

**BRAND  
NUDGE**

**W** **Worldpanel**  
by Numerator



Thursday 12th February 2026

**Shopper, Retailer & Category Insights**

# Private label isn't the enemy

## A plan for mutual growth



**Ross Watson**

COO at Brand Nudge  
Ex Senior Buyer with ASDA



**Sam Hart**

Business Unit Director at  
Worldpanel by Numerator

- **Private Tension**





There's a good reason why brands see private label as a competitor:

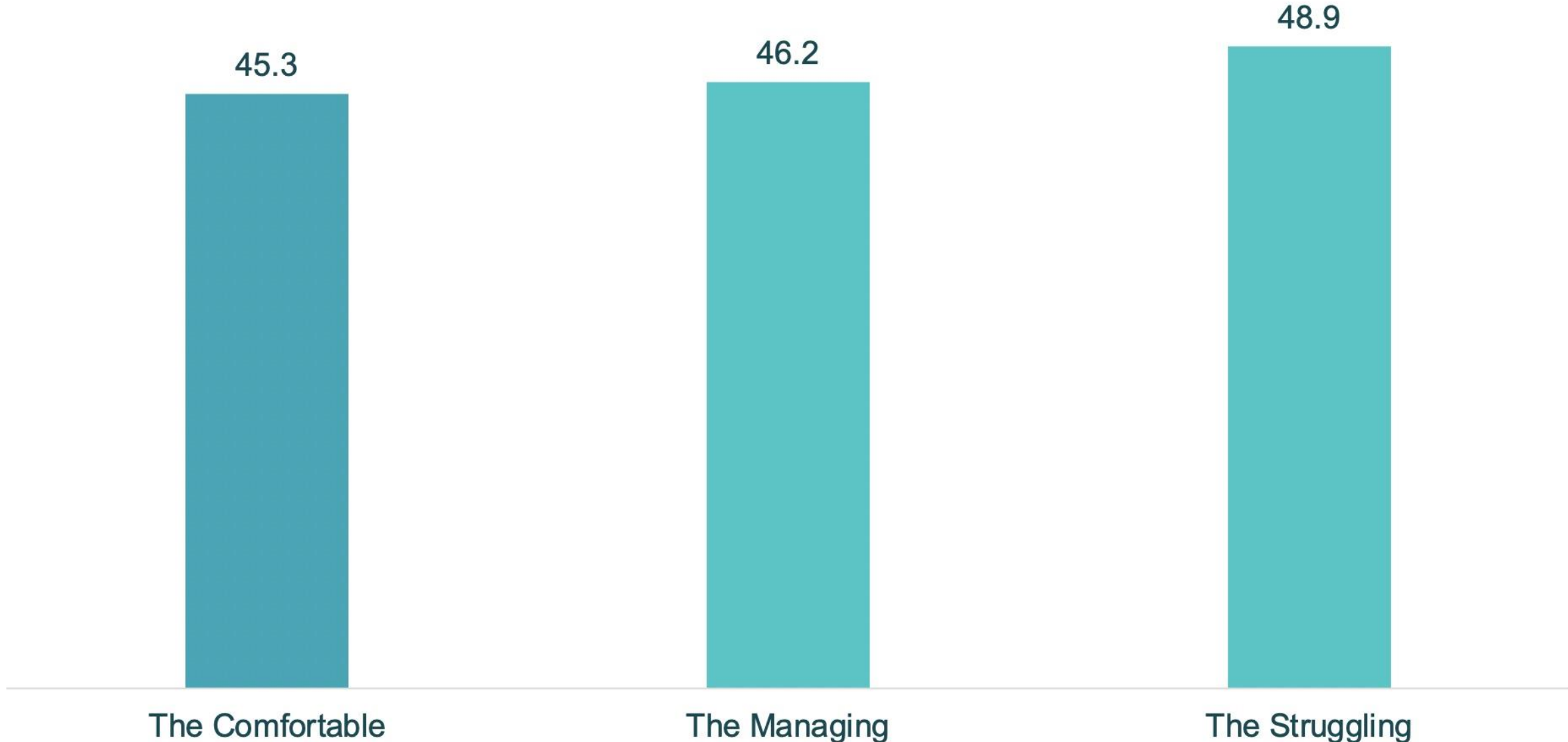
£1.3bn

Branded spend **lost** to private label  
over the last 5 years

Latest YoY: £283m

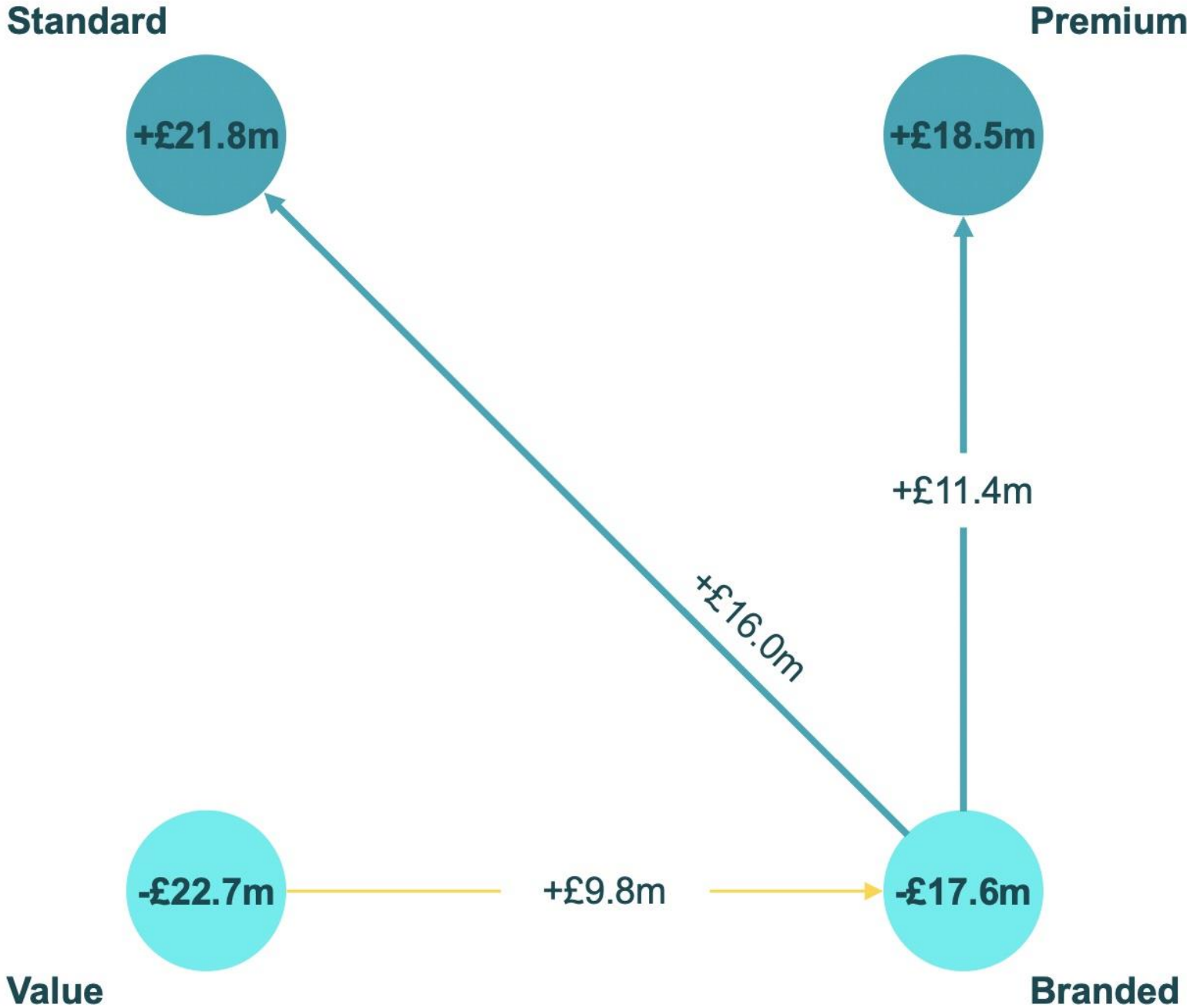
# Some blame economic climate

Spend share % on brands

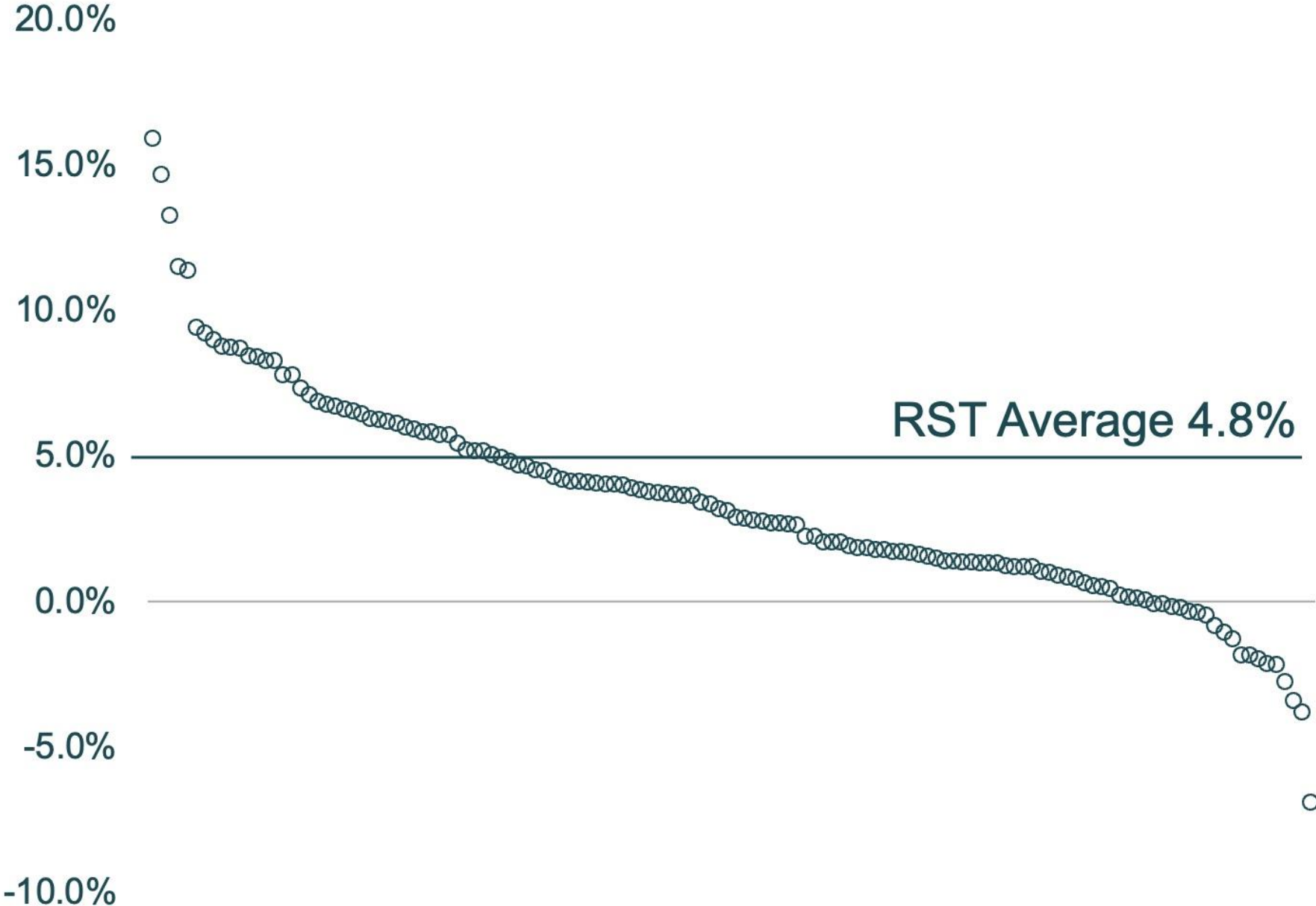


# The pressure is on, but the lines have blurred

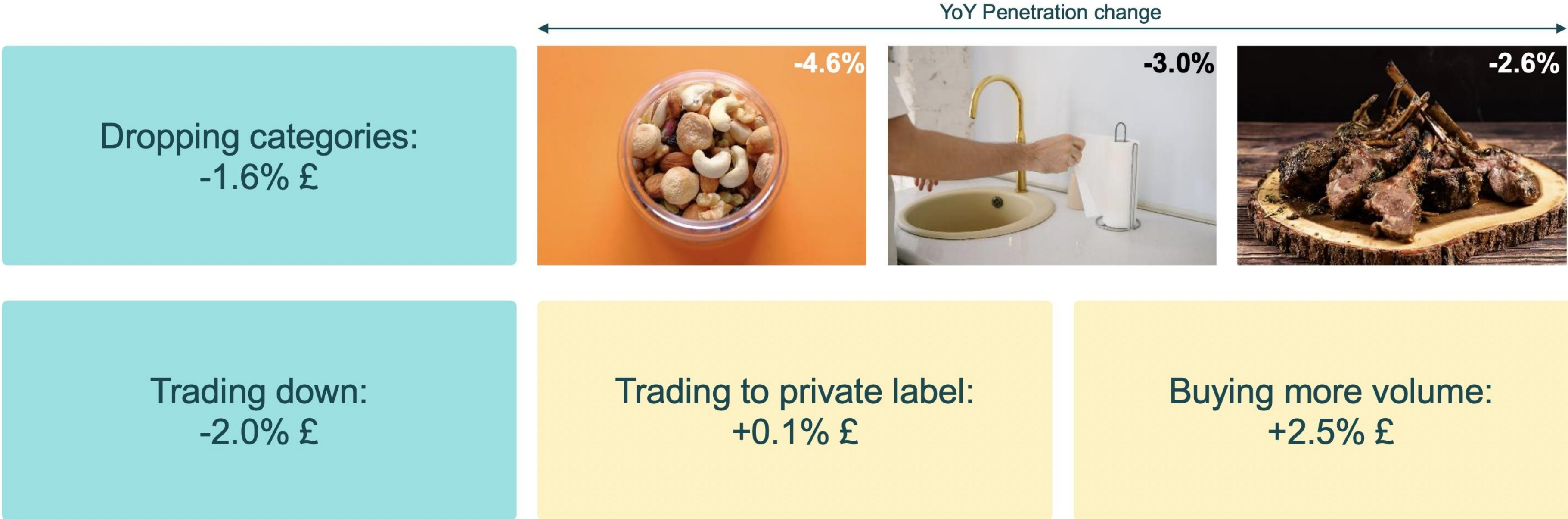
Total RST Spend Switching, 4w/e YoY



12 w/e Grocery Inflation %

