PLMA's 2026 Private Label Report

A statistical guide to today's store brands

STORE BRANDS:

A BRIGHT BEACON

IN U.S. RETAIL LANDSCAPE

- **Satisfied consumer needs**
- **Achieved retailer goals**
- **Outpaced national brands**
- **Set record sales & shares**

Presented by the Private Label Manufacturers Association

Source: Circana Unify+™/ PLMA

Store Brands: A Bright Beacon
In U.S. Retail Landscape

Overview

2025 Sales Dashboard

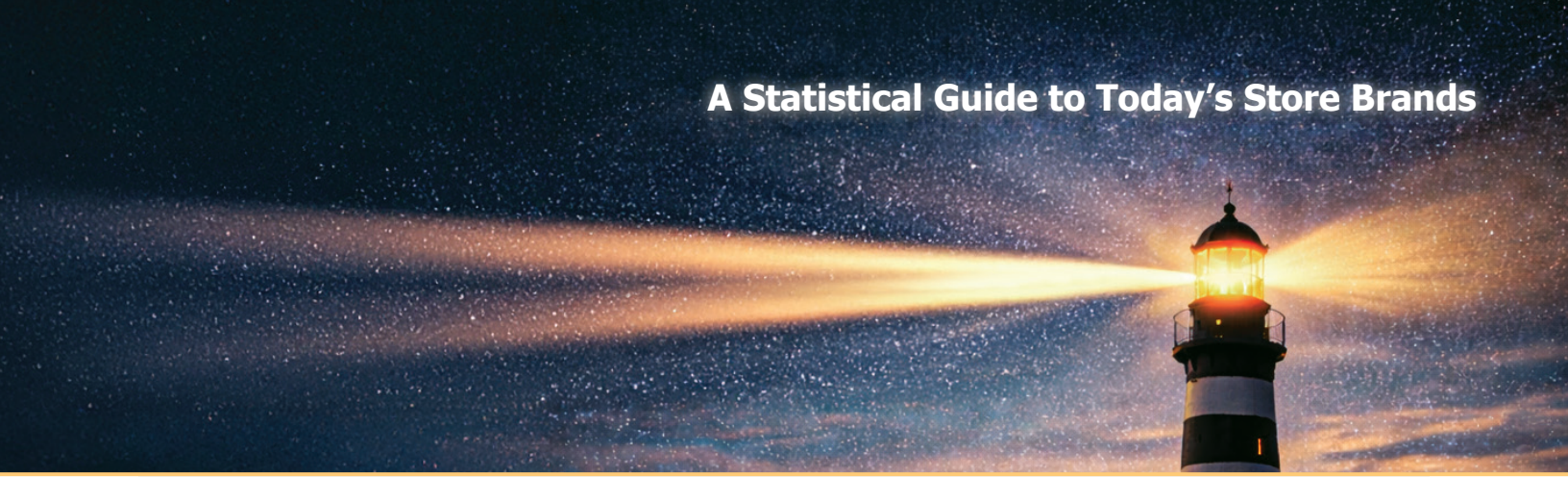
Dollar Sales	FY 2025	FY 2024	% Chg vs YA
All Channels	$1,328,777,419,205	$1,309,386,110,796	+1.5%
Store Brands	$282,782,060,652	$273,768,476,119	+3.3%
National Brands	$1,045,995,358,553	$1,035,617,634,677	+1.2%

Unit Sales	FY 2025	FY 2024	% Chg vs YA
All Channels	291,656,386,613	292,650,670,452	-0.4%
Store Brands	68,683,267,522	68,248,957,909	+0.6%
National Brands	222,973,119,091	224,401,714,543	-0.6%

In an economically challenging year as belt-tightening American consumers carefully weighed the purchase of food and nonfood products in all CPG categories, store brands stood out, more than holding their own at grocery checkouts across the country.

True to its form of the past several years, store brands in 2025 continued to serve as a bright beacon in the overall U.S. retailing landscape — satisfying consumer needs with high quality, value-driven product solutions; achieving, and in many cases exceeding, retailer goals for enhanced marketplace differentiation and performance; and, along the way, establishing new records for annual revenue as well as dollar and unit sales and shares.

Source: Circana Unify+™/PLMA



Store brand dollar sales in the year increased nearly three times the rate of national brands as the products surged ahead by 3.3% compared to a gain of only 1.2% for their national brand counterparts. Looking at unit sales, the head to head difference was comparable. Store brands advanced by 0.6% while national brands declined
by -0.6%.

