

Global Retail Brands

2019 SUPPLIERS GUIDE



The Continued Rise of
Global Private Label as
PLMA Celebrates 40 Years

Is Online Grocery the
Discounters' Achilles' Heel?

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Celebrating PLMA's 40th

It was great fun to look back at the last 40 years of the Global Private Label Industry to prepare this issue's celebration of PLMA's 40th Anniversary. We couldn't think of a better way to showcase private label suppliers than by featuring the association that has been their advocate since its inception.

I use the word advocate for a very particular reason. It defines the very essence of the PLMA. Everything they do serves a singular purpose...advance their members' business. Trade Shows, Executive Education, University Outreach, Leadership Conferences, Store Brands USA, PLMA Live, Salute to Excellence, The Private Label Hall of Fame are all intended to educate members, elevate the perception of private label and grow our business.

Let's ask Warren Buffet

But has the business grown? Just ask Warren Buffet who recently said, "When you're going toe to toe with a Walmart or a Costco or maybe an Amazon pretty soon ... you've got the weaker bargaining hand (referring to national brands) than you did 10 years ago," Buffett told CNBC. "So house brands, private label, is getting stronger. It varies by country around the world, but it's bigger. And it's gonna keep getting bigger." Thank you Warren.

And if you think Mr. Buffet would have made those comments if it weren't for the work of PLMA for these last 40 years, think again.

So if the opportunity presents itself, take the time to thank Brian Sharoff or a member of the PLMA staff for their role in the continued rise of the private label industry.

Thank you,

Phillip Russo

Editor/Publisher

phillip@globalretailmag.com

**PLMA 2019 ANNUAL MEETING
& LEADERSHIP CONFERENCE**

The Past, the Present and the Future

March 21-24 • Pebble Beach • California

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When you don't

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have time

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AND COLD SALADS,
SOUPS, RISOTTO AND
SIDE DISHES



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CERTIFIED



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FEW MINUTES,
EASY TO PREPARE
(JUST ADD WATER)
AND VERY FLEXIBLE



SHELF LIFE
20 MONTHS



WIDE RANGE
OF QUICK AND
HEALTHY DISHES



CONTENTS

Global Retail Brands / March 2019 / Volume 7 / Number 1



66

Departments

- Viewpoint / 4
- Contributors / 16
- Trade Fair Calendar / 18
- Notable / 44
- Global Trade Fairs / 86
- Advertiser's Index/
Next Issue Highlights / 90

Features

- Cover Story / 58
- PLMA's 40th Anniversary and the
Rise of Global Private Label
- Retail Analysis / 66
- Is Grocery Delivery the Achilles'
Heel for Discounters?
- Retail Profile / 70
- Earth Fare

Columns

- Mark Hewitt / 72
Social Media is Changing
Packaging Design
- Perry Seelert / 74
Imitation vs. Emulation
- Brent Tininenko / 76
Private Brand is Leading
Fred's into the Future
- Elise Cofield / 78
Rebuilding Public Schools in
Côte D'ivoire
- Lori Miller Burns / 80
Sensory Revolution: Win Loyalty
Through Emotional Connections
- Rita Manso / 81
Improving Transparency
and Sustainability Through
Technology
- James Butcher / 82
Customer Complaints Lead to
Partner Collaboration
- Rich Schaafsma / 83
Fair Trade Coffees, Unforgettable
Trips to Origin
- Maria Uspenski / 84
The Hot Trend of Premium Tea



58

Un'esperienza
meravigliosa

So many
exhibitors

Alle wichtigen
Einzelhändler

Così tanti
espositori

Contactos
excelentes

The best
show for
private label

Une formidable
expérience

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für Handelsmarken

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productivo

Excellent
contacts

LISTEN TO THE BUZZ*



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19-20 MARCH 2019
PARIS PORTE DE VERSAILLES - HALL 7.1



Global Retail Brands

MARCH 2019 / VOLUME 7 / NUMBER 1 OF 4

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WWW.GRUPPOLADORIA.IT



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by  **BolognaFiere**

PRIVATE LABEL CONFERENCE AND EXHIBITION

**BOLOGNA
2020**
16th edition



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JANUARY

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OKA PRODUCTS



WE MAKE YOUR PRIVATE LABEL, YOUR OWN RECIPES.
DON'T MISS THE OPORTUNITY TO BE PART OF THE NEW
ERA OF BEVERAGES AND SNACKS.



