# Finding Harmony on the Shelf

**A uniquely Canadian lens on the global private label and brand evolution**

*Private Label & Branded Products*

May 2025







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# *From competition to **collaboration***

Unlock future opportunities with this global deep dive into **the evolving landscape of private label and branded products.** We explore how retail-owned brands and name-brand products can coexist and thrive together on the store shelf, driven by changing consumer perceptions and shifting market dynamics.

Our *Finding Harmony on the Shelf: A uniquely Canadian lens on the global private label and brand evolution* report offers a comprehensive look at the **trends driving the growth of private label and branded products worldwide**—from **regional variations in consumer behavior** to the **increasing influence of retail media networks**. As unique generations continue to prioritize brand choice differently, there are new opportunities for both private label and branded products to collaborate. This strategic resource will equip businesses with the insights to not only adapt but also lead in the evolving retail landscape of 2025 and beyond.

***Don't just keep up; lead the way!***

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Vice President, Global Thought Leadership,
Marketing & Communications

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# 1

## Consumer outlook on private labels and brands

*Trends driving global growth and regional nuances*

# With global private label growth projections, Canadians are *sold* on private labels.

**3.3%**

annual Canadian sales growth year over year[1]

**42%**

of Canadian consumers say they're likely **buying more private label products than ever before[2]**

Some speculate that global private label food and beverage growth could progress at a **CAGR of 6.64% through 2028[3]**

Sources: 1) NIQ Retail Measurement Services, Canada, National All Channels, Total private label sales, Annual period ended Q3 2024 (52Wks PE 28 Sep 2024) vs. year ago,
2) NIQ 2025 Private Label & Branded Products report global survey, 3) Technavio via PR Newswire, Global Private Label Food and Beverages Market, Compound Annual Growth Rate (CAGR) 2023–2028

# **Fading stigma, value proposition, and demand growth** *have propelled private labels to new heights*


## The stigma has faded.

**68%** of global consumers say private labels **are good alternatives** to name brands

**68%**

## They deliver on value.

**69%** of global consumers say private labels **are good value** for the money

**72%**

## Demand has grown.

**60%** of global consumers say they **would buy more** private label products if a larger variety were available

**51%**

Source: NIQ 2025 Private Label & Branded Products report global survey

# But globally some consumers are more open to private label options than others

## **Canadians** are **as likely as** others globally to embrace them, **more likely** to value them, but **less likely** to demand a larger variety of them


*In Canada ...*

**68%**

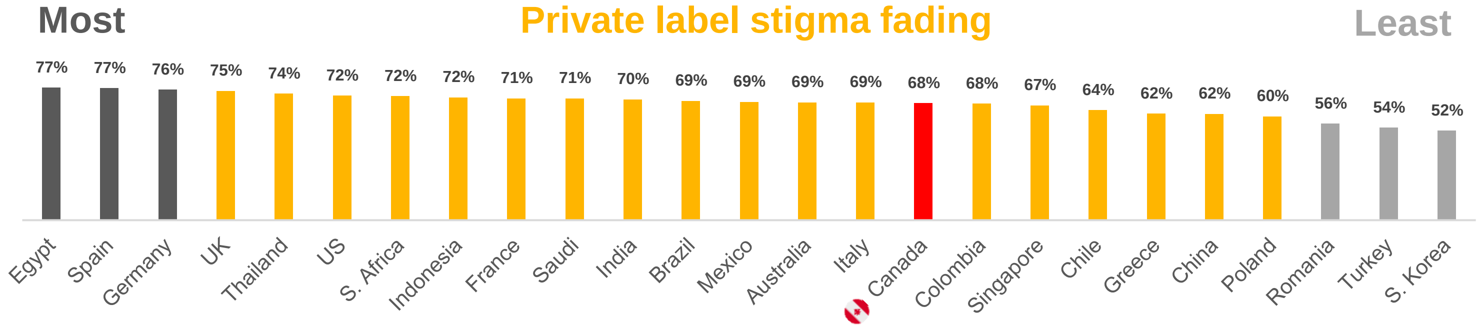
say private labels are good alternatives to name brands
(Global: 68%)

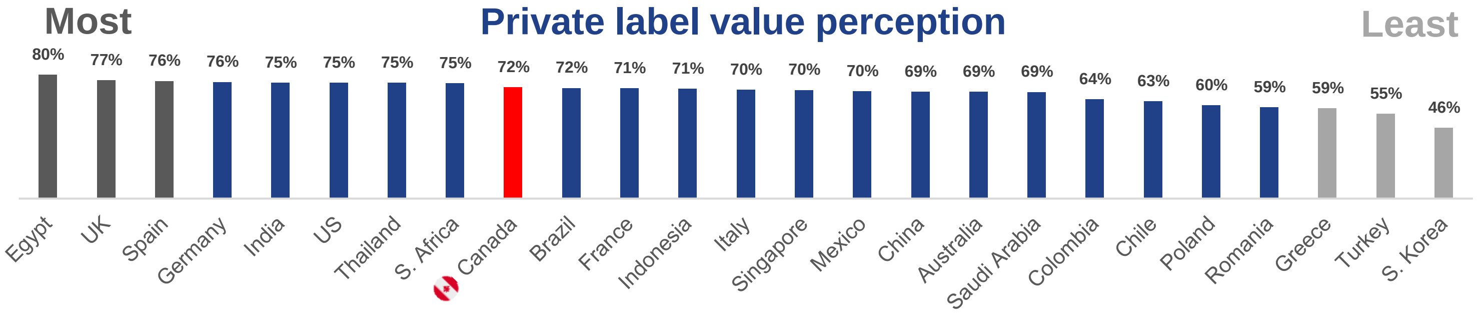
**72%**

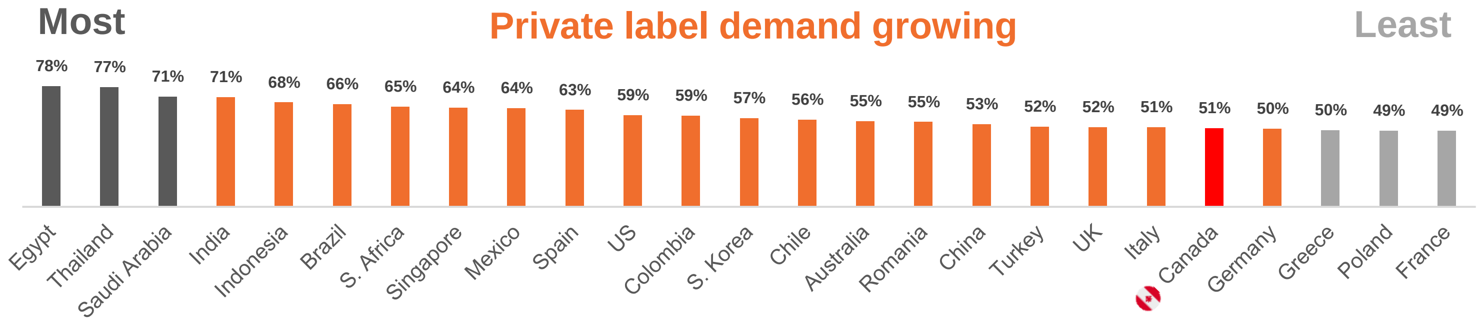
say private labels are good value for the money
(Global: 69%)

**51%**

say they would buy more private label products if a larger variety were available
(Global: 60%)



