

Inflation trends in ecommerce

US
March 2024 vs March 2023

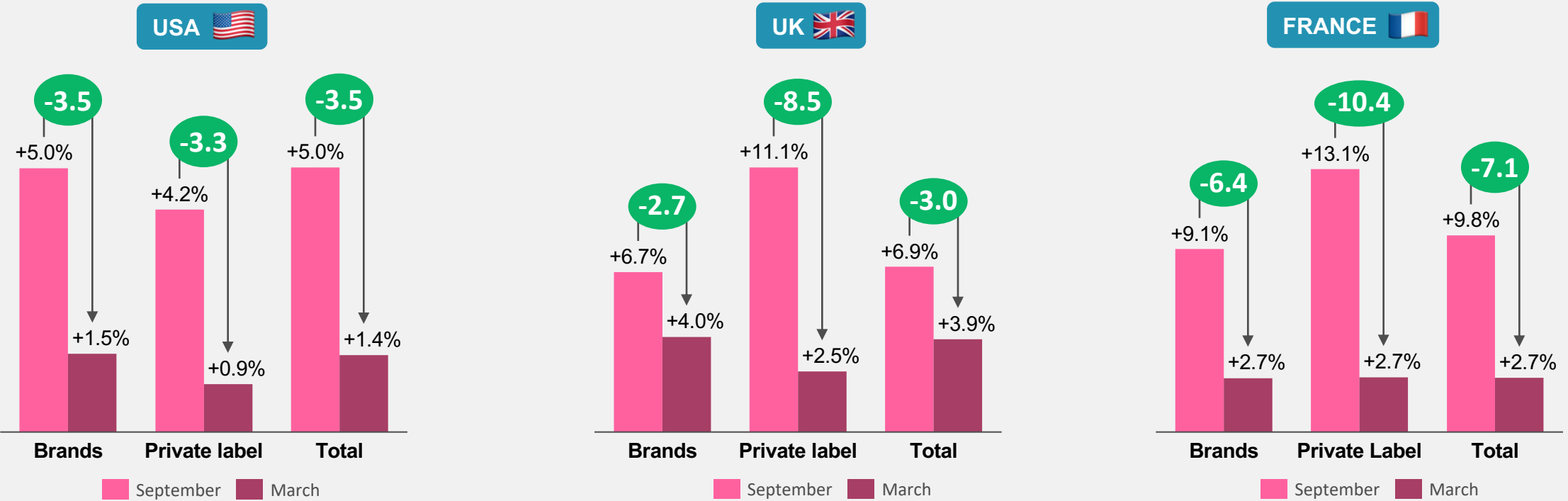


INFLATION 

March 2024 vs March 2023
Sept 2023 vs Sept 2022 

Inflation slowed, especially on private label.

The gap between brands and private label inflation has reduced.



INFLATION 

USA 

Pricing benchmark

Price inflation

Analysis objectives

- Analyze variations of average prices between March 2024 and March 2023

Methodology

- **Retailers included:** Walmart, Kroger, Amazon, Target – Pick up, Albertsons
- **Products included:** A selection of 29 categories
Standard SKU with ND > 10% in March 2024 and March 2023
Products can differ by retailer
- **Calculation:** The more products in a retailer or category, the more weight they are given in the total

Total = arithmetical average of base prices by product

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Pricing benchmark

Number of analyzed products

Category	Walmart	Kroger	Amazon US	Target pickup	Albertsons US	Total retailer
Pasta	671	655	78	147	418	1969
Pasta sauce	293	242	21	91	209	856
Crackers	271	347	92	113	256	1079
Cheese	202	807	7	298	922	2236
Beer & Cider	471	740	56	169	946	2382
Chips and other salty snacks	58	191	37	16	123	425
Cereals	38	64	31	2	59	194
Yogurt	470	396	16	219	347	1448
Chocolate	681	748	328	422	520	2699
Candy	368	264	292	158	202	1284
Cookie	496	585	213	240	429	1963
Carbonated Soft Drinks	267	551	34	130	462	1444
Water	205	359	87	176	406	1233
Diapers	335	147	92	234	147	955
Hair Care	243	116	182	214	102	857
Skin Care	1154	697	3212	1742	709	7514
Skin Cleansing	841	558	1111	756	495	3761
Deodorants	242	161	227	195	160	985
Oral Care	268	261	246	225	246	1246
Household Cleaning	406	206	35	291	263	1201
Fabric Cleaning	13	8		15	20	56
Dishwash	137	87	43	138	73	478
Spirits	180	176	1	165	258	780
4 Spices	1197	957	1613	218	1185	5170
Gift sets	18	2	135	21	3	179
Infant Toddler Nutrition	150	106	38	108	104	506