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Lori Miller Burns, Director of Marketing Relations and Communications for Arylescence, has worked in the personal care and fragrance industry for decades. She understands how the power of thoughtful sensory strategies builds and establishes winning brands in the marketplace.



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James Butcher is CEO of Solutions for Retail Brands (S4RB), a leader in consultancy-led software solutions for retail private brand collaboration. The company's cloud-based Affinity™ platform brings retail teams and their suppliers and customers together to work collaboratively as one team around successful private brands.



ELISE COFIELD

As Content Manager at Fair Trade USA, Elise helps deepen understanding of Fair Trade, support businesses selling Fair Trade products, and engage consumers about power of purchase.



MARIA DUBUC

Marketing By Design, President, Big Red Rooster, Vice President, Maria is a 25 year pioneer in creative management, Maria's key talent is to combine a career's worth of branding experience into something personal and unique for each and every client. Smart & Final, The Home Depot, 7-Eleven, and PriceSmart are among the retailer programs she currently runs.



CHRISTOPHER DURHAM

Founder, My Private Brand/The Velocity Private Brand Conference. Christopher Durham is an author, consultant, strategist and retailer with close to 20 years of real-world retail and corporate experience creating, launching and building numerous billion dollar Private Brands. My Private Brand, seeks to drive the changing Private Brand landscape, focusing on the emerging art and science of Private Brand management.



MARK HEWITT

As Group Managing Director of SGK in Europe, Mark Hewitt oversees the European brand development operations of Anthem and Brandimage. With 25+ years experience in brand development, digital strategy and integrated marketing for many of the world's most popular brands, Mark is in a unique position to advise on and create connected brand experiences that help drive brand performance



DENISE KLUG

Senior Retail Analyst at LZ Retailytics covering German, Austrian, Swiss as well as Benelux grocery retail. Her fields of expertise lie in discounters, private label and health & beauty retail. Prior to her current position, she worked for five years as an analyst for Planet Retail and was head of the Modern Grocery Distribution team in the Frankfurt office. Denise speaks regularly at various international retail conferences.



RITA MANSO

Rita has led Daymon's International Retail Consultancy, Branding & Design team, located in Lisbon for over 6 years. She oversees Daymon's areas of Strategy, Insights, Category Management, Research, Marketing, Branding, Design & Communications in the European Resource Center. Rita has developed Retail and Private Brand Strategy for key retail players such as Pick n Pay in South Africa, Makro in Brasil, Statoil/Circle K in western Europe and Kero in Angola.



MATTHIAS QUECK

Matthias Queck is Research Director at LZ Retailytics. With 15 years of analyzing the grocery retail market and supporting companies in decision making, he is a renowned expert on the industry. He specialises on Aldi, Lidl and private label developments globally. At LZ Retailytics, Matthias analyses the national and international operations of the largest Germany-based retail groups.



PERRY SEELERT

A retail branding and marketing expert, with a passion for challenging conventional strategy and truths. Perry is the Strategic Partner and Co-founder of Emerge, a strategic marketing consultancy dedicated to helping Retailers, Manufacturers and Services grow exponentially and differentiate with purpose.



BRENT TININENKO

VP of Private Brands for Fred's, Brent has spent the last few decades building private brands with retailers and private brand companies including, Walmart, Sam's Club, Daymon and Nash Finch. He is energized by developing private brands that compete with big, National Brands.



MARIA USPENSKI

Maria Uspenski is the founder and CEO of The Tea Spot, where her mission is to advance healthier living through the everyday enjoyment of whole leaf tea. An MIT mechanical engineer by trade, Uspenski is the innovative force listed on three U.S. patents for Steepware inventions. She is the author of Cancer Hates Tea, and was recognized as the "Top Tea Health Advocate" at the 2017 World Tea Expo.

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leader in
private brand
tomato
products,
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Customers
promote their
own brands.

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company,
our **4** focus
is on pleasing our
Customers
NOT Wall Street!

commit
to supporting
local family-
owned **5**
farms
and will purchase quality
fresh tomatoes from them.

6 protect
our
environment
by focusing on **zero-waste**
and **zero-landfill** production practices.

prepare our tomatoes at American manufacturing
facilities
to **support**
American
jobs **7** We are committed to
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work environment with fair wages
& opportunities for advancement.

