

Market Trends for Store Brands 2012

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Historic Marketing Trends

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| 1. Inflation | 1970's |
| 2. National Brands Saturation
Retail Consolidation
Decline of TV Advertising | 1980's |
| 3. Women in the Workforce | 1990's |
| 4. Walmart, Trader Joe, Whole Foods | 2000's |
| 5. Recession Psychology | Current |
| 6. New Media, New Technology | Future |

Results Around the Globe

	1990	Today
Great Britain	38%	48%
France	29%	45%
Germany	25%	42%
Spain	25%	48%
East Europe	n/a	25%
Greece and Italy	10%	17%

Consumer Trends

1. Convenience
2. Restaurant-Quality Foods
3. Health and Wellness
4. Niche Marketing

Retail Trends

1. Shopping Segmentation
2. Emphasis on Frugal Shopper
3. Single vs. Multi-Store Shopping Behavior
4. Baby Boomers Are Still Alive

Challenges for Store Brands

1. Innovation
2. Technology and Logistics
3. Global Supply Chain Management
4. Pricing
5. Partnership