

Inflation trends in ecommerce

US
September 2023 vs September 2022

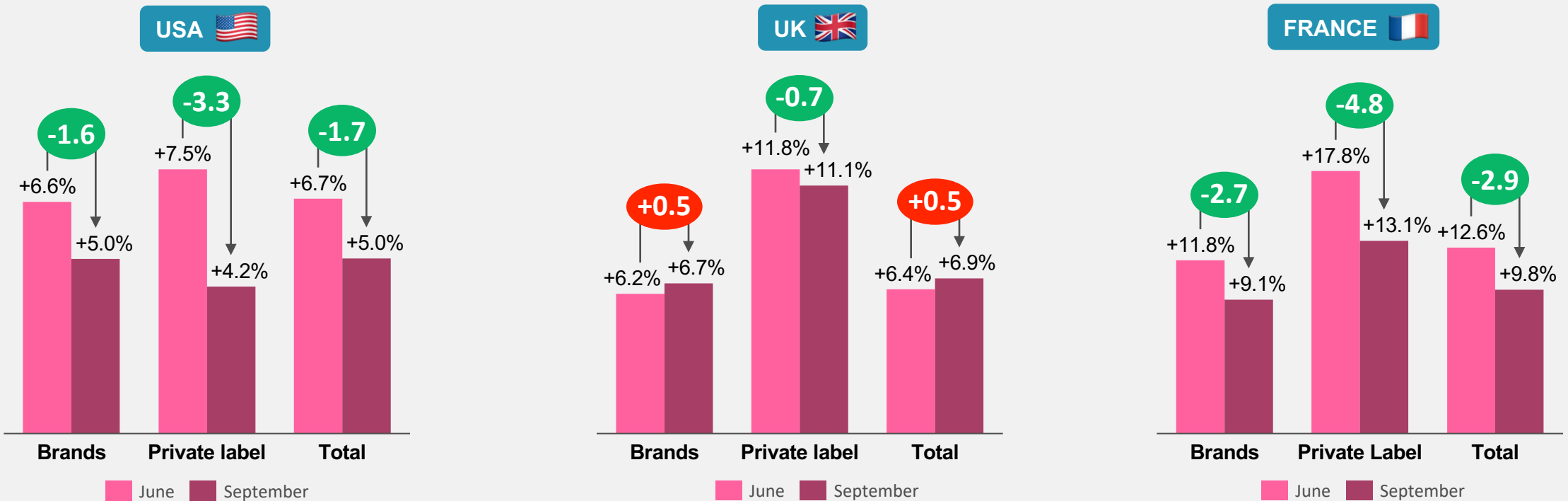


INFLATION

Sept 2023 vs Sept 2022
June 2023 vs June 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 September 2023 and September 2022

Methodology

- **Retailers included:** Walmart, Kroger, Amazon, Target – Pick up, Albertsons
- **Products included:** A selection of 29 categories
Standard SKU with ND > 10% in September 2023 and September 2022
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
Infant Toddler Nutrition	131	88	31	70	53	373
Pasta	601	664	233	291	758	2547
Pasta sauce	196	195	38	107	248	784
Crackers	250	312	137	134	301	1134
Cheese	264	748	7	303	1024	2346
Beer & Cider	286	387	3	124	562	1362
Chips and other salty snacks	712	950	627	535	958	3782
Cereals	283	390	214	196	343	1426
Yogurt	429	324	7	227	364	1351
Chocolate	458	435	128	285	374	1680
Candy	296	188	207	103	168	962
Cookie	376	474	162	184	321	1517
Gum	96	76	111	59	64	406
Carbonated Soft Drinks	261	456	13	105	404	1239
Water	106	150	56	92	212	616
Diapers	313	145	148	243	176	1025
Hair Care	1134	841	10	1108	808	3901
Skin Care	1160	654	91	1277	662	3844
Skin Cleansing	593	543	112	597	445	2290
Deodorants	343	224	0	243	237	1047
Oral Care	215	236	167	182	238	1038
Household Cleaning	190	140	4	165	138	637
Fabric Cleaning	204	93	20	158	129	604
Fabric Enhancers	135	85	18	78	81	397
Dishwash	95	81	6	103	79	364
Spirits	185	107	2	171	217	682
Spices	602	494	1220	90	663	3069
Shaving	113	87	0	103	93	396
Total category	10027	9567	3772	7333	10120	40819