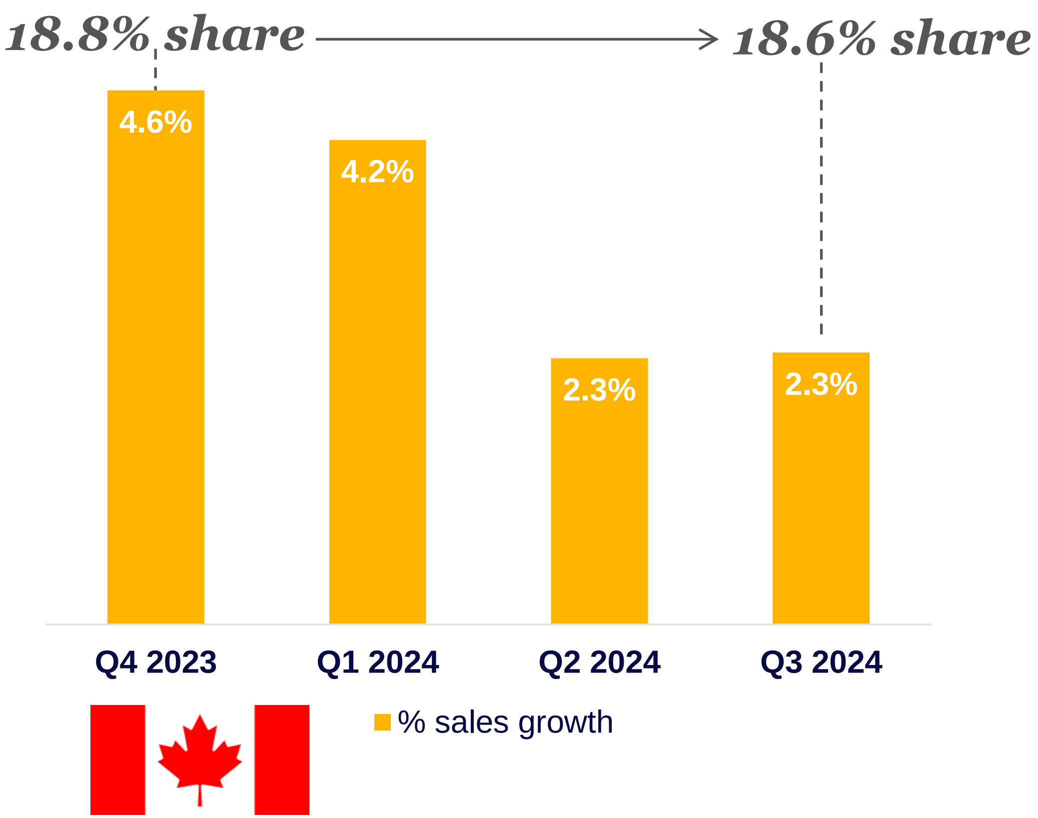




Source: NIQ 2025 Private Label & Branded Products report global survey

# Retailers must continuously innovate to maintain strong private label growth

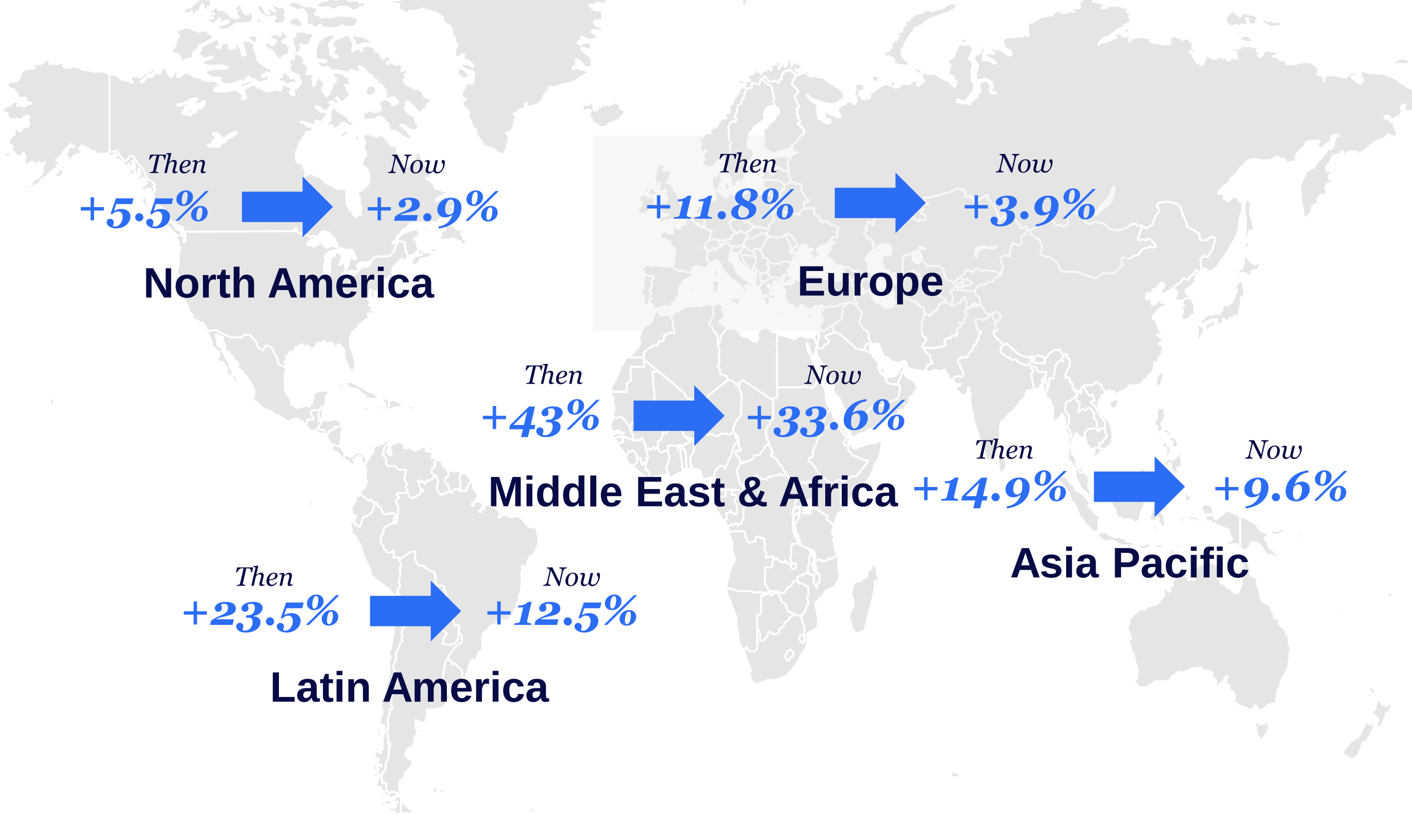
Share of sales has drop by 0.2 points in Canada, ***retailers will need to think differently*** to avoid deceleration of growth

*Canada private label sales % share and % growth vs. year ago*




*Regional private label sales % growth vs. year ago*

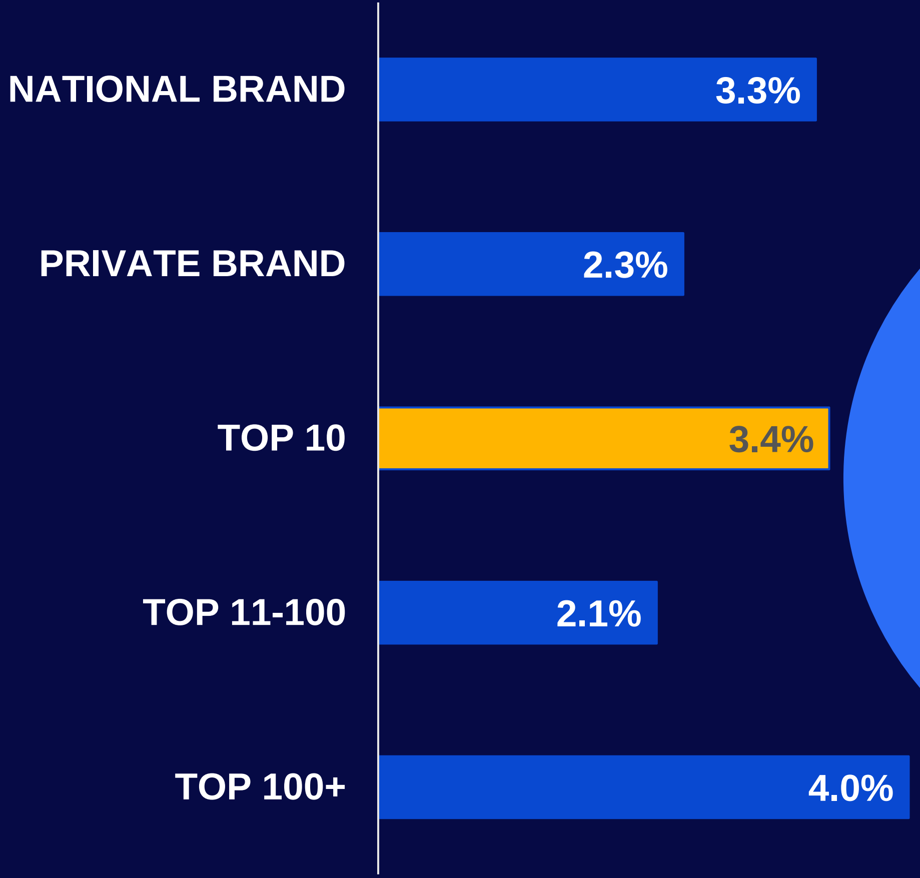
Annual period ended Q4 2023 vs. Q3 2024




Source: NIQ Retail Measurement Services, Total private label sales, Growth calculated vs. year ago, Annual period ended Q3 2024 through annual period ended Q4 2023, Value % growth and value % share - via Quarter By Numbers Private Label report

# *The plot thickens:* Top brands regain sales momentum as well

***Sales growth vs. year ago Canada: Private label and top National brands***




**Top 10 brands**
***outpace***
sales growth
of private labels

Source: NIQ Canada Retail Measurement Services, Sales % growth vs. year ago, Annual period ended Q3 2024

NIQ

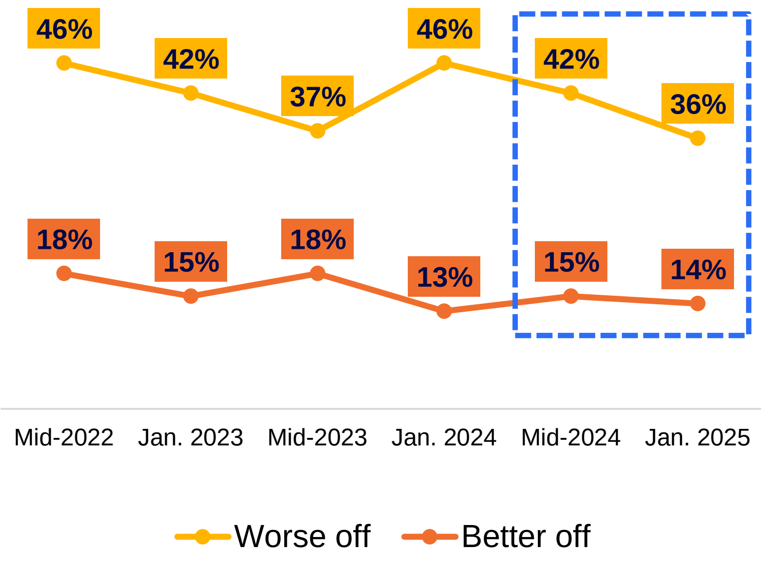
# What's behind these *shifts in performance?*

**Let's explore key drivers of consumer behavior change >>>**

# Recent financial stability and increased spending flexibility among Canadian respondents

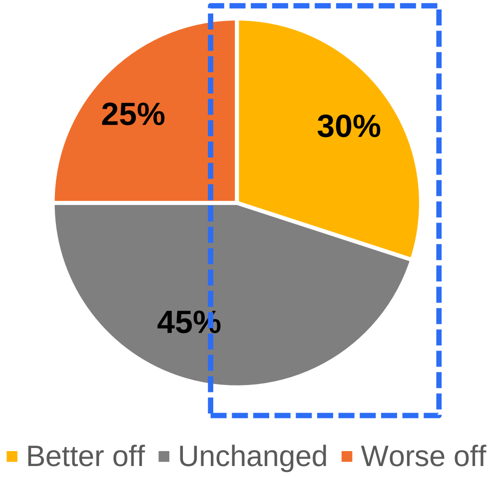
## Stability
**in Canada consumer financial position during past six months**