In all outlets, total store brand revenue for 2025 surpassed a quarter trillion dollars for the second year in a row, coming in at $282.8 billion, an increase of slightly more than $9 billion over 2024 and establishing an all-time high in annual volume. Store brand unit volume was up by 434.3 million to 68.7 billion, also setting a new record. National brands lost 1.43 billion units.

It's worth noting that, punching well above their weight, store brands accounted for 47% of all 2025 dollar sales gains in U.S. retailing — that's about $9 billion of the industry's $19.4 billion overall growth.

One of every four food and non-food grocery products purchased throughout the U.S. during the year carried the store's name or one of its brands.

"From the perspective of sales and shares, 2025 was U.S. store brands' most successful year ever," declared PLMA's President, Peggy Davies. "But it was also a year of achievement across the board, including the growing recognition of the strategic importance of store brands by the trade and consumer media, the investor and consultant community and, most importantly, by the C-suite at America's retailers. Not coincidentally, it was a banner year for PLMA, as well, highlighted by the best-attended Chicago Trade Show ever and the well-received inauguration of Store Brands Month."

"Retailers today are brand builders"

"Store brands have moved from just another item on the shelf to whole lines competing head to head with national brands and even setting the pace in some food and nonfood categories and subcategories. Retailers today are brand builders," said Peggy Davies, PLMA President, in announcing the publication of PLMA's 2026 Private Label Report, a compilation of the year in store brand and national brand sales results and trends, including in-depth looks at food and nonfood departments and select categories and subcategories.

The Report, *"Store Brands: A Bright Beacon In U.S. Retail Landscape,"* is available on plma.com in The Industry section. PLMA members and retailers can access the latest sales figures anytime by signing in to Circana's Unify+ portal at members.plma.com.

"There is trend-forward innovation happening in areas such as plant-based, wellness, sustainability and global flavors and ingredients, for example, and retailers are working hard to create unique products that are presented as exclusive to them. There is also the powerful impact of influencers and social media efforts that highlight such retailer exclusives," Davies added.

Bold flavors, inventive packaging and trending health-and-wellness products were front and center at PLMA's 2025 Private Label Trade Show, reported Emily Crowe, *Progressive Grocer*. She cited as leading trends, "a push for protein, earth-friendly snacking, unique flavor profiles, pickle-palooza, and innovative packaging."

One flavor trend stood out to PLMA's Davies at the Show. "Hot honey is showing up across multiple categories such as chips, condiments, sauces, beef sticks, even cheese. Beyond flavor and formulation, better-for-you products dominate in the majority of food and beverage categories. We're seeing kombuchas, cold-pressed juices, protein-rich foods and bone broth. That's where consumers are headed, and retailers are responding."

"Many grocers are going niche with their private labels," agreed *Grocery Dive*. "After working for years to develop broad lines of goods carrying their own names, grocers have been introducing products centered around highly specific themes — and sometimes available for only a short stretch of time.

Source: Circana Unify+™/PLMA

Kirkland brand accounts for a third of Costco's revenue

Retailers are launching lines to defend and expand their private label reach, according to Circana. Key new initiatives include Kroger's Smart Way and Mercado, Walmart's bettergoods, Target's Deal Worthy and Figmint, Amazon's Saver and CVS' Well Market.

"Walmart's bettergoods premium food line is explicitly using bright, well-designed packaging to appeal to the visually discerning shopper. This design intentionality signals higher quality ingredients, such as plant-based and organic, and lifestyle alignment, which are critical purchase drivers for high-income families," said *Insight Trends World*, calling it an example of the power of aspirational branding.

"Warehouse clubs, which long lured members with supersized packages of food sold at lower per-unit prices are leaning more heavily on private label brands to undercut competitors and reinforce their value proposition," reported *The Wall Street Journal*. Costco's Kirkland Signature brand is a linchpin of the retailer's success, accounting for a third of its $255 billion in annual revenue. Kirkland grew at a faster pace than overall sales during the latest quarter, offering up to 20% better value than name brands, while providing equal or better quality, noted Costco CFO Gary Millerchip.

"Store brands' boom is financially driven by high-earning, over $100,000 households, 82% of whom are increasing their private label purchases, outpacing lower-income groups," related Alvarez & Marsal Global. "The fact they are driving this increase indicates private label growth is a permanent market shift, not merely a temporary response to inflation."

"The next step in the evolution of private label is proprietary products," offered Greg Sleter, *Store Brands* magazine. "Today's highly competitive retail landscape has led some retailers to take advantage of their store brands and create unique items. Retailers are thinking beyond the traditional norms of private label. These products provide unique flavors and are proprietary to the specific retailer."

The Report

In their increasingly competitive face-off with national brands, store brands scored a wire to wire victory in 2025 as sales gains of the products jumped out in front of national brand results in the early months and stayed ahead all year.

