

2026

PRIVATE LABEL

& INNOVATION PLAYBOOK



Food Trade
News

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Introduction

The ground is shifting beneath the \$855 billion U.S. grocery market.

For more than a decade, the industry has been locked in slow motion. There have been too many stores chasing the same cautious consumers, too few clear points of difference. We've long described this stalemate as the "mushy middle": a crowded band of mid-market grocers squeezed between the price aggression of discounters and the scale firepower of the mega-chains like Walmart and Target.

That era of inertia is ending.

New creative-destructive forces are reshaping the field, forcing the middle to tighten up its game. These forces are relentless: The rapid spread of Aldi and Sprouts, Walmart's private-label reinvestment, and the \$271 billion surge in store-brand sales that's redrawing competitive lines.

The solution, it turns out, has been languishing on shelves for decades. I'm talking about store brands...

Private label, once a defensive lever, has become the platform for innovation, identity, and insulation from inflation. The most resilient post-pandemic operators are the ones who've turned "own brand" into an expression of who they are and, just as important, how they compete.

Aldi's disciplined vendor model and Wakefern's design-forward *Bowl & Basket* and *Wholesome Pantry* programs prove that control of the label means control of the margin. Kroger has taken that principle further, using its *Our Brands* ecosystem as a data-driven laboratory for new flavors, formats, and packaging design.

On the other end of the spectrum, Town & Country Markets in Seattle shows how even a six-store operator can wield private label as an effective storytelling/branding tool, through locally inspired brands like *EveryDay* milk and *Maka* sushi products that reflect the creativity of their own staff. Up and down the scale, the lesson is the same: when retailers own the brand, they own the relationship.

Our best research shows this dynamic at every level; it's happening from Weis Markets' quiet center-store efficiencies to the churn hitting Albertson's, Stop & Shop, and a host of independents across our nation still trapped in that mushy middle.

As public scrutiny of grocery pricing intensifies and consumer expectations reset, private label now offers a compelling double dividend: authority and affordability. The opportunity lies not just in cheaper SKUs but in smarter, differentiated regional brands that speak to local shoppers and defend margin in a deflationary world.

In this special report, *Food Trade News* and *Food World* draw from our on-the-ground reporting, proprietary data, and 80 years of industry expertise to map the forces shaping private-label innovation – and to help retailers position themselves for success in 2026 and beyond.

The Store Is the Brand

Visualizing the Power of Private Labels

Let's face it: for a long time, private label or store brands were thought of as something akin to knockoffs. Cheap. Less-than. The sole preserve of strapped shoppers who "had" to compromise on quality.

The picture couldn't be more different today. In an inflationary, post-pandemic market, consumers at all income brackets are budget-conscious. They're better informed, and they've asked themselves, "*Really, what's the difference?*" Most have concluded that the difference in quality is negligible – if it exists at all.

They're right to think so. In 2025, most store brand goods are manufactured or processed at the same facilities, with the same ingredients and quality control, as the national names.

Retailers have caught on, too. They've ditched the bland, generic "Your Name Here" packaging and brought sizzle to the space with brands like *Good & Gather*, *Everyday Essentials*, and *Wild Harvest*.

Many organizations are investing heavily in branding, packaging, and positioning to help reinforce consumers' growing appetite for private label. They're doing their part to create the perception that private label isn't just a "cheap alternative," but something more unique; a boutique or specialty item. As we'll see in a moment, that positioning allows for higher pricing and margins, too.

Budget-conscious consumers can feel like they're getting quality products *because they are*. According to Inmar's May 2025 Shopper Behavior Survey, 39% of shoppers say they've switched to a store brand within their last few trips.

Brands like Trader Joe's border on aspirational.

Their stores are carefully designed to feel like part of the neighborhood, all while adhering to a tightly curated corporate style. In the consumer headspace, Trader Joe's means "fun and playful, local, value-oriented."

This is why publications like *Forbes* have called Trader Joe's a "cult favorite," a phrase you wouldn't have heard associated with a grocery store 30 years ago. This banner is a real jewel in Aldi's crown.

For more traditional retailers, store brands are a game-changer – a way to own the value story. With national brands, the manufacturer calls the pricing shots; the retailer is just the distributor, margins are thin, and differentiation is limited.

Private label flips that equation. When the retailer controls the brand, it controls the value – capturing manufacturing margin, shaping price perception, and reaping the rewards of shopper loyalty.

"We've seen private brand sales outperform, with grocery private-brand penetration up 60 bps versus last year."

– John Burner, CEO, Sam's Club

That dynamic connects directly to the rise of discounters like Aldi. While Aldi is far from the only player here, it's the purest illustration of this market shift. Between 90% and 95% of Aldi's sales (roughly \$27 billion in 2023) come from private label merchandise. For all intents and purposes, Aldi *is* private label; it's the quintessential private-label-first retailer.