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Pricing benchmark

Number of analyzed products

Category	Walmart	Kroger	Amazon US	Target pickup	Albertsons US	Total retailer
Sport Nutrition	318	376	201	250	303	1448
Diabetes Nutrition	34	9	2	1	8	54
Frozen meat free	1	24		1	21	47
Frozen Breakfast	17	59			25	101
Sauces	675	650	256	248	842	2671
Rice	122	127	76	50	134	509
Nutrition Bars	117	186	104	105	126	638
Syrup	153	189	182	82	180	786
Ready to drink Coffees & Teas	156	205	71	123	254	809
Dips	243	353	26	109	293	1024
Dairy Beverage	180	215	34	120	188	737
Juice	433	531	111	201	536	1812
Non-alcoholic beverages	39	68	44	13	103	267
Toilet Paper	77	40	8	27	61	213
Wipes	50	55	36	71	49	261
Feminine Care & Incontinence	343	286	103	271	268	1271
Facial Tissue	44	20	5	40	25	134
Ice Cream	568	612	6	349	602	2137
Grand Total	13245	13436	9492	8564	13082	57819

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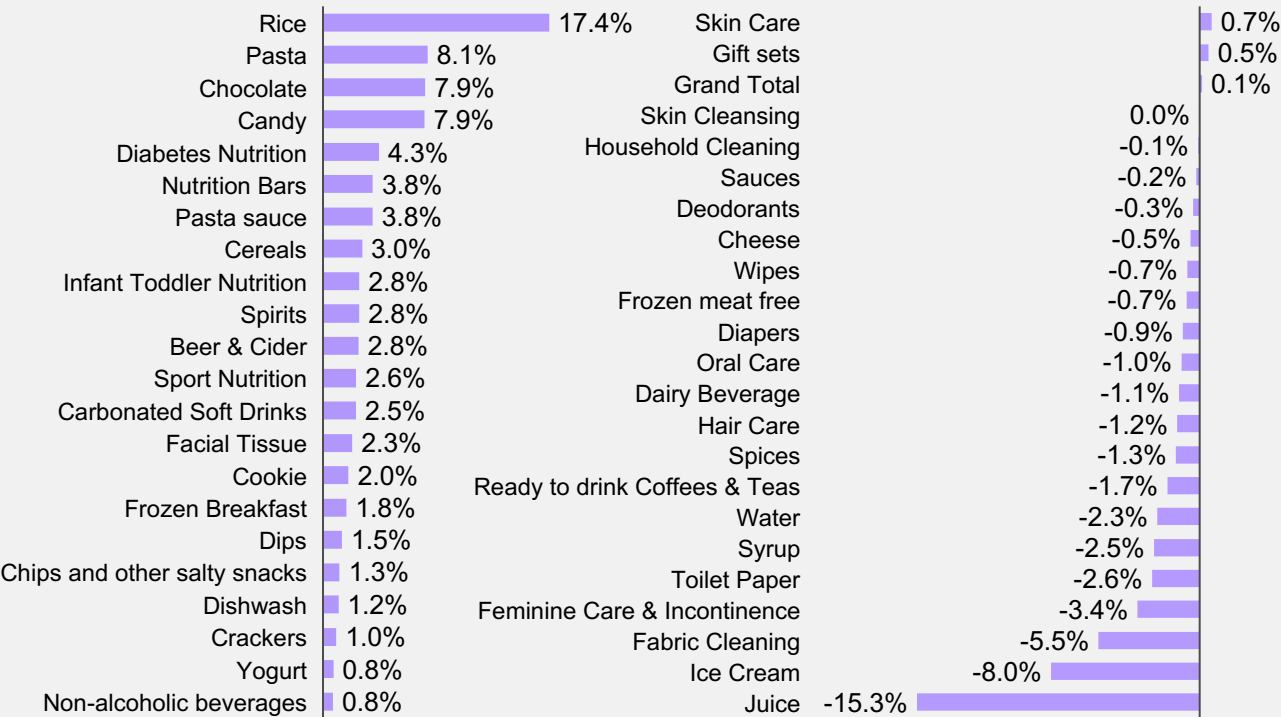
USA 