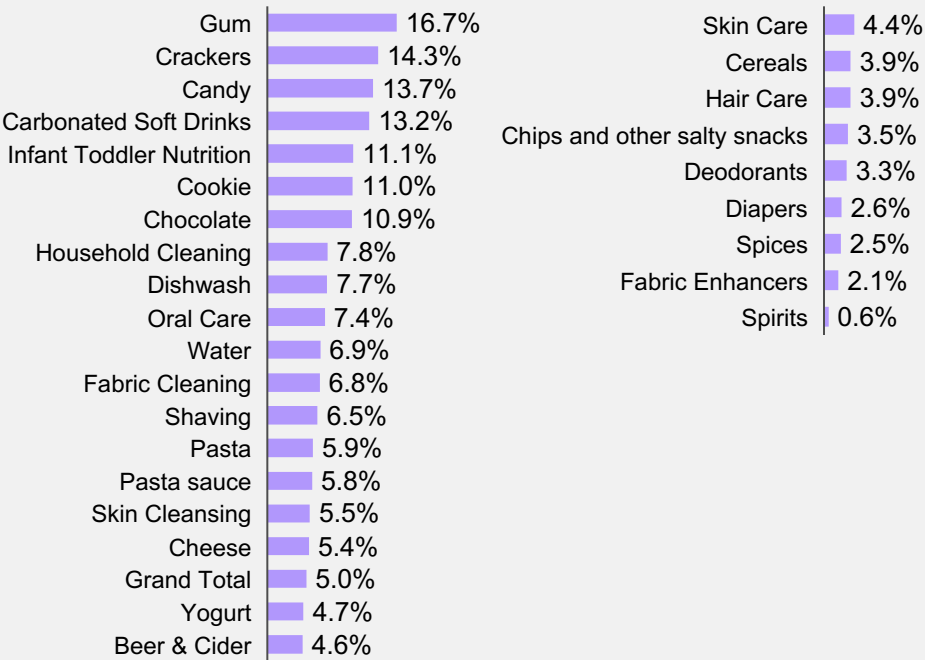
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Executive summary

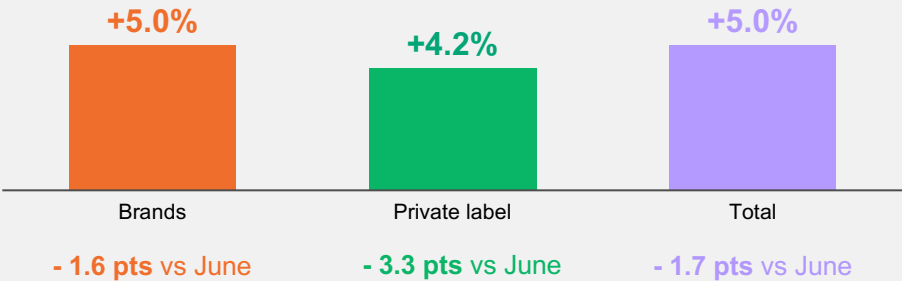
Total categories September 2023 vs September 2022

US price inflation by retailer



Summary

- Inflation slows: +5.0% inflation in September 2023 compared to 2022 (vs +6.7 in June), especially on private label +4.2pts (vs+7.5 pts in June).
- The sugar universe has the highest inflation rates, lead by these categories: Gum (+16.7%); Candy (13.7%); Cookies (11%).
- The trend is reversing, with private label now having less inflation than brands.
- Apart from Walmart, this tendency occurred across retailers.



