[Times & Trends]

A Snapshot of Trends Shaping the CPG and Retail Industries

October 2008

Private Label 2008
Shopping Patterns Shift in a Transforming Economy

IRI Breakthrough Insights. Breakthrough Results.

The Private Label Palliative

The fact that shoppers are facing a crisis of confidence and checkbook has been well documented by IRI and many other firms that study consumer trends. How shoppers are meeting today's economic challenges is a key question on the minds of CPG manufacturers and retailers as we enter the most shopping intensive period of the year.

One important bellwether of shopper behavior is private label product adoption patterns. Private label purchases have traditionally accounted for approximately 16 percent of CPG spending and one-fifth of products purchased. Retailers have worked diligently to change the face of private label. Gone are the generic brown paper labels with black type. In its place today are premium products, innovative packaging, aggressive in-store merchandising and even feature ad support. Historically, lower- and middle-income shoppers have represented the largest population segment purchasing private label. However, as detailed in IRI's latest report on the Transforming Economy, *Shoppers in Crisis*, even upper-income shoppers, those earning $100,000 or more, are turning to private label as part of a money-saving strategy.

Today's economic transformation is also changing what types of private label products people purchase. Private label penetration has always varied by channel. Private label goods represent just under 25 percent of grocery store unit share, versus just over 15 percent at in the mass and dollar channels. Growth rates are highest in the drug store channel, in part due to significant price discounts offered by private label healthcare and beauty and personal care products.

Growth in private label sales at drug stores reflects significant changes in shoppers' rituals. For example, shoppers are avoiding visits to the doctor for simple illnesses and purchasing OTC remedies to save money. To extend their savings, they are turning to private label products. Shoppers are also staying away from the hair and nail salon, opting instead for home-based hair coloring and hair care products, nail polishes, make up and similar products.

As the U.S. economy continues to operate in uncharted territory, shoppers will continue to change their behaviors to cope. Some of these changes are easy to predict, others will be more nuanced. As shoppers opt out of some products and stores, they will opt into others. It is critical for the ongoing success of CPG manufacturers and retailers to not only react to, but anticipate these trends and be ready with products, assortments and store layouts that meet the shopper's changing needs. Securing this level of shopper knowledge and achieving nimbleness never before seen in our industry requires as a starting point unprecedented amounts of data, analytical tools that can tease out trends and preferences among minute shopper groups, and organizational structures that can quickly convert new insights and strategies into new shopping experiences for the consumer.

There is no time like the present to get started. I'm eager to hear your comments and share your perspectives.

Thom Blischok
President, Consulting & Innovation

EXECUTIVE SUMMARY: TURNING INSIGHTS INTO ACTION
CPG MANUFACTURERS

INSIGHT	ACTION
» With difficult economic conditions expected to last at least 12 more months, private label is well-positioned to play a major role in satisfying consumers' need for value in the CPG marketplace	» Brand manufacturers must re-evaluate pricing strategies to ensure alignment against the value needs of key consumer segments
» Private label share varies across channels but is highest in grocery; retailers across channels have elevated the importance of private label as a key source of differentiation, and drug and dollar retailers posted sizable private label share gains the year	» Consider partnering with retailers to provide multi-tiered- *branded and private label-* solutions with a clear value proposition across broad consumer segments
» Habitual private label shoppers are concentrated among a select segment of the population; demographics play a major role in defining private label purchase behavior	» Mitigate private label gains with targeted promotions against high-priority consumer segments supported by solutions-based merchandising
» The average private label discount versus national brand is about 30%, but the average price gap varies markedly across departments	» Invest to identify optimal price gap versus private label; carefully test price changes prior to rollout
» Innovation has been a key private label mitigation strategy for manufacturers, and is becoming more critical as private label trial activity increases	» Continue to focus on innovation and brand positioning strategies

EXECUTIVE SUMMARY: TURNING INSIGHTS INTO ACTION
CPG RETAILERS

INSIGHT	ACTION
» With difficult economic conditions expected to last at least 12 more months, private label is well-positioned to play a major role in satisfying consumers' need for value in the CPG marketplace	» Retailers should support private label initiatives with feature ads and display-based merchandising to raise awareness among prospects seeking low-cost in-category alternatives
» Private label share varies across channels but is highest in grocery; retailers across channels have elevated the importance of private label as a key source of differentiation, and drug and dollar retailers posted sizable private label share gains the year	» Leverage multi-tier private label lines which have broad appeal; tailor offerings at the market/store level to maximize relevance among key consumer segments
» Habitual private label shoppers are concentrated among a select segment of the population; demographics play a major role in defining private label purchase behavior	» Understand core private label needs across key consumer segments; develop highly targeted promotional campaigns; continually track consumer response to enable mid-program modifications
» The average private label discount versus national brand is about 30%, but the average price gap varies markedly across departments	» Continually re-evaluate pricing strategies at the market and store level to assure alignment with store goals and to maximize value proposition among key consumer segments
» Innovation has been a key private label mitigation strategy for manufacturers, and is becoming more critical as private label trial activity increases	» Analyze product development best-practices across departments and categories to identify low cost private label innovation opportunities

INTRODUCTION

[The evolution of the U.S. private label market has accelerated in the face of growing financial turmoil.]

For a majority of Americans, the country's economic struggles are impacting nearly every aspect of daily living. Within the packaged goods arena, the effects of the economic downturn have been nothing less than profound.

Manufacturing costs are climbing, profit margins (for manufacturers *and* retailers) are being squeezed to the breaking point, channel migration activity has escalated, and consumer shopping attitudes and behaviors are shifting rapidly in the face of economic uncertainty.

Private label is well-positioned to compete in these difficult conditions. In fact, retailers are increasingly leveraging store brands as a key aspect of their differentiation strategies.

The evolution of private label has coincided perfectly with the emerging CPG needs of our country. With economic woes in the headlines daily and consumers grappling to stay afloat amid escalating financial strains, private label has become a formidable force in the packaged goods industry.

The market is not expected to ease for at least another 12 months. Financially strapped consumers are being forced to opt out of some categories and find lower-cost substitutions in others. Retailers are seizing this opportunity to drive trial and adoption of new and expanded private label lines.

In some categories, manufacturers of brand name goods are being forced to develop private label mitigation strategies never before deemed necessary.

The evolution of the U.S. private label market has accelerated in the face of growing financial turmoil.

This report provides insight into current and emerging private label trends that will enable manufacturers and retailers to develop and execute private label strategies that align with overall corporate goals while simultaneously addressing the rapidly changing needs of U.S. shoppers in crisis.

PRIVATE LABEL SHARE TRENDS

[The U.S. private label market has reached a pivotal point in its development, and retailers have turned up the heat with respect to product development and promotion.]