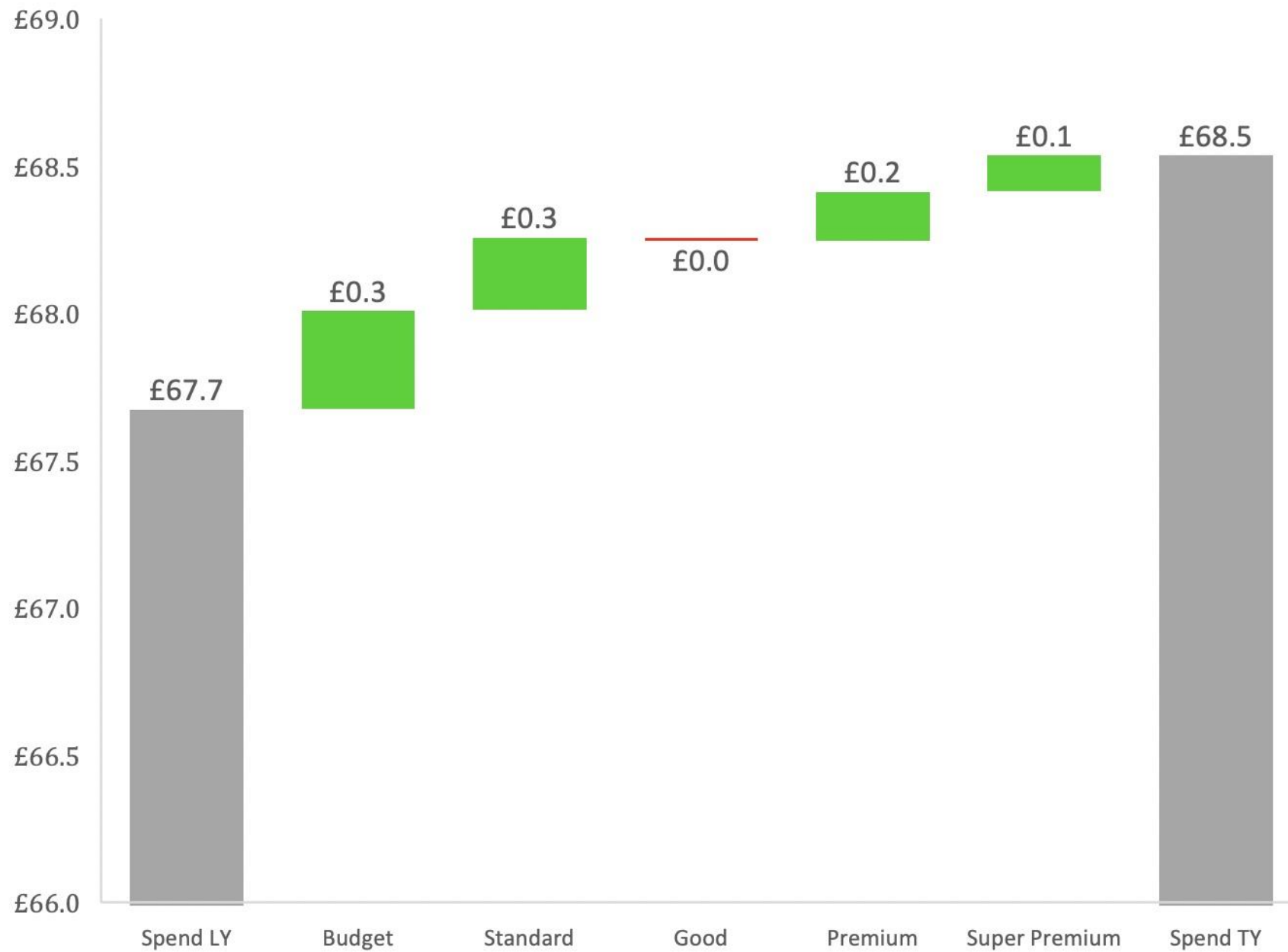


# So private label switching isn't the cost-saving measure it once was



# For brands, there's a lesson and an opportunity

**Total private label FMCG : 12 w/e key switching movements from brands**



Source: Worldpanel by Numerator, Total FMCG, 52 w/e 10<sup>th</sup> August 2025

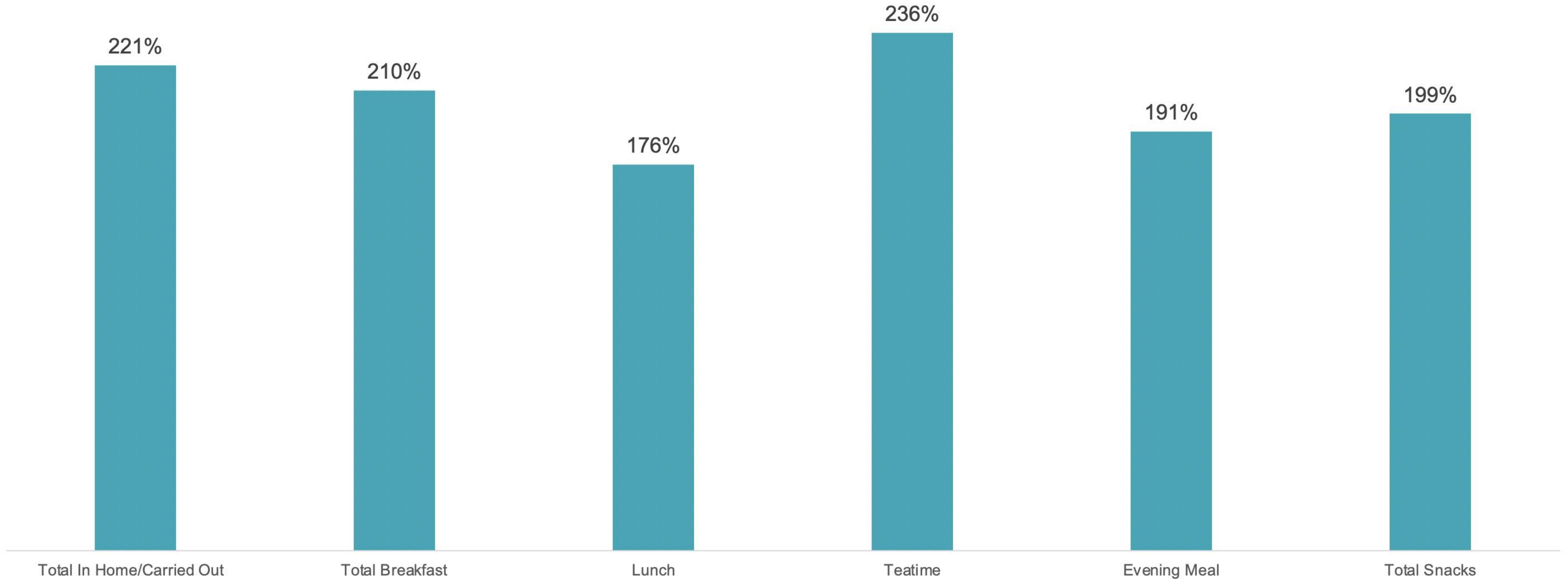
**Total branded FMCG: Price tier contribution to change**



