

PLMA CONCLAVE

Food Forum India

5 March 2010

Renaissance Convention Center

PLMA[®]

PLMA CONCLAVE

Differentiation and Challenges:

What Is Private Label Doing Right?

What Is Private Label Doing Wrong?

**What Can Private Label Do to Hold On
to the Gains It Has Made?**

PLMA[®]

PLMA CONCLAVE

Market Share Gains (by Volume)

| | 2005 | 2009 |
|-----------------------|------------|------------|
| United Kingdom | 42% | 48% |
| France | 32% | 34% |
| Germany | 40% | 41% |
| Spain | 33% | 39% |
| Netherlands | 21% | 25% |
| United States | 21% | 24% |

PLMA CONCLAVE

Market Share Gains (by Volume)

| | 1999 | 2009 |
|-----------------------|------------|------------|
| United Kingdom | 39% | 48% |
| France | 24% | 34% |
| Germany | 25% | 41% |
| Spain | 20% | 39% |
| Netherlands | 17% | 25% |
| United States | 19% | 24% |

PLMA CONCLAVE

Consumer Attitudes

| | 1999 | 2009 |
|--------------------------------|-------------|-------------|
| % Frequent PL Shoppers | 36% | 65% |
| % PL As Good As NB | 55% | 90% |
| % PL As Well Packaged | 45% | 85% |
| % Want More PL Products | 34% | 60% |

PLMA[®]

PLMA CONCLAVE

Consumer Attitudes

| | 1992 | 2009 |
|--------------------------------|-------------|-------------|
| % Frequent PL Shoppers | 12% | 65% |
| % PL As Good As NB | 35% | 90% |
| % PL As Well Packaged | 32% | 85% |
| % Want More PL Products | 30% | 60% |

PLMA[®]

PLMA CONCLAVE

Reasons for Growth

- 1. Supermarket Penetration**
- 2. Too Many Brands Chasing Shelf Space**
- 3. Microwave Revolution**
- 4. Women in the Workforce**
- 5. Convenience, convenience, convenience**

PLMA CONCLAVE

Tom Stephens
Formerly,
Vice President
Corporate Brands
Loblaws (Canada)

Joop Elderhorst
General Manager,
Trading and Supply
SPAR International
(Netherlands)

PLMA[®]