Over the past several years, private label has consistently accounted for about 16% of CPG spending and one-fifth of products purchased. Though not remarkable, the growth trend has been slightly positive each of the past four years. This past year has seen escalating growth rates as consumers increasingly turn to private label in order to save money on packaged goods.

Retailers are helping to fuel private label growth with new strategies including more distinctive, premium labels, innovative packaging, in-store merchandising, and even feature ad support.

For example, Target's Archer Farms brand has implemented innovative cereal packaging. This summer, Archer Farm's introduced a slim oblong-shaped cereal canister that stores neatly in a cabinet and features a reclosable lid.

Efforts such as these are successfully changing consumer perceptions of private label. No longer is private label seen as a low cost alternative to brand name products. Consumers increasingly believe that private label offerings are as good, sometimes even better, in quality as their brand name counterpart.

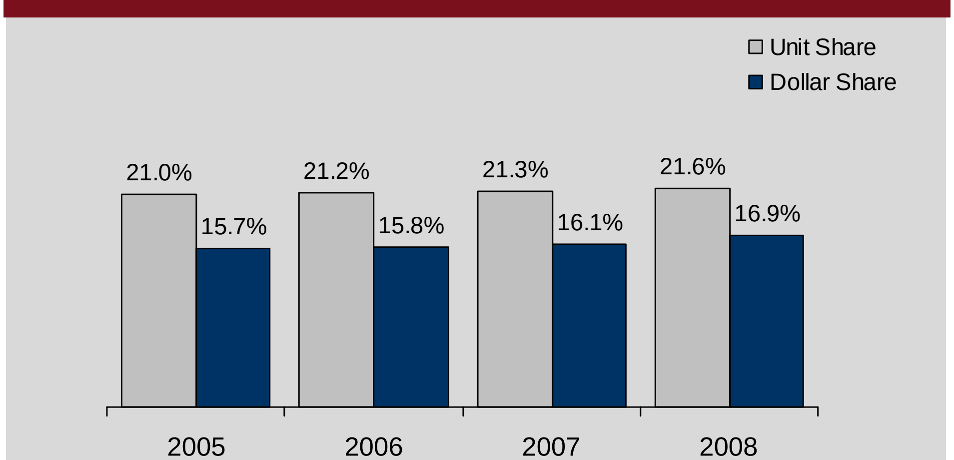
Kroger and Safeway are examples of private label's growth; each have private label shelf penetration of about 25%[1]. But private label share growth is happening across retail channels. With ready access to consumer attitudes and behaviors vis-à-vis private label offerings, retailers are well-positioned to drive trial and adoption bringing private label share to new highs.

Private label share growth has accelerated across all income segments over the past year as consumers struggle under intense economic pressures.

IRI, *Transforming Economy: Shoppers in Crisis*

[1] Company Web site; PLMA

Private Label Share of CPG Spending: All Outlet



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years

CHANNEL SHARE

[Private label spending is highest in the grocery channel, but drug and dollar retailers are building momentum.]

Private label share varies across retail channels, and is highest among grocery retailers. Share growth, however, is strongest among retailers in the drug channel.

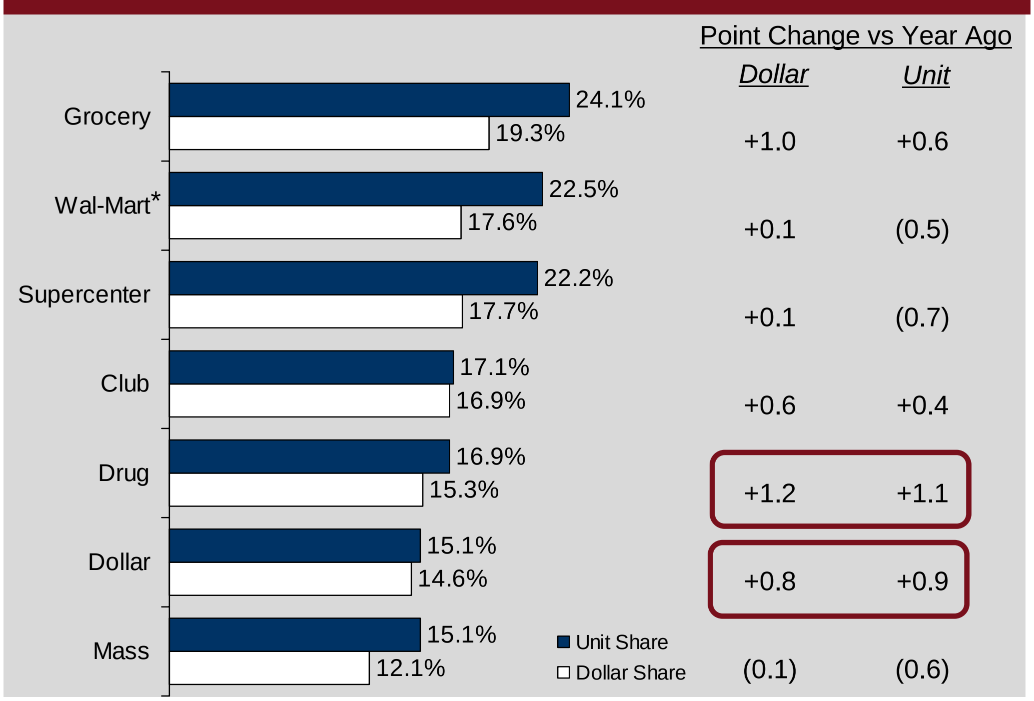
Over the past year, private label share of drug sales (dollar and unit) climbed one full point. The catalyst behind this growth is likely multi-pronged.

As illustrated in IRI's *Transforming Economy: Shoppers in Crisis*, drug channel basket rings have grown as consumers increasingly turn to the channel for local fill-in trips. At the same time, self-care behavior is up sharply, reflective of consumer efforts to limit expenditures wherever possible, including efforts to reduce trips to the doctor.

The dollar channel is also faring well in the battle for share of private label expenditures. Once again, shifting shopping patterns amid financially challenging economics play a major role in dollar's share gains.

As consumers seek to stretch their CPG dollars further, dollar stores are increasingly being leveraged for pantry-stocking missions. Illustrated below, the channel is effectively capitalizing on consumers' need for affordability and value with private label offerings.

**Private Label Share of CPG Spending:
By Channel**



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior year
*Total Wal-Mart with Neighborhood Markets

DEPARTMENT SHARE

Consumer focus on self-care and an increased OTC availability of once Rx products are fueling growth of health-related private label product offerings.