Store brands' month-to-month performance in 2025 was nearly perfect, outpacing national brands in dollar sales increases in all but one of Circana's thirteen reporting periods from December 29, 2024 to December 28, 2025.

There was a fast start, a steady midyear followed by an outlier one segment dip, and a positive finish. From January to April, store brands' monthly dollar sales gains averaged about 5%, a carryover from the strong final months of 2024; from May to September sales increases settled in at 3% per month, then the lone blemish occurred in September when sales eased -0.4%. During October, sales rose again, by 3.3%, a resounding rebound from the prior negative period. For the fourth quarter, store brands' average monthly dollar sales were plus 2%, restoring a skein of positive results.

Riding on the favor of shoppers, store brands — also called private label, retailer brands or own brands — set all-time highs in both key metrics by moving up to 21.3% in dollar share and ahead to 23.5% in unit share for the 52 weeks ending December 28, 2025, according to Circana Unify+, PLMA's exclusive provider of all outlets data.

Taking a half decade lookback, annual dollar revenue of store brands increased $64.8 billion, or plus 30%, over the past five years — from 2021 to 2025 — and dollar share was up from 19.1% to 21.3%. Annual unit sales of store brands advanced 2.7 billion, or plus 4%, and unit share improved from 21.6% to 23.5% during the period.

During 2025, store brand improvements in unit and dollar sales occurred across multiple departments and categories.

In store brand unit sales gains, the best performing department for 2025 was far and away Pet Care, up 5.4%, followed by Liquor at +4.4%, then Beverages, +2.3%; Frozen, +0.9%; Refrigerated, + 0.7% and General Food, +0.2%. Auto was flat. Four departments were down from last year: Home Essentials, -0.4%; Beauty, -0.9%; Health, -2.0% and General Merchandise, -2.4%.

Source: Circana Unify+™/PLMA

Looking at store brand dollar sales gains, seven departments finished ahead of the prior year. The Refrigerated department expanded the most, gaining 6.1% in store brand revenue for the 52 weeks ending December 28, followed by Beverages, +4.8%; Pet Care, +3.7%; Liquor, +3.6%; Beauty, +2.8%; Frozen, +2.4%; General Food, +1.6% and General Merchandise, +0.9%. Declines were recorded in three sections: Home Essentials, -0.4%; Auto, -0.5% and Health, -2.3%.

As for total store brand units sold last year, the #1 department was General Food with 20 billion, then Refrigerated, 15 billion; Beverages, 5.1 billion; General Merchandise and Frozen, both at 4.7 billion; Health, 2.4 billion; Pet Care, 990 million; Beauty, 970 million; Home Essentials, 751 million, and Liquor, 10 million.

2025 Monthly Store Brand Dollar Sales

Date	Store Brand Dollar Sales	% Chg vs. YA	National Brand Dollar Sales	% Chg vs. YA
1/26/25	$21,894,043,448	7.2%	$77,144,460,785	2.0%
2/23/25	$21,732,866,811	5.6%	$78,252,414,727	0.4%
3/23/25	$21,498,213,251	4.8%	$78,473,158,232	0.6%
4/20/25	$21,664,210,037	5.3%	$80,931,872,624	2.3%
5/18/25	$21,282,534,712	3.5%	$80,373,242,107	0.9%
6/15/25	$21,635,911,206	3.5%	$82,111,117,549	0.9%
7/13/25	$21,670,447,846	3.0%	$82,824,427,207	1.3%
8/10/25	$21,298,330,765	2.9%	$81,502,020,994	1.9%
9/7/25	$21,690,964,851	2.6%	$79,300,706,385	1.3%
10/5/25	$21,230,634,632	-0.4%	$79,300,706,385	-0.4%
11/2/25	$21,479,075,122	3.3%	$79,755,593,734	1.4%
11/30/25	$22,709,844,721	1.6%	$81,704,869,768	1.4%
12/28/25	$22,994,983,250	0.5%	$84,320,768,056	1.4%
Total	$282,782,060,652	3.3%	$1,045,995,358,553	1.2%
Dollar Share	21.3%		78.7%	

In terms of total store brand dollar sales in all U.S. outlets for the year, Refrigerated was the largest department with $60.8 billion. Next in line was General Food at $52.9 billion followed by General Merchandise, $25 billion; Frozen, $22.4 billion; Health, $18.1 billion; Beverages, $15.1 billion; Pet Care, $5.6 billion; Beauty, $3.9 billion; Home Essentials, $3.3 billion and Auto, $1 billion.