8 offer
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Consolidate multiple product categories to
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worry free
low-cost supply chain
solutions



MARCH 2019

5 – 8

Foodex Japan

Makuhari Messe,
Chiba-shi, Mihama-ku
Nakase, Japan
www.jma.or.jp/foodex

5 – 9

Natural Products Expo West

Anaheim Convention Center
Anaheim, CA USA
www.expowest.com

14 – 18

Cosmoprof / Cosmopack

Worldwide Bologna

Bologna Fiere
Bologna, Italy
www.cosmoprof.com

19 – 20

M.A.D.E. Paris

Paris Porte de Versailles
Paris, France
www.madeparis.com

21 – 24

PLMA's Annual Meeting and Leadership Conference

Pebble Beach
(Home of the 2019 US Open)
Pebble Beach, CA USA
www.plma.com

26 – 27

Wabel Frozen Summit

Hilton Charles de Gaulle Airport
Paris, France
www.wabel.com

26 – 27

Wabel Chilled & Dairy Summit

Hilton Charles de Gaulle Airport
Paris, France
www.wabel.com

APRIL

10 – 11

Cibus Conect

Fiere di Parma
Parma, Italy
www.cibus.it

APRIL

29 – May 2

Velocity US

Le Meridien Charlotte
Charlotte, NC USA
www.mpbvelocity.com

30 – May 2

SIAL Canada

Energare Center
Toronto, Canada
www.sialcanada.com

MAY

7 – 9

Seafood Expo Global

Brussels, Belgium
www.seafoodexpo.com

15 – 16

World Retail Congress

RAI Amsterdam
Amsterdam, The Netherlands
www.worldretailcongress.com

JUNE

2 – 4

IDDBA

Orlando Convention Center
Orlando, FL USA
www.iddba.org

12 – 13

Wabel China Summit

Shanghai, China
www.wabel.com

12- 14

Cosmoprof India Mumbai

Bombay Convention Center
Mumbai, India
www.cosmoprof.com

20 – 21

MakeUp in Paris

Carrousel du Louvre
Paris, France
www.makeupinparis.com



21 – 22

PLMA's World of Private Label

RAI Amsterdam
Amsterdam, Netherlands
www.plmainternational.com

21 – 23

New York Summer Fancy Food Show

Javits Convention Center
New York, NY USA
www.specialtyfood.com

28 – June 1

THAIFEX

Impact Exhibition Center
Bangkok, Thailand
www.thaifexworldoffoodasia.com

JULY

28- 30

Cosmoprof North America

Mandalay Bay Convention Center
Las Vegas, NV USA
www.cosmoprofnorthamerica.com



AUGUST

24–26

NACDS Total Store Expo
Boston Convention and
Exhibition Center
Boston, MA USA
tse.nacds.org

SEPTEMBER

6–9

SANA Organic Trade Fair
Bologna Fiere
Bologna, Italy
www.sana.it

11–14

Natural Products Expo East
Baltimore Convention Center
Baltimore, Maryland USA
www.expoeast.com

23–25

PACK EXPO
Las Vegas Convention Center
Las Vegas, NV USA
www.packexpo.com

25–26

Vitafoods Asia
Sands Expo & Convention Center
at Marina Bay
Bay Sands, Singapore
www.vitafoodsasia.com

25–27

Expoalimentaria Peru
Jockey Exhibition Center
Lima, Peru
www.expoalimentariaperu.com



OCTOBER

5–9

Anuga
Koeln Messe
Koeln, Germany
www.anuga.com

OCTOBER

16–17

**Wabel Home, Beauty &
Personal Care Summit**
Hilton Charles de Gaulle Airport
Paris, France
www.wabel.com

21–23

Velocity Europe
Myriad Hotel
Lisbon, Portugal
www.mpbvelocity.com

NOVEMBER

12–15

**Wabel Grocery, Wine & Spirits,
Drinks, Sweets Summits**
Hilton Charles de Gaulle Airport
Paris, France
www.wabel.com

12–15

Cosmoprof / Cosmopack Asia
Hong Kong Convention Center
Hong Kong
www.cosmoprof-asia.com

13–16

**Vietnam Food Expo
Saigon Exhibition &
Convention Center**
Ho Chi Minh City, Vietnam
www.foodexpo.vn/en

17–19

PLMA's Private Label Trade Show
Rosemont Convention Center
Chicago, IL
www.plma.com

DECEMBER

10–12

Shanghai Private Label Fair
"World of Private Label"
Pavilion Shanghai New
International Expo Center
Shanghai, China
www.plmainternational.com