Every point of market share Aldi gains is a structural shift toward private label. Lidl, with its disciplined European model, and Walmart, with its sheer scale, reinforce the same trend.

Meanwhile, private label still accounts for only 15% to 25% of sales at many legacy players. The takeaway for traditional retailers is clear: grow, improve, and defend your own brands... or risk permanent erosion.

The good news is that the growth potential for retailers of every size here is impressive.

Back in January, Dutch giant Ahold Delhaize said it expects 45% of its worldwide sales to come from its various private labels by 2028. Albertsons is aiming to book 30% of its sales from its store brands by the end of next year. Industry-wide, store brand sales jumped by 3.9% in 2024 and the expectation is private label growth will average 6% a year until at least 2030.

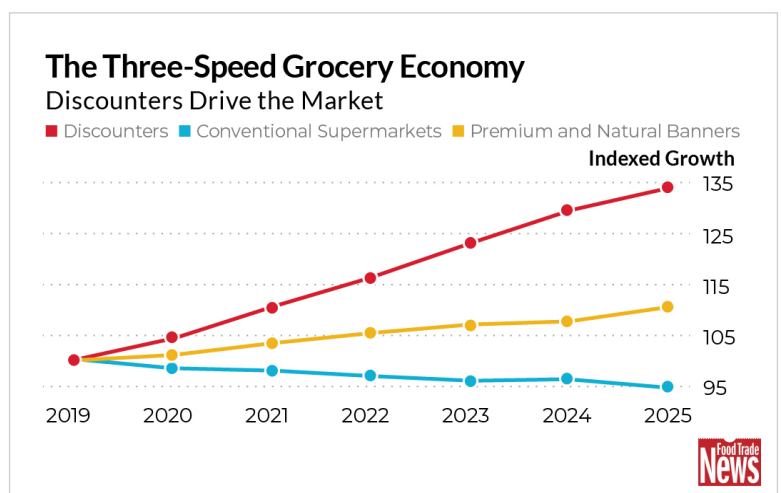
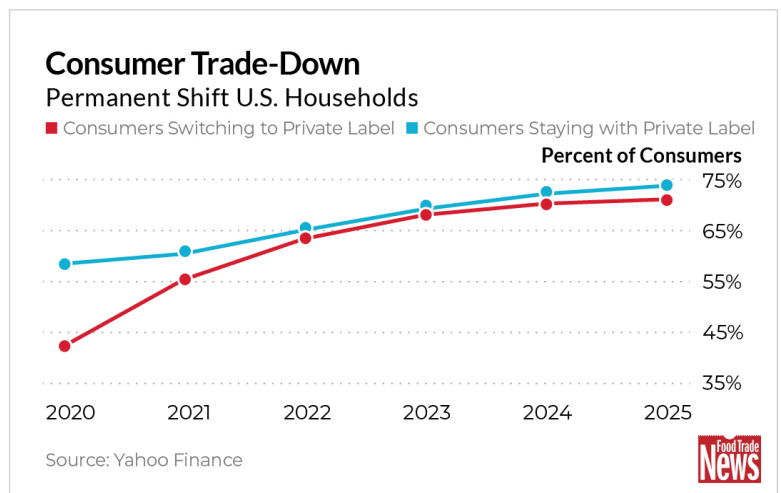
All of this growth is actually *outpacing* the wider US grocery market. That's projected to grow by 5.5% a year between now and 2030.

Smart retailers aren't letting the grass grow. They're moving right now.

Take Wakefern, for example. It's a near-\$21 billion, 45-member co-operative serving consumers in the Northeast with around 365 stores. Its *Bowl & Basket*, *Paperbird*, and *Wholesome Pantry* lines now account for about a quarter of sales, up from the high teens in 2020. Weis and Kroger show similar growth.

A private label strategy isn't just a way to increase margins. In certain cases, these store brands are outcompeting and exceeding national brand competition.

Aldi's *Simply Nature* granola and Publix's *Publix Premium* Greek yogurt are just two popular private labels that can command a higher price than the nationals.



Private label is best positioned to compete on price in a tiered strategy; retailers will often have entry/value private labels goods, mid-tier, and “premium.” It’s these premium private labels that are meant to compete with (and surpass) national brands on perceived quality, ingredients, organic labeling, or other unique product attributes. In many instances, these premium store brands, like Target’s Archer Farms, can command higher prices.

This isn’t just happenstance, and it ties in directly with the ongoing consumer re-evaluation we’ve talked about. As private labels improve formulations or packaging, say, or source more premium inputs, they can better close – and in some cases invert – quality perception gaps.