Executive summary

The Juice category experienced the largest deflation at -15.3%

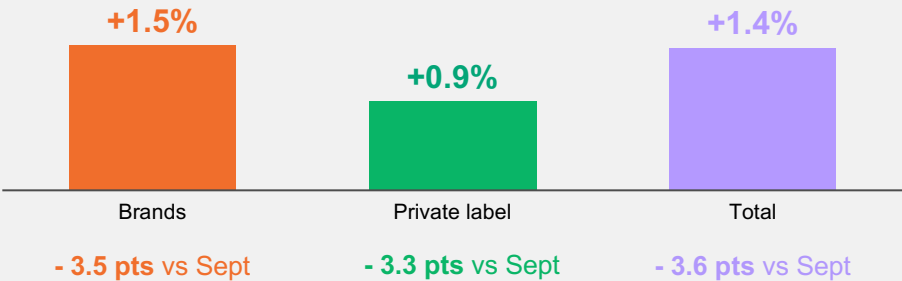
Total categories March 2024 vs March 2023

US price inflation by retailer



Summary

- Inflation slows: +1.5% inflation in March 2024 compared to 2023 (vs +5.0% in Sept), especially on private label +0.9pts (vs +4.2 pts in Sept).
- The starches universe is experiencing the highest inflation rates, led by the following categories: Rice (+17.4%) and Pasta (+8.1%).
- Private label still have less inflation than brands.
- Albertson and Kroger are experiencing private label deflation compared to March 2023.



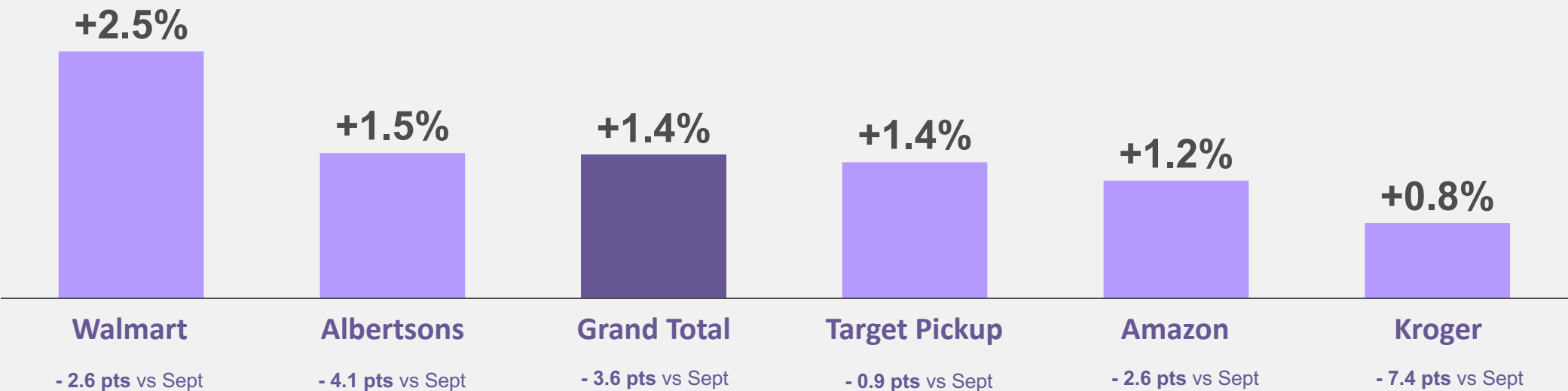
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Inflation in the US.

Kroger and Albertsons underwent the most deflation.