JANUARY 2020

TBA

NRF 2020

Javits Convention Center
New York, NY USA
www.events.nrf.com

15–16

Marca by BolognaFiere
Bologna Fiere
Bologna, Italy
www.marca.bolognafiere.it

19–21

Winter Fancy Food Show
Moscone Convention Center
San Francisco, CA USA
www.specialtyfood.com

FEBRUARY 2020

2–5

ISM Cologne
Koeln Messe
Cologne, Germany
www.ism-cologne.com

10–14

Prodexpo
Expocenter Fairgrounds
Moscow, Russia
www.prod-expo.ru/en/

12–15

BIOFACH
Exhibition Centre Nuremberg
Nuremberg, Germany
www.biofach.de

22–25

ToyFair
Jacob K. Javits Center
New York, NY USA
www.toyfairny.com

TBA

Private Label Trade Show Japan
Tokyo Big Sight
Tokyo, Japan
www.jma.or.jp/pb/en/

COSMOPROF

Cosmoprof Worldwide Bologna is a custom exhibition with three different salons dedicated to specific industries and distribution channels, with each show opening and closing on different dates in order to facilitate the flow of visitor traffic and make the most of opportunities for networking and doing business.

Together with the Cosmoprof shows in Bologna, Las Vegas, Hong Kong and Mumbai, BolognaFiere Cosmoprof organizes many events in the beauty sector, including the field of wellness and health.

In 2018 the BolognaFiere Cosmoprof has consolidated its leadership in Europe with new shows in the professional beauty salon and nail sectors thanks to the acquisition of the German group Health & Beauty owner of the Beauty Forum Brand.

www.cosmoprof.com

COSMOPROF
WORLDWIDE BOLOGNA



DAYMON

Present in over 50 countries through over 100 retail partners, Daymon has been a pioneer since 1970 in maximizing the potential of Private Brand products that differentiate retailers. Daymon Worldwide is committed to creating customized solutions from strategy to execution for retailers and brands looking to participate and lead with their private brand program.

Daymon is the world's leading Private Brand procurement and management company with global trading hubs with strong local supplier knowledge with over 24,000 supplier contacts.

The company grew within retail worldwide to become unique as a center of excellence, expertise and experience in the management of retail brands specializing in:

- Brand Strategy, Market & Retail Insights
- Category Management & Analytics
- Brand Management & Product Development
- Global Sourcing
- Design & Creative Services
- Field Sales & Retail Execution
- Brand Activation

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Daymon



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For more information: www.dek.de



FOODEX JAPAN

FOODEX JAPAN

Asia's largest exhibition dedicated to food and drink across Japan and the whole world.

Over the 4 days of the exhibition, about 82,000 buyers from food service, distribution, and trading companies are expected to attend. Attention will be given to the expansion of business opportunities domestically and internationally upon the activation of the TPP. Numerous buyers will also be attending from abroad, and business talks will be held with domestic and international manufacturers.

Makuhari Messe, Japan
FOODEX JAPAN Secretariat
Convention Business Center,
Japan Management Association
3-1-22 Shibakoen, Minato-ku, Tokyo 105-8522, Japan

For more information: www.jma.or.jp/foodex/en





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of our produce is grown by
AMERICAN FARMERS



GERMINAL

ORGANIC IS OUR TRADITION. WE PRODUCE THE AUTHENTIC TASTE OF ORGANIC

Germinal has been working to ensure the quality of what it produces for 40 years and became over time a benchmark for organic, gluten free, vegan products and baby food. This thanks to the R&D investments that allowed Germinal to offer a wide range of products: from sweet and savoury products to fresh ready meals.

All the raw materials that Germinal uses are grown without chemical synthesis products and the final products are made without colouring agents, preservatives, additives and GMOs. This is Germinal's organic: a history of authenticity, research of quality, respect for the environment, food security and passion.

"With our products we respect the environment, in cooperation with suppliers and commercial partners who share our commitment to sustainability" says Emanuele Zuanetti – CEO of Germinal.

Germinal is proud to be among the most influential European producers of organic sweet bakery goods, specializing in gluten-free, vegan, baby-food and functional products.

Sustainability is the cornerstone of the Company.

For more information: www.germinalbio.it/en/



GLOBAL TISSUE GROUP

Global Tissue Group ® has fostered a reputation for providing value for our customers as their private label paper manufacturer for bath tissue, facial tissue, napkins and paper towels with customer service to each and every one of them. Our customers depend on our flexibility, confidentiality and quality, from paper products to services; from our specialty paper manufacturing capabilities and consistent supply to custom-tailored private label programs. Our goal is to ensure that no matter your needs, Global Tissue can deliver.