Source: Worldpanel by Numerator, Total FMCG, 52 w/e 10<sup>th</sup> August 2025

# Because the most valuable consumption moments feature both PL and brands

% value difference when both brand and PL present\*



# The growing challenge from Private Label



# SKU Count

January 23 – September 25



Total private label - food

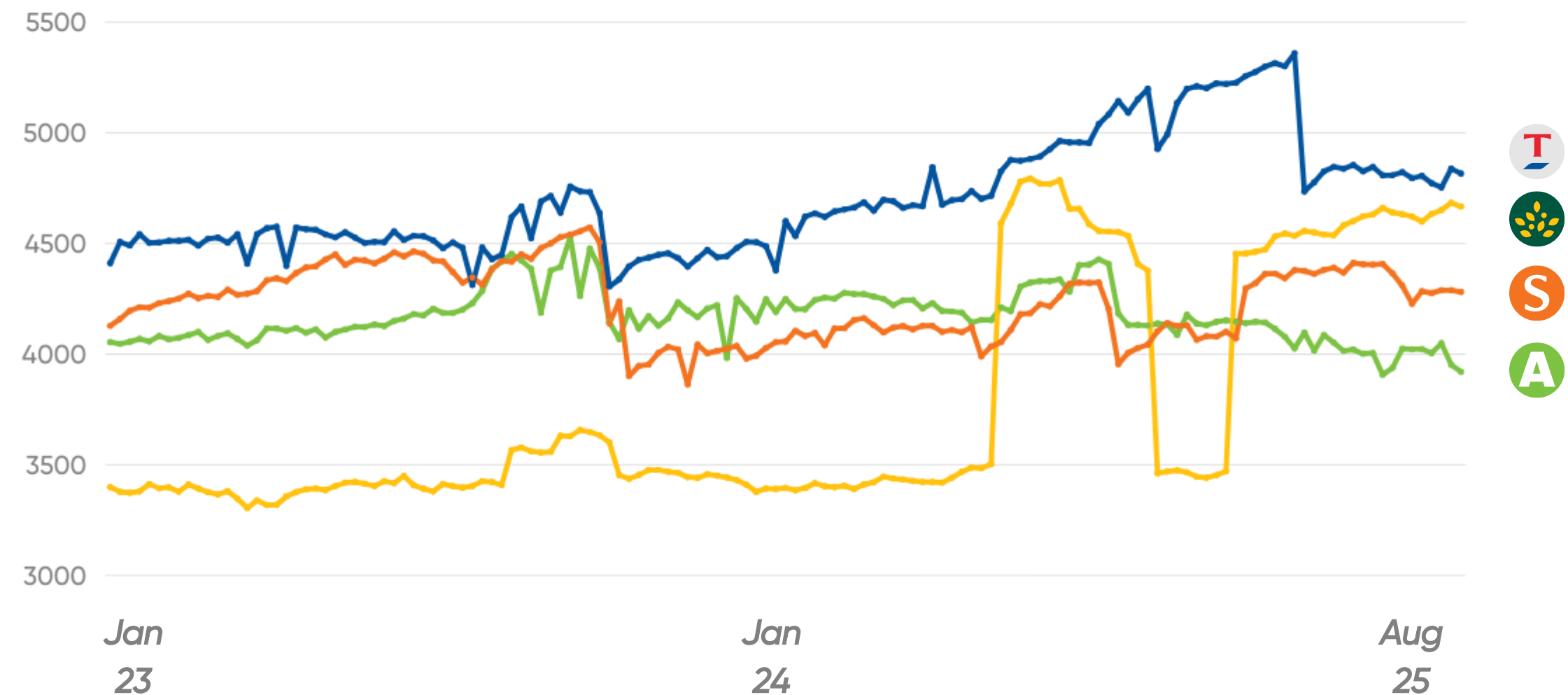
**17,864** SKUs



Range growth

**+12%** vs 2023

### Private label SKU count - Total



# Category Delta

January 23 – September 25



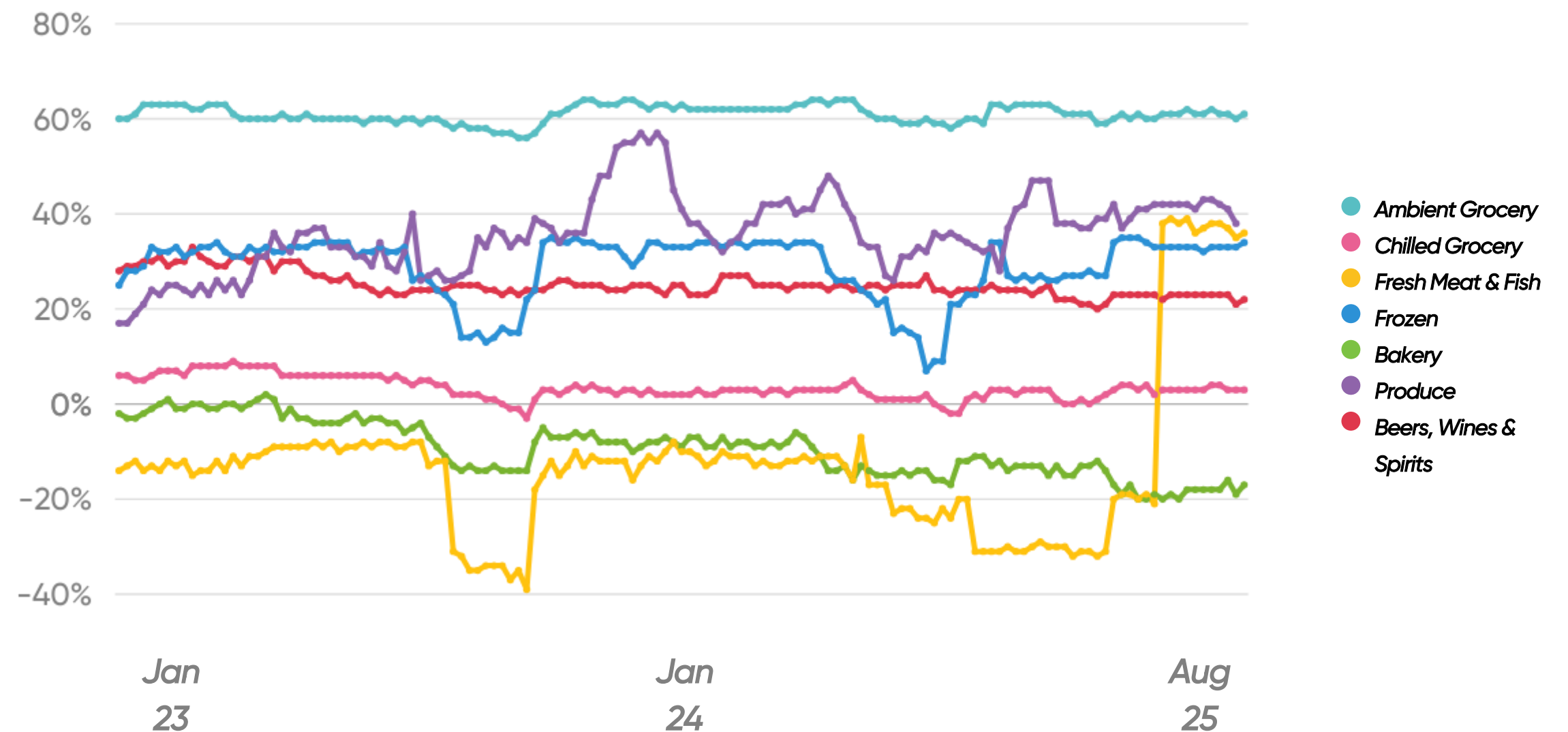
Largest Delta

61% Ambient



Smallest Delta

(17%) Bakery



# Online Visibility

February '24 Vs February '26

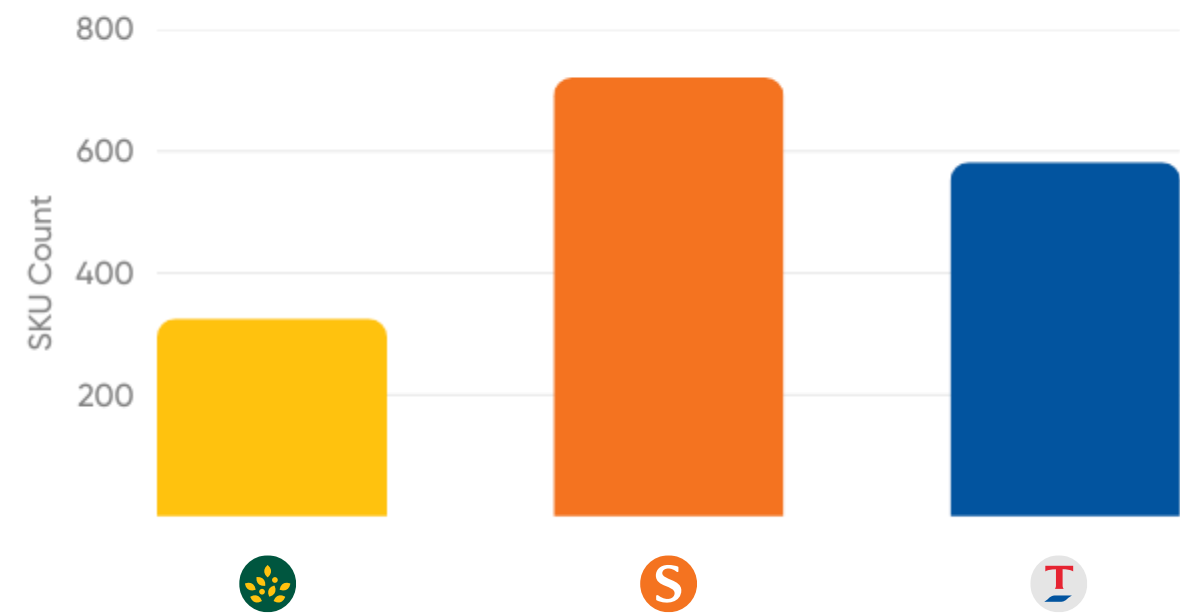
Search Term	Branded Share of Top 10 Results February 24	Branded Share of Top 10 Results February 26	% Visibility Change
Biscuits	83%	65%	-21%
Cheese	78%	45%	-42%
Yoghurt	90%	80%	-11%