Total categories March 2024 vs March 2023
US price inflation by retailer



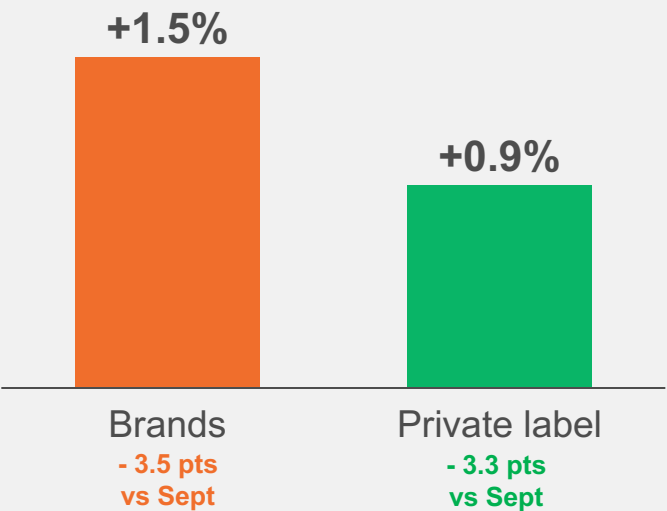
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USA 

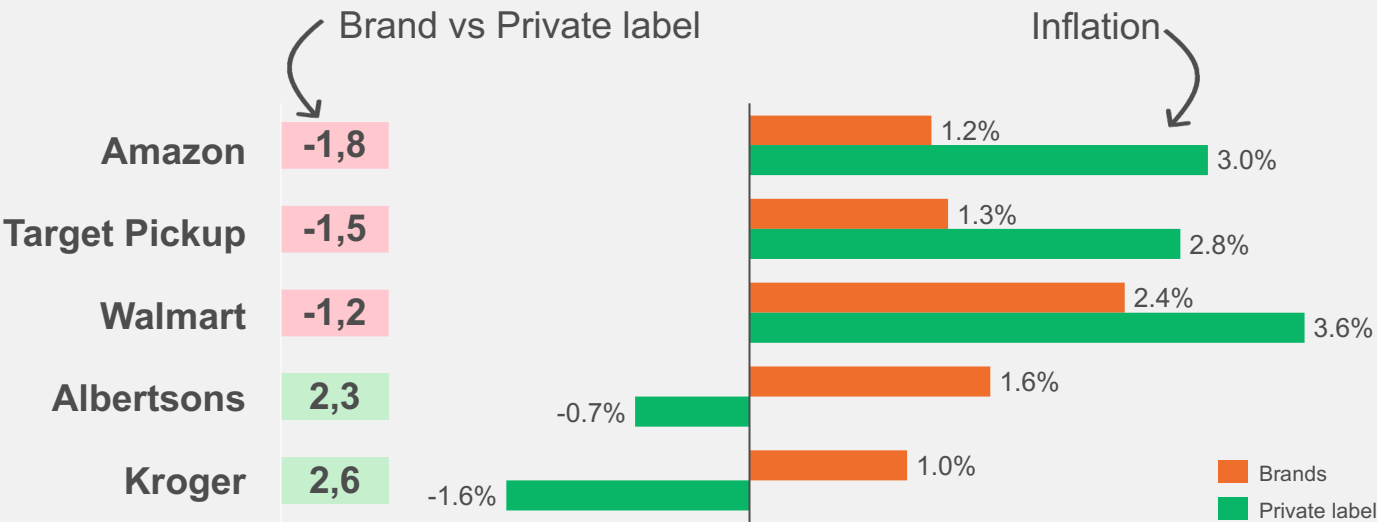
The trend among brands and private labels is shifting!