In creating diversified household paper products that cater to every market category, you can feel confident putting your label on our goods. We bring the trust and comfort of our relationship to your consumers, who will grow to depend upon our standard of manufacturing excellence – and your brand, through our private label programs, contract manufacturing, or our control brands. This is what sets us apart from our competition. Global Tissue provides value, quality and consistency, and helps organizations like yours increase their revenue. Let us enhance your paper program and your margins. Be a part of our Strong A.R.M. program, and Attract consumers, Retain them and create Margin enhancement every day.

For more information: www.globaltissuegroup.com



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for your brand.



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BOSTON MA / SCOTTSDALE AZ / SAN DIEGO CA / DONGGUAN CHINA / WAKEFIELD UK

LA DORIA S.p.A.

La Doria, established in 1954, is an Italian leading corporation in the canned food sector and particularly in the production of tomato-based products, pasta sauces, canned vegetables, fruit juices and beverages. Today the company is the leading Italian producer of canned vegetables and tomato-based products (peeled and chopped tomatoes), the first largest producer of pasta sauces under private labels and the second largest producer of fruit juices and beverages (the first in the private labels segment).

A leading position abroad

The company can also boast leading positions on some demanding foreign markets such as the UK, Australia and Japan. It ranks first on the English market of tomato-based products and baked beans under private labels. La Doria is a major supplier for mass market retailers both in Italy and abroad, and is specialized in the private labels sector, or the supermarket's brands.

LA DORIA S.p.A.

Via Nazionale, 320 - 84012 Angri (SA) - Campania - Italy
+39.081.5166111

www.gruppoloria.it



LE BONTÀ (Nuova Terra)

Le Bontà was founded in 1994 in Prato, in the Tuscan hinterland, with the aim of creating sauces, meat sauces and patès that express the best Tuscan gastronomic tradition. In 2011, the giant Drogheria & Alimentari, leading herb and spice company, purchased Le Bontà, which expanded the productive force of the Tuscan brand while still integrating its rural and genuine identity. In 2012, the brand Nuova Terra, a valuable player of the cereal, legume and seed market was purchased.

Nuova Terra: a broad selection of natural and organic cereals, seeds and soups. I Toscanacci: a line of high-quality sauces without preservatives. Bonvé: a line of vegan and organic sauces. Accademia Toscana: a range of sophisticated and very high-quality sauces for the Italian and foreign market.

Grains, seeds, pulses, mixes for hearty or light soups, an entire Organic Line dedicated to those who choose a sustainable way of life, and another, a Gluten-Free Line for those who don't want to give up on taste when they have to follow a specific nutritional regimen: Nuova Terra foods meet every requirement or desire.

For more information: www.nuovatterra.net

Le Bontà





Our team looks forward to working on your private label coffee program!

Since 1935

PARAMOUNT[®] ROASTERS



Steve Morris

President / COO

517.853.2419

smorris@paramountroasters.com



Angelo Oricchio

Chairman / CEO

517.853.2404

aoricchio@paramountroasters.com



LUCART

Innovation has been the distinctive feature of Lucart Group since its origins and today it can offer cutting-edge products and develops innovative solutions to assure a better future and to address new market challenges.

Lucart Group has a history that goes back to the 30's when the Pasquini family decided to set up a paper production factory in Villa Basilica (Lucca). At the beginning, production was mainly focused on one-side glazed paper for flexible packaging, table-covers and placemats. Subsequently, at the end of the 80's, the Group diversified its activity entering also the tissue market (kitchen rolls, hand towels, wipers, toilet paper, napkins etc.). Today Lucart Group is the main European manufacturer of fine MG paper for flexible packaging and is among the top European producers of tissue and airlaid paper and products and is always a breakthrough in innovation.

In 2011, Lucart R&D department for the use of fibres alternative to virgin fibres launched an ambitious project aimed at recovering all the materials contained in beverage cartons. These cellulose fibers are used to obtain tissue products and are identified as Fiberpack® brand; the aluminium and polyethylene are recovered and converted into a homogeneous material called Al.pe.®

For more information:

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www.lucartgroup.com**



LZ RETAILYTICS

LZ Retailytics is an international analyst group set up to support the retail and consumer goods industries by providing insightful data and analysis to facilitate business planning and decision making. The group delivers these insights in the form of an innovative digital platform as well as through workshops, in-house training and advisory projects.

