

MINTEL

Private label 2026: the era of strategic creativity



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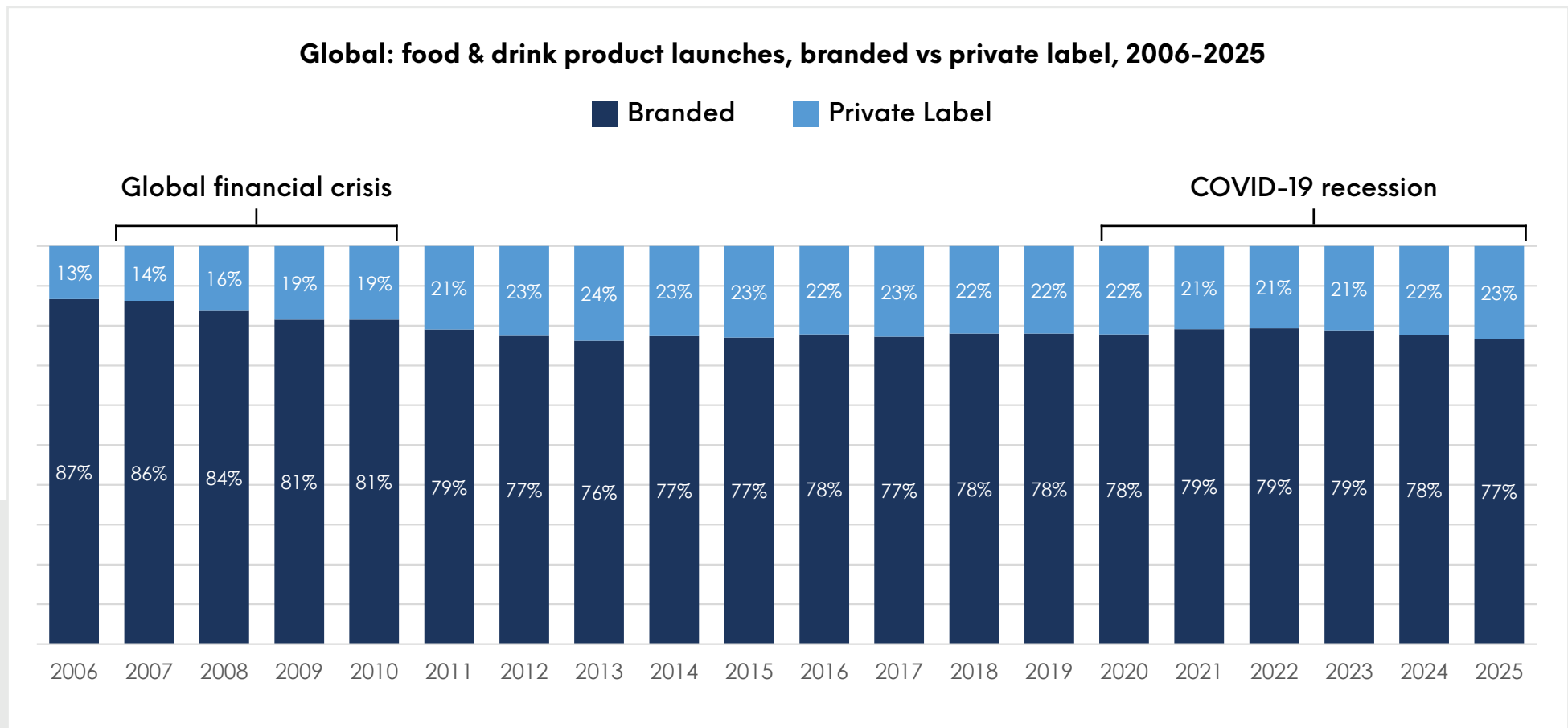




The state of private label

Retail brands are shifting from budget substitutes to trusted choices, delivering both quality and value