The gap between brands and private label is now -0.6pt

Total categories March 2024 vs March 2023
US inflation by type of brand



Total categories March 2024 vs March 2023
US inflation by type of brand

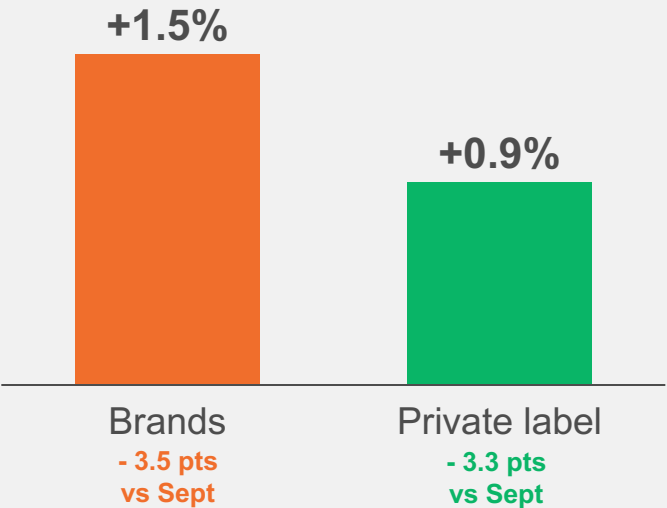


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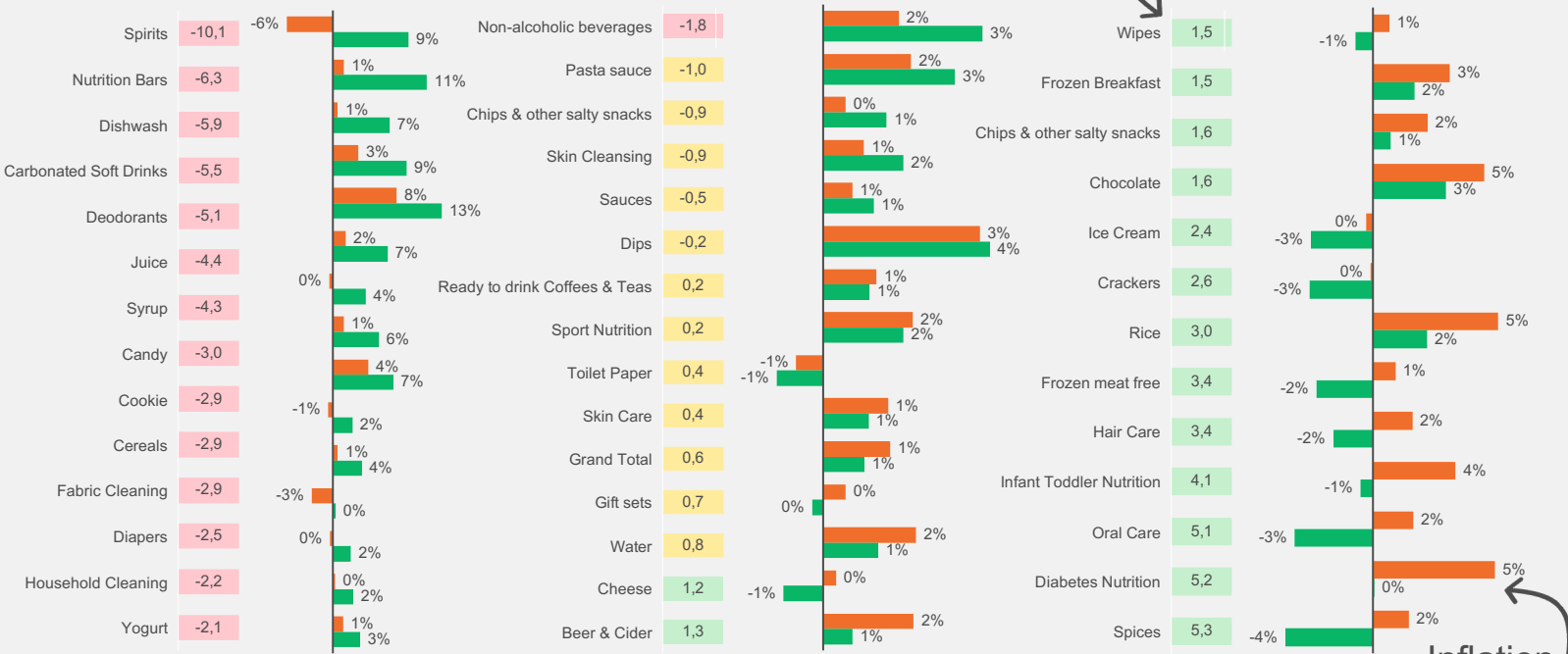
USA 

Some categories still see large variance in branded & private label

Total categories March 2024 vs March 2023
US inflation by type of brand



Total categories March March 2024 vs March 2023
US inflation by type of brand



Data Impact by NielsenIQ – Walmart, Kroger, Amazon, Target – Pick up, Albertsons –Constant product scope