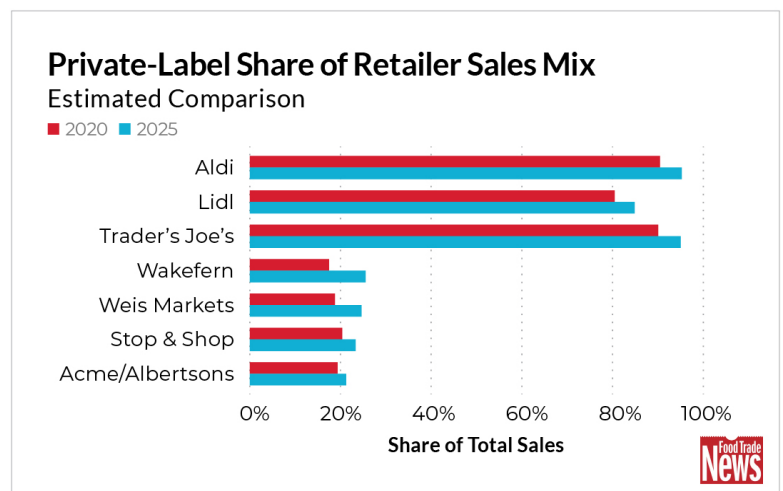
If consumers believe the store brand offers something extra, like better ingredients, “clean label,” or more sustainable sourcing, they may be willing to pay more. In fact, respondents in the Center Store Survey cited “improved quality” as a driver of private label price increases.

The pattern is unmistakable: private label has become structural. It delivers margin control, flexibility, customer loyalty, and insulation from manufacturer price hikes – and it’s rewriting the rules of who owns the grocery value chain.

Across the country, private label looks different depending upon the retailer, and sometimes even the aisle. So let’s look at how this trend is playing out in the real world.

“We think that the private label category and segment will continue to grow... We just see green pasture in front of us.”

– Dave Rinaldo, PLMA Keynote Speech



Snapshots from the Field

Food Trade News has been following many of these retailers for decades, through every market cycle and merchandising reinvention. Each one has taken a distinct path toward “owning the label,” and each path reveals something about what it takes to compete in today’s grocery economy.

For some, like Wakefern or ShopRite, store brands have become a canvas for brand-building, transforming house lines like *Bowl & Basket* into full-fledged consumer brands with their own equity, design language, and sourcing ethos. Others, like Kroger, treat their *Our Brands* portfolio as a living laboratory, using digital feedback loops and shopper data to refine everything from packaging to flavor profiles in real time. H-E-B has turned tiering into architecture, using value, mainstream, and premium lines to serve every customer segment while preserving brand coherence. And Town & Country Markets shows that even a six-store

operator can create authenticity and local connection through employee-designed packaging and regionally inspired products.

Across models, one principle emerges: the retailers thriving in this era tightly manage their private label, but more than that, they *curate* it. They use their own brands to communicate who they are, not just what they sell. That’s the real competitive edge. In a market where the shelf has become a storytelling platform, the best operators are proving that execution is less about copying national brands and more about creating brands of your own.

These retailers have a lot to teach us about execution, so let’s dive deep into the steps they’re taking, challenges they’ve faced, and rewards they’ve reaped along the way.

Town & Country Markets: Designing Differentiation

In the Seattle area, Town & Country Markets has turned its private label into a living expression of place. Its *EveryDay* dairy line and *Maka* sushi-inspired brand are aesthetic and story-driven extensions of the Pacific Northwest’s local ethos.

In other words, they convey a distinct cultural vibe.

Town & Country’s employees often contribute to packaging and art design, giving each product an authenticity that’s difficult, if not impossible, to fake.

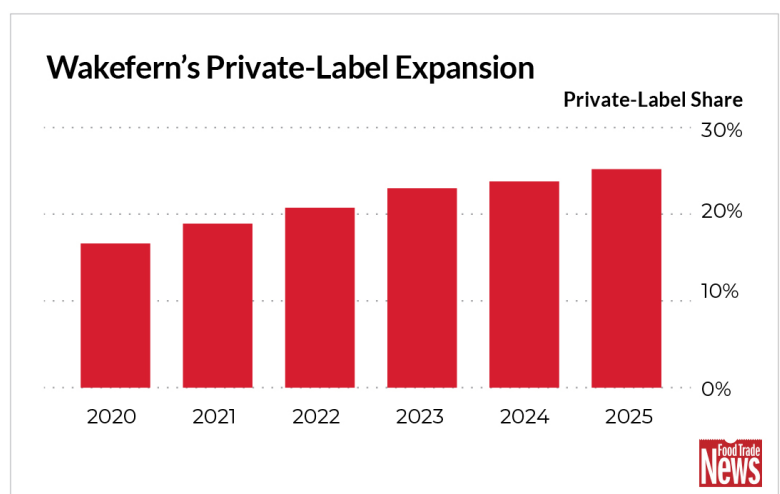
That collaboration connects the brand directly to the people who make and sell it, deepening internal pride and shopper trust alike.