A two year review of departmental store brand sales provides a closer look at where the greatest growth is occurring. The best performing section in store brand dollar sales over the period was Refrigerated, up by 12.4%, followed by Auto, +9%; Beverages, +8.4%; Beauty, +6.4%; Frozen, +6.2%; General Food, +5.9%; Pet Care, +5.4%; Home Essentials, +3.4% and General Merchandise, +2.1%. Health was off 1.1%.

In unit sales, the top gainer for store brands was Auto, +8.8%; then Pet Care, +8.7%; Beverages, +5.8%; Frozen, +3.7%; Home Essentials, +3.5%; Refrigerated, +3.4%; General Food, +3.1% and Beauty, +1.6%. Declining in units were General Merchandise, -1.9% and Health, -2.2%.

"Conditions are ripe for continued private label success"

Drilling down even further, store brand expansion occurred in a majority of Circana's categories. The products racked up unit sales gains in 55% of the 165 food categories in which they were sold in 2025 and enjoyed dollar sales improvement in 59% of them.

Among the 165 nonfood categories that offered store brands last year, unit sales growth was recorded in 41% and there were dollar sales increases in 47%. Store brands are ubiquitous; in 2025 they were available in 97% of the 342 food and nonfood categories that Circana tracks monthly for PLMA.

There's still plenty of room for private brands to grow, believe industry experts. "Conditions are ripe for continued private label success," advised Circana.

McKinsey reported "more than 80% of U.S. consumers rate the quality of private brand food products the same or better than national brands and nearly 90% feel that private brands offer similar or better value. Increasingly, chains are taking on the big brands with strategies that bundle innovation, marketing and razor-sharp pricing."

Source: Circana Unify+™/PLMA

"Consumer trust and trial show continued acceptance and willingness to explore new private brand products, even in traditionally brand-dominated spaces. All generations are more open to trying new private label products, though younger consumers are most adventurous," stated Circana in its 2025 report, *From Growth to Transformation: The U.S. CPG Private Label Story.*

"Private labels of the future will see broad investment not just from major retailers, but also from regional and mid-sized players. Economic uncertainty will continue to elevate private brands. Quality and innovation will continue to be the focus, while emerging trends in sustainability and localization gain emphasis," added Circana.

2025 Monthly Store Brand Unit Sales

Date	Store Brand Unit Sales	% Chg vs. YA	National Brand Unit Sales	% Chg vs. YA
1/26/25	5,381,693,505	2.9%	16,598,110,531	-0.1%
2/23/25	5,245,381,349	1.6%	16,718,032,663	-1.4%
3/23/25	5,172,606,909	0.1%	16,808,359,199	-1.4%
4/20/25	5,218,708,275	1.0%	17,415,093,164	0.7%
5/18/25	5,084,755,529	-0.6%	17,077,181,014	-0.7%
6/15/25	5,207,444,288	0.0%	17,555,500,956	-0.7%
7/13/25	5,239,825,989	0.2%	17,763,872,124	-0.5%
8/10/25	5,166,429,515	0.0%	17,349,240,320	-0.1%
9/7/25	5,232,135,128	0.3%	17,326,648,458	-0.9%
10/5/25	5,166,575,403	-1.9%	16,835,641,966	-1.9%
11/2/25	5,308,728,872	2.3%	16,810,761,520	-0.6%
11/30/25	5,699,817,421	2.0%	17,311,034,311	-0.2%
12/28/25	5,559,165,339	0.3%	17,403,642,865	-0.5%
Total	68,683,267,522	0.6%	222,973,119,091	-0.6%
Unit Share	23.5%		76.5%	

"Private brands aren't riding a wave. They are the wave"

NielsenIQ concurred. In its study, *Finding Harmony On The Shelf: 2025 Global Outlook on Private Label & Branded Products,* 59% of consumers said they would buy more private label products if a larger variety were available. The report also found that 72% of consumers believe private labels are good alternatives to name-brands, with 75% saying store brands are a good value for the money. Fully 59% trust store brands since they are endorsed by the retailer.

That level of trust is consistent across four key demographic groups, with 58% of Boomers, 55% of Gen Xers, 63% of Millennials and 62% of Gen Zers saying they "trust private label brands." NielsenIQ reported that as a whole, branded products on average are now priced about 19% higher than store brands, adding, "Consumers around the U.S. are sold on private labels." "Private brands aren't riding a wave. They are the wave," proclaimed *Progressive Grocer.*

"Private label had a moment in 2025 but that trend is unlikely to cease anytime soon," said *eMarketer.* Once consumers switch to private label, brands face an uphill battle to win them back. By offering high-quality products at lower price points, chains reset what shoppers expect for the money. Private labels are sticky, and the longer consumers stay switched, the harder it becomes for brands to reclaim lost ground.