Private-label products tend to get a boost when the economy is struggling



Source: Mintel GNPD

Challenging times are driving consumers to cut their grocery spending

RISING FOOD PRICES

51%

of US consumers are purchasing store brand food/drink products more often than a year ago because of high food and drink prices

BETTER VALUE

60%

of German consumers would choose an own-label food and non-alcoholic drink product over a branded product if it was cheaper

AFFORDABILITY

61%

of French consumers agree that buying own-label products makes a healthy diet more affordable

Base: US: 715 internet users aged 18+ who are purchasing store brand food/drink products more often than last year (Feb 2025); Germany: 1,918 internet users aged 16+ who have bought branded or own-label food and non-alcoholic drink products in the last three months (Nov 2024); France: 1,000 internet users aged 16+
Source: Kantar Profiles/Mintel, February 2025 (US), November 2024 (Germany, France)

Private label proves its power as value and innovation converge

As shoppers recalibrate spending, retail brands shift from budget alternatives to trusted, quality-led choices.

Consumers expect more than price - seeking private labels that surprise, delight and reflect their lifestyles.

Retailers use innovation to differentiate, evolving private label into a driver of growth and brand identity.





The innovation imperative

Retailers move beyond price and parity, embracing bold experimentation and creative risk-taking

Shoppers expect retailer brands to excite and inspire

Shoppers expect retailers to lead, anticipating needs through new flavours, formats and benefits.

Differentiation comes from creativity, agility and calculated risk-taking.

Leading retailers position private label as an innovation engine, driving new concepts and premium experiences.

Private label proves it can deliver both smart value and true originality.



Innovation with purpose will define added value



Enhancing functionality

H&B Mango & Yuzu Flavour Energy Kombucha with Benefits contains adaptogens; ashwagandha; vitamin B12 to help reduce tiredness and fatigue; and live cultures to support a healthy microbiome (H&B, UK)



Mastering sustainable innovation

Nice! Milky & Dark Fusion Couverture Chocolate repurposes the transitional mix between milk and dark chocolate into a smooth, layered bar, helping close the production loop at Coop's Halba factory (Coop, Switzerland)



Harnessing AI and technology

You Us GS Retail Premium Sweet Corn Popcorn. The AI-designed pack features a QR code for interactive storytelling, blending digital innovation with snacking indulgence (GS Retail, South Korea)

Retailers lead on functionality and wellbeing

Health-focused consumers drive demand for functional private label balancing taste and nutrition.

Shoppers increasingly seek everyday wellbeing support (e.g. added-benefit drinks).

