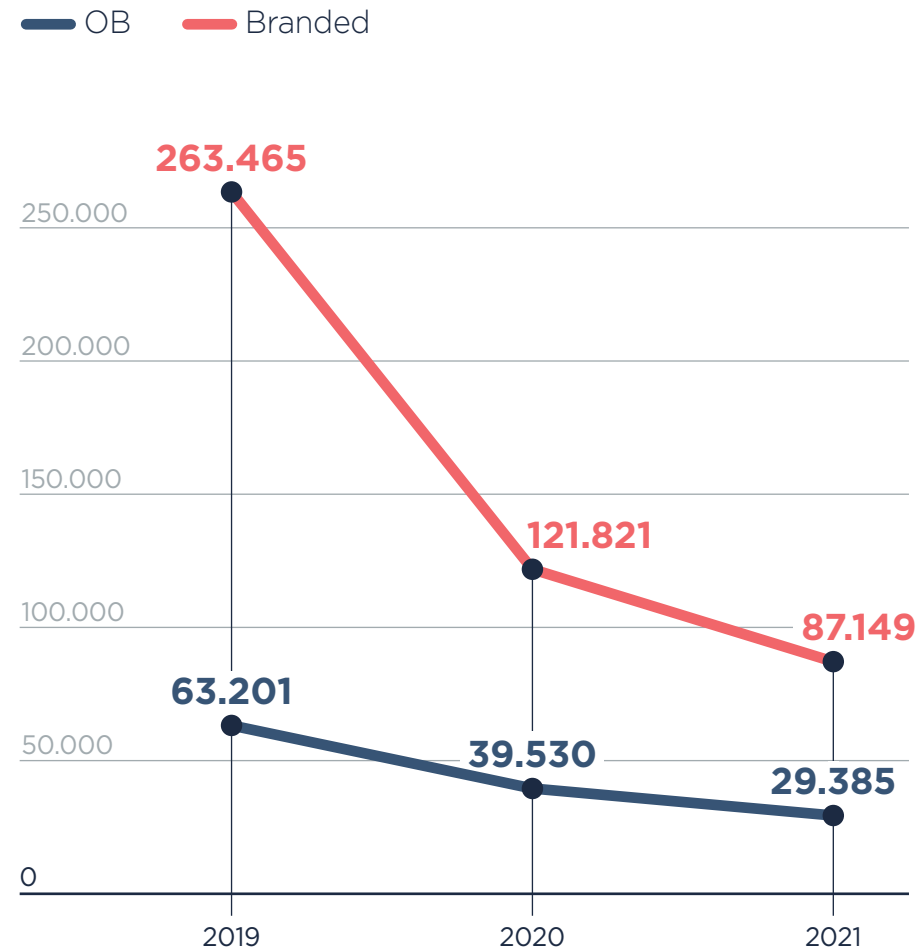


Private Brand Performance 2021

The number of new product introductions has fallen during the pandemic, with Private Brands introducing nearly **-34%** fewer products in 2020 and **-54%** fewer in 2021. But name brands dropped substantially more: **-46%** and **-65%**, respectively.

Number of New UPCs



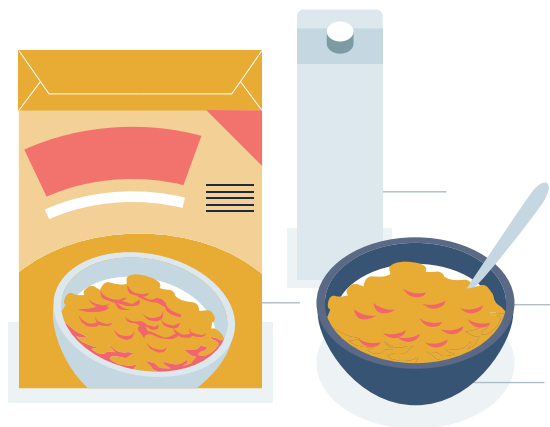
Private Brand New Item Innovation

Amidst the overall pullback in 2020, Private Brand retailers identified key categories for **new product growth in 2021**