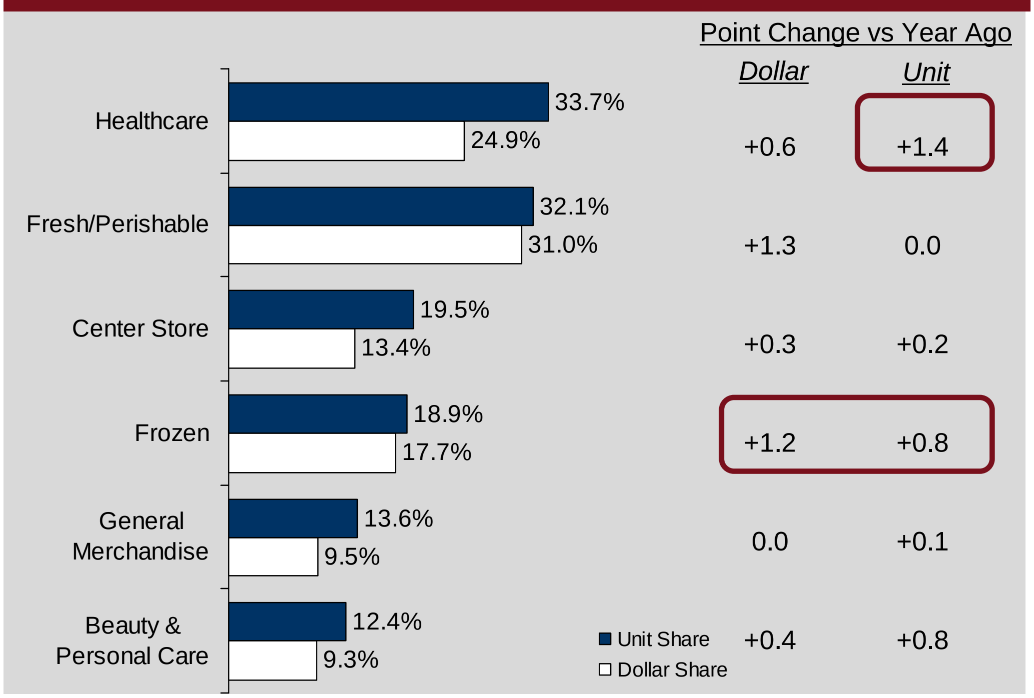
Private label offerings of OTC products have grown significantly over the past year, lifted by growing numbers of prescription products moving to OTC, and retailer efforts to capitalize on functional and customized product features to create a unique private label offering (e.g. fast-melt variations, slow release, etc).

As demonstrated below, consumers are receptive to these new product introductions, and have shifted spending accordingly.

Across channels, private label now represents one-third of healthcare department units and one-quarter of department sales. Private label unit growth within the healthcare department has significantly outpaced growth in any other department. This is good news for drug retailers. As a destination location for healthcare products, the channel is well-positioned to compete.

The frozen foods department has also been a source of growth for private label goods. A resurgence of at-home from-scratch cooking has consumer demand for easy-to-prepare meal solutions and meal component categories on the rise. Thanks to increased perceptions of quality, private label frozen foods are being recognized as a convenient and affordable solution to meal-time conundrums.

Private Label Share of Department Spending: All Outlet



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior year

PRIVATE LABEL PRICE DISCOUNT BY DEPARTMENT

[The average discount offered by private label products varies greatly by department.]

On average, private label products cost about 30% less than their brand name counterpart. That discount varies greatly, though, at the department level.

As illustrated in the chart below, for instance, the average private label fresh/perishable item costs only 3.5% less than its branded counterpart.

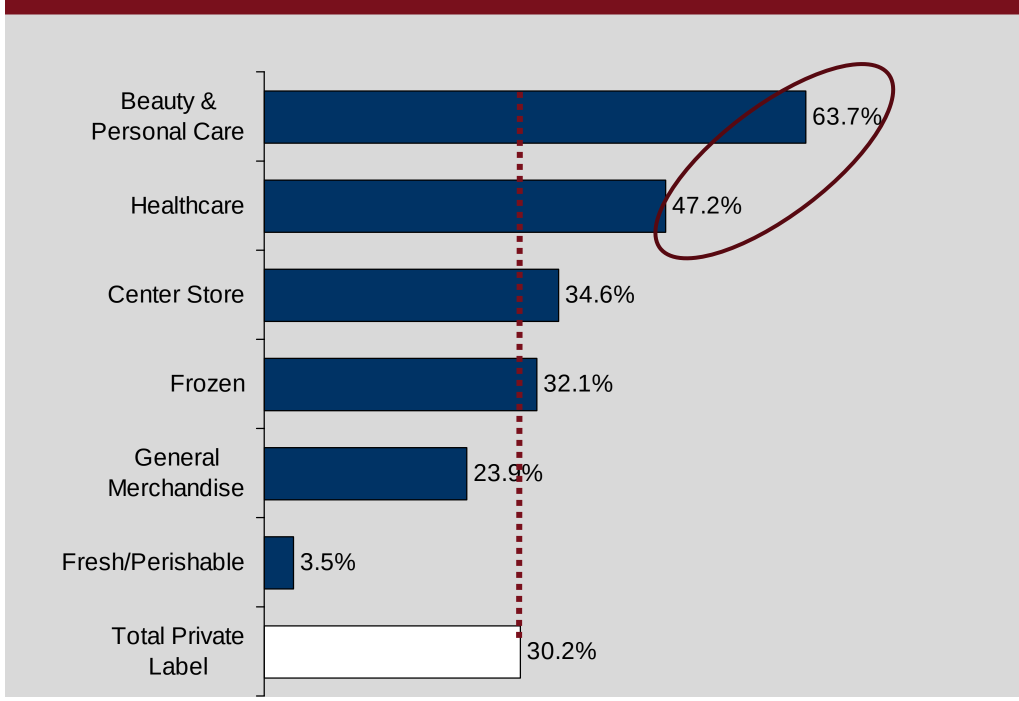
In the beauty/personal care department, though, private label buyers will save nearly 64% versus branded, on average. The difference is rather remarkable. Private label healthcare products also offer a sizeable, yet less drastic, price gap.

Much of the price gap can be explained by the high cost of innovation in beauty/personal care and healthcare.

Research and development, testing and even packaging are quite costly, and, in the end, most new product ideas actually fail. Those that succeed must shoulder the burden of cost of their own development as well as the cost of those that were not as successful.

Retailers and manufacturers must be on the alert for innovation that works. The key is to watch innovation in every category and across every department. Wherever possible, import proven ideas from other categories- even those from other departments- to create in-category differentiation, then tailor the product to the specific need of the category's key consumer segments.

Private Label Average Price Discount by Department: All Outlet



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008

CATEGORY LEVEL CONCENTRATION

[Private label penetration is quite low across most categories, and spending is concentrated among a finite group of CPG categories.]