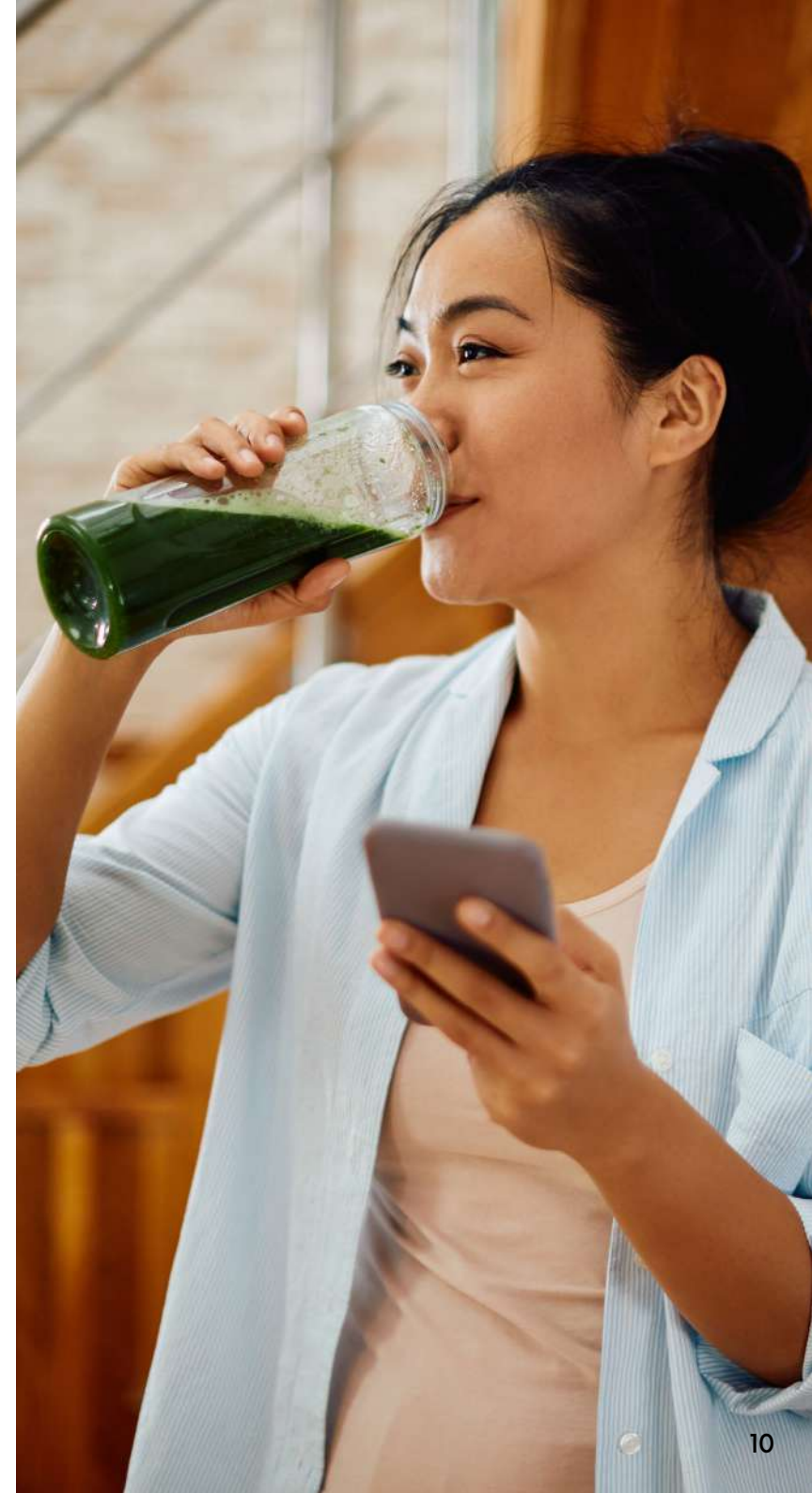
Retailers can lead by embracing emerging health trends early - from high protein to gut health and collagen.



Waitrose High Protein Meatballs: 29g protein and 8



M&S YAY! Mushrooms AM and PM Shot Duo Pack





AI and technology will shape future private-label innovation

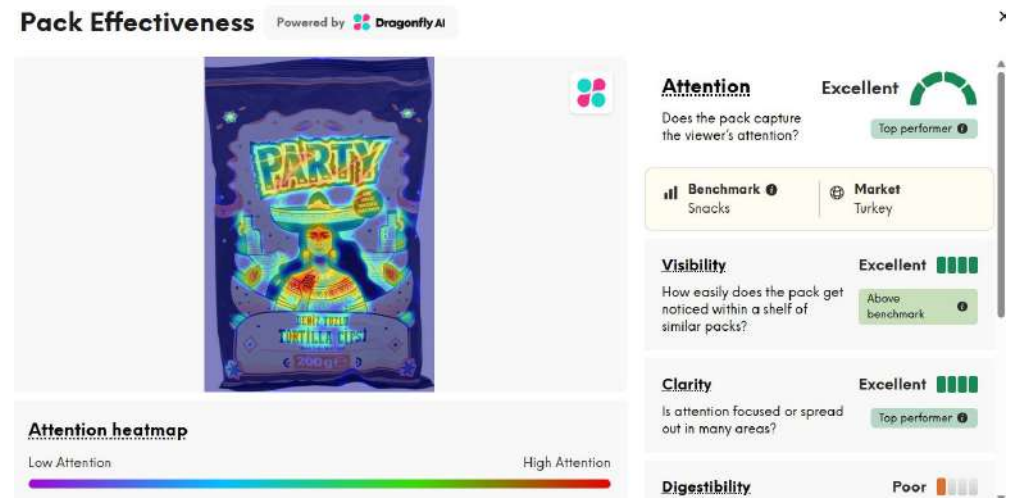
AI and emerging tech will help retailers spot trends, optimise and predict demand, as well as enable personalised, interactive experiences.