Town & Country’s model proves that design and regional storytelling can do what scale alone cannot: build loyalty through *recognition*. In a market saturated with “organic” and “fresh” offerings, the *EveryDay* and *Maka* private labels stand by feeling unmistakably local to the Seattle area; fresh, distinctive, even neighborly. And they can hold their own in terms of price and volume, too.

Wakefern: Turning Private Label into a Brand Engine

Wakefern has done what most regional co-ops only talk about, and turned private label into a brand strategy. Its *Bowl & Basket*, *Paperbird*, and *Wholesome Pantry* lines are fully realized, design-forward brands with their own equity, storytelling, and customer following. Now the cooperative is extending that philosophy upstream.

Through its 2023 *Own Brands Supplier Diversity Summit*, Wakefern has begun



sourcing from a wider pool of minority-, woman-, veteran-, and LGBTQ-owned producers. Don't dismiss this as a feel-good gesture; it's a product-development accelerator. Each new supplier adds distinct flavor, format, or nutritional value that broadens the private-label mix and strengthens the in-store narrative.

The result is a private-label ecosystem that's modern, inclusive, and market-responsive. Wakefern's names move the co-op beyond "house brand" and into full-fledged brand-building. For Wakefern, private label is a full-blown identity platform.

Aldi: Private Label, No Apologies

The \$102 billion Mülheim, Germany-based multinational remains the benchmark and the horse to beat when it comes to private-label dominance. 95% of its sales come from store-controlled products.

What's more, the gridlock that can often paralyze grocery operations is an opportunity for an operation like Aldi; each new small-format store erodes legacy banners' share.

Aldi offers extremely aggressive prices on its store brand goods, but it also offers coherence consumers respond to; every aisle reinforces the same value promise and every SKU is there for a reason.

In a marketplace where "store brand" once implied "compromised," Aldi has made it aspirational through design consistency, operational simplicity, and relentless cost focus.

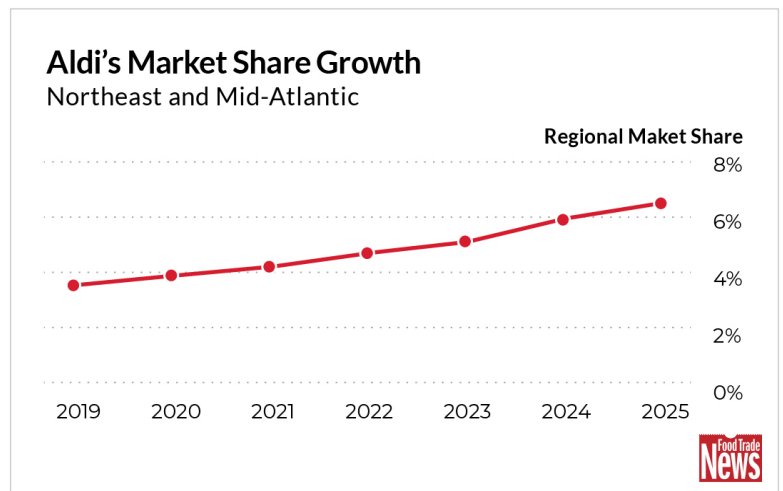
It might be tempting to take away "Just do what Aldi does" as the lesson here, but that's the incorrect way to think about it. Besides, Aldi hasn't exactly had a straight shot to its private labeling success.

You may recall that Mondelez (maker of Oreos, Chips Ahoy, and Wheat Thins) brought suit against Aldi claiming trademark infringement. It appears that Aldi's marketing department simply copied the competing national brands' packaging – colors, layouts, fonts & styles – to sell their private label products. *(At the time of this report no conclusions have been reached in that suit.)*

Aldi recently executed a substantial rebrand for almost all of its in-house private label foods under the "Aldi's Original" label.

The new rebrand is strong and getting positive feedback... but it should have been the starting point, not merely a reaction to lawsuits.

Branding is essential today for almost every retail product, and it's what can make private labels so powerful.



The real lesson is integration; the closer your store brands align with your operational DNA and culture, the more resilient your economics become.