*Current consumer financial position*
% respondents, Canada



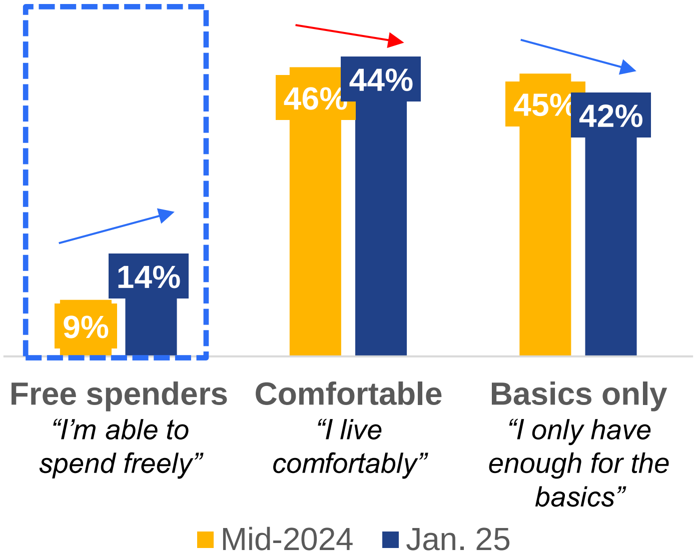

## Uncertainty
**in future state of affairs**

*Expected financial position by end of 2025*
% respondents, Canada




## Spending flexibility
**has increased**

*Spending mentality*
% respondents, Canada



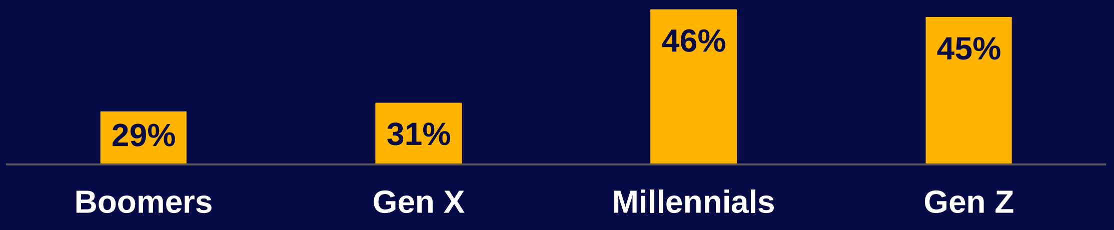

Source: NIQ 2025 Private Label & Branded Products report global survey

## More than 1/3 of Canadian consumers, especially younger generations, *are open to splurging on premium options*

When it comes to premiumization, some factors are more influential than others.

# 37%

of Canadian consumers say they're likely to **treat themselves by upgrading to a premium brand** product




Source: NIQ 2025 Private Label & Branded Products report global survey

NIQ

### More influential

***Loyalty*** **48%** would pay more to purchase from a brand/retailer that **rewards my loyalty**

***Incentives*** **44%** would pay more on a purchase to get **something else for free** (e.g., qualify for free shipping)

***Efficacy*** **37%** would pay a premium on the option I believe is **the most safe/effective**

### Less influential

***Immediacy*** **24%** would pay a premium to receive something **sooner/more immediately**

***Scarcity*** **23%** would pay a premium to buy **something often "sold out"/hard to get**

***Novelty*** **21%** would pay a premium to have something **when it first hits the market**

*A rising tide can lift all boats:*

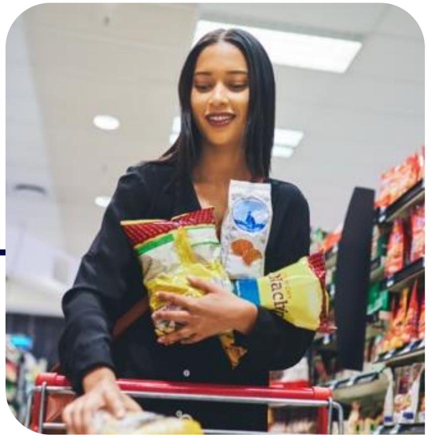
# Every organization has the chance to help grow the size of prize with consumers

Seize consumers' openness to trying "whichever" brand fits their needs.

**57%**

of Canadian consumers say **brand or store brand is irrelevant**; they just buy what they need.

***Needs-driven decisioning***



**48%**

of Canadian consumers say they're **buying more brands, across more categories** than ever before

***Broader consideration sets***

**57%**

of Canadian consumers say if they look hard enough, they can find a brand that fits their exact needs

***Captive shopper audiences***

Source: NIQ 2025 Private Label & Branded Products report global survey

# From competition *to collaboration.*

**Retailers** have tested, iterated, developed, and marketed **next-level private label brands** that are capturing the eyes and wallets of consumers.

At the same time, **manufacturers** have **hit a stride with consumers beyond inflation highs** and have fostered emotional connections that extend their brand influence beyond any singular retail channel.

**>>> Unlock total category and generational spending potential, *together.***

# The future belongs to those who find harmony on the shelf.

# 2

## Finding harmony on the shelf

*Assessing **symbiotic** dynamics between private label and branded products*

# Finding harmony between brands starts with understanding the primary drivers of brand choice

Today, consumer decisioning is driven most heavily by ***functional*** reasons.

***In Canada, what is most important to consumers when choosing a brand to buy?***

**Top/Bottom**
reasons to buy a brand:

- ▲ **Affordable**
- ▼ **Celebrity-endorsed**

**Average importance**
% Canada respondents

**73%**
**Functional reasons [F]**
Specific aspects or offerings within a brand's value proposition

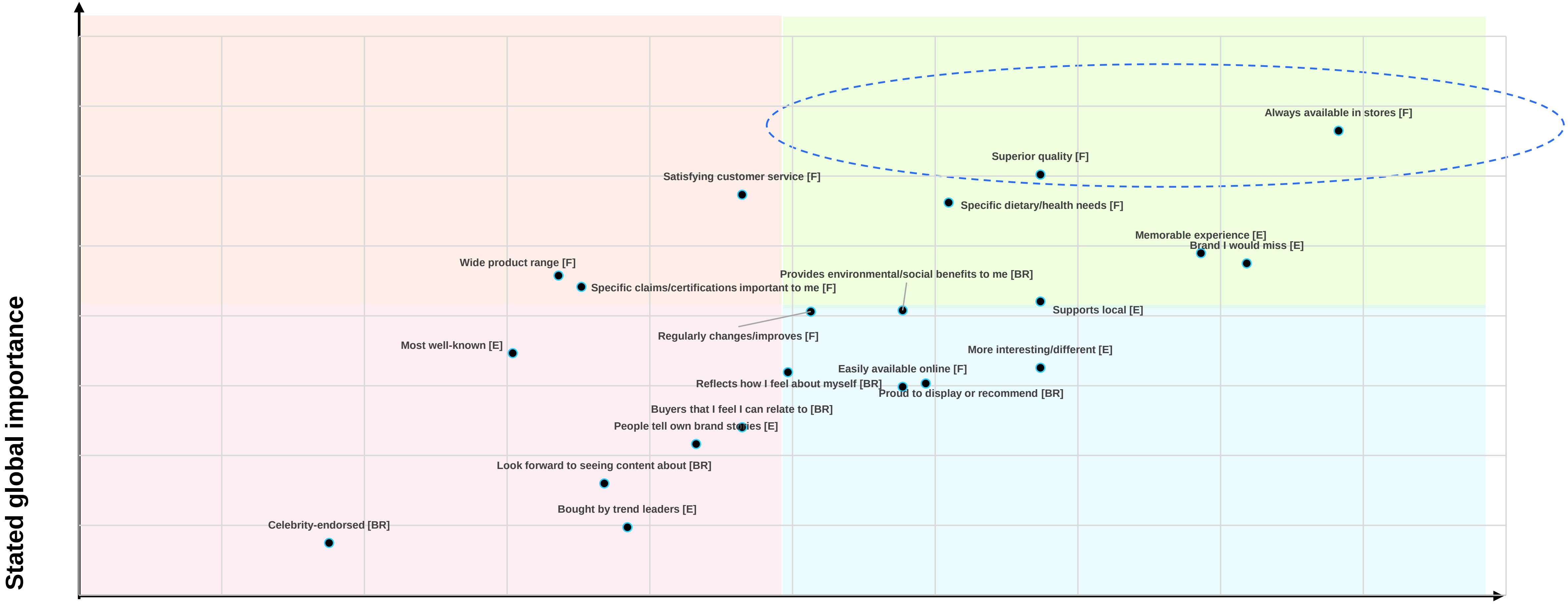
**54%**
**Emotional reasons [E]**
Intangible or reputational qualities/values of a brand

**45%**
**Brand resonance [BR]**
Aspects that align to one's personal or cultural resonance/identity

Source: NIQ 2025 Private Label & Branded Products report global survey

# For private labels, above all else, consumers in Canada expect value and quality

Future growth will favor those who leverage these strengths alongside what name brands are bringing to the table.




[E] – Emotional reasons  [F] – Functional reasons  [BR] – Brand resonance

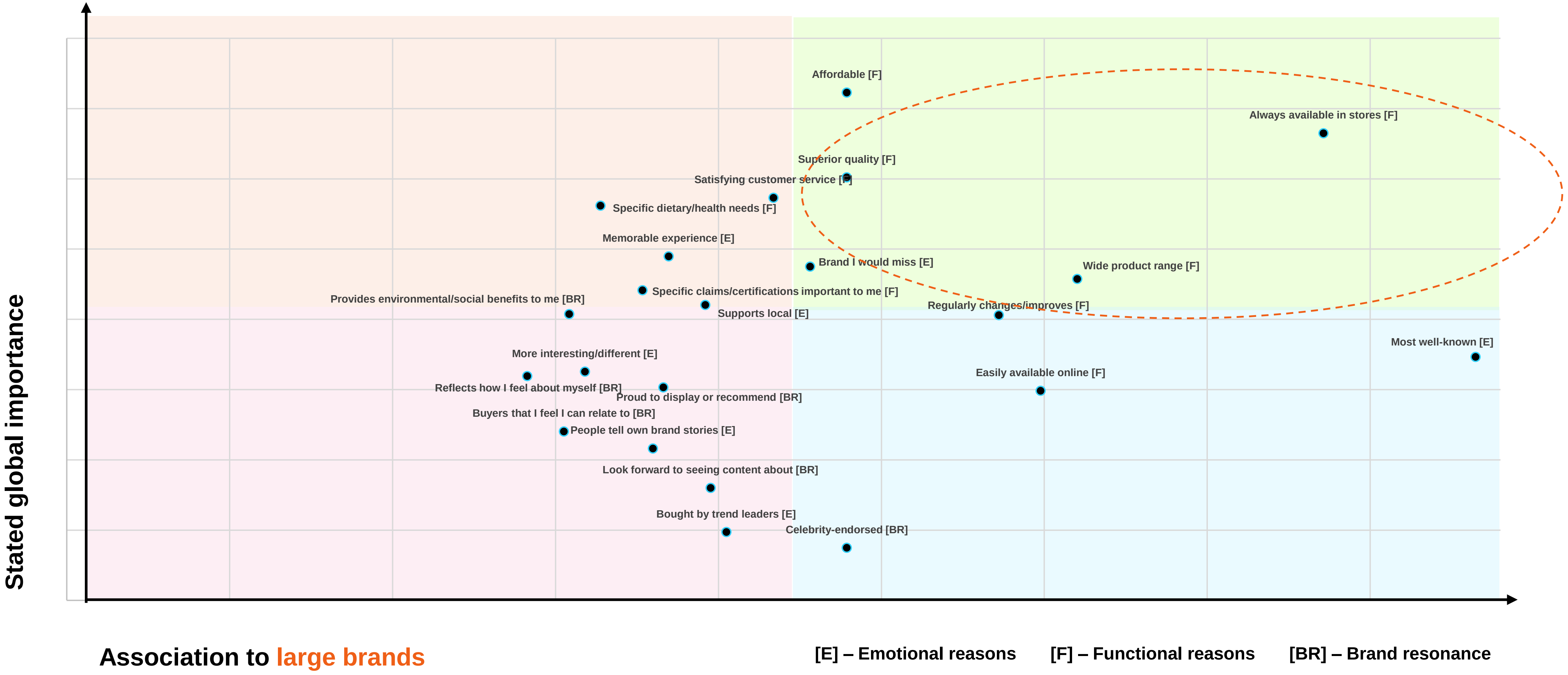
**Association to private labels**

LOW –> HIGH measure of how much consumers associate these factors to that of "private labels"

Source: NIQ 2025 Private Label & Branded Products report global survey

# But for name brands, Canadian consumers expect and availability and product range

Name brands should avoid direct competition with private labels and double down on unique motivators like notoriety, wide assortment, and omni availability.