Appendix

Inflation by retailer

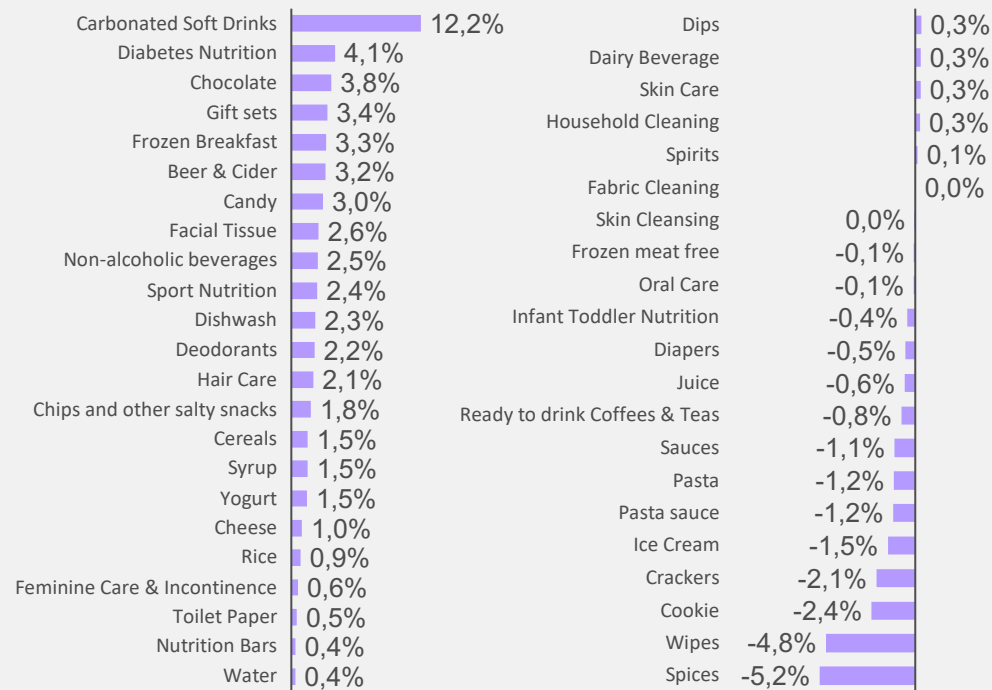
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Carbonated Soft Drinks and Rice saw the highest inflation.

Kroger

March 2024 vs March 2023

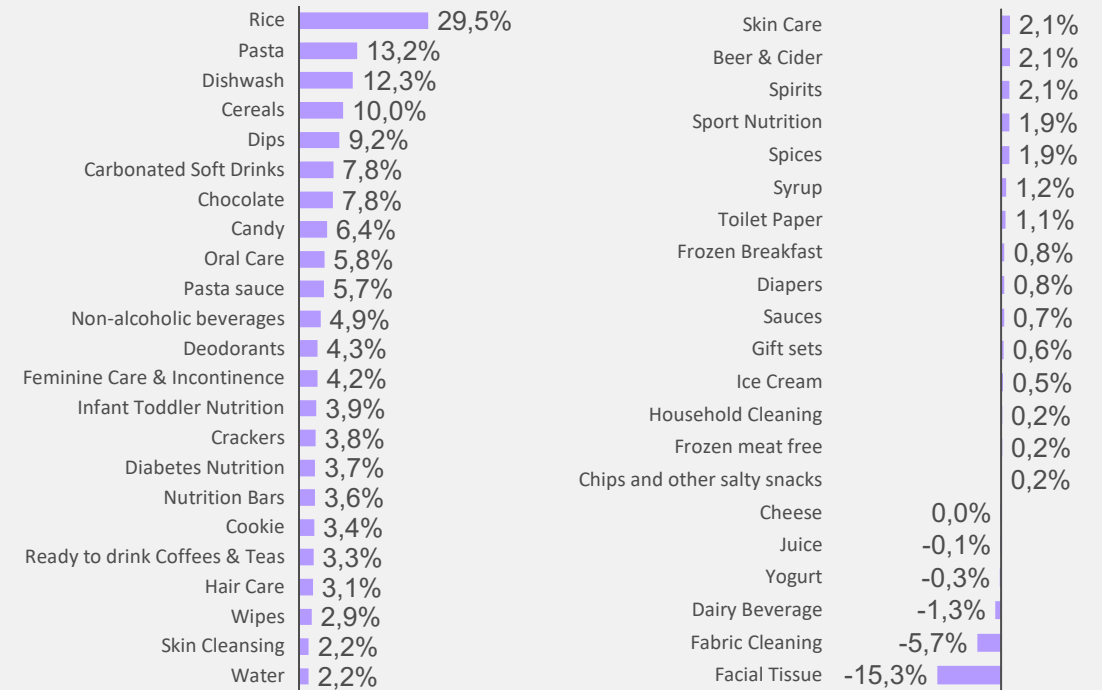
US price inflation by category, Kroger



Walmart

March 2024 vs March 2023

US price inflation by category, Walmart



Data Impact by NielsenIQ – Walmart, Kroger, Amazon, Target – Pick up, Albertsons –Constant product scope