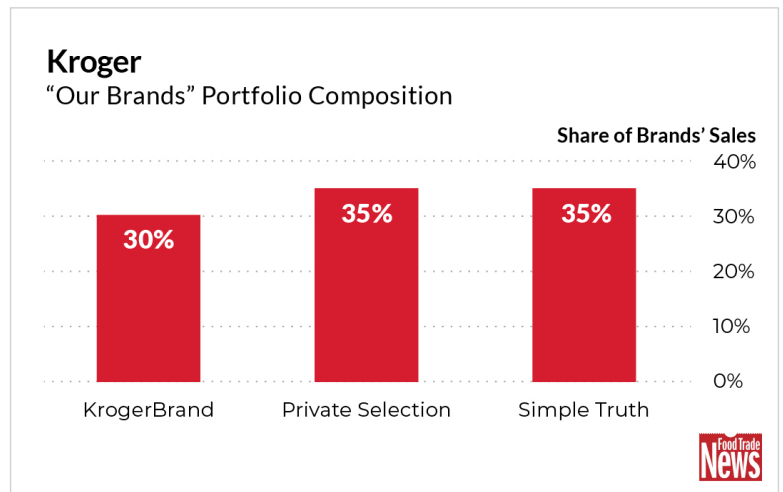
Kroger: Private Label Product Laboratory

Kroger has done something remarkable with its private label effort, and the industry would be wise to take note. The organization has turned private label into a testing ground for the future of grocery retail.

The grocer's Our Brands portfolio, which is anchored by *Private Selection*, *Simple Truth*, and *Heritage Farm*, now generates more than \$30 billion annually. But what sets Kroger apart is how it uses data and digital infrastructure to shape that growth.

Through its loyalty ecosystem and digital shelves, the Midwestern retailer continuously A/B-tests packaging, price points, and formulations across markets before rolling out winners to any market it serves.

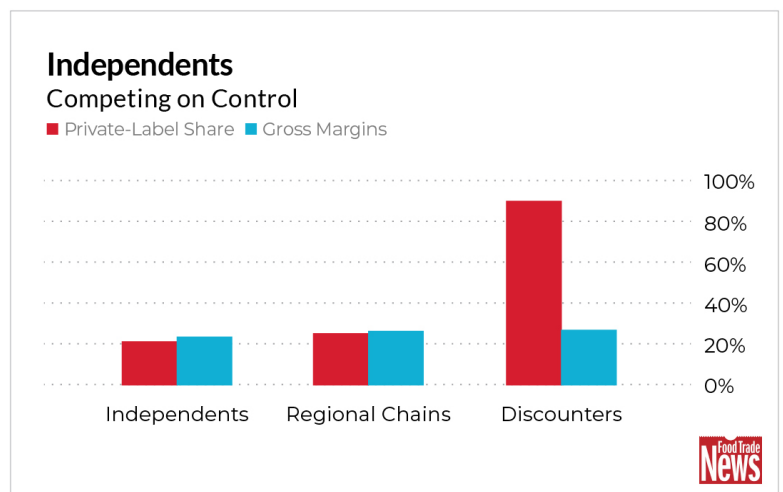
The *Simple Truth* line, for instance, evolved from an organic niche to a massive, multibillion-dollar wellness platform through this data feedback loop. As competition tightens, Kroger's advantage lies in scale-driven experimentation and its ability to treat private label as a brand system and a laboratory.



Independents: Survival at Street Level

Calling New York's independent scene "competitive" is like calling the Grand Canyon a "ditch." Yet, private label has become the secret to survival in this market.

Groups like Allegiance Retail Service, Key Food, and Krasdale are leveraging shared procurement and small-run manufacturing to produce affordable private label goods that gel nicely with neighborhood tastes, whether that's classic American, Latin staples, or Korean condiments.

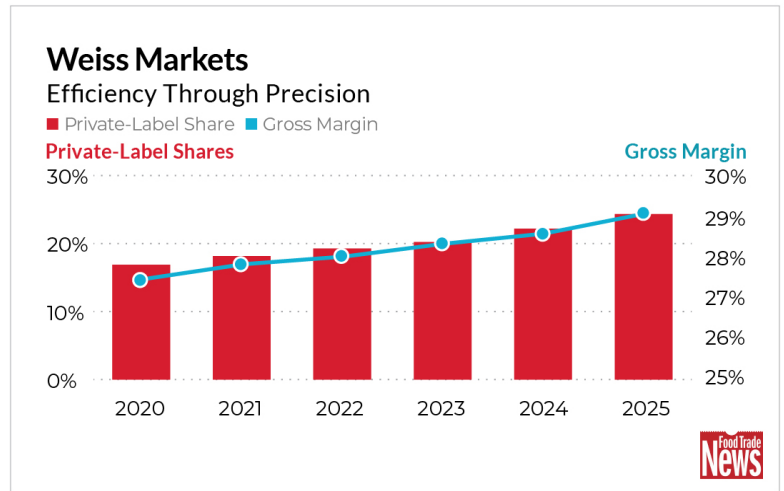


What they lack in massive scale, they make up for in appealing specificity, from a salsa that tastes like home to an irresistible gochujang that flies off shelves.

Margins are undeniably thin here, but private label is giving these small operators oxygen, and a means of control in a market frequently rocked by rent spikes and wage inflation.