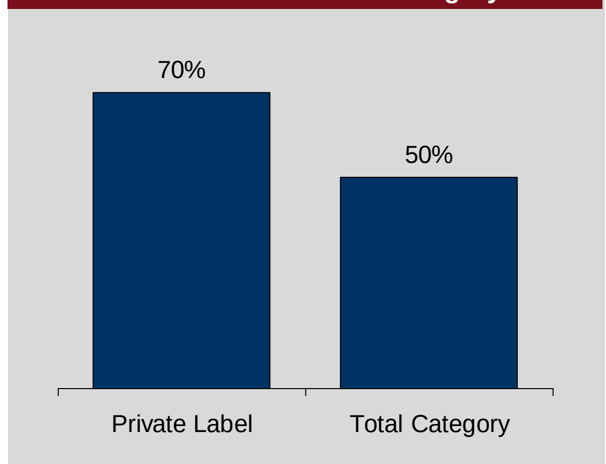
Despite elevated retailer focus, private label penetration remains quite low. The chart below reflects penetration of greater than 50% among only 4% of CPG shoppers. Even among heavy private label shoppers, penetration is less than 25% among nearly two-thirds of the population.

As a result, private label sales are quite concentrated. Illustrated in the chart to the right, 50 categories (ie, less than 17% of all CPG categories) represent 70% of private label sales. Concentration is significantly lower among branded products, where the top 50 categories account for half of total sales dollars.

Difficult economic conditions have brought retailers a unique opportunity to dramatically grow private label trial through an "affordable" product mix. But effective targeting is critical.

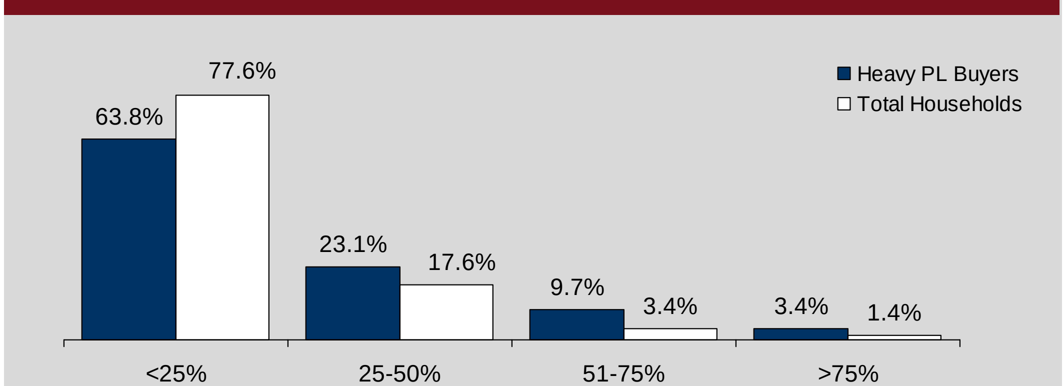
As marketers reexamine their private label strategies, the time is ripe for implementation of multi- tiered programs. Because some areas have been harder hit by economic forces than others, promotional support budgets should be re-allocated to markets where the need is most critical. Messaging must be value-oriented and highly targeted to ensure relevance to key consumer segments at the region and market level.

Top 50 Categories* Dollar Sales as % Total CPG Private Label vs Total Category



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008
*Top 50 Categories Based on Private Label Dollar Sales

% of CPG Categories by Private Label Penetration
Among Category Buyers



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008

PRIVATE LABEL PURCHASE SEGMENTS

[Heavy private label buyers represent a disproportionate share of spending.]

The concentrated nature of private label extends beyond the number of categories offered, also describing the number of habitual private label purchasers in CPG today.

Though nearly everyone purchases some private label products at some point- private label penetration remains firm at 100%- a notable 33% of shoppers are considered heavy buyers of private label goods. This valuable private label consumer segment actually accounts for nearly two-thirds of private label sales.

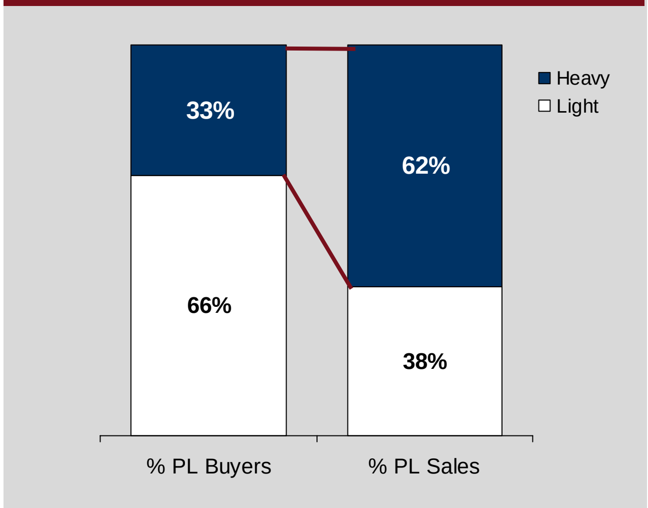
Heavy private label shoppers allocate one-fifth of their CPG spending to private label products- nearly double the private label spending of the general CPG population.

While significant opportunity remains, the fact that 33% of consumers are heavy CPG buyers marks an increase versus last year, when 28% of shoppers were heavy private label buyers.

The appeal of private label has definitely broadened, but retailers must continue to penetrate new consumer segments in order to maintain momentum.

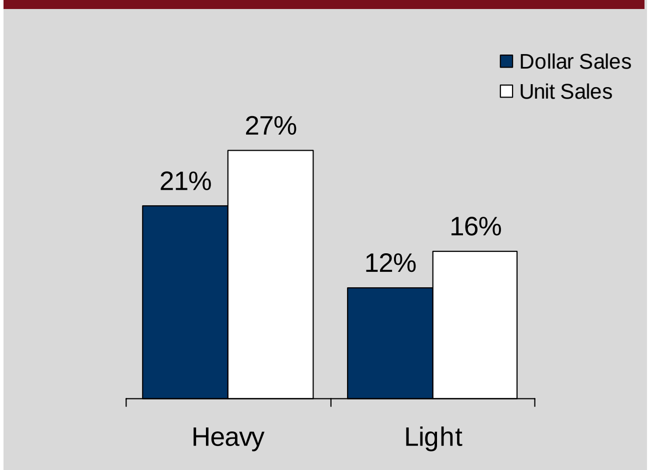
Brand manufacturers beware: retailers have raised the bar on private label. The need to innovate and differentiate is more critical than ever, and speed to market does count.

Total CPG All Outlet Private Label Sales Contribution of Heavy vs Light Buyers



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008

Private Label Share by Purchase Segment



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008

CONSUMER SPENDING BY SEGMENT

[The demographically-motivated nature of private label spending emphasizes the importance of highly segmented and target private label strategies.]