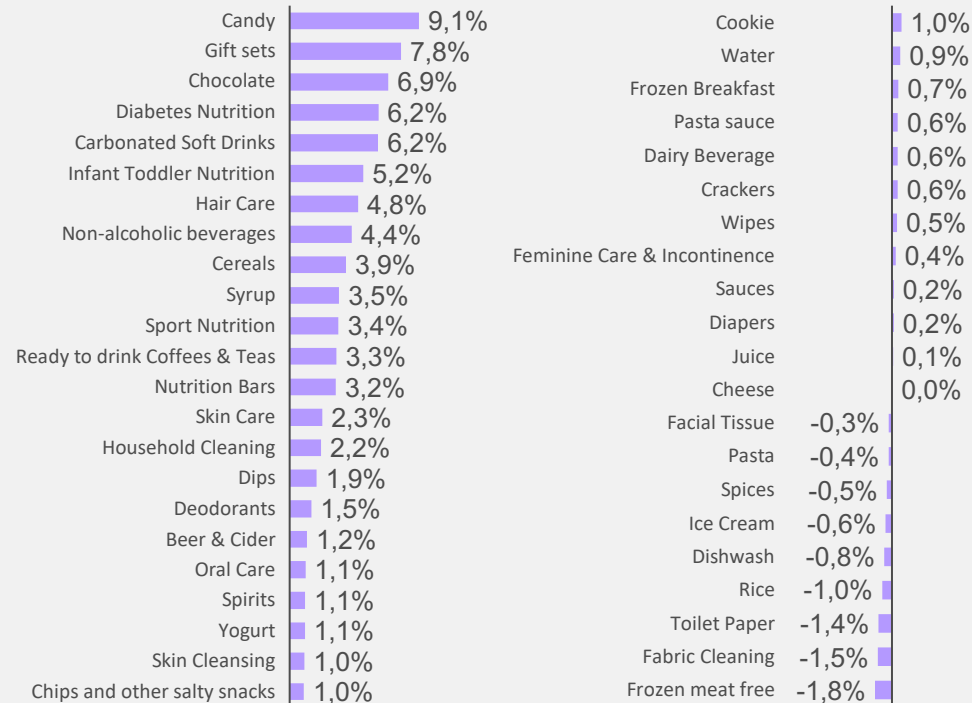
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Chocolate and candy saw the highest inflation.

Albertsons

March 2024 vs March 2023

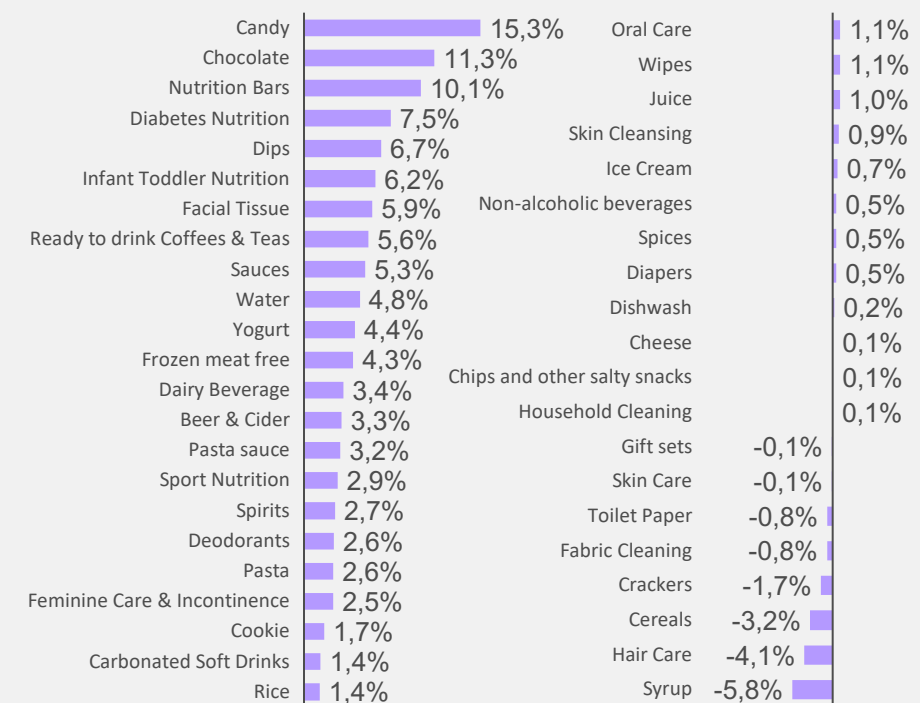
US price inflation by category, Albertsons