● PB ● NB

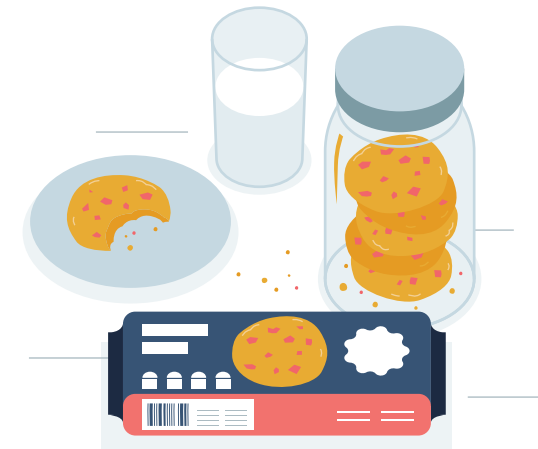
Ready to Eat Cereal

2020 v 2019	→	2021 v 2020
-48%	→	+66%
-53%	→	-35%



Cookies

2020 v 2019	→	2021 v 2020
-66%	→	+60%
-57%	→	-22%



Dry Cat Food

2020 v 2019	→	2021 v 2020
-44%	→	+13%
-5%	→	-8%



Source: Catalina Buyer Intelligence Database. Analysis period 1/1 - 12/31 of each year