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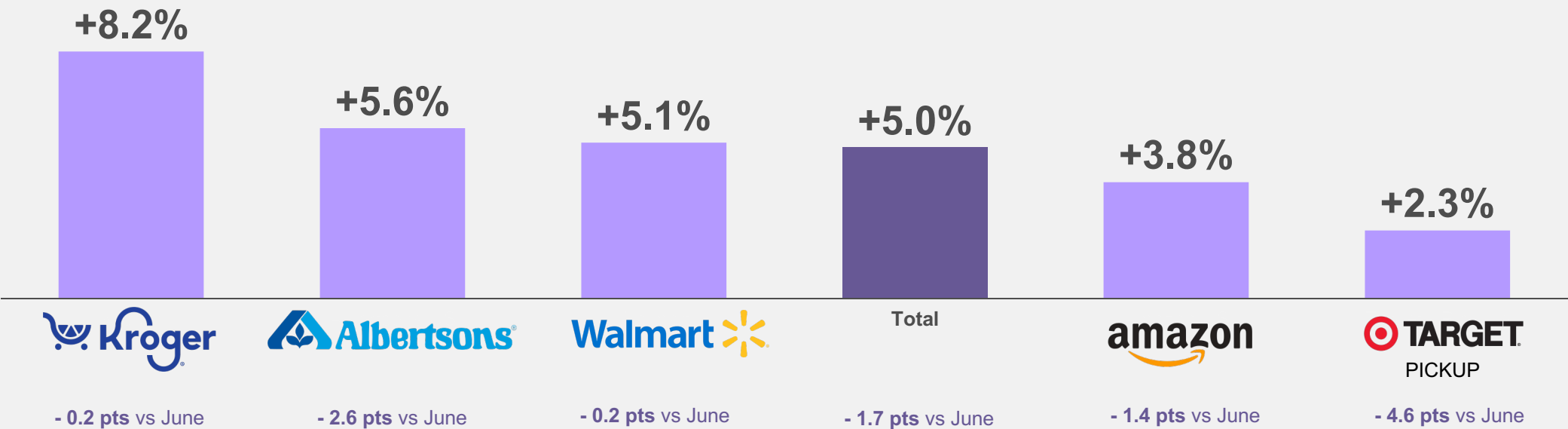
USA 

Inflation in the US.

Kroger and Albertsons remain the retailers with the highest inflation

Total categories September 2023 vs September 2022

US price inflation by retailer



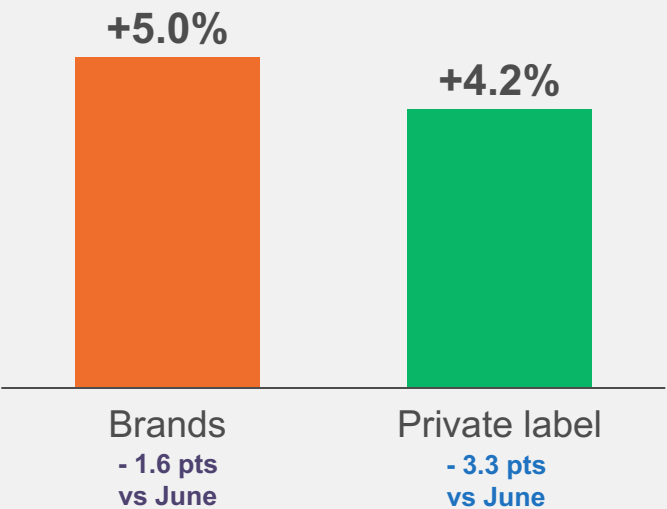
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USA 