Target Pickup

March 2024 vs March 2023

US price inflation by category, Target Pickup



Data Impact by NielsenIQ – Walmart, Kroger, Amazon, Target – Pick up, Albertsons –Constant product scope

INFLATION 

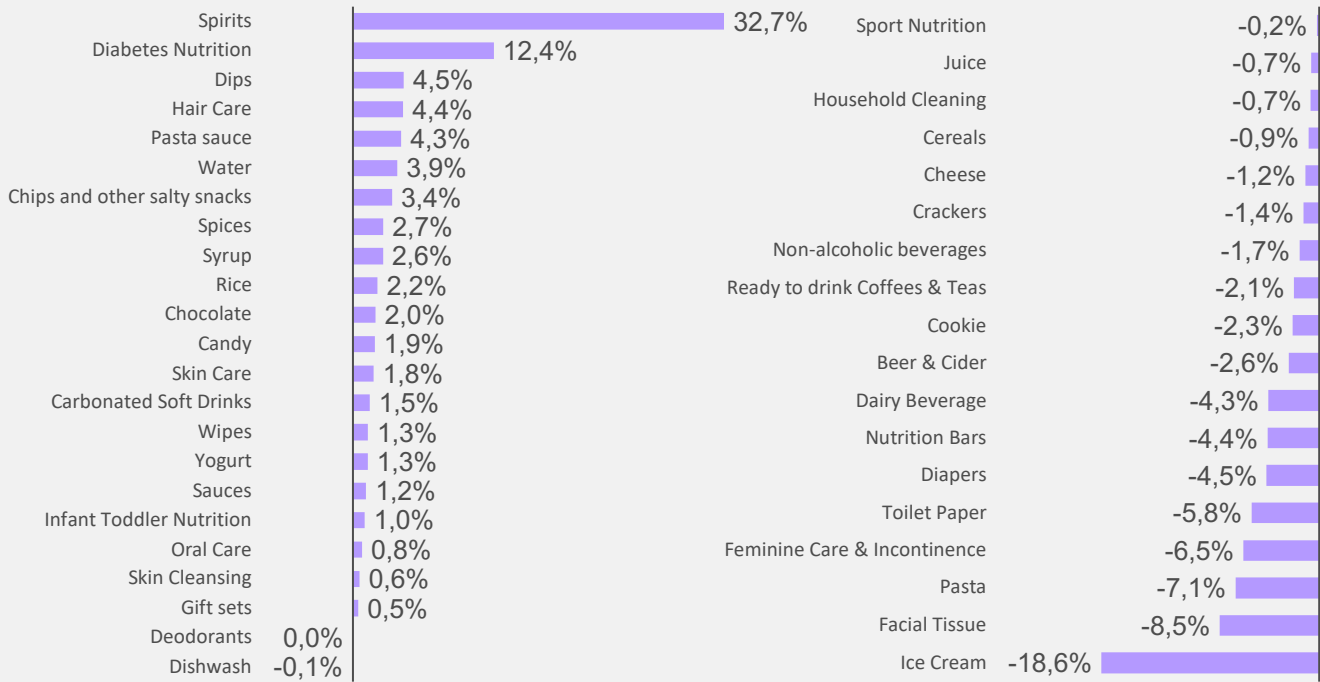
USA 

Spirits and Diabetes Nutrition saw the highest inflation.

Amazon

March 2024 vs March 2023

US price inflation by category, Amazon



Data Impact by NielsenIQ – Walmart, Kroger, Amazon, Target – Pick up, Albertsons –Constant product scope

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