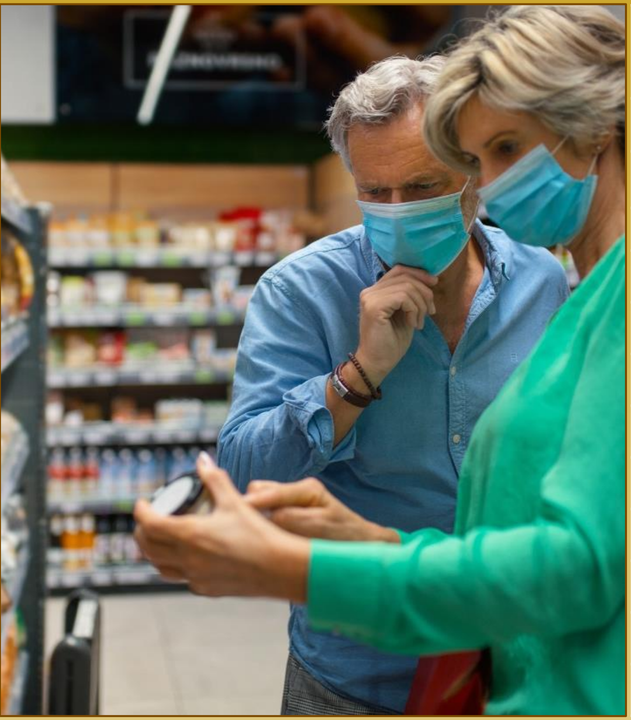


CHART 2D

PRIVATE LABEL MARKET SHARE — MASS | CLUB | DOLLAR

	DOLLAR SHARE			UNIT SHARE		
	TODAY	YR AGO	CHG	TODAY	YR AGO	CHG
New England	19.3%	19.1%	0.2	23.7%	23.2%	0.4
East North Central	21.8%	21.3%	0.5	26.1%	25.6%	0.6
East South Central	22.6%	22.0%	0.6	26.3%	25.7%	0.6
West North Central	22.5%	22.0%	0.5	26.9%	26.1%	0.8
West South Central	22.0%	21.6%	0.4	25.5%	25.0%	0.5
Middle Atlantic	20.2%	19.8%	0.5	24.8%	24.3%	0.5
South Atlantic	21.8%	21.3%	0.5	25.9%	25.5%	0.4
Mountain	22.3%	21.9%	0.5	26.3%	25.7%	0.6
Pacific	18.3%	17.8%	0.5	22.1%	21.2%	0.9

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

A Statistical Guide to Today's Store Brands

TOPLINE REPORTS – TOTAL U.S. REGIONAL DIVISION PROFILES

CHART 3D

PRIVATE LABEL MARKET SHARE — SUPERMARKETS

	DOLLAR SHARE			UNIT SHARE		
	TODAY	YR AGO	CHG	TODAY	YR AGO	CHG
New England	18.0%	18.2%	-0.2	21.6%	21.7%	-0.1
East North Central	18.8%	19.2%	-0.4	23.9%	24.3%	-0.5
East South Central	20.8%	21.6%	-0.8	25.5%	26.5%	-1.1
West North Central	17.5%	17.9%	-0.4	23.0%	23.3%	-0.4
West South Central	16.7%	16.8%	-0.2	22.5%	22.5%	0.0
Middle Atlantic	17.3%	17.2%	0.0	20.6%	20.5%	0.2
South Atlantic	18.1%	18.9%	-0.8	21.9%	23.0%	-1.1
Mountain	21.2%	21.9%	-0.7	25.0%	25.6%	-0.7
Pacific	17.1%	17.5%	-0.4	20.0%	20.3%	-0.3

Source: NielsenIQ/PLMA

CHART 4D

PRIVATE LABEL MARKET SHARE — DRUG CHAINS

	DOLLAR SHARE			UNIT SHARE		
	TODAY	YR AGO	CHG	TODAY	YR AGO	CHG
New England	17.0%	17.5%	-0.5	16.2%	16.5%	-0.3
East North Central	16.5%	16.7%	-0.2	15.6%	15.3%	0.3
East South Central	18.3%	18.6%	-0.3	16.6%	16.5%	0.2
West North Central	17.0%	17.3%	-0.2	19.4%	18.7%	0.8
West South Central	14.8%	15.2%	-0.5	14.1%	14.3%	-0.2
Middle Atlantic	14.6%	14.8%	-0.2	14.9%	14.9%	0.0
South Atlantic	16.5%	16.9%	-0.4	15.8%	16.0%	-0.3
Mountain	16.1%	16.4%	-0.4	15.4%	15.5%	-0.1
Pacific	14.6%	15.2%	-0.6	15.2%	15.4%	-0.3

Source: NielsenIQ/PLMA

PLMA's 2021 Private Label Yearbook

Editor	Dane Twining
Executive Summary	Joe Azzinaro
Production Director	Alisa R. Svider
Production Design	Amy Chow
Research Director	Tom Prendergast

Published by :

Private Label Manufacturers Association
630 Third Avenue, New York, NY 10017
Telephone: (212) 972-3131   Fax: (212) 983-1382   www.plma.com