LOW –> HIGH measure of how much consumers associate these factors to that of “larger name brands”

Source: NIQ 2025 Private Label & Branded Products report global survey

# Find your unique *runway for growth*

**There are ways to grow *alongside* your competition.** Start with assessing *symbiotic dynamics*: Your relative **reputation, pricing, influence, and impact** could be influenced (for the better) by other category players.

# Symbiotic dynamics for private label and branded products

*Click to navigate to each section:*

***Brand halo effect***

Name-brand reputation can boost private label credibility by comparison.

***Increased traffic***

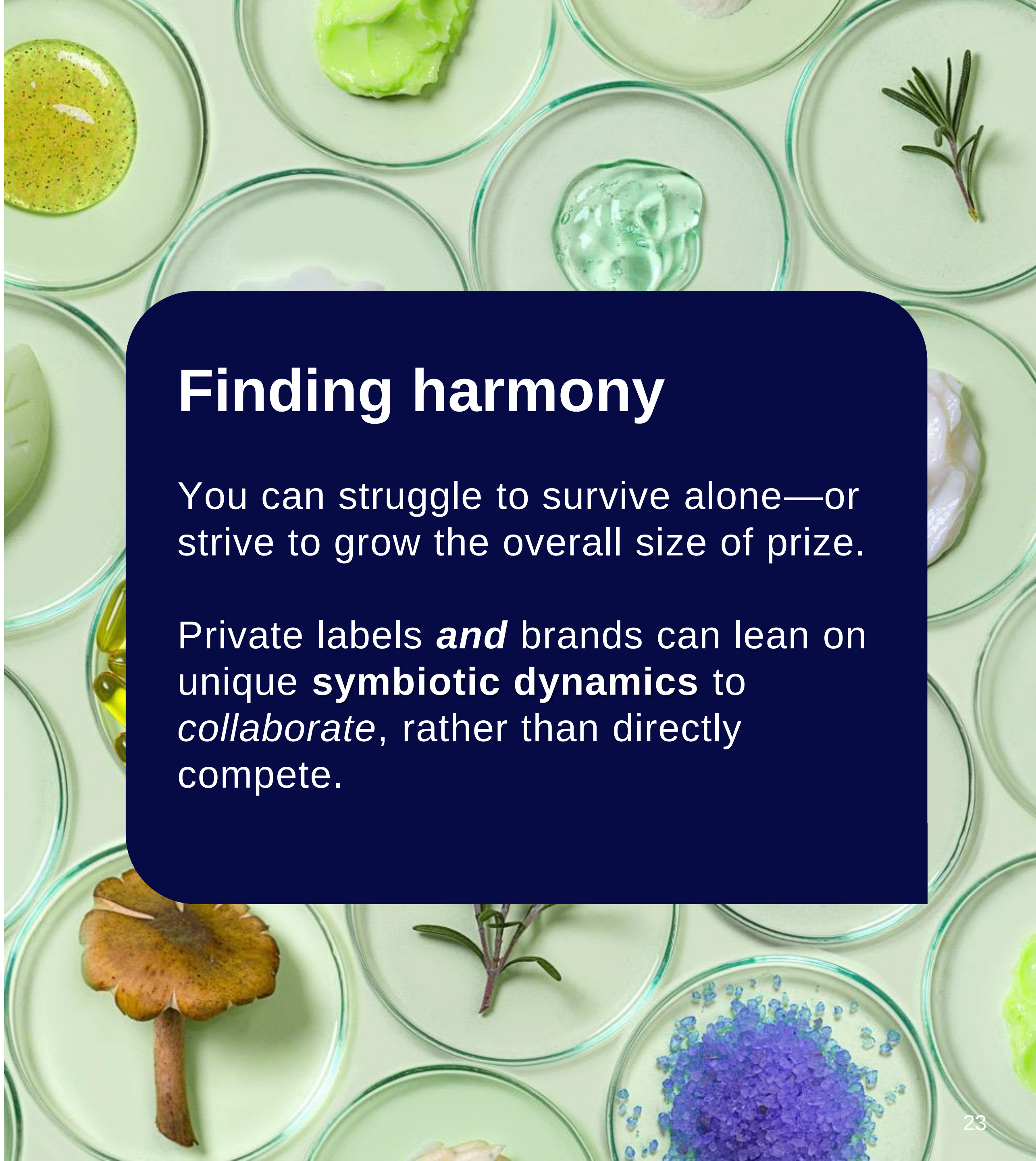
Popular private labels drive overall retailer traffic that can benefit name brands.

***Market expansion***

Private labels can empower entire categories, propelling name-brand opportunities forward.

***Price anchoring***

Name-brand pricing sets a benchmark for private label value perception.



## Finding harmony

You can struggle to survive alone—or strive to grow the overall size of prize.

Private labels ***and*** brands can lean on unique **symbiotic dynamics** to *collaborate*, rather than directly compete.

# Private label growth guidance

SYMBIOTIC DYNAMIC 1

## Brand halo effect

Name-brand reputation can boost private label credibility by comparison.

### How it can help:

Retailers can harness the credibility of well-known brands to boost the appeal of their own private labels. The perception that a store brand can match the quality or perception of a premium name brand builds consumer trust and drives sales.

### Action for retailers:

***Find your halo to harness growth.***

# Private label growth guidance

***Retailers investing big in brand storytelling***

BRAND HALO EFFECT

## Lidl basks in halo of Coca-Cola's famous holiday truck

Read more >>>

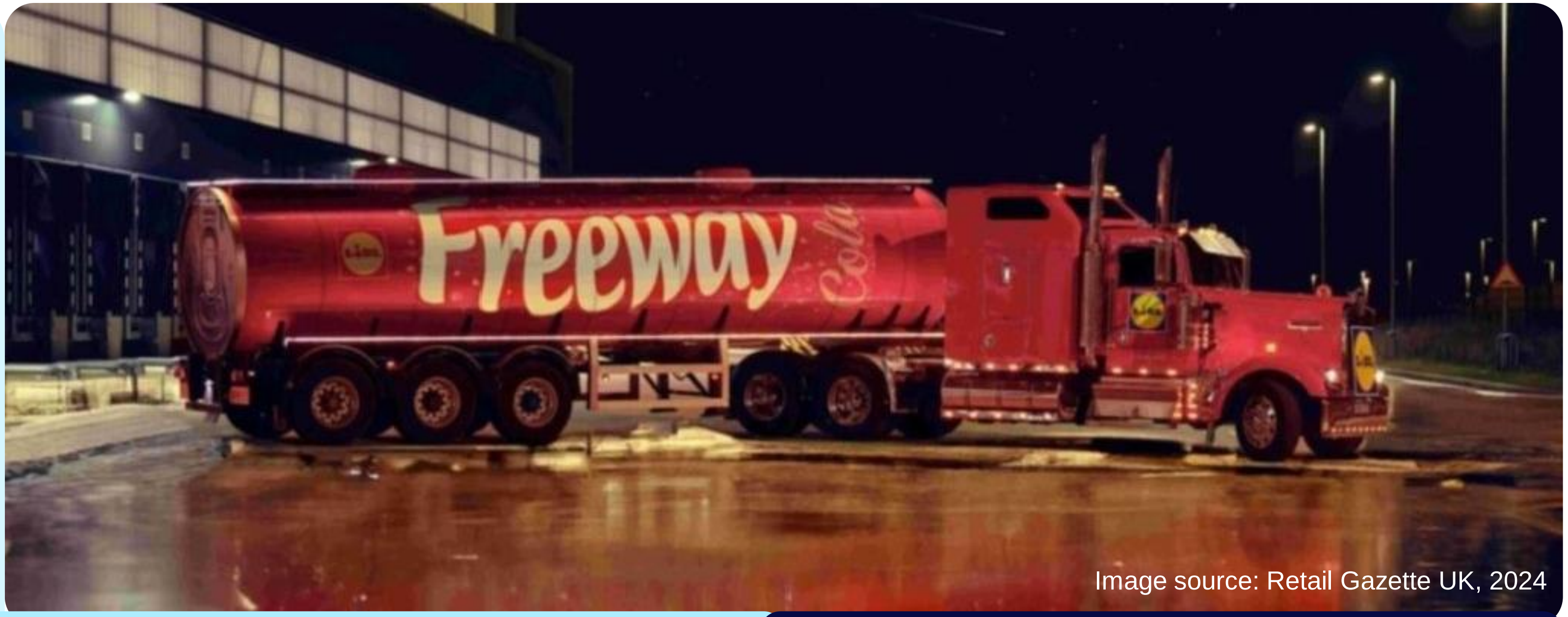



Image source: Retail Gazette UK, 2024

### Credibility built from name-brand nostalgia:

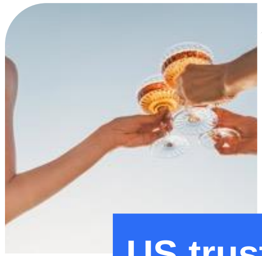
Harnessing the values of community-building, festive spirit, and new product discovery, this discount grocer took product experience to new heights for UK consumers with its private label cola label and giveaways promoting "middle aisle" offerings to prospective shoppers.