Source: Circana Unify+™/PLMA

2025 Store Brand Department Sales: Food & Nonfood

Departments	2025 Store Brand	% Chg vs. YA
Dollar Sales (in Billions)		
Refrigerated	$60.8	6.1%
General Food	$52.9	1.6%
General Merchandise	$25.0	0.9%
Automotive	$1.0	-0.5%
Frozen	$22.4	2.4%
Health	$18.1	-2.3%
Beverages	$15.1	4.8%
Pet Care	$5.6	3.7%
Beauty	$3.9	2.8%
Household Essentials	$3.3	-0.4%
Liquor	$68.7m	3.6%

Departments	2025 Store Brand	% Chg vs. YA
Unit Sales		
Refrigerated	15bn	0.7%
General Food	20bn	0.2%
General Merchandise	4.7bn	-2.4%
Automotive	137.5m	0.0%
Frozen	4.7bn	0.9%
Health	2.4bn	-2.0%
Beverages	5.1bn	2.3%
Pet Care	989.8m	5.4%
Beauty	970.1m	-0.9%
Household Essentials	751m	-0.4%
Liquor	9.7m	4.4%

2025 Store Brand Department Shares: Dollars & Units

Departments	2025 Store Brand Dollar Share
Beauty	7.3%
General Merchandise	36.0%
Health	20.6%
Household Essentials	9.9%
Pet Care	17.2%
Beverages	10.0%
Frozen	26.4%
General Food	18.2%
Liquor	0.1%
Refrigerated	36.6%

Departments	2025 Store Brand Unit Share
Beauty	13.3%
General Merchandise	44.4%
Health	25.2%
Household Essentials	15.1%
Pet Care	18.1%
Beverages	12.3%
Frozen	27.9%
General Food	22.9%
Liquor	0.1%
Refrigerated	38.4%

Source: Circana Unify+™/PLMA

Store Brand Dollar and Unit Share and Sales 2021-2025

Year	Dollar Share	Unit Share
2021	19.1%	21.6%
2022	20.0%	22.0%
2023	20.4%	22.7%
2024	20.9%	23.3%
2025	21.3%	23.5%

Year	Dollar Volume	Unit Volume
2021	$218bn	66bn
2022	$247.3bn	65.5bn
2023	$262.2bn	66.5bn
2024	$273.7bn	68.2bn
2025	$282.8bn	68.7bn

Another major factor in store brands' buoyant outlook is that from the CEO on down, retailers are all in on their own products. "The scope of private label is broader than ever. What we're seeing is a lot of retailers tiering their offerings into good, better and best," pointed out Neil Saunders, *GlobalData Retail*. "Since 2021, the value tier has grown 35%, the mid-market tier 65% and the premium tier 76%. By focusing on innovation, store brands are more frequently seen as stand-alone labels that release new, on-trend items," he said.

"The 'value luxury' trend is the strategic pivot by grocers to elevate store brand quality and design, making them aspirational purchases preferred by high-income consumers seeking efficacy and value. They're also setting aggressive goals, such as Albertsons aiming for 30% private label share. Aldi's decision to unify branding under its name emphasizes confidence in its private label quality to carry the store's reputation. These moves confirm a long-term industry shift where private label is a central pillar of operations," said *Insight Trends World*.

Michelle Garcia, director of client strategy at RR Donnelley, a marketing services firm, said "mindful spending is the new normal. Inflation trained consumers to move from reactionary cost-cutting to a deeply ingrained, strategic approach to spending. They're mixing high and low retail options."

"Retailers are doubling down on private labels as a strategic asset for differentiation, brand building and creating emotional bonds with shoppers. Through innovation, pricing and promotion excellence at their grassroots," according to Sally Lyons Wyatt, Circana's Global EVP & Chief Advisor, Consumer Goods & Foodservice Insights.

"We are a private brand company..."

In announcing plans to expand its Kirkland brand, Costco's CFO explained its ultimate goal is offering value, not name brands. "We believe our expertise in buying and the flexibility afforded by our limited SKU can give us greater agility to navigate the current environment...and increase our member values compared to the market."