Weiss Markets: Discipline Pays the Bills

While competitors chase flashier innovation headlines, Weiss has quietly executed one of the steadiest private-label build-outs in the region. Its center-store program has improved sourcing discipline and margin management year-over-year, even as inflation and wage pressure bite relentlessly. Weiss's own-brand penetration now rivals much larger peers, a reflection of steady merchandising, clean price architecture, and operational control.



Weiss is leaning into reliability: “the same, but sharper.” It’s proof that private label can scale with precision over splash, and that a conservative, quality-first culture can quietly out-perform in “margin-tight” markets.

Amazon Fresh: The Cautionary Tale

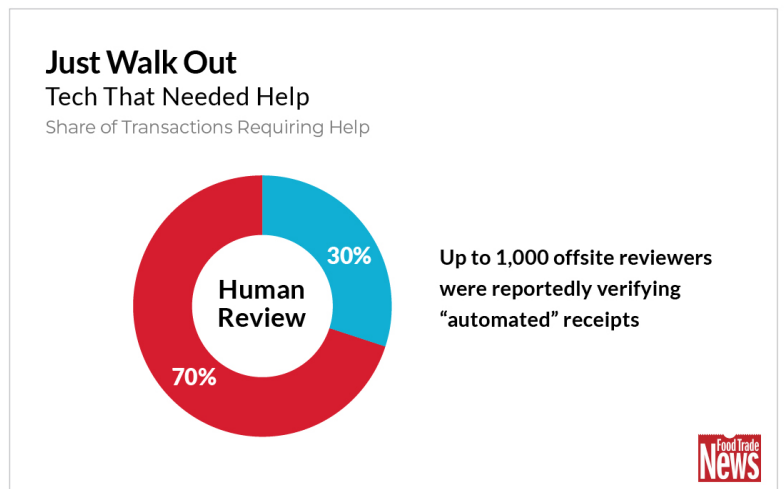
When Amazon merged its *Happy Belly* and *Amazon Fresh* labels into a unified line, it looked like what it is: a scale play in private label.

But it hasn’t been completely smooth sailing. Amazon Fresh has struggled with its largely undefined brand. Worse, the rollout of its “Just Walk Out” cashier-less technology has been a dud.

Some shoppers found it off-putting, and the tech was unable to provide timely receipts for shoppers.

What’s more, it was recently reported that up to 70% of all “Just Walk Out” transactions ended up requiring human scrutiny, courtesy of around 1,000 offsite workers.

Amazon Fresh is disappearing from the United Kingdom, where it’ll be replaced by the (much more successful) Whole Foods banner. The US market continues to be hit or miss for the brand, with a patchwork of locations opening and closing.



The takeaway is this: No matter how big your operation, no matter how sophisticated your logistics and “last mile” are, your brand has to stand out and stand for something. Slapping a successful name on something blurry and undifferentiated is no guarantee of success.

H-E-B: The Architecture of Loyalty

In Texas, H-E-B has spun up a private label portfolio strategy whereby the marketing department has built “ecosystems” around its store brand offerings. It sports a multi-tier lineup: H-E-B, Hill Country Fare, and the upscale Central Market Organics and All Natural lines. This covers virtually every shopper segment from value to aspirational.

That tiering enables H-E-B to serve both the budget-conscious and the quality-driven without diluting its brand identity whatsoever.

Meanwhile, its Primo Picks program acts as an innovation incubator, spotlighting local suppliers and limited-run regional favorites that often evolve into permanent private-label SKUs management can slot into its ecosystem.

The result is a store brand structure that feels *designed*, not improvised. It comes across as consistent, emotionally resonant, and deeply local. Customers recognize these products as expressions of Texas pride; there’s not a whiff of corporate strategy in evidence, and that’s exactly why they build loyalty. H-E-B is using private label to cement relationships, foster trust, and, not least of all, reap repeat business.

The ripple effects of private label dominance don’t stop at the store shelf. They’re reshaping how manufacturers think about partnership, innovation, and survival itself.

There’s a special lesson – and a unique opportunity – in this for players in the wider consumer packaged goods (CPG) sector, too.

Giants like Unilever, Procter & Gamble, and PepsiCo, to name just a few, will need to adapt to this changing retail reality.

How Consumer Packaged Goods Will Respond

Like many consumers, Generation Z don’t see private label as “just cheap” anymore; they see it as smart.

PMLA data shows nearly three-quarters of Gen Z shoppers now rate private label as equal – or superior – to national brands. Sentiment and brand loyalty are eroding faster and faster in this key demographic.

For CPGs, understanding store brands and coming to grips with this trend



are prerequisites for shelf survival. As we've seen, private label is the mechanism by which retailers grow customer relationships, defend margins, and tell their story. It's no longer "what's on the shelf under the Coke," or the "mustard one row down from the French's."