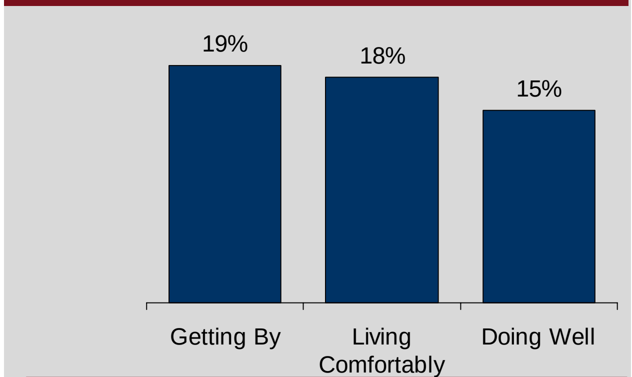
Private label penetration and share of spending is strongly impacted by demographics. For example, the chart to the right illustrates that private label share decreases as income increases. IRI's *Transforming Economy: Shoppers in Crisis* report reveals, though, that in these tough economic times, wealthier consumers have stepped up private label purchase activity as they seek value through substitution rather than opting out of a category completely.

Another key indicator of private label spending is household size. Shown in the bottom chart on this page, private label penetration increases sharply with household size. Particularly in today's economy, larger households are looking to stretch their CPG dollars as far as possible. Private label products go a long way to answering this need for value.

Due to the powerful influence of demographics on private label usage, private label dynamics will vary notably by local trading area, and often, within a trading area. To compete effectively, retailers must strictly adhere to segmented private label strategies. Multi-tiered offerings will bring broader appeal, and those retailers that successfully establish a "halo" brand will reap sizable private label share increases.

Manufacturers of branded products must also clearly understand diverse and changing market dynamics, and must adjust their product, promotion and distribution strategies to ensure value across critical categories/ brands based on key consumer segments.

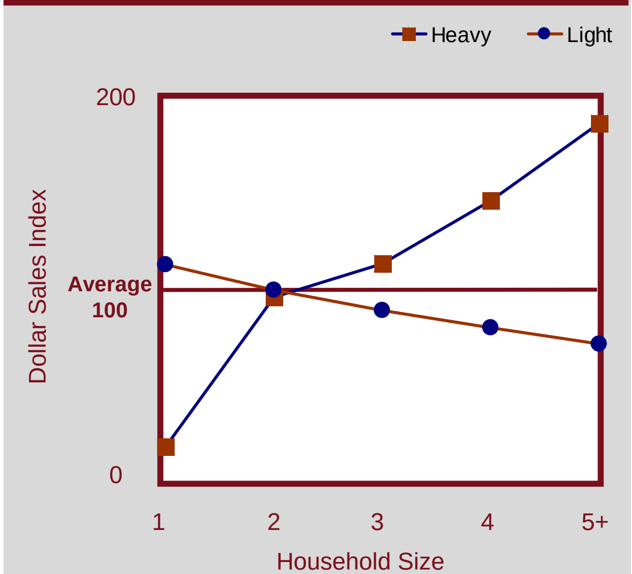
Private Label Dollar Share by Income Segment



Point Change vs Year Ago	+0.8	+0.9	+0.7

Source: IRI Consumer Network™; 52 weeks ending 9/7/2008

Private Label Dollar Index by Household Size (100 = Average)



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008

CATEGORY OPPORTUNITY

[*Private label is protecting or growing share in two-thirds of top CPG categories.*]

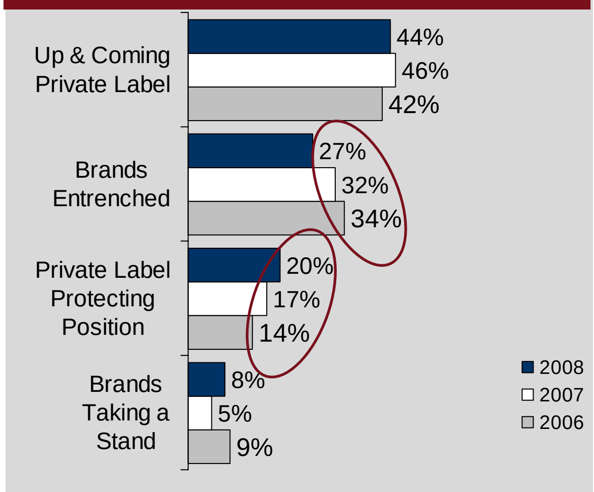
Private label opportunity varies widely at the category level. All in all, however, private label performance is strong. As illustrated in the matrix on the bottom of this page, private label is protecting or growing share in nearly two-thirds of the top 100 CPG categories. These two quadrants combined have grown 12 points over the past two years.

Conversely, only 27% of the top 100 categories are classified as “brands entrenched”. This marks a 6 point decline versus two years ago.

Among the remaining 8% of top 100 categories, branded products are gaining share. This trend marks a 3 point increase versus year ago, and is in line with performance two years ago.

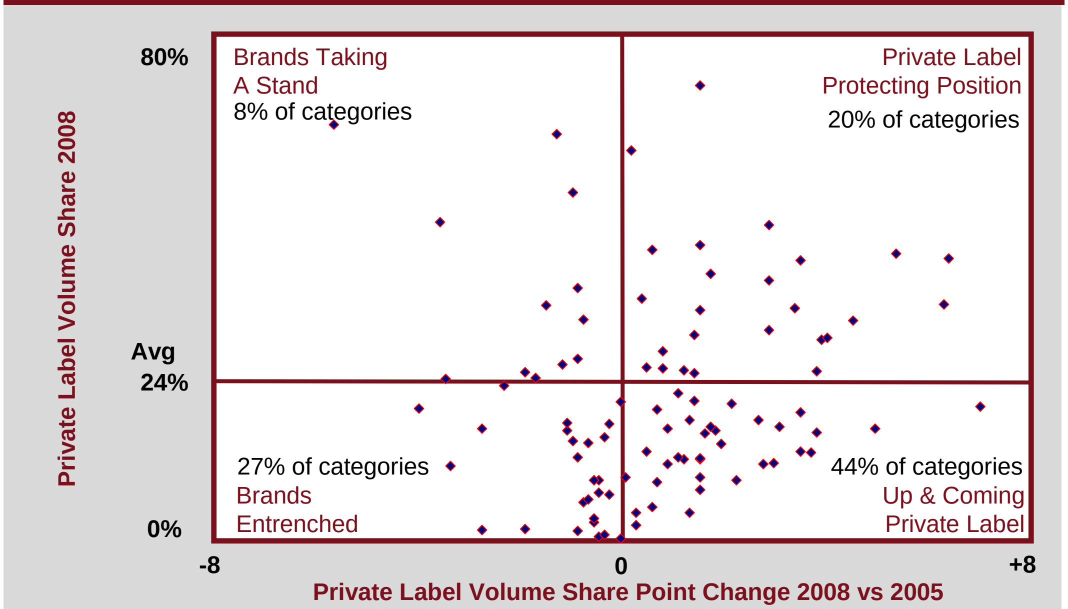
The pages that follow provide a more in-depth look at each quadrant.