### Action for retailers:

***Find your halo to harness growth.***

# Around the world, many private labels are already benefitting from the “halo” of name-brand comparisons



## US trust in private label alcohol options

[*Read more >>>*]

**Costco’s Kirkland Signature spirits:**
Drinkers have often flocked to this line of bulk-size spirits. Touted for its similarities to premium vodka or whisky/whiskey name brands, this private label brand is sought out not only for its incredible value but also for its high-quality taste.

## UK skincare elevated by private label influence

[*Read more >>>*]

**Aldi's Lacura Skincare:**
This skincare range is often compared to high-end brands carried in specialty retailers. The products have and continue to receive positive reviews for their quality and affordability.

## Asia e-grocery expands to private label food

[*Read more >>>*]

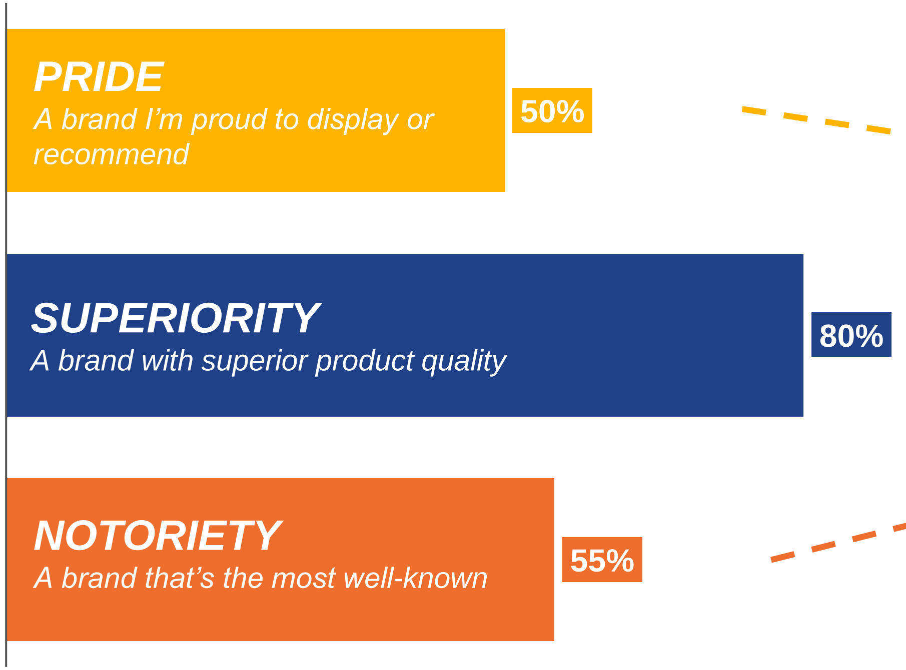
**Foodpanda’s *bright* foods:**
With the largest range available in Singapore and Malaysia, this new private label brand offers customers high-quality products with up to 25% savings compared with other brand alternatives.

# Brands hold a strong presence through factors like pride, superiority, and notoriety, but Canadian retailers have continued to invest in private labels to bridge these gaps

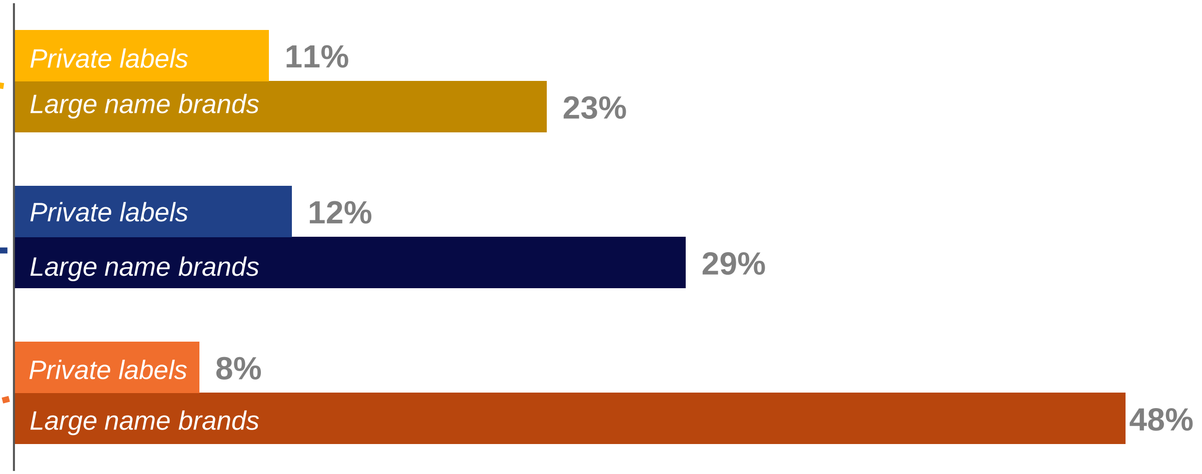
## *Importance of brand attribute*

% Canadian respondents, "Very + Somewhat important"




## *Association to private labels or name brands*

% Canadian respondents, consumers' association of attributes to certain brand types




### *Private-label food got more popular thanks to inflation—but now it's here to stay*

**Canada:** Retailers are introducing new products and expanding shelf space for their brands, including Metro Irresistible rebranding, to meet growing interest.

Read more >>>

Source: NIQ 2025 Private Label & Branded Products report global survey
Source: Canadian Grocer | Private-Label Food got more popular thanks to inflation – but now its here to stay | Amid high inflation and supply chain issues, private label powers up

# Private label growth guidance

SYMBIOTIC DYNAMIC 2

## Price anchoring

Name-brand pricing sets a benchmark for private label value perception.


### How it can help:

Name-brand pricing often sets the bar for consumer decisioning. And when these known—and often premium—brands are priced higher, retail-owned private labels are often seen as value-driven alternatives. Pricing contrasts can amplify the appeal of private labels and entice consumer choice.

### Action for retailers:

*Entice with price,*
*then convert on quality.*

# In Canada, across CPG categories …

**Branded products**
are sold at

# 7.5%

higher average price than
private label products.

Source: NIQ, Global Strategic Planner, Total CPG across global scope of 54 markets, Directional read of % difference in Avg. Unit Price of Branded Products aggregate vs. Private Label aggregate, Latest 52 weeks ended Dec. 29, 2024, Reflected in US dollars

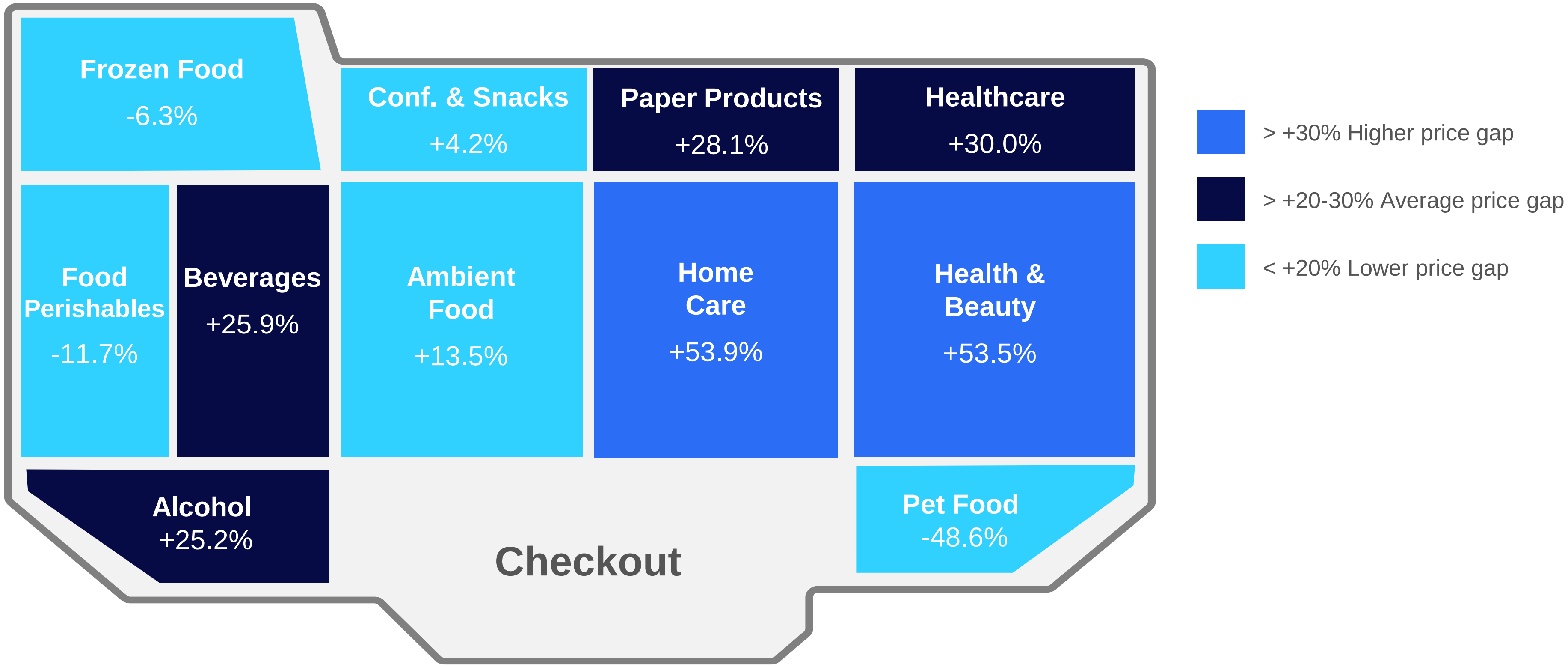
# *Mind the gap:* Some brand swaps save consumers much more than others

The price differential between private label and branded products varies across categories.

***Right-size your strategy:*** *Product quality may be questioned the most where price gaps between brands are the highest.*

## *Branded product price differential by department: Canada*

Directional read of topline average unit price of branded vs. private label CPG products




Source: NIQ, Global Strategic Planner, Total CPG and departments across global scope of 54 markets, Directional read of % difference in Avg. Unit Price of Branded Products aggregate vs. Private Label aggregate, Latest 52 weeks ended Dec. 29, 2024, Reflected in US dollars

# Pricing contrasts, coupled with a commitment to quality, have amplified private label appeal

### *Supermarket brand wins taste test among notorious name brands*

**UK:** In a blind taste test, judges gave top scores to Aldi's baked beans brand, which costs a fraction of what name brands cost in the category.