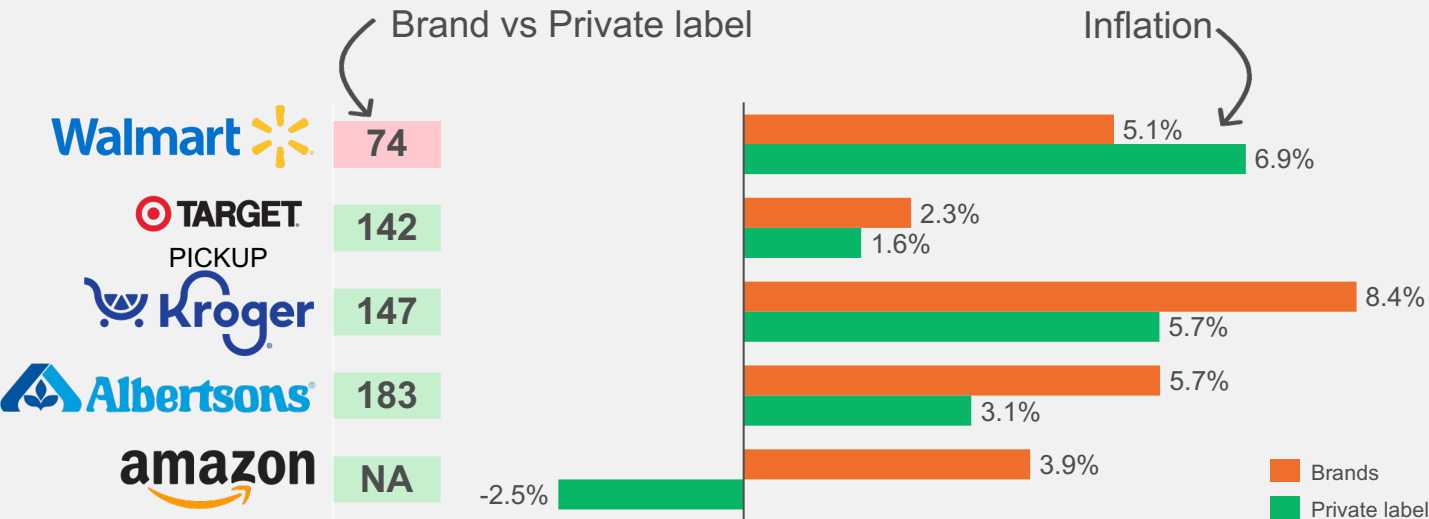
The trend among brands and private labels is turning!