CPGs can no longer think of store brands as merely value-tier competitors, and the smartest players will stop thinking of private labels as competitors at all. As these brands morph into the retailer's identity, a lot of CPG brands will find greater upside working *with* store identities rather than against them.

After all, as digital shelves and personalization expand, brand equity (read: shelf space) will increasingly be controlled by retailers' AI systems. Loyalty apps, personalized offers, search rankings, buyer data, and more – it will all play a role. Here's how that's likely to play out.

Growing Partnerships and Reframing Future Relationships

Strategically, private label allows CPGs and retailers to re-tier a category together. Consider a retailer using its private label to anchor the value tiers while the national CPG reinforces its brand at the premium end. Together, they reduce mid-tier competitors and expand overall category value.

Smart collaboration like this can increase total category profitability, not just share redistribution.

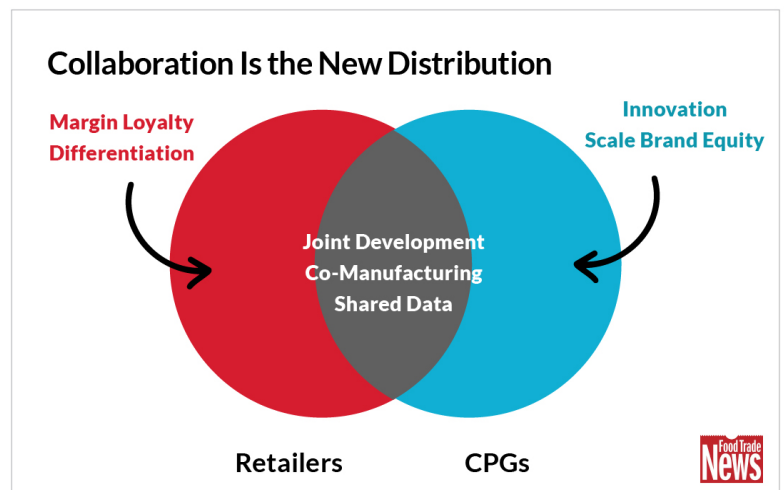
Additionally, instead of viewing private label as the "enemy at the gate," forward-looking CPGs should recognize: Private label isn't necessarily a replacement for brands.

Retailers are becoming curators of ecosystems, not just sellers of goods. Being part of that ecosystem, through co-manufacturing, data partnerships, or joint innovation, can continue a brand's long-term category relevance.

In this way, collaboration is the new form of distribution.

This approach lets CPGs lend their technical credibility or ingredient expertise while staying aligned with the retailer's brand promise. For example, think of a Target-branded energy snack marked "Formulated with Gatorade Science."

It transforms the relationship from contract manufacturing to brand collaboration, creating consumer trust for the private label and positive brand association for the CPG.



“Good & Gather is on the brink of becoming Target’s first \$4 billion owned brand... this year, we’ll add 600 new items across Good & Gather and Favorite Day.”

– Target, Q4/24

The implications for both retailers and manufacturers are profound. What began as a reactive cost-management tool has evolved into a shared growth platform, redefining how the entire grocery ecosystem creates and captures value.

That evolution sets the stage for what comes next, when private label stops being a simple tactic and develops into something much more important.

Outlook 2026

The Year Private Label Becomes a Strategy

The old calculus – “national brands drive traffic, store brands fill price gaps” – doesn’t work anymore. What used to be a “category” has become a core competency, and what used to be a tactical margin tool has become the central strategic pillar for many of the savviest regional and national grocers.

“Private label sales hit a record in 2024 ... the quality, value and innovation that store brands provide can’t be beat.”

– Peggy Davies, PMLA

Across the Northeast and Mid-Atlantic, the momentum behind private label is unmistakable. In the 2025 *Food World* and *Food Trade News* Regional Market Studies, discounters continued their steady march upward while most traditional banners held ground at best.

The retailers gaining share were the ones redefining what a private label is and what it can do.

The most successful operators are treating their own brands as full-fledged businesses, complete with creative direction, customer data, and disciplined margin management. Wakefern’s *Paperbird*, *Bowl & Basket*, and *Wholesome Pantry* lines have turned packaging and sourcing into storytelling tools. Weis is refining operational precision until it looks like strategy.

And independents are finding that even small-batch private labels can build neighborhood-level loyalty that price alone cannot.

The structural shift toward private label is playing out among suppliers, too. Manufacturers who might once have been wary of store brands now see them as a growth channel. TreeHouse Foods has repositioned itself as a private-label solutions provider, while SunOpta, Schreiber Foods, and Lassonde have shifted capacity toward retailer-branded goods.