[Read more >>>]

### *Retailer shines as only private label endorsed by Michelin Star chef*

**SA:** Checkers, a South African retailer, attracts consumers with the nation's only private label product range endorsed by a Michelin Star chef.

[Read more >>>]

### *Grocery chain receives top honors for its private label alcohol offerings*

**US:** A popular American grocer has recently been honored with 80 awards for its diverse range of private label alcohol offerings.

[Read more >>>]

***Strategically leverage the perceived price anchors set by name brands.***

**Action for retailers:**

*Entice with price, then convert on quality.*

# Branded products growth guidance

SYMBIOTIC DYNAMIC 1

## Increased traffic

Popular private labels drive overall retailer traffic that can benefit name brands.


### How it can help:

The popularity of a retailer's in-demand private label products increases shopper traffic, often leading to additional premium or branded item purchases. Securing strategic placements around private label buzz can boost the visibility and sales of name brands.

### Action for manufacturers:

*Ride the traffic wave from hot private labels.*

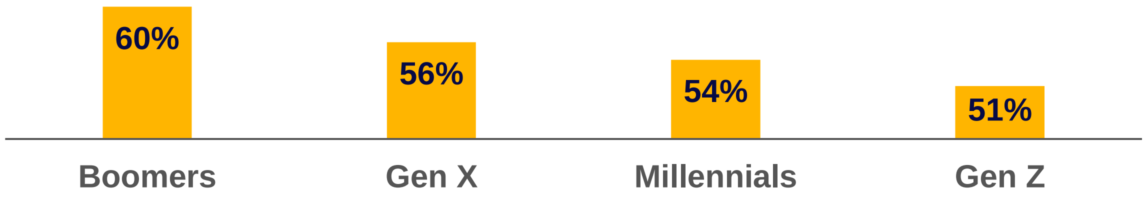
# Trust in a retailer = trust in its products, according to consumers

Retailers' reputation holds opportunity for potentially ***all*** products it carries.

# 56%

of Canadian consumers say they **trust store brands, as they are endorsed by the retailer**

*Consistent across generations—Boomers in particular:*




Source: NIQ 2025 Private Label & Branded Products report global survey

## Action for manufacturers:

*Ride the traffic wave from hot private labels.*

NIQ

# Canadian retailers that drove the most growth for private labels also grew national brand

**5 retailers**
in the Canada drove over

**81%**

of CPG
**private label** growth

**+ $556M**

in **private label sales growth** brought in collectively by the Top 5 retailers in the Canada

**But name brands also saw growth in many of these heavily retailer-branded stores:**

**+ $3.4B**

in **National Brand sales growth** brought in collectively by the same 5 Canadian retailers

**Same 5**
Canadian retailers drove over

**60%**

of CPG **National Brand** growth

Source: NIQ Consumer Panel, Canada CPG/FMCG, Value sales change vs. year ago, Latest year ended Dec. 28, 2024

# Playing the field: Branded products benefit from being largely "retailer-agnostic"

Collaborate in channels where private labels are hotly sought after ***and*** find growth independently via other channels.

***Rank of consumer channel preferences by brand type***

% Canada respondents

| Where consumers usually shop for **PRIVATE LABELS** | Where consumers usually shop for **LARGE NAME BRANDS** |
|---|---|
| #1: Supermarket/Grocery store | #1: Pharmacy / Drug store |
| #2: Pharmacy/Drug store | #2: Supermarket/Grocery store |
| #3: Warehouse Club stores | #3: Mass Merchandiser |
| #4: Dollar Stores | #4: Warehouse Clubs |

**Action for manufacturers:**

*Ride the traffic wave from hot private labels.*

Source: NIQ 2025 Private Label & Branded Products report global survey

# Branded products growth guidance

SYMBIOTIC DYNAMIC 2

## Market expansion

Private labels can empower entire categories, propelling name-brand opportunities forward.

### How it can help:

Popular private labels can evolve overall category perceptions, boosting acceptance of high-quality products or even increasing adoption and usage among consumers. This market expansion can benefit both the retailer and name brands operating in the same category.

### Action for manufacturers:

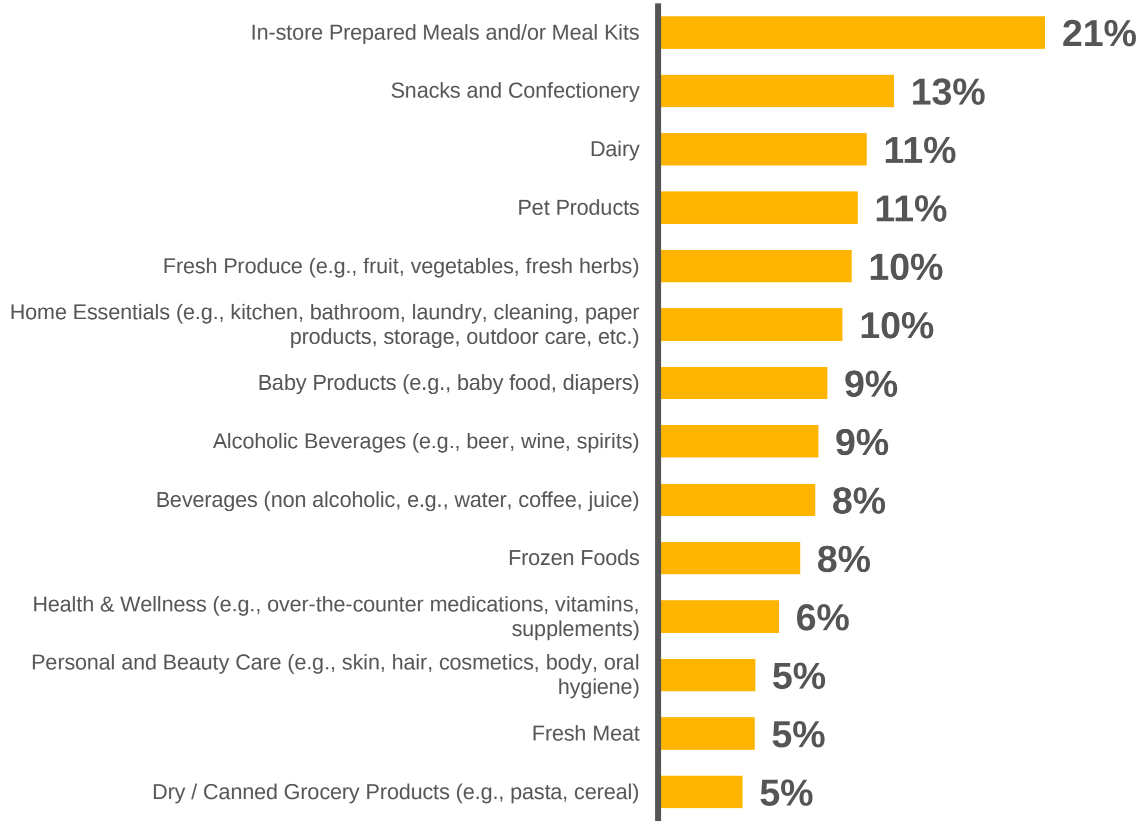
*Make a bigger splash with expandable categories.*

# *Open to growth:* Consumers are willing to expand their spending on key categories

Brands can strategize around these valuable opportunities to expand purchase repertoires.

## *Categories consumers would "splurge" on: Canada*

% respondents, most likely to "spend more than their usual amount as a treat for enjoyment"




## Emerging need states for spending more

***At-home luxuries***

**54%**

say they're likely to **spend more on at-home experiences** to save on restaurant and entertainment expenses

***One-stop shop***

**54%**

say they're likely to spend more at the store, website, app, or outlet that **carries most of what they need in one place**

***Convenience***

**44%**

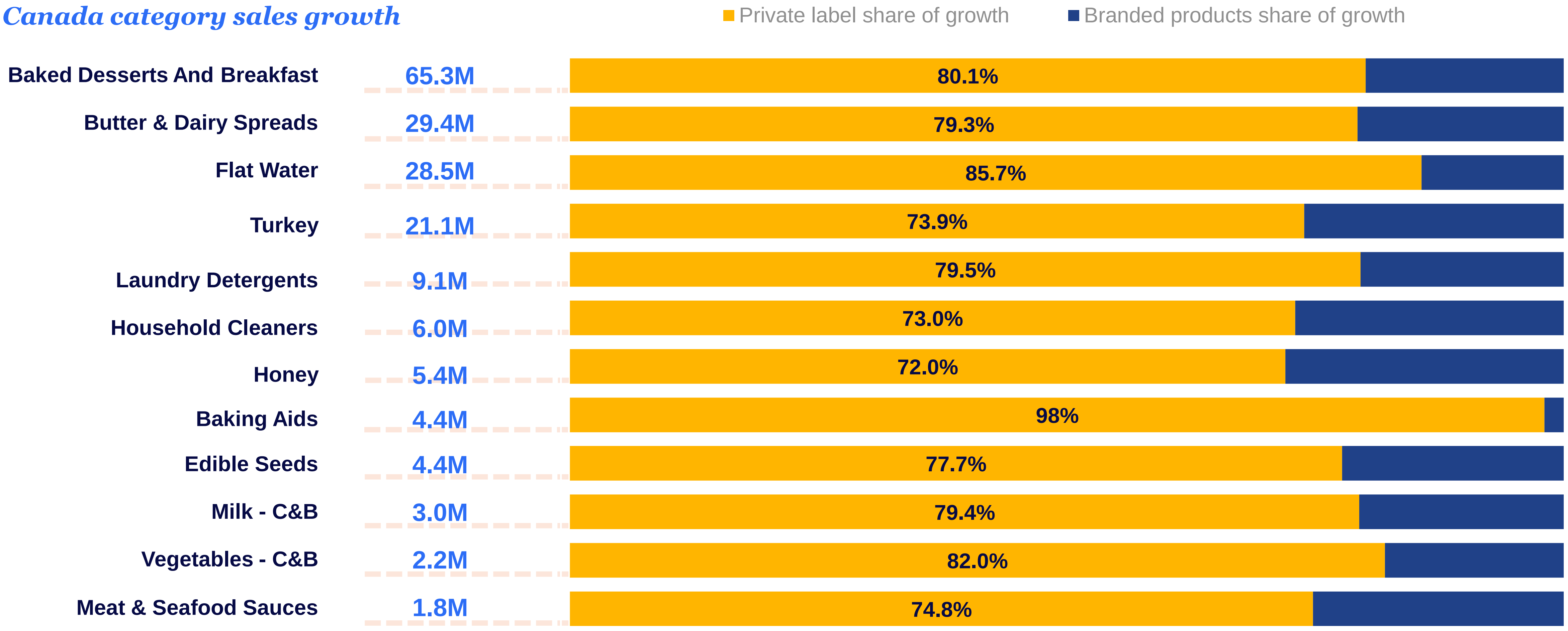
say they're likely to spend more on **product formats that are convenient to use**

Source: NIQ 2025 Private Label & Branded Products report global survey

# Top categories that have been “expanded” by private label in Canada

Private labels here have driven over half of year-over-year sales growth, amplifying expanded category opportunities for brands as well.