The gap between brands and private label is now -0.8pt

Total categories Sept 2023 vs Sept 2022
US inflation by type of brand



Total categories Sept 2023 vs Sept 2022
US inflation by type of brand

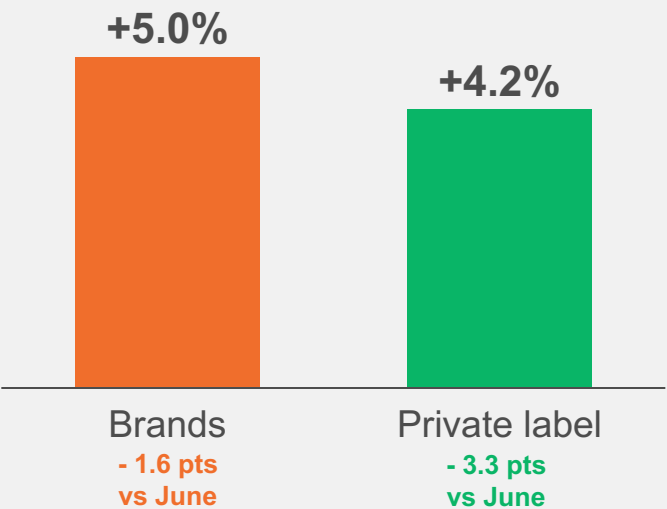


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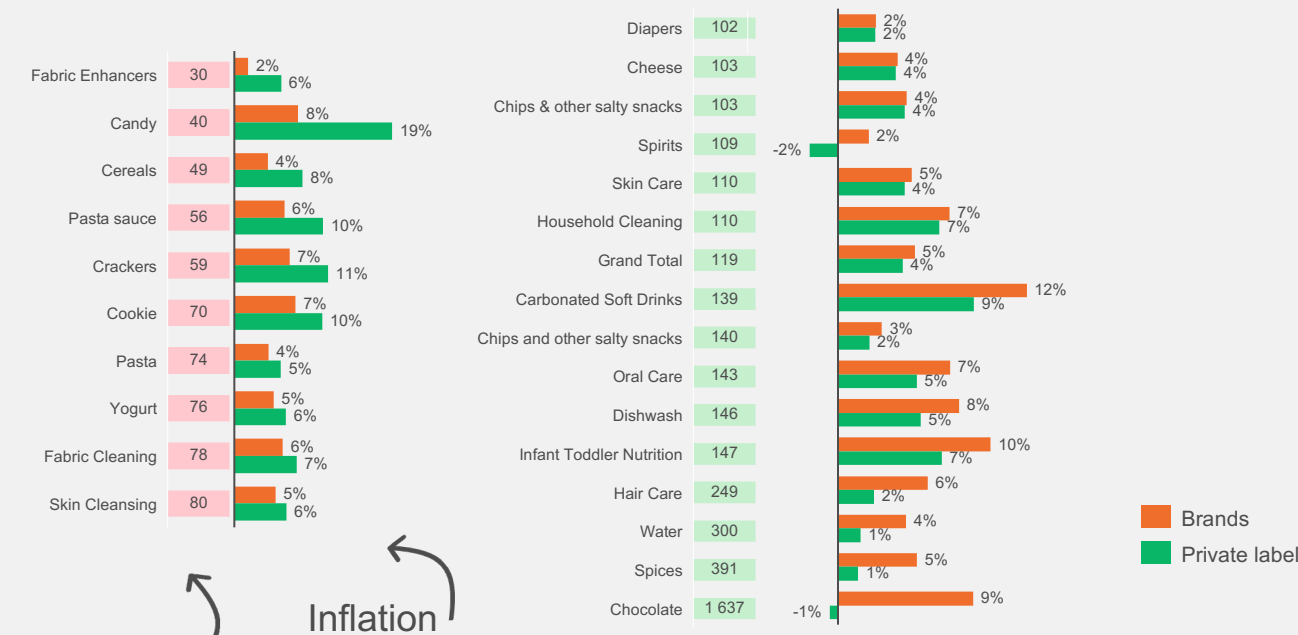
USA 

Some categories still see large variance in branded & private label.

Total categories Sept 2023 vs Sept 2022
US inflation by type of brand



Total categories March Sept 2023 vs Sept 2022
US inflation by type of brand



Brand vs Private label

Inflation

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

Appendix

Inflation by retailer

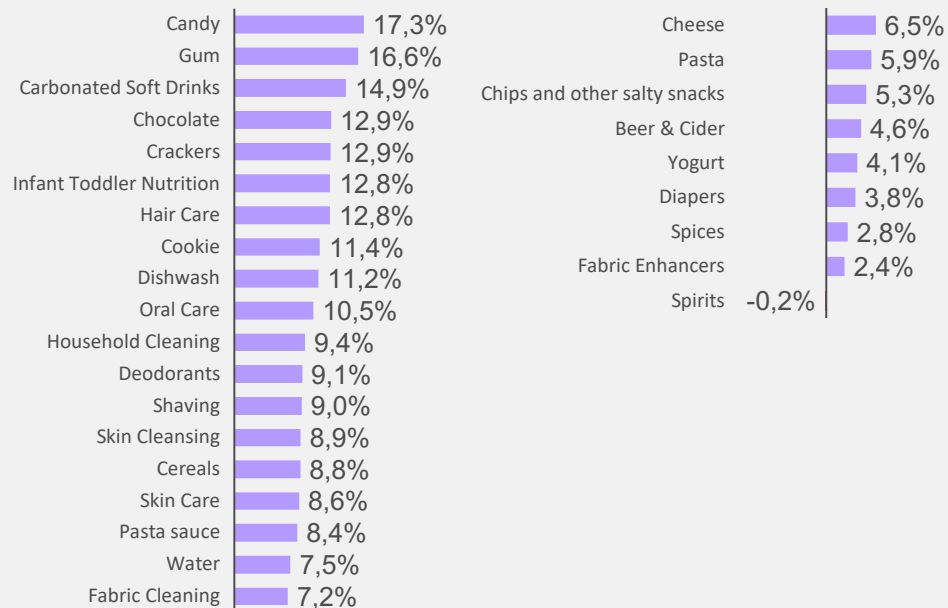
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Gum and candy saw the highest inflation.