Carrefour uses AI to cut food waste; Coles Australia applies predictive analytics to prioritise high-potential launches and personalise shopping.

These advances make private label a data-driven growth lever, allowing retailers to compete with brands on creativity, relevance and speed.



AI-designed packaging signals a tech-forward approach using innovation to elevate everyday tortilla chips (BIM, Turkey)





03

Seasonal reinvented

Rethinking seasonal moments helps retailers create more relevant and inspiring limited-edition ranges

Reinventing the seasonal playbook beyond citrus and candy canes

Seasonal innovation has followed a predictable formula, but expectations are shifting.

Relevance and novelty now outpace routine, driven by a desire for playful disruption.

Private label can break from tradition with bolder, more dynamic limited editions.

Significant scope for private label to spark excitement, generate buzz and drive sales.



Private label will reimagine occasions for modern consumers



Infusionist Coffee & Caramel Egg-Fusion Martini Duo (Aldi, UK)

Private label refreshes occasions, focusing on connection, self-care and inclusivity.

Opportunities for premium treats, mood-boosting drinks and self-care gifts that resonate with modern consumers seeking meaning beyond the mainstream.

Aldi's 'That's That Me Espresso' Egg injects fresh relevance and sophistication into classic occasions, pairing an espresso-martini-flavoured chocolate egg with a ready-to-drink espresso martini can.



What's next? Tapping into cultural micro-seasons

Cultural awareness and agility will define the next wave of seasonal innovation.

Social platforms fuel micro-seasons and fast-moving trends.

Viral moments (eg hot honey, tinned fish date night, tanghulu) reveal what excites consumers now.

Private label can translate these into playful, story-led limited editions.



A top-down view of a person's hands holding a black smartphone over a wooden table filled with various Asian dishes. The phone's screen displays a grid of nine food images, mirroring the dishes on the table. The background is slightly blurred, showing bowls of rice, dumplings, and other ingredients.

04

Together we create

By partnering with brands, chefs and creators, retailers combine scale, credibility and creativity to unlock new ways to surprise and engage shoppers

Why collaboration matters now

INTEREST IN BRAND FUSIONS

45%

of Spanish consumers find collaborations between sweet biscuit brands and other food/drink brands appealing (eg Oreo and Coca-Cola)

Collaborations with brands, restaurants, suppliers and influencers are transforming private label into a platform for co-creation and storytelling.

Partnerships reflect a shift to experimentation and cross-category innovation that resonates with adventurous, modern consumers.

Rather than signalling the decline of national brands, this evolution unlocks a new growth model where brands and private label coexist.

Base: Spain: 1,000 internet users aged 16+
Source: Mintel, November 2024



Retailers move from co-branding to co-creation



Co-creating unique products

M&S Food Caramel Sauce & Marmite is a smooth, sweet-savoury blend of rich caramel and the iconic umami flavour of Marmite (UK)



Leveraging restaurant know-how

Target Good & Gather Collabs Rodney Scott Seasoning Blend Trio brings the signature flavours of award-winning pitmaster Rodney Scott to home cooks (US)