CPG Category Distribution by Private Label Development Quadrant 2005-2008



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years
*Top 100 Categories Based on Dollar Sales

Top 100 CPG Categories
All Outlet 2008 Private Label Share & Point Change 2008 vs 2005



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years

PRIVATE LABEL PROTECTING POSITION

[Retailers who are able to successfully create a halo-brand will be rewarded with increased penetration and repeat shopping behavior.]

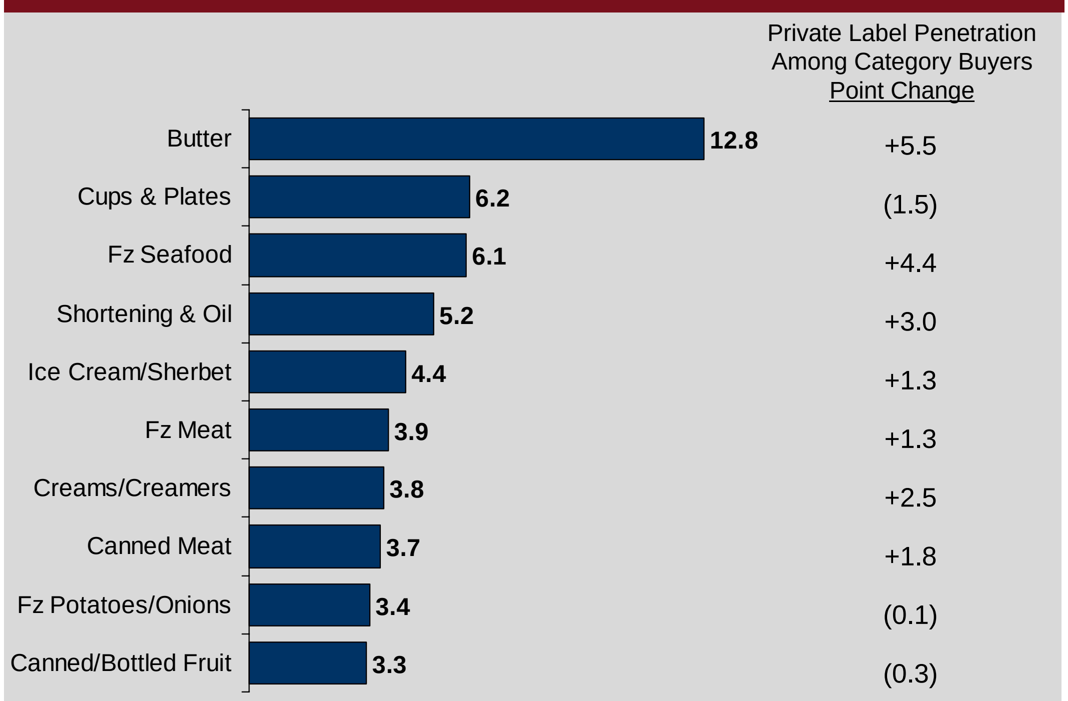
In 20% of categories, referred to herein as “protecting position”, private label boasts above average and growing share. As illustrated in the chart below, private label household penetration is on the rise in most of these categories. In some instances penetration has been increasing steadily for the past several years.

In top-performing butter, for instance, household penetration has climbed 5.5 points since 2005. Frozen seafood also posted several years of solid penetration growth, climbing 4.4 points over the same time period. The power of penetration is clearly at play here.

This phenomenon speaks volumes for retailers with low private label share. Establishing relevance to current buyers is important, but the ability to think outside the box in order to understand and respond to the needs/wants of non-buyers cannot be overstated.

Multi-tier private label programs provide broad appeal across diverse market segments. Additionally, multi-unit and buy-one-get-one will drive usage and loyalty as consumers clamor for maximum value in the face of intense financial pressures.

Top 10 Categories with Above Average and Increasing Private Label Share
2008 vs 2005: All Outlet Private Label Volume Share Point Change



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years
Among top 100 categories

UP & COMING PRIVATE LABEL

[In private label, manufacturer-retailer cooperation is more important than ever before.]

Among 44% of top CPG categories, private label share is below average, but on the rise. The categories with the highest private label share gains are highlighted in the chart below.

In nearly all of these categories, private label penetration is also climbing, and quite significantly in some cases.

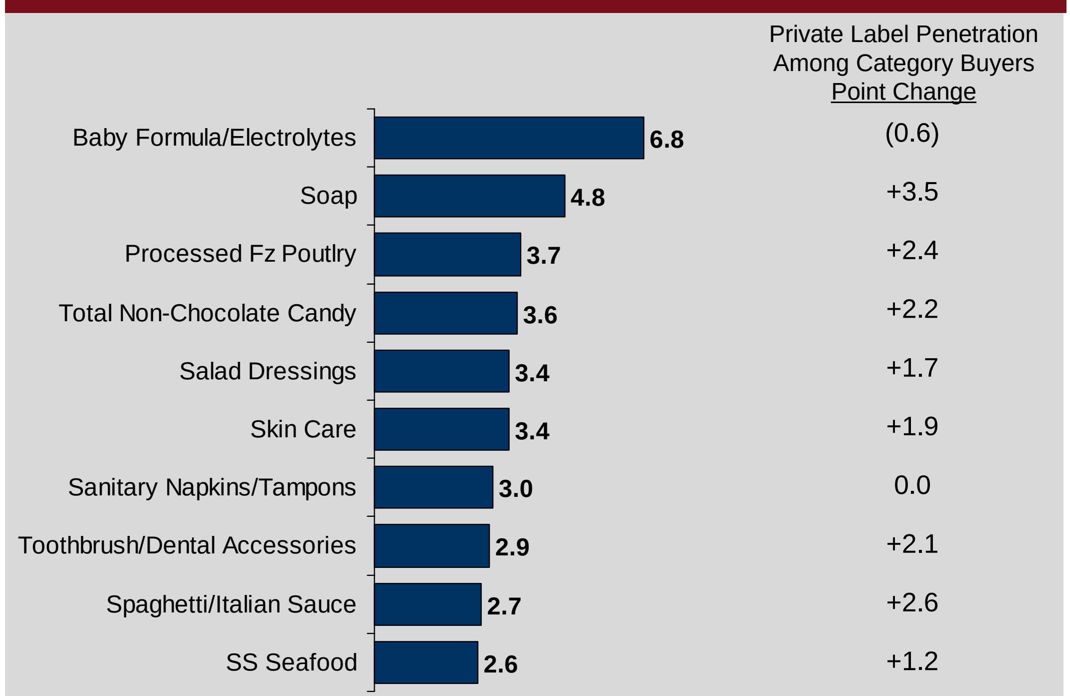
For example, non-chocolate candy increased penetration by 2.2 points this year, after a 3.5 point increase last year. Likewise, skin care penetration is up 1.9 points this year, following a 5.2 point increase last year. And salad dressing penetration climbed 1.7 points this year after an increase of 3.3 points last year.