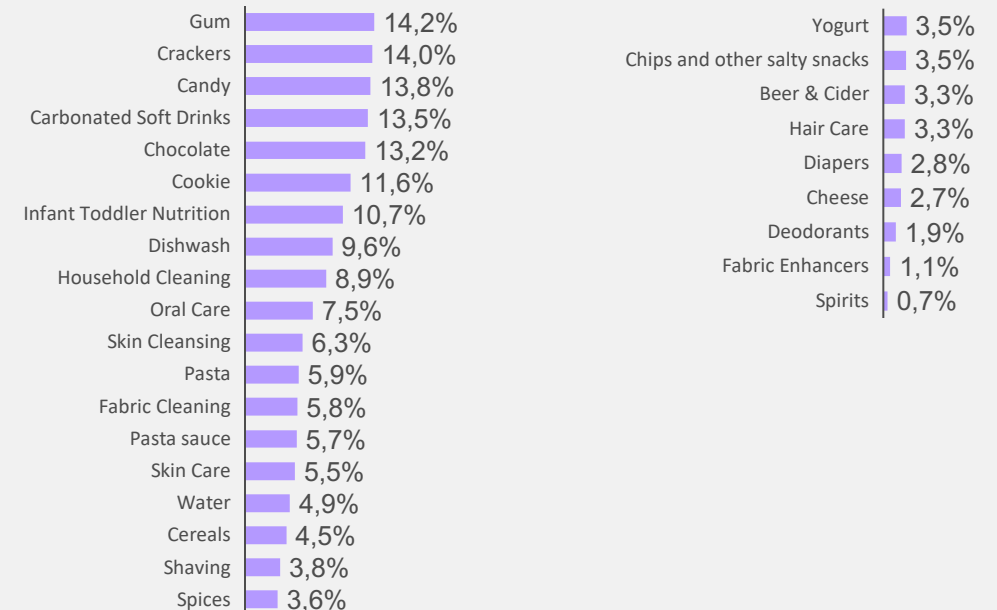
September 2023 vs September 2022

US price inflation by category, Kroger



September 2023 vs September 2022

US price inflation by category, Walmart



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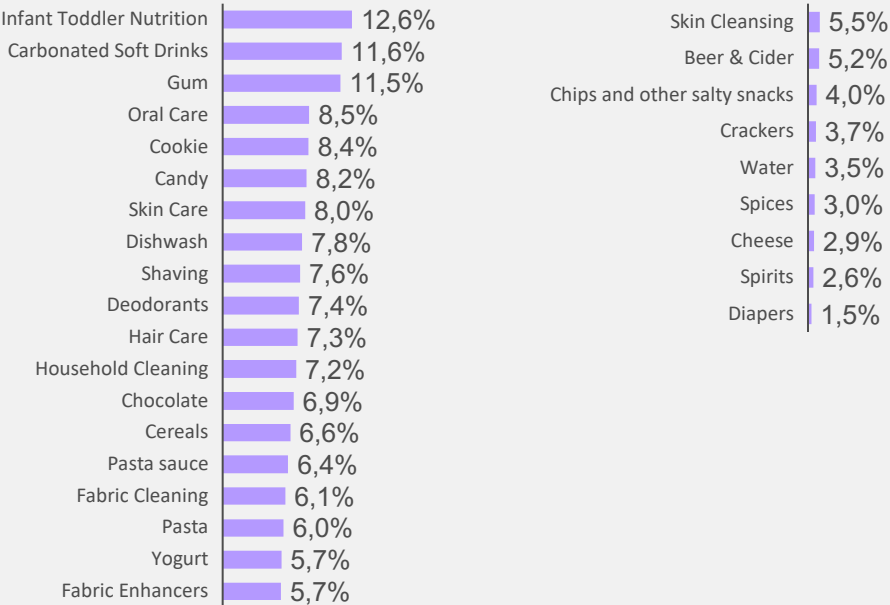
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Carbonated soft drinks and candy saw the highest inflation.