***Canada category sales growth***




Source: NIQ Market Track, National Incl Nfld All Channels. Abs. Value Growth and share respective to Private Label aggregate and Branded Products aggregate, Latest 52 weeks ended Dec. 28, 2024, vs. year ago, Reflected in CAD dollars

# Renowned retailer experiences can drive spending that grows the whole store (and all brands within it)

### *Crowds of consumers explore brands at this atypical convenience chain*

**US:** With some of the largest convenience stores in the world, Buc-ee's brings renowned excitement to passersby eager to explore and spend on the wide array of ***all*** brands carried by the popular retailer.

Read more >>>

### *Consumers prepared to spend big at new wholesale locations worldwide*

**JPN:** A worldwide phenomenon, Costco amasses huge attention and dollars as it unveils its first store in the Okinawa Islands. Consumers clamor to try all the brands available inside.

Read more >>>

### *New product use cases inspired by retailer's holiday pop-up experience*

**US:** Inspiring how consumers spend on holiday food favorites, Aldi, a popular discount retailer, opened its first-ever "charcuterie chalet" sampling experience—leaving patrons full of ideas on how to procure a festive feast.

Read more >>>

***Collaborate to evolve your brand alongside key retailers.***

**Action for manufacturers**

*Make a bigger splash with expandable categories.*

# 3

## From competition to *collaboration*

*Assessing **competitive** dynamics between private label and branded products*

# Manufacturers face key challenges posed by private labels

## *Price undercutting*

- ***The challenge:*** Private labels offering comparable quality at lower prices
- ***The risk:*** Losing cost-sensitive consumers driven by price alone

## *Shelf space competition*

- ***The challenge:*** Retailers that may prioritize placements of their own private label products
- ***The risk:*** Losing priority shelf space

## *Perceptions of parity*

- ***The challenge:*** Consumers' belief in the equivalent quality of private labels vs. others
- ***The risk:*** Losing pricing power and potential erosion of brand equity

# *Price undercutting:* Private label price advantage continues to hold weight with consumers

## *Price undercutting*

- ***The challenge:*** Private labels offering comparable quality at lower prices
- ***The risk:*** Losing cost-sensitive consumers driven by price alone

### *Drivers of brand choice: Canadian average*

% respondents, stated importance


**Brand choice drivers:**
**[E] – Emotional reasons**
**[F] – Functional reasons**
**[BR] – Brand resonance**

**Affordability wins**

Among a variety of choice drivers—including emotional or functional reasons and brand resonance—consumers say ***affordability*** matters most, positioning private labels for success.

Source: NIQ 2025 Private Label & Branded Products report global survey

# *Shelf space competition:* Partner today, or risk a retailer-owned tomorrow

Canada pilots a new "store-brand-exclusive store."

**39%**

of Canadian consumers say that some of their favorite **name brands no longer seem to be available when searched for**

**Retailers hold the keys to shelf space**

Brands will need to work harder to collaborate and protect their priority shelf placements and distribution with retailers (both in-store and online).

## *Shelf space competition*

- ***The challenge:*** Retailers that may prioritize placements of their own private label products
- ***The risk:*** Losing priority shelf space

## *Loblaws pilots ultra-discount, fully private label store*

**CA:** From store-branded shopping carts to a discount-friendly limited assortment of the retailer's everyday goods, this location tries to offer a simple and affordable experience to Canadians pressured by food costs.

Read more >>>

Source: NIQ 2025 Private Label & Branded Products report global survey

# *Perceptions of parity:* 46% of Canadian consumers are feeling good about the quality of private labels

**45%** of Canadian consumers say they **would switch to a cheaper medicinal alternative (biosimilar/equal quality)**

**46%** of Canadian consumers say that **private labels are higher or equal quality** than name brands

**26%** of Canadian consumers say they **would pay the same or more for a private label product** than a name brand

**Quality concerns are being minimized**
Private labels in Canada have done well to assure the quality they bring to Canadian consumers. Globally, over half of respondents (51%) believe private labels are as good as name brands.

## *Perceptions of parity*

- ***The challenge:*** Consumers' belief in the equivalent quality of private labels vs. others
- ***The risk:*** Losing pricing power and potential erosion of brand equity

Source: NIQ 2025 Private Label & Branded Products report global survey

# Retailers face key challenges posed by branded products

### *Brand loyalty*

- ***The challenge:*** Strong loyalty to brand (quality, reliability, prestige, etc.) may be hard to overcome
- ***The risk:*** Limited conversion of brand-loyal buyers

### *Category dominance*

- ***The challenge:*** Extensive marketing and broader cross-channel distribution reinforces top-of-mind position for brands as category leaders
- ***The risk:*** Limited room to establish an independent—and leading—private label identity

### *Nostalgia and trust*

- ***The challenge:*** Brands that benefit from years (or even decades) of building trust, recognition, and emotional connections with consumers
- ***The risk:*** Limited cultural influence and legacy for storytelling, slowing trust development and long-term growth

# *Brand loyalty:* Despite openness to private labels, younger consumers still have name-brand loyalty

## *Brand loyalty*

- ***The challenge:*** Strong loyalty to brand (quality, reliability, prestige, etc.) may be hard to overcome
- ***The risk:*** Limited conversion of brand-loyal buyers

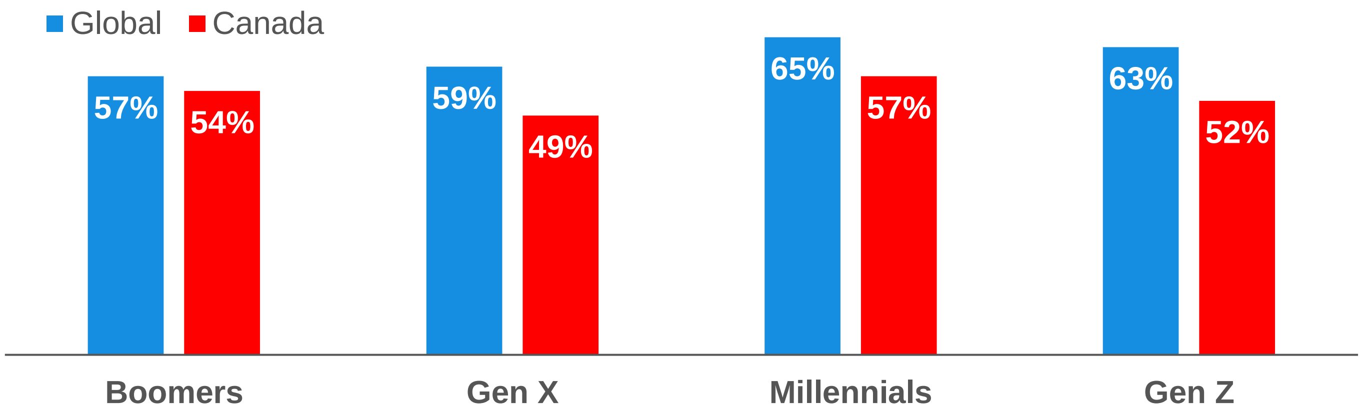
**61%**

of global consumers say they **always buy the same name brands** they know and trust

61%

**Younger consumer have a routine with name brands they're loyal to**

Despite their reputation for being open to private labels, younger generations can be particular and steadfast in their choice of name brands they choose to purchase.




Source: NIQ 2025 Private Label & Branded Products report global survey

# *Category dominance:* In many regions (Asia in particular), name-brand costs are "worth it" to consumers

**33%**

of Canada consumers say that **name brands are worth the extra price**

**Asian markets most willing to pay for brands**

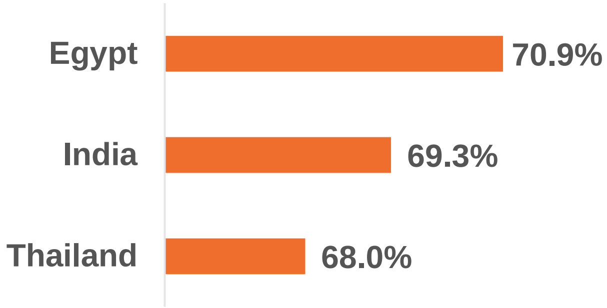
For many consumers, name brands maintain their worth and category leadership. Especially for consumers in Asia, branded products are often considered "worth" the extra price.

## *Category dominance*

- ***The challenge:*** Extensive marketing and broader cross-channel distribution reinforces top-of-mind position for brands as category leaders
- ***The risk:*** Limited room to establish an independent—and leading—private label identity

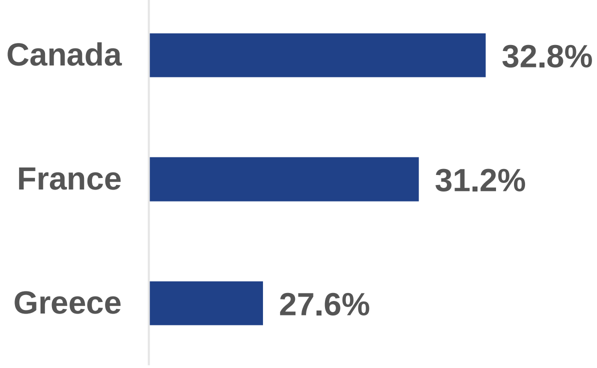
**Top markets: % respondents**

*"Name brands are worth the extra price"*




**Bottom markets: % respondents**

*"Name brands are worth the extra price"*




Source: NIQ 2025 Private Label & Branded Products report global survey

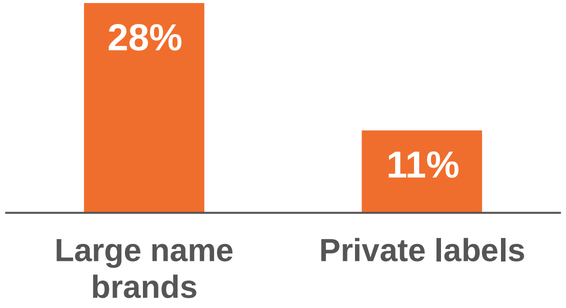
# *Nostalgia and trust:* Name brands have deep emotional connections among Canadian consumers

***Association to brand type:***

| Emotional drivers of brand choice | Large name brands | Private labels |
|---|---|---|
| Memorable experiences with brand | 23% | 13% |
| Most well-known brand in its category | 48% | 8% |
| One that would be missed if not used anymore | 28% | 13% |
| People tell their own stories about liking this brand | 23% | 9% |
| More interesting or different than other brands | 21% | 12% |

## *Emotional drivers: Canadian average*

*% respondents, association to brand type*




**2X emotional connection**

Name brands still own the space of "emotional connection" to consumers. In fact, people are more than twice as likely to associate emotional factors with large name brands compared to private labels.