PLMA 2024 data shows contract manufacturing for store brands is expanding faster than national-brand output; Circana and FMI also report a rise in co-manufacturing partnerships, particularly in fresh and frozen categories.

Private label’s expansion is pulling manufacturing into closer alignment with retail strategy, turning longtime vendors into co-developers of brand equity.

Private Label Is Rewriting the Rulebook

For decades, the tension in grocery has been between scale and differentiation.

Private label is now bridging that divide. The same set of forces that once threatened regional retailers, like Aldi's expansion, Walmart's efficiencies, and the Great Consumer Trade-Down, are now showing them how to survive and thrive.

These competitors proved that control of the label equals control of the margin. Regional grocers are finally taking that lesson to heart. But the path forward isn't without risk. As Amazon's Amazon Fresh experiment demonstrates, a big, well-known name is no guarantee of success. The brand has to be clearly defined and accessible.

In 2026, we'll see more scrutiny of retailer-manufacturer relationships, particularly in the "own brand" space. Transparency, sourcing authenticity, and environmental, social, and governance (ESG) performance will all shape how the next generation of shoppers perceives value.

All the same, it's a big mistake to think of this as a headwind; the sharpest players will realize it's actually an invitation.

Private label is becoming the fastest-moving laboratory in grocery. It's where design, supply chain, and consumer insight meet. It's also where the next generation of regional leadership will emerge.

The question for every retailer heading into 2026 isn't *"How many SKUs do we have under our store name?"* Rather, it's *"What story are those SKUs telling the market about us?"*

For over 80 years, *Food World* and *Food Trade News* have tracked the evolution of the regional grocery business from family-owned chains to sophisticated retail ecosystems. The next chapter is being written right now... and private label is the organizing principle.

For consumers and operators alike, it's no longer the cheaper option but the smarter one. And in a market defined by gridlock and thin margins, the grocers who own their brands will own their future.

Executive Summary

Three Keys to Private Label Success in 2026

1. Private Label Has Become the Growth Engine

Private label isn't the sideshow for national brands anymore. It's the main event, and an incredible growth driver. Store-brand sales surged to \$271 billion in 2024, up 15% in just two years, and now represent more than a quarter of regional banner sales in our 2025 *Food World* and *Food Trade News* Regional Market Studies.

Retailers already hold the keys to tapping this growth, and they'll be well served by building better store brands. That means revamping legacy private labels that have gone stale, refreshing packaging and positioning, and adding new lines that fill unmet shopper needs.

Retailers who treat their private labels as "brands-within-a-brand" are going to be in the best position to expand share and pad margins in 2026.

2. The Consumer Shift Is Permanent

The "trade-down" era has become a "buy smart" era. Two-thirds of American households regularly purchase private label goods, and three-quarters say they'll keep doing so, even as inflation cools.

The "generic" stigma was *yesterday*: consumers now see store brands as quality equals (or even better) than national ones. Keep in mind today's shopper is discerning, not desperate. They look for trusted, well-designed, store-controlled brands that feel authentic, local, or "better-for-you."

This is the moment for retailers to leverage that trust: the perception battle has already been won.

3. Regional Retailers Are Rewriting the Rules

From Wakefern's diversity sourcing to Weis's operational discipline and H-E-B's multi-tiered architecture, successful regional retailers are reinventing what private label means. There is no one size fits all, and no panacea. The most defensible private label brands will be the ones with the most relevance to the unique audiences they serve.

- **Tiered Strategy:** Value, mainstream, and premium lines broaden appeal and protect margin. One size doesn't fit all and one brand may not be the answer.
- **Essentials & Specialty Mix:** Focus on categories that blend "everyday basics" with "better-for-you" SKUs ~ high-turn and high-loyalty products.
- **Local Identity:** Spotlight regional producers or limited runs to deepen authenticity. Celebrating local and regional products helps authenticity and connection to your customers.
- **Design & Packaging:** Make it beautiful. Visual identity drives perceived quality.

Don't just blindly copy competitors, but create interesting and exciting in-house brands

- **Loyalty & Promotion:** Integrate private label into digital programs and merchandising strategy. Understand your brand's consumer awareness, and support it from a marketing perspective.
- **Supplier Management:** Build flexible sourcing models; partner with both scale and specialty vendors to unlock value and margin.

Private label is no longer the cheaper option; it's the smartest growth lever for 2026 and beyond.

And so retailers can't focus their store brands on competitive pricing alone anymore.

They need to manage and market their store brands so they can compete on value, trust, and design, not just cost.

In the coming decade of upheaval and systemic change for the industry, grocers who own their brands will own their future.

About This Report

The 2026 Private Label & Innovation Playbook is a special editorial project by the research team at *Food World* and *Food Trade News*, drawing on their respective 2025 Regional Market Studies, proprietary reporting, and 80+ years of industry intelligence.