September 2023 vs September 2022

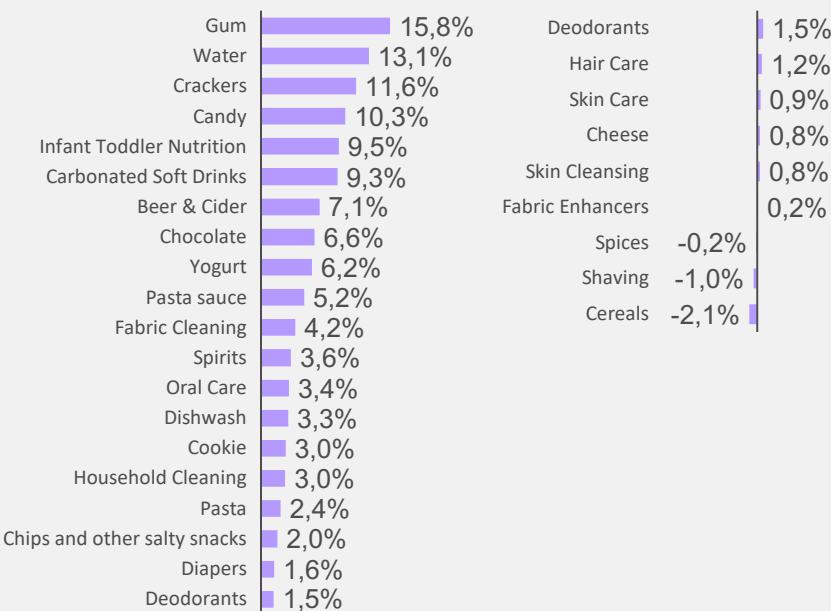
US price inflation by category, Albertsons



PICKUP

September 2023 vs September 2022

US price inflation by category, Target Pickup



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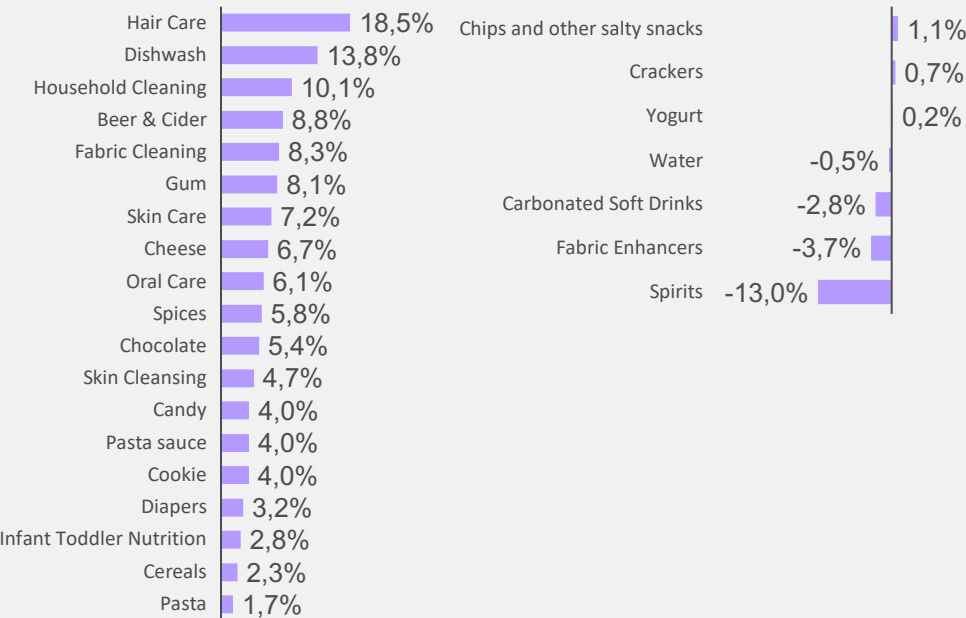
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Home and beauty care saw the highest inflation.



September 2023 vs September 2022

US price inflation by category, Amazon



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