Though this seems like a loss to manufacturers, the trend truly reveals a significant opportunity.

Particularly in these difficult economic times, consumers across income segments are seeking means to save money without opting out of a category completely.

The time is ripe for manufacturers and retailers to explore a cooperative effort- a partnership which provides a branded product targeting one segment (or segments)of the marketplace while the private label targets another segment (or segments). It's a win-win situation which capitalizes on manufacturers' and retailers' shared interest in delivering a satisfying shopping experience, even in the face of adverse economic conditions.

Top 10 Categories with Below Average and Increasing Private Label Share
2008 vs 2005: All Outlet Private Label Volume Share Point Change



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years
Among top 100 categories

BRANDS ENTRENCHED

[For manufacturers, innovation and differentiation are key private label mitigation strategies.]

In just over one-quarter of the top 100 CPG brands (27%), private label is losing share. Much of this trend is attributable to innovation among branded CPG manufacturers.

Yogurt, dog food and margarine/spreads have each lost considerable share since 2005, down 3.8, 3.3 and 3.2 share points, respectively. Yogurt and margarine/ spreads have seen high levels of innovation as manufacturers seek to add plant sterols and other functional attributes in order to distinguish their products. New releases by Smart Balance, Dannon and Promise are just a few examples.

Innovation is more difficult for retailers. Retailers must spread their focus over hundreds of categories/brands/products versus manufacturers' focus on only a handful. Plus, innovation is costly, and few new product introductions are money makers. Retailers simply cannot afford to innovate to the same degree as manufacturers and produce lower cost product alternatives.

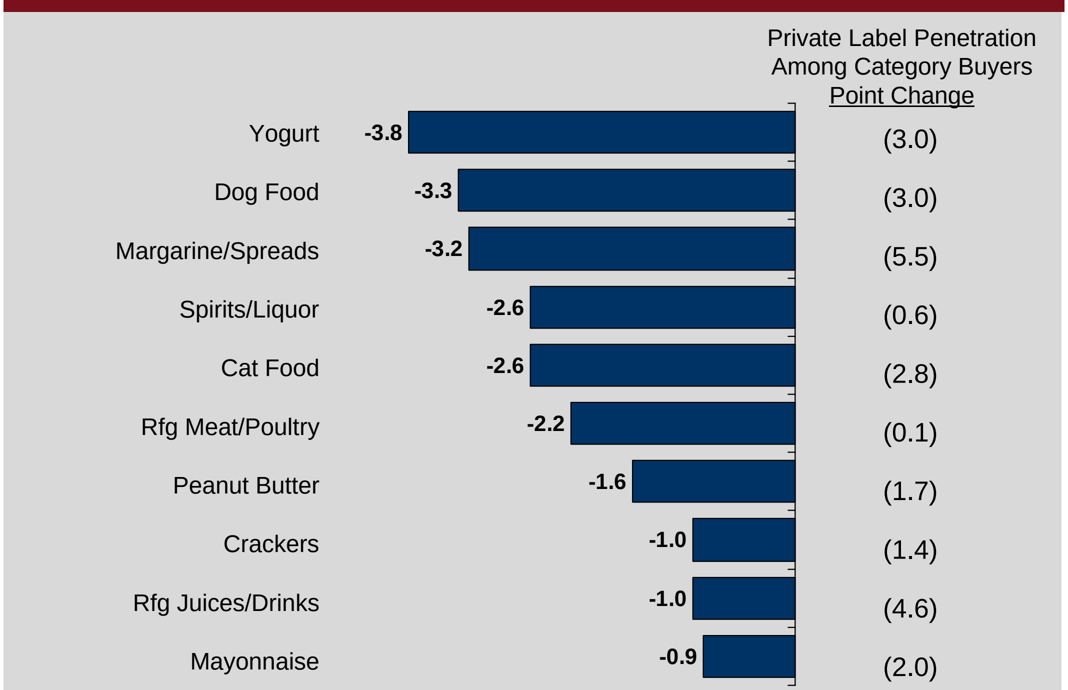
Strategic thinking is critical to success. Consider "importing" successful product/package innovations from outside categories. Or partner with manufacturers; share the risk and return associated with new product innovations.

Manufactures and retailers share a common goal: fulfill the needs of the consumer. Private label will not grow beyond the appetite of the consumer.

"The manufacturer clearly has the best set of cards in the poker game when it comes to innovation."

Jan-Benedict Steenkamp, *Private Label Strategy: How to Meet the Store Brand Challenge*

Top 10 Categories with Below Average and Declining Private Label Share
2008 vs 2005: All Outlet Private Label Volume Share Point Change



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years
Among top 100 categories

BRANDS TAKING A STAND

[***Manufacturers may enjoy an advantage vis-à-vis product innovation, but "retailers have the ultimate living laboratory" at hand.***]

Within 8% of categories, branded products are gaining ground. Much of these share gains are attributable to introduction of products with innovative and/or distinctive features.

For example, Bounty recently introduced several specially-targeted paper towels, such as Bounty Super Duty and Bounty Cooking . Tropicana recently introduced Tropicana Pure Valencia 100% orange juice, positioned as the most premium juice ever offered by Tropicana.

And innovation goes beyond product ingredients. For example, Poland Springs recently introduced Eco-Shape® bottles, designed to be easier to hold while using less plastic in its packaging. Bird's Eye now offers frozen vegetables in microwave-ready "steam-fresh" packaging.