# Has 'Aldi Price Match' Changed the Game?

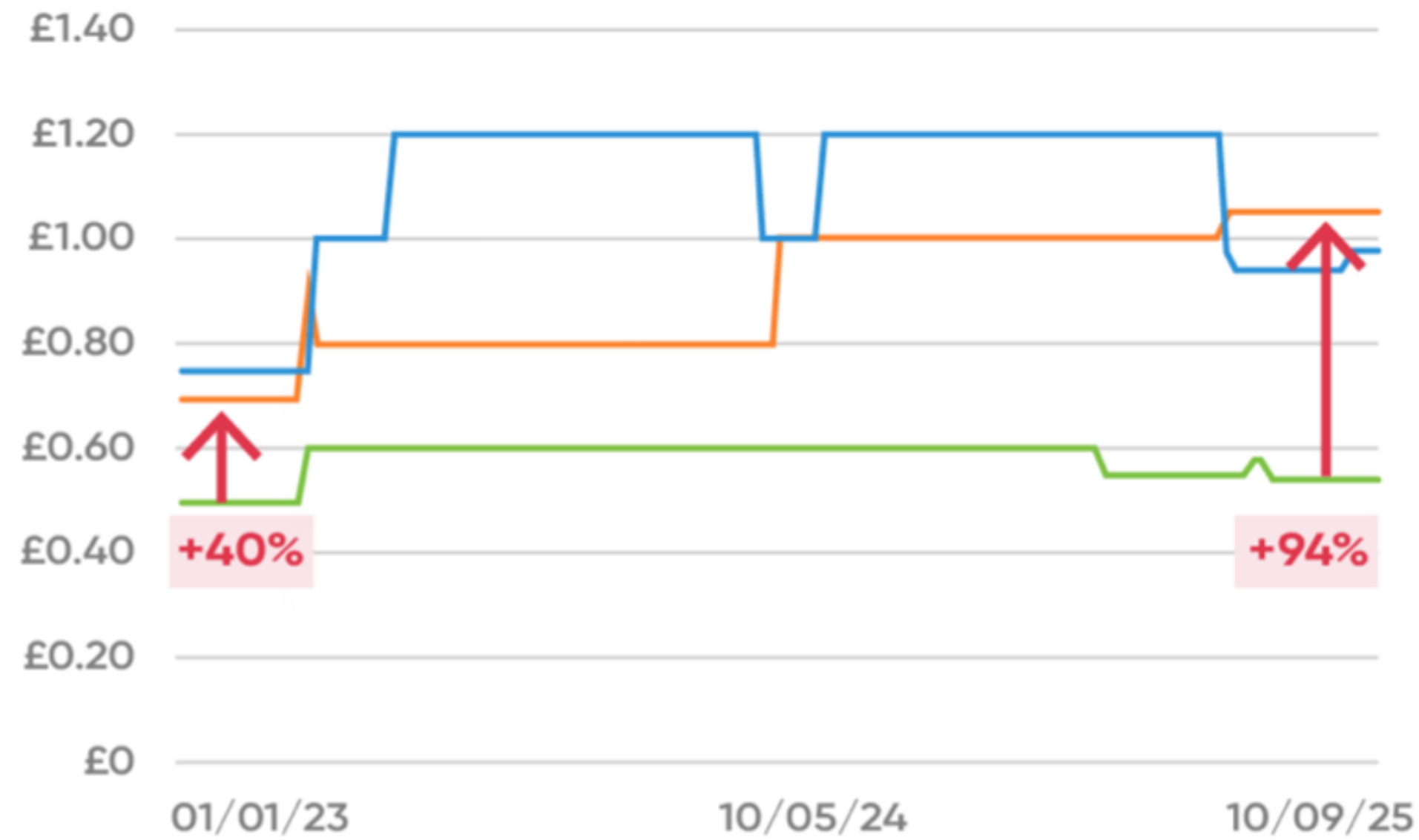


### Aldi/Lidl price match SKUs



### Brand vs PL delta by category



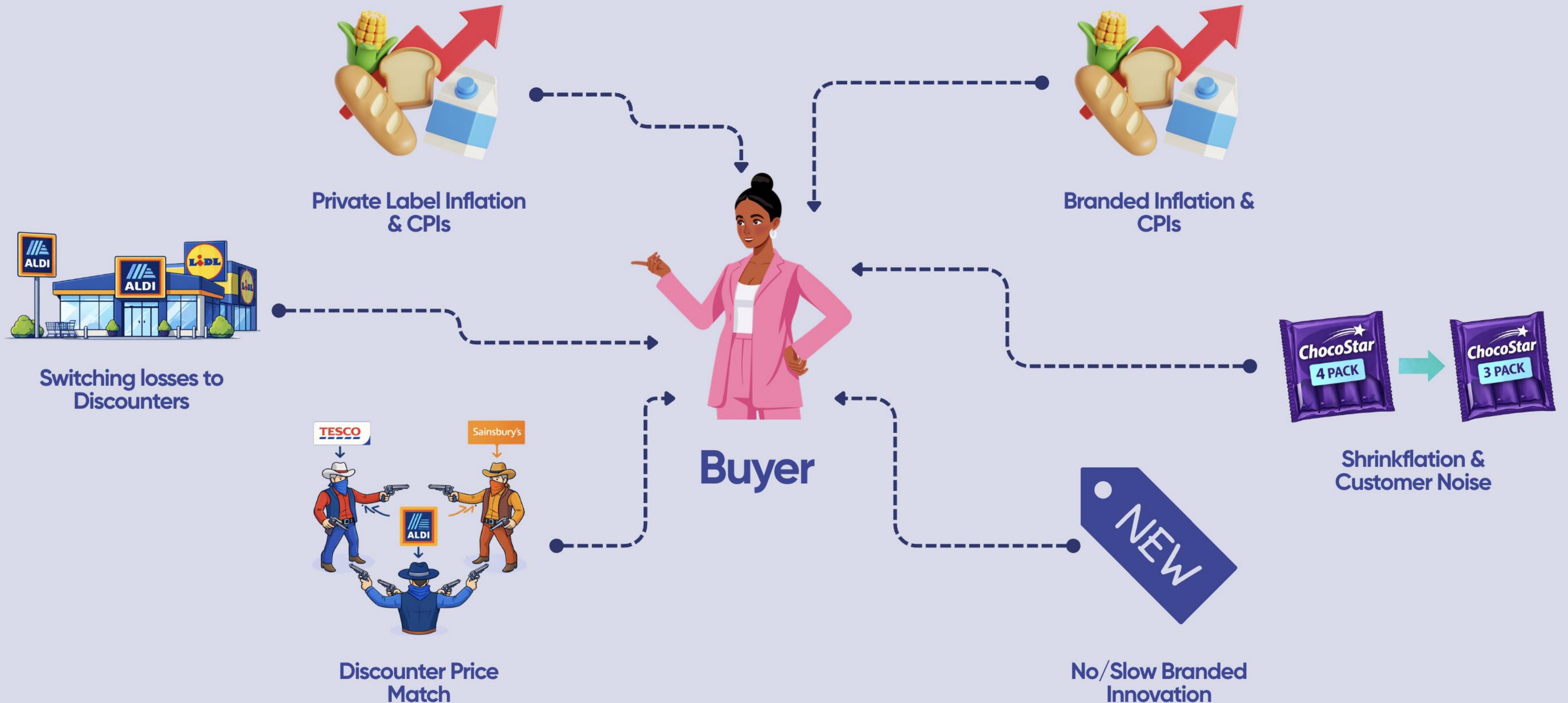


-  PL 500g passata (Non Aldi variants)
-  Branded 500g passata
-  PL 500g passata (Aldi variant)