## *Nostalgia and trust*

- ***The challenge:*** Brands that benefit from years (or even decades) of building trust, recognition, and emotional connections with consumers
- ***The risk:*** Limited cultural influence and legacy for storytelling, slowing trust development and long-term growth

Source: NIQ 2025 Private Label & Branded Products report global survey

# 4

## The road to mutual success

*Specific opportunities for retailers and manufacturers to drive collaboration and growth*

# Consumers are ready for the ***right brands*** *(including private labels)* to find them across the ***many channels*** they frequent ...

**53%**

of Canadian consumers say they **maintain different shopping lists** for different in-store and online outlets

**46%**

of Canadian consumers say they **look online for things out of stock at their local store**

**36%**

of Canadian consumers say they would likely **repurchase a new brand they tried as a retailer's substitute** for their first choice

**74%**

of Canadian consumers say they **shop at a physical store because it has the lowest prices**

Source: NIQ 2025 Private Label & Branded Products report global survey

# … because, today, interaction with brands happens across a rapidly evolving *omnichannel universe*

Retailers
Digital media
Online
Influencers
SMB
Home delivery
T&D
Manufacturers
Quick commerce
B2B
Social commerce
D2C
Food delivery
Pantry-loading
Secondhand
Retail media networks
Media
Metaverse
Click & Collect
Marketplaces
Traditional trade
Community buying
CPG
Gamification
VR
Loyalty programs
Last mile
Subscriptions
Wholesale
Localization
Pop-ups
AI
Globalization
Specialty stores
Webrooming
Showrooming
Spearfishing
Modern trade

## With the right platform, brands can *collaborate* to unlock *incremental* consumer spending

*Enter:*
*The rising realm of* ***Retail Media***

**Retail Media Networks (RMNs)** are advertising platforms that operate within an e-commerce environment. They provide brands with opportunities to showcase their products to highly targeted audiences, directly on the platforms where consumers make their purchasing decisions.

Read more >>>

# The transformational power and potential of retail media

**+$1.3T**

of enterprise value from retail media in US by 2026[1]

As retail media investments reach record levels, **retailers and brands will need to focus on not only competitive, but also *collaborative* shopping experiences**. This approach will elevate overall categories and drive incremental revenue for all parties.

## *For retailers*

**Boost overall growth potential**

- Retailers can monetize their platforms by offering premium placements to branded products.
- Retailers can simultaneously integrate their private label offerings via RMN promotional campaigns.

**Dual promotion of both branded and private label offerings can enhance total category engagement, brand learnings, and growth potential.**

## *For consumers*

**Personalize shopping experiences and seamless product discovery.**

- Consumers can benefit from tailored recommendations and promotions.
- Consumers' product discovery process can be enhanced toward both premium and value-driven options.

**Optimal conversion on consumer interests, driven by shopping experiences tailored to unique preferences.**

## *For manufacturers*

**Leverage new data for precision targeting**

- Brands can leverage collaborative retailer data to reach highly segmented audiences.
- Brands can identify and focus on shoppers most likely to trade up on premium options.

**RMNs enable brands to tell their stories and provide exclusive offers, helping to defend market share.**

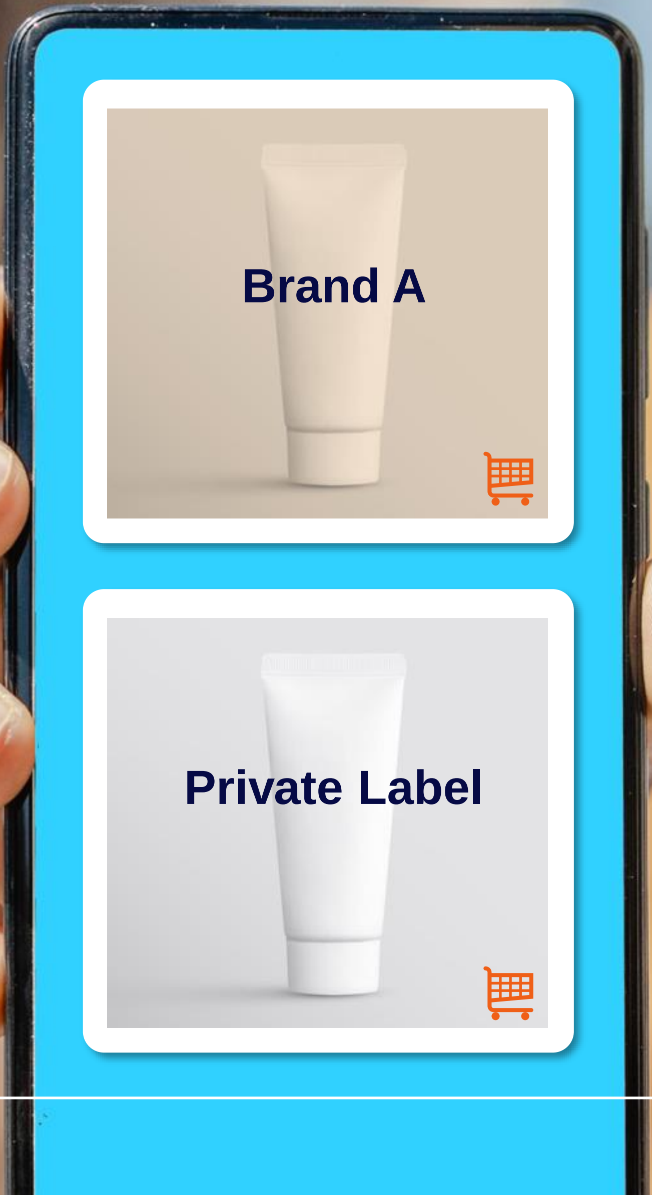
Source: 1) McKinsey & Co.

# RMNs
# =
# *a "Win-Win-Win" for all*

**Platforms for *collaboration*, rather than competition alone**

*Opportunities for those who get the RMN landscape "right"*

*The 'Sweet Spot' of Mutual Success*




## For retailers

**Maximize ad revenue *and* category sales**

- ✓ Higher ad revenue from both name brands and private labels
- ✓ Higher total category sales enabled by strategic ad placements
- ✓ Heightened consumer loyalty driven by relevant, personalized ads

## For brands

**Precision targeting and enhanced positioning**

- ✓ Storytelling and better RMN ad placements to strengthen premium positioning
- ✓ Access to new data for targeting consumers granularly
- ✓ Foster coexistence with private labels for category growth—without direct competition

## For private labels

**Recognition and rapport among consumers**

- ✓ Heightened discoverability and credibility fostered by (brand-funded) RMN co-promotions
- ✓ Enhanced path to targeting value-driven shoppers with minimal marketing spend
- ✓ Exposure to the same set of shopper segments being actively engaged by name brands

# It’s time to embrace *collaboration* over *competition*

| ***Shifting topline global performance highlighted the need for:*** | ***Symbiotic and competitive dynamics identified how to:*** | ***So what? Now what?*** |
| --- | --- | --- |
| **Incrementality** | **Play to strengths** | **Mutual omnichannel success** |
| • Branded products need to maintain recent growth momentum and justify positioning with consumers.<br>• Private labels need to avoid further growth stagnancy and seize earned growth momentum. | • Branded products should play to emotional strength of connection and invest in functional facets of brand differentiation.<br>• Private labels should continuously own and innovate how to meet value-driven needs of consumers. | • Collaboration across channels (with amplified storytelling, customized experiences, etc.) can boost overall category engagement and growth. |

# Opportunities for *retailers*

**Key takeaways**
to ensure all brands you carry can thrive *together*.

So what? Now what?

## Strengthen consumer traffic through co-promotion and limit cannibalization across your retailer portfolio.

**01**

### Strengthen category traffic
Ensuring prominent placement of ***both*** name brand and private label options can cater to a wide and diverse set of customers. This maximizes category traffic and total growth potential.

**02**

### Avoid cannibalization
Position private label products as “smart alternatives” rather than direct substitutes. This maximizes growth potential by enabling name brands ***and*** private labels to meet demands for premium and high value.

**03**

### Develop co-promotion programs
Incentivize “total-category buying” by developing promotions and loyalty campaigns where the purchase of name brands can provide discounts or incentives toward private labels (or vice versa).

# Opportunities for *manufacturers*

**Key takeaways**
to protect and grow market share.

So what? Now what?

## Maintain premium appeal, innovate with co-branded marketing, and fully leverage retailer partnerships.

**01**

### Double down on your worth

Be clear and confident in creating a unique value proposition to justify your premium price. Emphasize aspects of exclusivity, heritage, luxury, or innovation that private labels cannot match.

**02**

### Collaborate with retailers

Partner to co-create shopper journeys. Highlight the quality taste or experience of your brand while boosting overall category sales (e.g., cross-promotions that private labels alone cannot replicate).

**03**

### Innovate with trade incentives

Offer incentives for co-branded marketing efforts, shelf positioning, and more. Create a cohesive narrative with retailers (e.g., “Prestige at every price point” or “For the moments that matter most”).

# Reveal your brand's *Next*—with *The Full View* from NIQ

**We're strengthening brand engagement through** *market-tested consumer insights.*

**We're uncovering a world of market** *performance shifts in store and online.*

**We're providing brand-specific line of sight into** *consumer buying behavior.*

**We're helping brands optimize** *performance across RMNs.*

>>> **Learn more** about *NIQ BASES* ***Innovation Testing***

>>> **Learn more** using NIQ ***Market Measurement solutions***

>>> **Learn more** with NIQ ***Consumer Behavior & Insights***

>>> **Learn more** via *NIQ Activate* **Retail Media Intelligence**