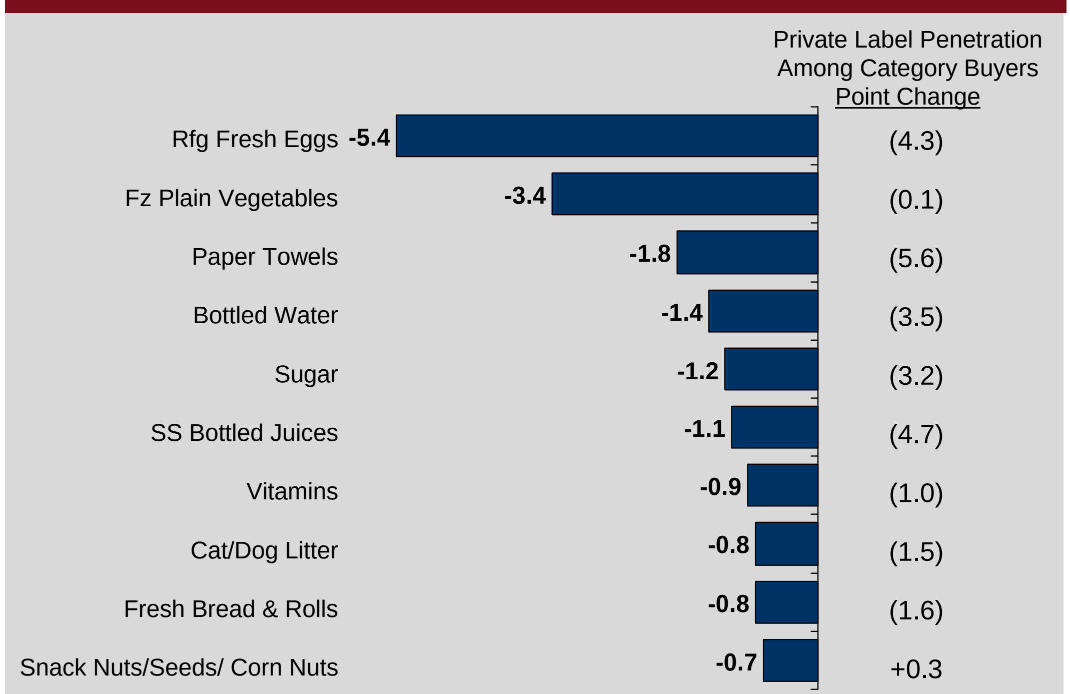
Manufacturers be aware. Retailers are out to win. Private label focus is intensifying.

Supervalu's "Own Brands" initiative is a major focus going forward. The multi-tiered private label line has its own Web site, 39,000 SKU's, and it is gaining ground. Our Brands will continue to be an integral part of Supervalu's value message going forward[1]. And Fresh & Easy Neighborhood Markets (CA), owned by Tesco, is in the process of rolling out an extensive line of ready-to-eat meals, coffee, tea, cereal, and more under its private label. The chain says private label already accounts for 70% of its sales[2].

"Retailers have the ultimate living laboratory at their disposal. Contrast that with manufacturers trying to work through the retailer system, who may require months just to get something into test."

Julie Quick, VP Account Planning, Saatchi & Saatchi X [3]

Top 10 Categories with Above Average and Declining Private Label Share
2008 vs 2005: All Outlet Private Label Volume Share Point Change



Source: IRI Consumer Network™; 52 weeks ending 9/7/2008 and same period prior years
Among top 100 categories

[1]Private Label Buyer, 09/08
[2] Private Label Buyer, 09/08
[3] BrandPackaging, 09/08

CONCLUSIONS
CPG MANUFACTURERS

Manufacturers seeking to develop effective brand strategies vis-à-vis private label should consider the following action items:

» Continually identify and assess brand-specific opportunities and risks with respect to private label

- Invest to identify optimal price gaps versus private label
- Build trial and/or repeat purchase within categories that demonstrate growing private label threat through BOGO and multi-unit promotions
- Explore expanded distribution opportunities across channels and retail accounts with low private label development

» Refine competitive strategies vis-à-vis private label

- Re-evaluate pricing strategies to ensure alignment against needs of key consumer segments
- Invest in product and packaging innovation within categories that demonstrate growing private label presence
- Assess feasibility of multi-tier offerings across key categories/product lines, either alone, or in partnership with key retailer accounts

» Continually measure and monitor share shifts

- Test-market product, pricing and promotion changes prior to roll-out
- Track and benchmark store-level shifts relative to private label among key retail partners
- Mitigate private label gains with targeted promotions against high-priority consumer segments; support promotions with solutions-based merchandising

CONCLUSIONS
CPG RETAILERS

Retailers seeking to grow private label share should consider the following action items:

» Continually identify and assess private label opportunities and threats

- Invest to understand core private label needs across key consumer segments
- Tailor private label offerings at the market level
- Support private label with highly targeted marketing campaigns, including in-store display and feature ad initiatives

» Continually refine private label development strategies

- Evaluate feasibility of multi-tier offerings across key categories/product lines, either alone, or in partnership with brand manufacturer partners
- Continually re-evaluate pricing strategies at the market and store level to assure alignment with store goals and to maximize value proposition among key consumer segments
- Analyze product development best-practices across departments and categories to identify low-cost private label innovation opportunities

» Measure and monitor share shifts on an on-going basis

- Test-market product, pricing and promotion changes prior to roll-out
- Track and benchmark store-level private label share shifts relative to national brands
- Create targeted promotions against high-priority consumer segments; support with solutions-based merchandising

RESOURCES

To gain insight into opportunities across specific categories, consumer segments, channels or retailers, contact your IRI client service representative regarding custom analyses leveraging the following resources:

IRI Consumer Network™

Nationally representative panel of households tracking purchases with hand-held barcode scanners; extensive demographic profiles enable in-depth analysis of purchase behavior across standard or custom-defined consumer segments across channels.

IRI AttitudeLink™

IRI's custom survey capability that can be executed via email, telephone or Internet; the ability to link attitudes with actual purchase behavior enables clients to track sales across custom attitudinal segments.

IRI's *Private Label 2009: Understanding Emerging Trends & Key Success Factors In Private Label*

Coming in early 2009… IRI's Consulting & Innovation team will release its latest thought leadership report focused on emerging trends and key success factors in private label. The broad-based report analyzes the U.S. private label marketplace from the viewpoint of consumers, retailers, and manufacturers. This report represents the culmination of comprehensive primary and secondary research and uncovers emerging opportunities for both retailers and manufacturers. From a full four-year analysis of proprietary scan data, the report provides the latest private label share and volume growth performance across retail channels as well as food, beverage, and nonfoods categories. Much of the report is built upon a proprietary shopper survey which provides private label shopper insights across key consumer segments and categories. Also included is a series of best-in-class retailer case examples based upon proprietary trade interviews with retailers and manufacturers.

For more information, contact Sean Seitzinger at sean.seitzinger@infores.com

>>> MORE INFORMATION

Please contact Susan Viamari at susan.viamari@infores.com with questions or comments about this report.

About IRI

IRI is the world's leading provider of consumer, shopper, and retail market intelligence and insights supporting 95 percent of the FORTUNE Global 500 consumer packaged goods (CPG), retail and healthcare companies. Only IRI offers the unique combination of integrated market information, automated and predictive analytics, innovative enabling technologies, and domain expertise. With IRI, leading retailers and manufacturers are able to quickly discover breakthrough insights driving smarter decisions and actions across the enterprise for breakthrough results. Companies around the world depend on IRI for improved productivity, stronger brands, and dramatic revenue growth. For more information, visit http://us.infores.com

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