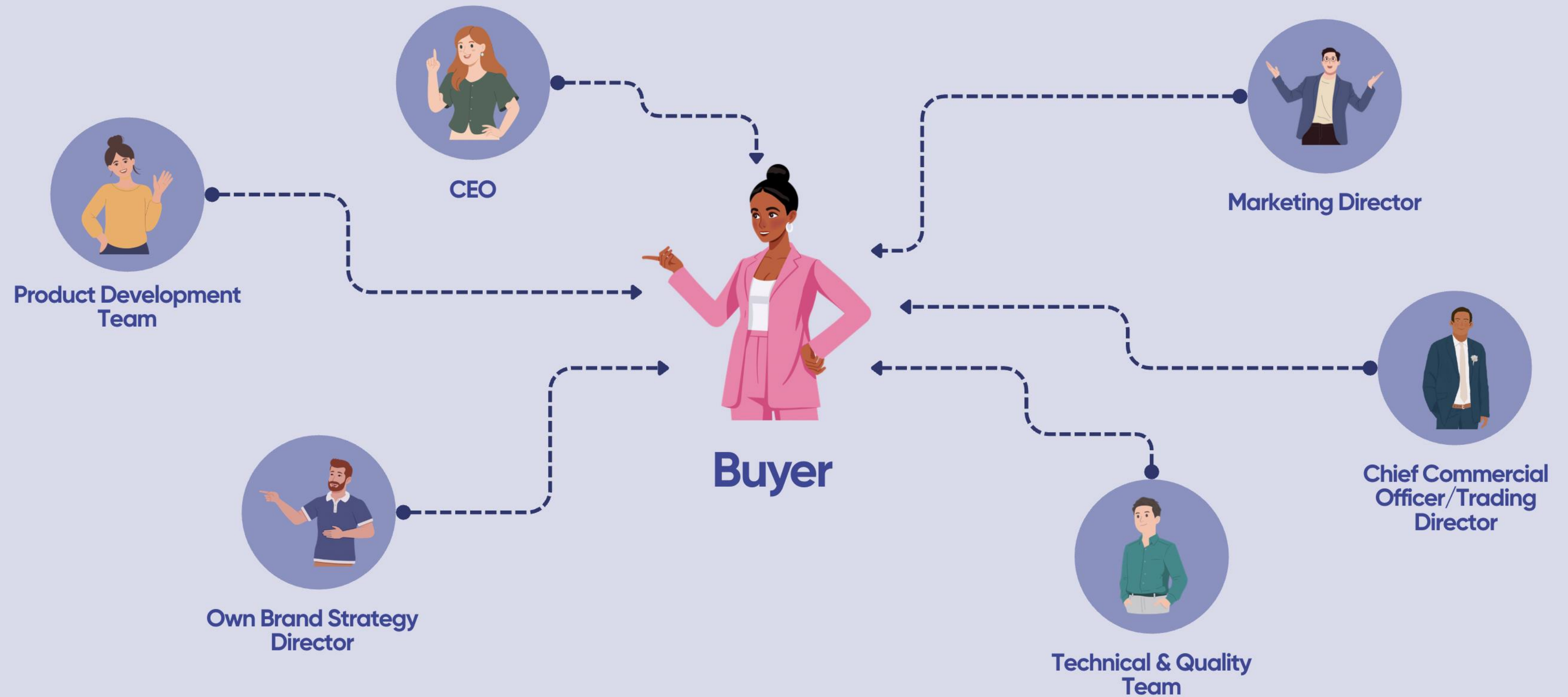
	Jan 23	Sep 25
PL variants vs LP core SKU	+40%	+94%
Brand vs private label	+50%	+81%

# How Brands win alongside Private Label?

# The Buyer's Challenge



# The Buyer's Challenge



1

Precision Data = Precision Outcomes

▪

2

Build & Reaffirm Brand Value

▪

3.

Reclaim Innovation

4.