Partnering with industry innovators

Nature's Promise Greenhouse Grown Spring Mix. Giant Food partnered with hydroponic farming leader BrightFarms to launch fresher, longer-lasting Nature's Promise greens (US)

Influencer partnerships will be key to authentic engagement with Gen Z and Gen Alpha

IN THE UK

79%

of 16–34-year-olds who shopped via social media in the last month did so after seeing it promoted by an influencer or celebrity

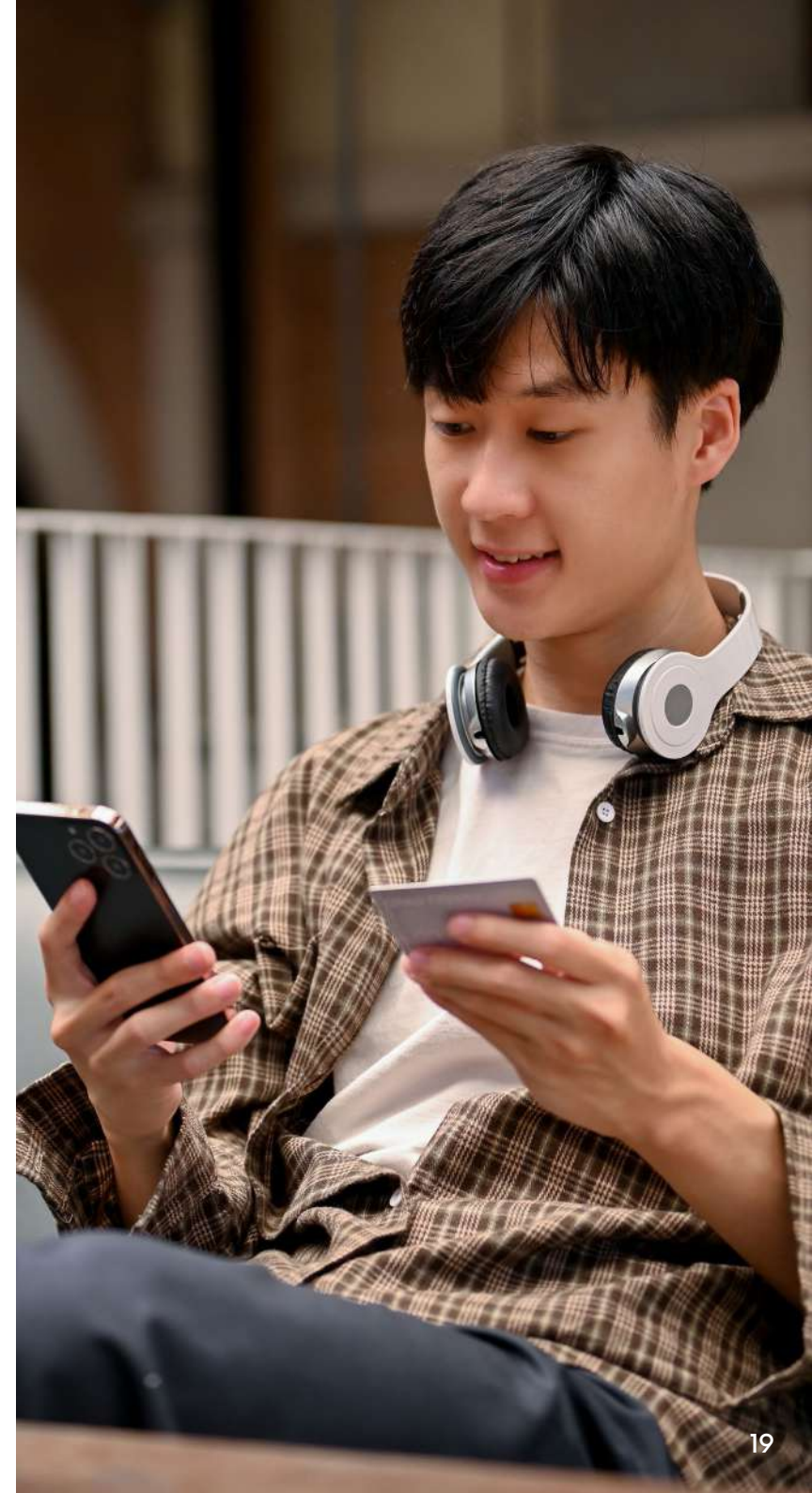
Influencer partnerships drive Gen Z engagement and discovery via TikTok and Instagram.