Source: Circana Unify+™/PLMA

2025 Top 20 Nonfood Categories for Store Brand Dollar Sales

Category	Store Brand Dollar Sales	Store Brand Dollar Share
Cups & Plates	$3,701,879,134	61.1%
Toilet Tissue	$3,402,529,723	31.5%
Paper Towels	$2,928,790,937	40.3%
Upper Respiratory	$2,829,362,707	25.5%
Food & Trash Bags	$2,627,686,615	46.9%
Vitamins	$2,296,877,652	20.8%
Kitchen Storage	$1,980,306,063	44.3%
Gastrointestinal	$1,813,435,576	34.6%
Dog Food	$1,432,838,482	13.3%
Internal Analgesics	$1,413,185,353	29.6%
Culinary	$1,255,816,301	33.4%
Candles	$1,170,160,471	57.7%
Dog Treats & Chews	$1,155,376,592	23.1%
Disposable Tableware	$1,002,310,943	88.6%
First Aid Accessories	$966,513,692	41.1%
Adult Incontinence	$878,327,301	32.7%
Diapers	$859,714,914	14.6%
Home Health Care/Kits	$783,894,881	48.3%
Socks	$753,211,250	34.5%
First Aid Treatment	$742,511,122	37.2%

Echoing many of his colleagues, Joel Rampoldt, Lidl US, has emphasized the company's strong commitment to store brands and, in particular, to its partnerships with private label suppliers.

2025 Top 20 Nonfood Categories for Store Brand Unit Sales

Category	Store Brand Unit Sales	Store Brand Unit Share
Cups & Plates	774,416,269	65.9%
Food & Trash Bags	620,527,780	59.7%
Paper Towels	456,155,543	53.3%
Toilet Tissue	382,028,748	36.2%
Upper Respiratory	338,289,811	30.4%
Disposable Tableware	279,749,048	85.8%
Kitchen Storage	278,273,742	48.7%
Vitamins	238,281,824	28.2%
Internal Analgesics	236,286,802	36.4%
Dog Food	235,418,291	19.4%
Cat Food	234,972,010	10.9%
Gastrointestinal	227,704,926	39.3%
Culinary	226,207,301	48.2%
Candles	222,373,912	53.2%
First Aid Treatment	195,872,117	55.8%
Dog Treats & Chews	194,217,328	26.1%
Drinkware	192,957,968	67.6%
Facial Tissue	176,686,258	40.1%
Household Air Fresheners	161,084,160	24.1%
First Aid Accessories	159,718,398	45.2%

Source: Circana Unify+™/PLMA

2025 Top 20 Food Categories for Store Brand Dollar Sales

Category	Store Brand Dollar Sales	Store Brand Dollar Share
Natural Cheese	$9,861,563,948	51.1%
Fresh Eggs	$9,442,188,087	67.0%
Dairy Milk	$9,151,353,805	55.5%
Bottled Water	$8,289,286,304	31.2%
Meat - Rfg	$6,393,364,562	58.1%
Fresh Bread & Rolls	$4,551,398,187	25.4%
Seafood - Fz	$4,540,122,967	65.0%
Salty Snacks	$2,764,723,345	7.1%
Shortening & Oil	$2,759,721,745	45.3%
Cookies	$2,731,888,253	20.7%
Pastry/Doughnuts	$2,539,081,290	32.0%
Breakfast Meats	$2,465,685,680	27.5%
Butter/Butter Blends	$2,409,005,464	48.0%
Entrees - Rfg	$2,407,473,694	41.5%
Coffee	$2,399,530,320	17.6%
Poultry - Fz/Rfg	$2,339,485,891	38.1%
Snack Nuts/Seeds/Corn Nuts	$2,230,779,102	38.0%
Baking Needs	$2,187,507,162	39.1%
Luncheon Meats	$2,098,523,818	28.3%
Spices/Extracts/Salt	$1,918,794,113	28.8%

2025 Top 20 Food Categories for Store Brand Unit Sales

Category	Store Brand Unit Sales	Store Brand Unit Share
Bottled Water	3,048,331,488	36.0%
Natural Cheese	2,967,677,322	59.4%
Dairy Milk	2,944,726,148	63.4%
Fresh Bread & Rolls	1,906,940,990	35.7%
Fresh Eggs	1,778,041,803	71.6%
Ss Vegetables	1,612,839,555	53.9%
Salty Snacks	1,115,144,809	10.2%
Plain Vegetables - Fz	1,021,481,794	67.5%
Cookies	813,311,935	23.3%
Spices/Extracts/Salt	760,106,827	39.0%
Pasta	728,077,036	40.6%
Baking Needs	721,858,925	45.1%
Pastry/Doughnuts	717,688,524	31.5%
Meat - Rfg	686,719,541	58.8%
Tomato Products	649,689,572	46.8%
Yogurt	588,794,626	13.6%
Butter/Butter Blends	542,164,604	51.6%
Carbonated Beverages	507,935,866	4.4%
Sugar/Sugar Alternatives	500,749,004	62.9%
Bottled Juices -SS	493,816,650	18.5%

Source: Circana Unify+™/PLMA

"Gap between U.S. private label share and Europe's will narrow"

"We invest in suppliers," he affirmed in his keynote at PLMA's sold-out 2025 Private Label Trade Show. Lidl's business philosophy is built on differentiation through price, quality, and simplicity. Store brands play a central role, with 80% of its 3,300 core items positioned as private label. "We are a private brand company because it's the way we can deliver the best price and best quality."