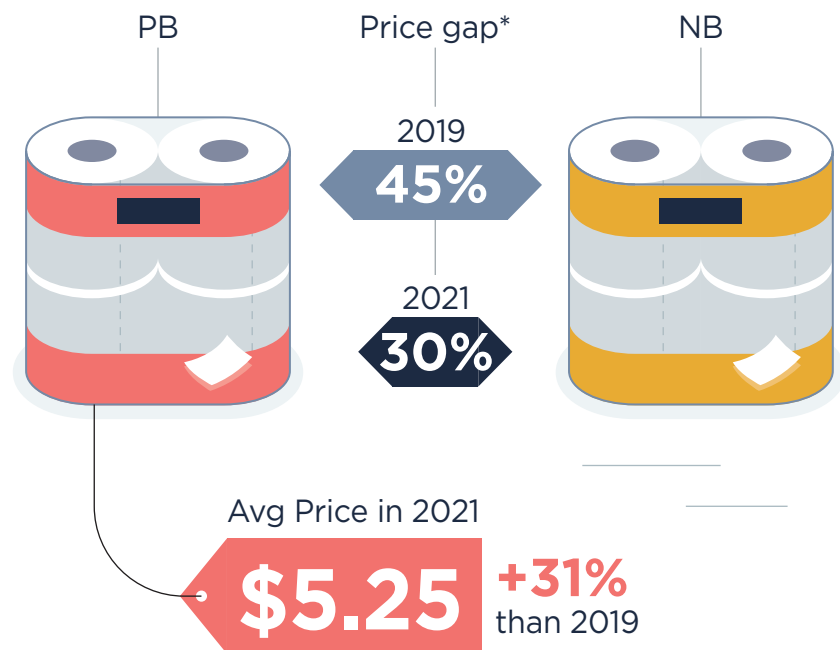
Private Brand Performance 2021

Paper Products

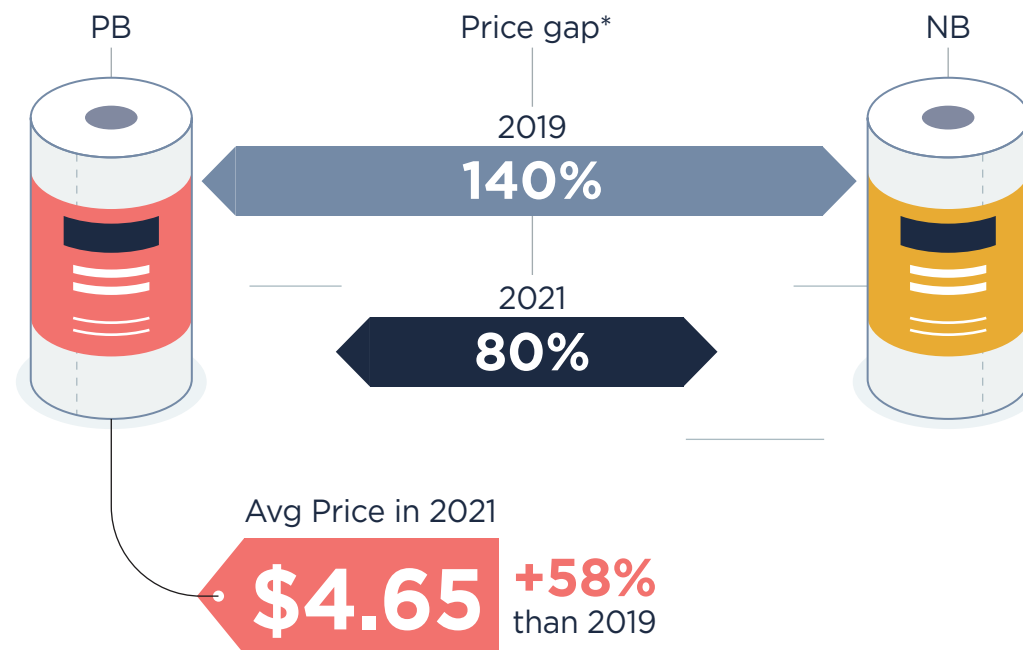
Amidst inflationary concerns, Private Brands are reinforcing quality and value in key categories although the price differential with some name brands is shrinking. In the paper products category, for example, the price differential for facial tissue is on the rise because of name brand price increases, while bath tissue and paper towels price gaps have shrunk.

Private v. National Brand Pricing Trends

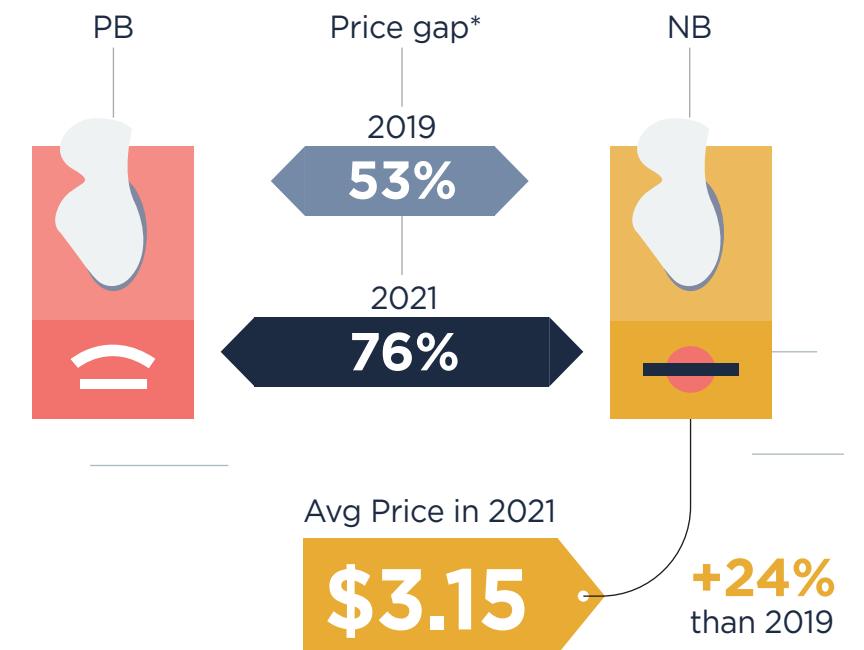
Bath Tissue



Paper Towels



Facial Tissue



*Price difference is based on an average of all package sizes

2021 Top Private Brand Categories

Sales Change Versus Pre-COVID-19



+191%
Frozen
Potatoes



+135%
Disinfectant
Cleaners



+120%
Home Health
Testing



+115%
Baking
Ingredients



+97%
Contraceptives