Influencers bring authenticity, trust and cultural relevance vs traditional marketing.

Shift from sponsorship to co-creation of products, recipes and campaigns.

Creators and micro-influencers enable targeted, high-trust reach at lower cost

Base: UK: 483 internet users aged 16–34 who have purchased products via social media in the last month
Source: Mintel, May 2025



What's next? The era of ecosystem innovation

Private label shifts to networked creativity, involving continuous co-creation and rapid testing.

Retailers act as collaboration hubs, connecting brands, chefs and creators.

Move from product owners to innovation orchestrators.

Success driven by relevance, agility and impact.



Key takeaways

From private labels to category creators

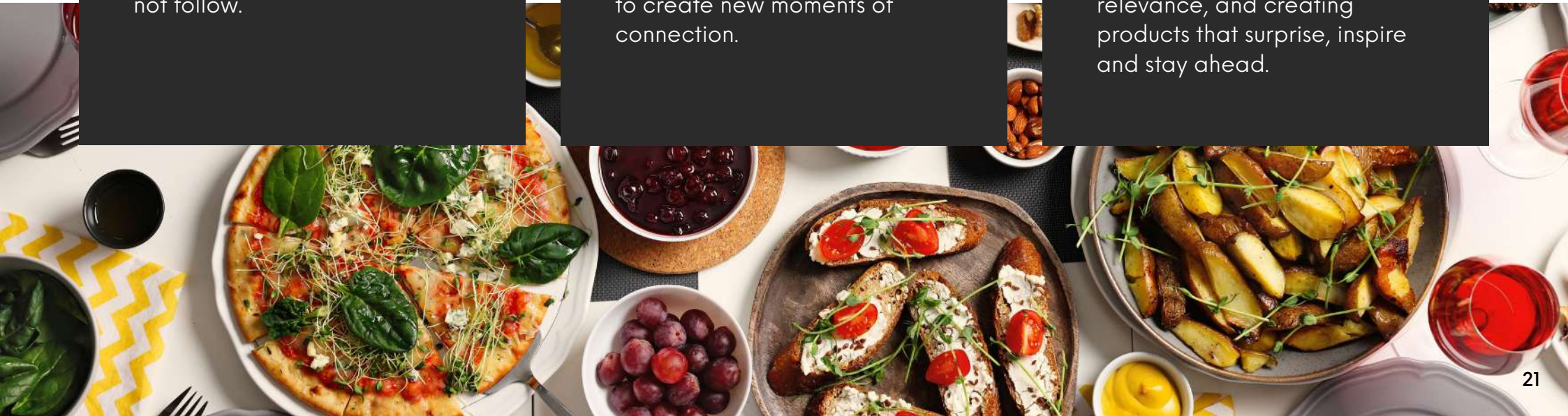
Private label can no longer rely on price alone. By combining speed, sustainability and sensory appeal, retailers can turn store brands into innovation engines that lead, not follow.

Leverage seasonal and limited editions

Seasonal and limited-edition innovation is no longer about timing. It's about cultural relevance, blending global flavours, storytelling and trend agility to create new moments of connection.

Collaborate to innovate

The future of private label lies in collaboration and co-creation, with partnerships across brands, chefs and creators amplifying credibility, building emotional relevance, and creating products that surprise, inspire and stay ahead.