He predicted the gap between the prevalence of private label goods in the U.S. vs Europe will narrow. The trend is positive. Over the past two years, when measured alongside Europe's top 17 national private label markets, American store brands ranked 6th in dollar share increase, at plus 0.8 points, and 9th in unit share gain, up 0.9 points.

Rampoldt was the latest in a line of top retail executives who served as the featured speaker at recent PLMA events. Others included Jack Sinclair, CEO, Sprouts Farmers Market; Dave Rinaldo, President at ALDI; Juan De Paoli, Vice President of Our Brands, The Kroger Co., and John Ross, President and CEO, IGA.

Next up for PLMA is Scott Morris, Walmart's SVP, Private Brands Food, Consumables and Manufacturing, who will keynote the association's 2026 Annual Meeting & Leadership Conference with an address on The Future of Private Brands. The conference, themed "Building Brands That Drive Success," is set for Bentonville, Arkansas, April 15-17.

"The U.S. grocery market is not merely a battle of price but a contest of perception and precision," suggested *International Supermarket News*. "Retailers who understand why consumers buy — not just what they buy — will secure the next surge of growth. In a country of vast economic diversity and shifting loyalties, success will belong to those who combine value, trust, and digital intelligence into a single, coherent experience."

Success with private brands can be a boon to a retailer's bottom line. "The biggest U.S. grocery chains have developed massive private label businesses," reported the *Financial Times*. "Costco's Kirkland Signature brand is 30 years old and recently hit $86 billion in annual sales. About a quarter of Walmart U.S.'s $462 billion in annual net sales now come from private brands, including its Great Value label." Kroger brands account for more than $30 billion in sales. Over 90% of customer households purchase Our Brands products. In 2026, the chain plans to expand the assortment to maintain competitive advantage.

Inside the Nonfood Category
2025 Top 20 Store Brand Dollar Growth

Subcategory	Dollar Sales	% Chg Vs YA
Hearing Aids/Accessories	$1,219,178	21952.6%
Hair Coloring	$6,233,883	638.7%
Mailing Supplies	$135,988,863	237.3%
Electric Shaver Groomer	$4,344,809	219.9%
Pet Vehicle & Travel	$2,003,424	165.6%
Pavement De-Icing	$16,665,611	93.9%
Deodorant	$3,631,060	86.6%
Pet Treats	$4,075,545	80.8%
Hair Appliances	$2,001,675	67.2%
Matches	$5,190,484	51.5%
Hair Conditioner	$46,496,739	43.9%
Showerheads	$39,774,608	37.7%
Outdoor Insect/Rodent Control Chem	$42,779,294	31.8%
Laundry Fabric Care Additives	$73,663,857	31.6%
Fragrances - Women's	$171,497,855	29.9%
Shoe Polish & Accessories	$44,020,309	27.0%
Appearance Accessories	$15,440,163	21.2%
Household Cleaning Products	$148,339,851	19.5%
Pantyhose/Nylons	$12,678,881	18.8%
Coffee & Espresso & Tea	$67,075,355	17.5%

Above $1M In Sales

Source: Circana Unify+™/PLMA

Record PLMA Show reflects store brand expansion

Albertson's CEO Susan Morris said: "What we've seen from the consumer is a continued focus on value. A shift to trading down, maybe to smaller sizes, and a focus on own brands, that's why we believe we have an incredible upside opportunity. We also see an increased usage of coupons. Consumers are sticking closer to their shopping list, maybe not buying that extra item. They're shortening their list and sticking to it."

One key barometer of store brand expansion and future prospects are metrics from PLMA's annual private label trade show in Chicago, which since reopening in 2022 after the pandemic has seen increases of 37% in exhibiting companies and 31% in participating retailers, wholesalers and other visitors.

Some 63 countries were represented at the November 2025 Show, largely in 54 national pavilions. Overall, more than 1,900 exhibiting companies occupied some 3,000 booths while total attendance exceeded 13,700. More than 50,000 food and nonfood products were featured. The 2026 Show will be held November 15-17 at the Donald E. Stephens Convention Center in Chicago.

"The record setting 2025 Trade Show and the gratifying news of store brands' powerful full-year results led us into the celebration of Store Brands Month in January," said PLMA's Davies. "Store Brands Month is now an annual nationwide collaboration of retailers and suppliers that promotes food and nonfood private label products directly to the country's grocery shoppers."