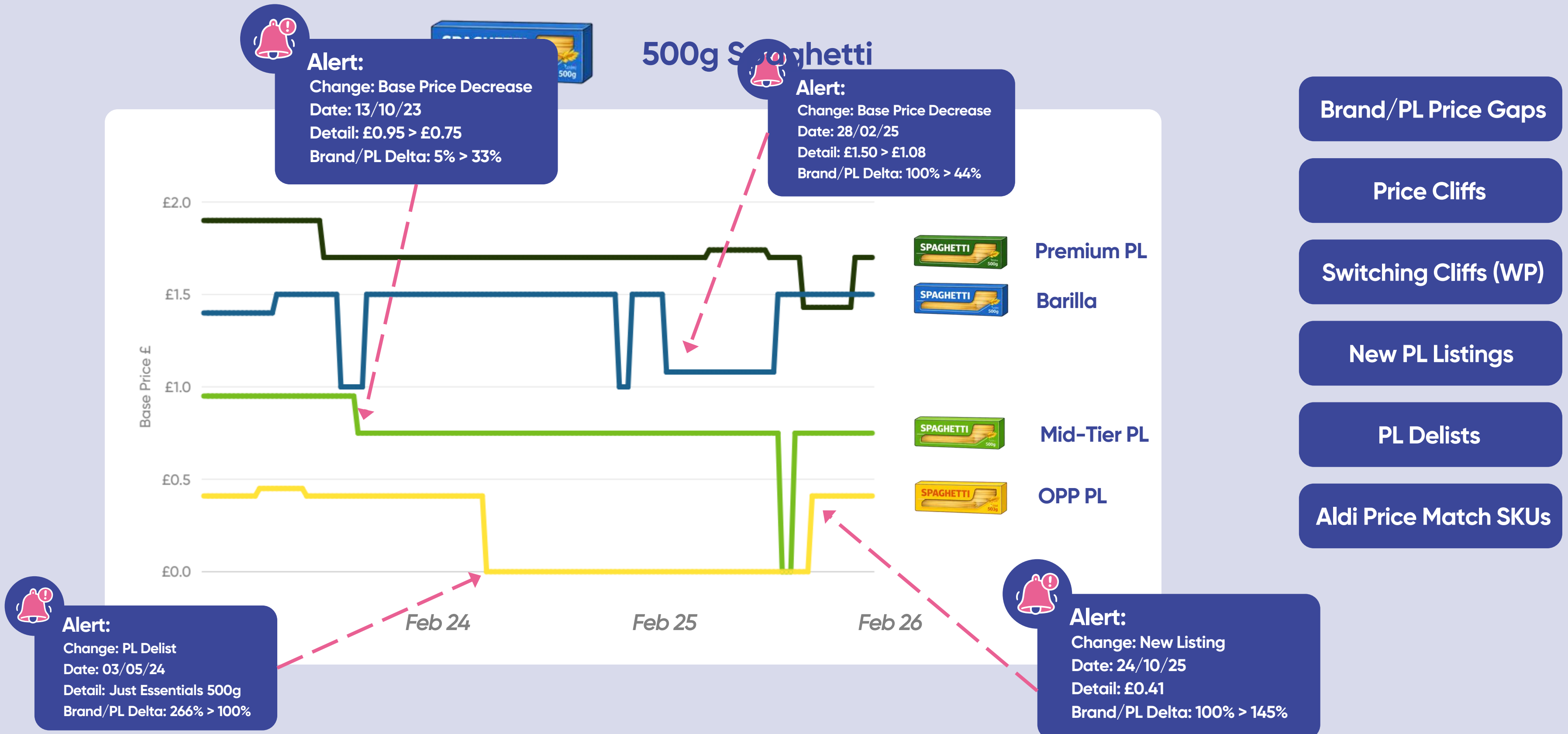
Deliver Through Private Label

1

Precision Data = Precision Outcomes

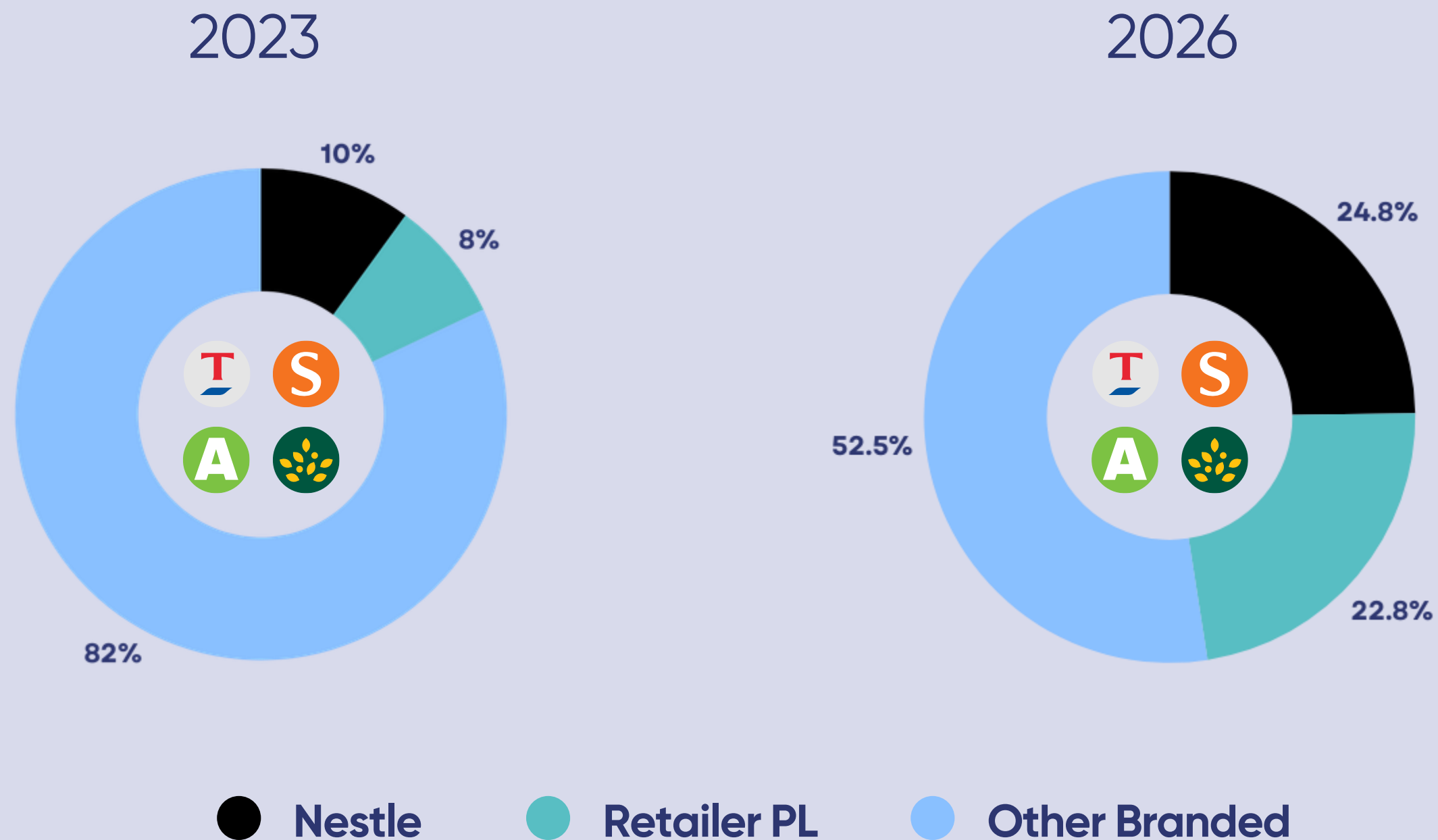
▪

# Precision Data = Precision Outcomes



# Precision Data = Precision Outcomes

## Share of Top 10 Search Results



Share of Search

Shelf Rank Position

Share of Shelf

Avg. Rating Vs PL

Engagement Vs PL

PL Taxonomy Placing

Substitution Trees

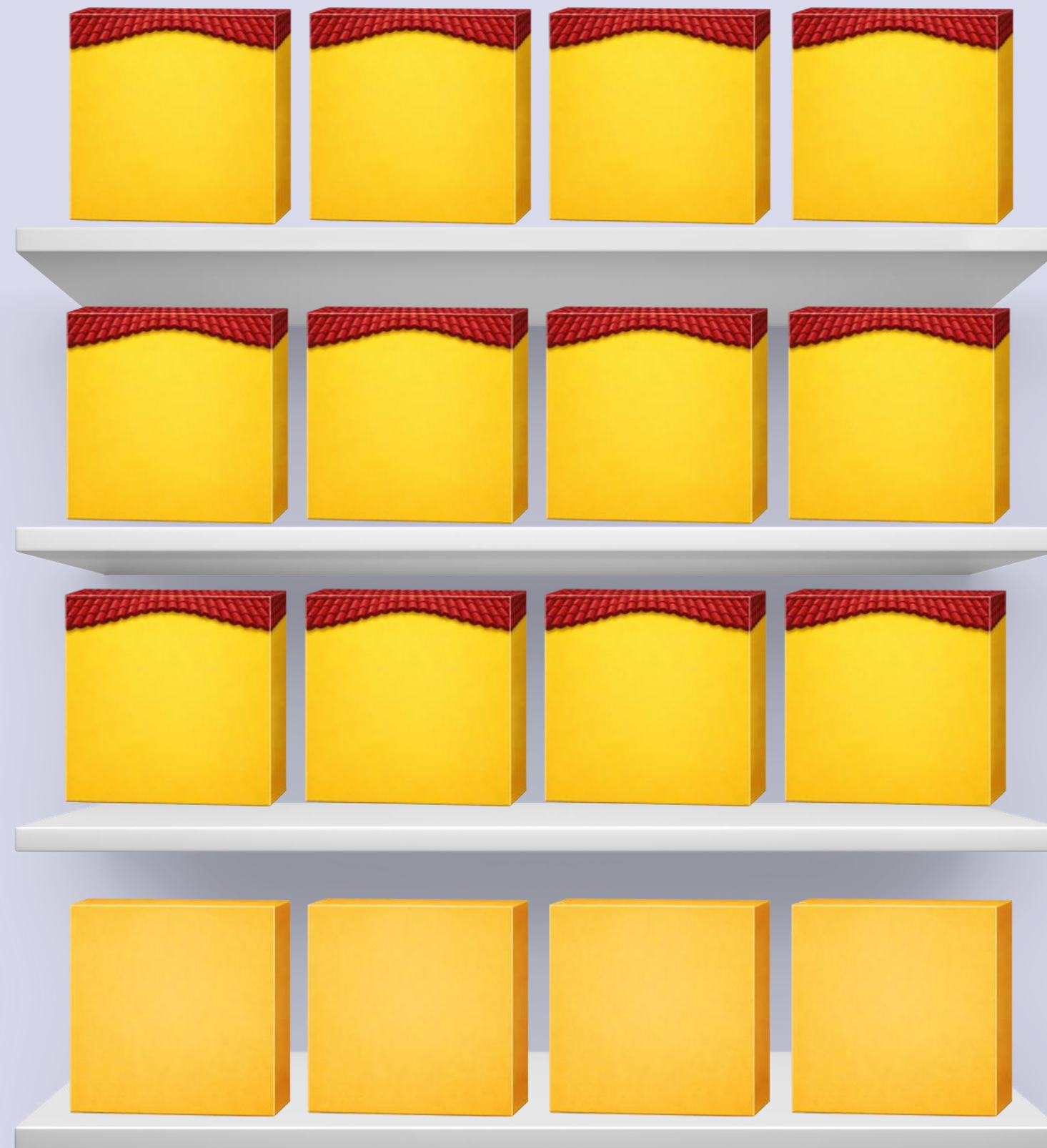
**2**

## Build & Reaffirm Brand Value

■

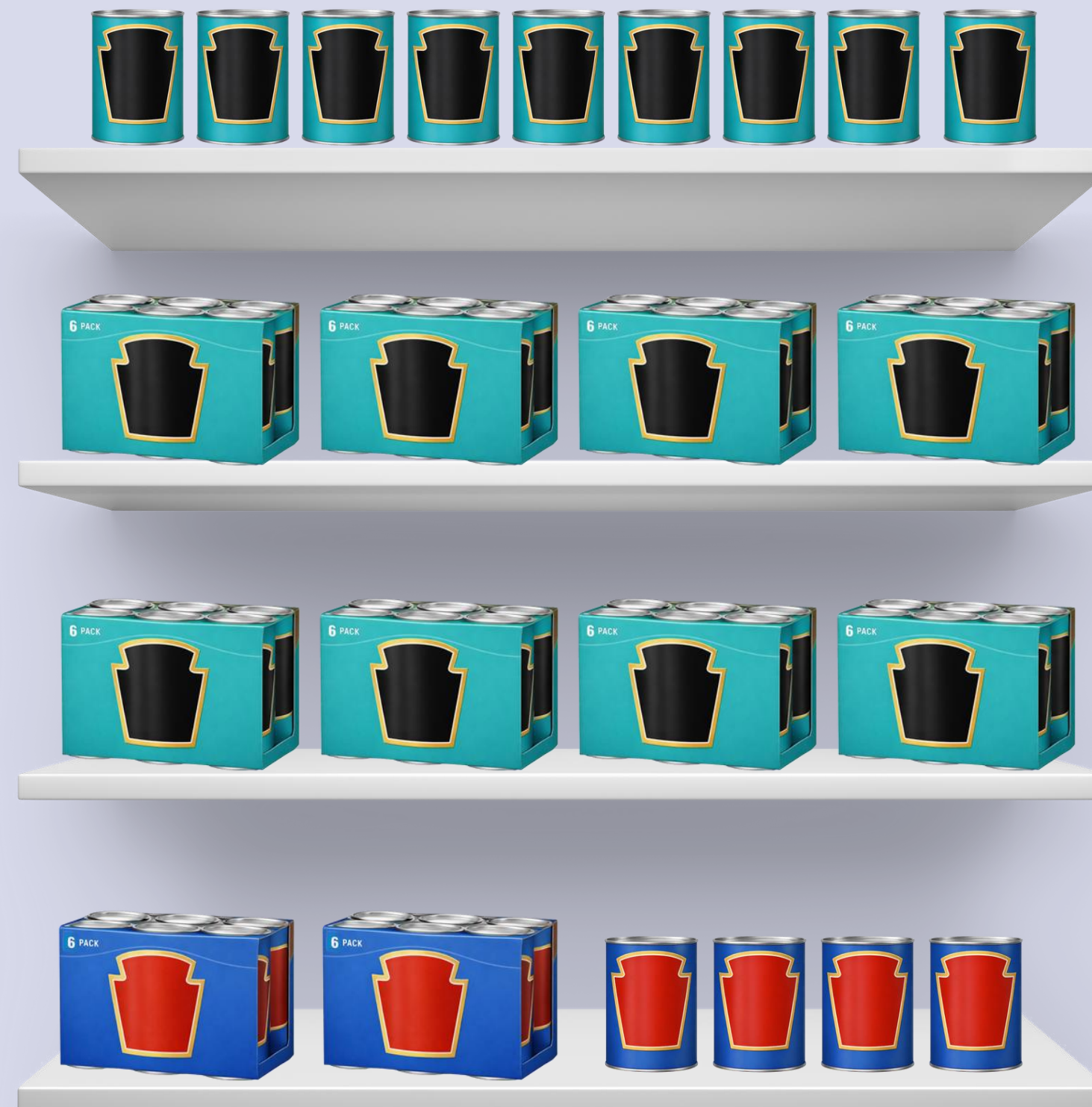
# Build & Reaffirm Brand Value

BRAND  
NUDGE



# Build & Reaffirm Brand Value

BRAND  
NUDGE



**3**

**Reclaim Innovation**

■

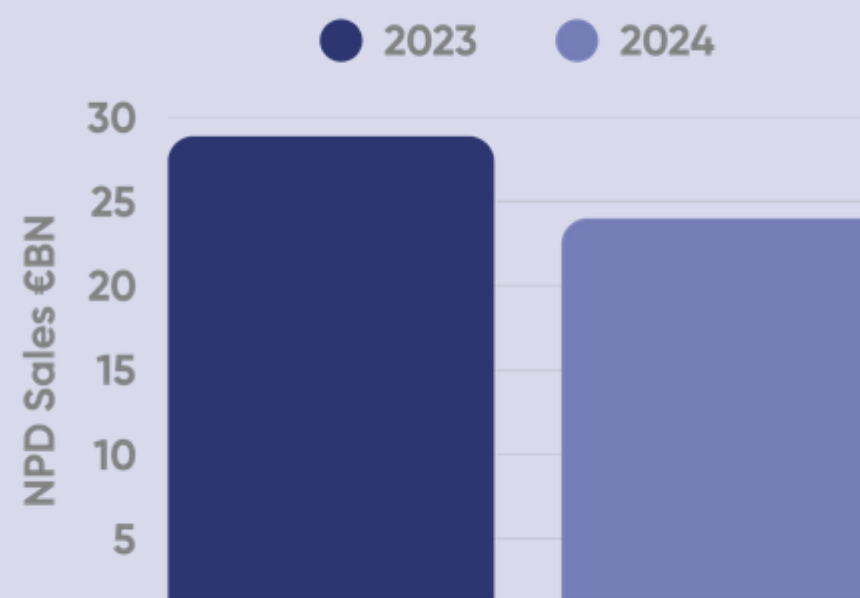
# Reclaim Innovation

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**-20%**

Branded Innovation  
2024 Vs 2023



**(€4.8BN)**

Sales from New  
Product Launches  
2024 Vs 2023



**5.2%**

Lowest ever  
recorded innovation  
by Circana in 2024

# Reclaim Innovation – 2025 PL 'Firsts'

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# Reclaim Innovation – Drive Category Value

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Vs.



Size

1KG (25 Serves)

45g (1 Serve)

Retail

£2.95

£1.45

£/KG

£2.95

£28.89

+880%

£/25 Serve

£2.95

£36.25

+1130%

**4.**

**Deliver Through Private Label**

# Deliver through PL, not against it

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✓ Drives Branded Sales

✓ Drives Non Compete PL

✓ Makes Buyer Look Good

✓ Creates Value for Shopper

1

Precision Data = Precision Outcomes

▪

2

Build & Reaffirm Brand Value

▪

3.

Reclaim Innovation

4.

Deliver Through Private Label

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Friday 27th March



12pm (GMT)

Join us for our next webinar

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Trade up or lose out:  
Driving premiumisation in  
a low growth market