Ask the innovation question you're actually trying to answer

INTRODUCING GNPD DEEP RESEARCH

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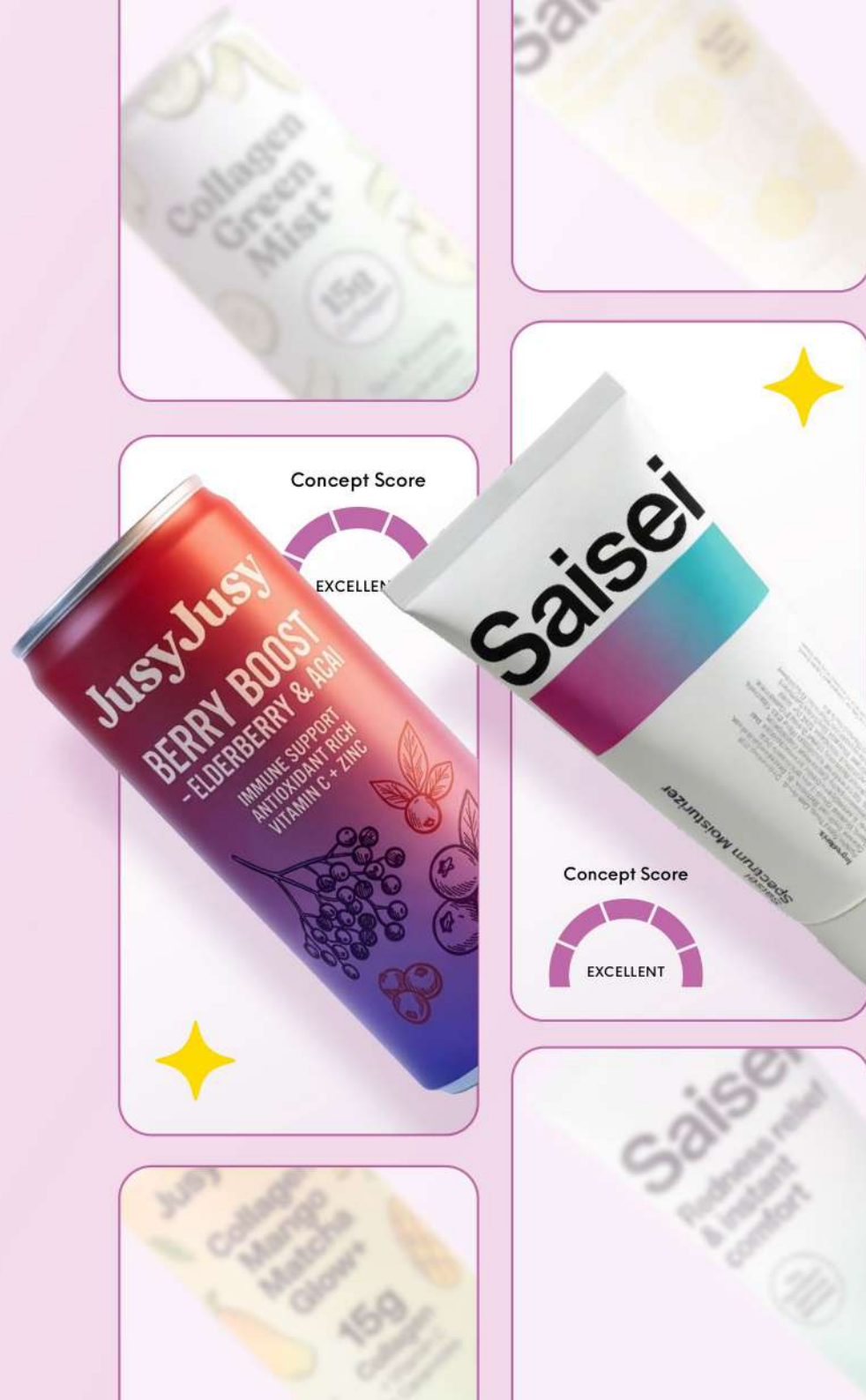
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