"Retailer-driven in-store and social media efforts focus on the key attributes of store brands — quality, value, consistency, uniqueness and innovation — across all categories in both brick and mortar and online formats. For 2026 we also teamed with three social media influencers to enhance the promotion as consumer trust in influencer messaging continues to rise," informed Davies.

"A major objective is generating more consumer trial, which surveys consistently prove to be store brands' best friend in gaining new and subsequently loyal customers. We've started off 2026 right where we left off."

Inside the Nonfood Category
2025 Top 20 Store Brand Unit Growth

Subcategory	Unit Sales	% Chg vs. YA
Hair Coloring	2,072,329	564.6%
Mailing Supplies	51,695,780	439.1%
Electric Shaver Groomer	210,203	414.0%
Hair Appliances	200,107	185.3%
Pet Vehicle & Travel	185,074	130.4%
Pavement De-Icing	1,333,015	71.6%
Pet Treats	693,312	67.0%
Pet Supplements	2,277,527	39.4%
Shoe Polish & Accessories	4,632,727	33.5%
Bath Products	9,072,278	32.9%
Fragrances - Women's	13,679,666	32.0%
Outdoor Insect/Rodent Control Chem	8,484,713	29.8%
Deodorant	448,344	28.6%
Other Cleaning Tools	1,845,166	25.9%
Laundry Fabric Care Additives	10,322,933	21.2%
Cat Treats	42,451,556	19.3%
Appearance Accessories	2,699,783	17.9%
Hair Conditioner	6,489,382	17.3%
Matches	1,147,258	14.6%
Water Filters/Devices	1,907,038	14.4%

Sales Above 100K

Source: Circana Unify+™/PLMA

Inside the Food Category
2025 Top 20 Store Brand Dollar Growth

Subcategory	Dollar Sales	% Chg vs YA
All Other Milk	$22,220,506	64.2%
Other Snacks - Fz	$7,318,475	46.8%
Energy Drinks	$66,631,029	38.6%
Canned Juices- SS	$40,397,473	30.9%
Baked Goods - Rfg	$421,143,461	28.4%
Aseptic Juices	$119,925,469	24.3%
Fresh Eggs	$9,442,188,087	22.7%
Seafood - Rfg	$522,933,396	20.6%
Sports Drinks	$168,442,902	19.2%
Chocolate Candy	$906,114,863	17.3%
Spirits/Liquor	$14,108,396	15.3%
Rtd SS Milk & Milk Alternatives	$148,120,829	15.2%
Yogurt	$1,373,648,832	15.0%
Meat - Rfg	$6,393,364,562	14.8%
Barbeque Sauce	$60,831,024	14.5%
Gum	$7,946,994	13.4%
Frankfurters	$249,880,869	13.3%
Dried Meat Snacks	$529,745,722	13.1%
Dry Fruit Snacks	$234,341,471	13.0%
Coffee	$2,399,530,320	12.5%

Sales above $1 million

Inside the Food Category
2025 Top 20 Store Brand Unit Growth

Subcategory	Unit Sales	% Chg vs. YA
All Other Milk	7,413,850	79.0%
Other Snacks - Fz	1,416,728	54.6%
Canned Juices-SS	23,635,114	43.6%
Energy Drinks	35,037,075	27.6%
Aseptic Juices	38,408,965	26.6%
Spirits/Liquor	1,753,421	25.7%
Sports Drinks	57,532,383	21.6%
Prepared Vegetables - Fz	1,589,699	21.6%
Baked Goods - Rfg	63,520,839	19.1%
Seafood - Rfg	69,003,683	16.2%
Lunches - Rfg	79,926,985	13.7%
Meat Pies - Rfg	761,705	12.9%
Dip/Dip Mixes - SS	37,337,203	10.2%
Carbonated Beverages	507,935,866	9.5%
Honey	89,018,908	8.7%
Dry Fruit Snacks	39,863,145	8.5%
Dinner Sausage	205,858,386	8.2%
Meat - Fz	169,497,193	7.9%
Dry Beans/Vegetables	157,087,952	7.6%
Whipped Toppings - Rfg	359,990,223	7.5%

Sales above 500,000 units

Source: Circana Unify+™/PLMA

Credits

PLMA's 2026 Private Label Report
Store Brands: A Bright Beacon In U.S. Retail Landscape

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Published by:
Private Label Manufacturers Association
630 Third Avenue, New York, NY 10017
Telephone: +1 212 972-3131
www.plma.com

Source:
Circana Unify+™/PLMA

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