LZ Retailytics' team of senior analysts is spread internationally and all are well known for their deep knowledge of the retail industry. Our experts specialise in new store formats, e-commerce and digitalisation, private label, hard discount, retail technology and logistics. Our retail analysts deliver key insights and intelligence on the latest grocery retail trends in Europe.

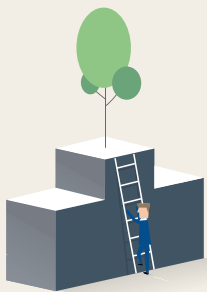
Lebensmittel Zeitung is part of dfv media group one of Europe's largest independent specialist media companies. LZ Retailytics is part of Lebensmittel Zeitung (LZ) the leading trade and business newspaper for grocery and consumer goods in Germany.

For more information: www.retailytics.com

LZ Retailytics
Lebensmittel
Zeitung

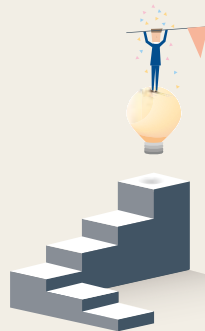


INNOVATIVE PAPER SOLUTIONS, SUSTAINABLE TISSUE PRODUCTS, FOR THE FUTURE OF THE PEOPLE AND THE PLANET



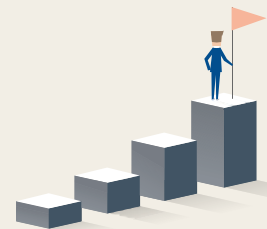
SUSTAIN

production processes that aim to reduce the environmental impact and optimise the use of resources.



INNOVATE

through the continuous research of inventive and competitive solutions.



EXCEL

in the quality of products and services through better manufacturing and organisational efficiency.

M.A.D.E.*

M.A.D.E.*: The exhibition dedicated to co-creation, innovation and business in custom-made and own-label products! Bringing together 450 manufacturers and over 4500 visitors looking for the latest innovations and trends, this international event takes place every year in March in Paris, Porte de Versailles. It is a source of unique expertise aimed at all retail channels and distribution networks.

"PHYGITAL FOOD & LIFE

Where I want, when I want, how I want!

In 2019, M.A.D.E. invites you to explore and analyse consumer expectations, innovative products and packaging, future concepts. Our experts analyse PHYGITAL Food & Life through two sub-themes that provide a global and complementary overview of consumer expectations in terms of consumption locations, access to information, consumption patterns, and products:

New mobility options (snacking, drinkification, on-the-go, e-commerce, conversational shopping, ...) New consumptions (sensory, premium, flexitarianism – no longer vegetarianism – nutritional and collaborative transition, AI, connected, food tech, green food, ...)

The 2019 edition of M.A.D.E. will take place on 19th & 20th March 2019.

For more information: www.madeparis.com



Phygital
Food & Life

MARCA BY BOLOGNAFIERE

Marca is one of the largest European trade fairs for the private label industry and the International Supermarket Label Exhibition. It is organised by BolognaFiere in collaboration with the Associazione della Distribuzione Moderna.

It is the only Italian exhibition dedicated entirely to private labels. With two packed days full of business opportunities, workshops and debates in an event which has quickly established itself as the must-attend show in the industry.

Marca offers the opportunity for the branding industry to develop relations with the large supermarket chain brands who promote their private label policies annually during the fair.

Marca is: the only exhibition where all the Major Retailers are represented with their own stands at the fair; the only Italian exhibition and the second largest in Europe devoted entirely to the Private Label business; the must-attend event for the entire FMCG community; a unique opportunity to meet high-quality exhibitors representing the Italian and international manufacturing industries.

Marca provides a detailed presentation of the latest Private Label items launched in the market and offers exclusive training and information exchange tools, including conferences, exploring market trends, consumption and purchasing patterns in the Private Label sector.

For more information: www.marca.bolognafiere.it

maRca
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MASSIMO ZANETTI

Insights Drive Sales

Understanding the consumer is vital when determining your next step to reach your company goals. With coffee being the second most traded commodity in the world, data management and analysis is imperative. Keeping track of coffee trends can lead to a more fact based decision that will increase sales. A retailer that is armed with a clear understanding of the consumer ultimately will be more proactive.

Shopper insights requires detailed study of factors that influence the shoppers' perception and behavior in store as well as online. Combining shopper data along with sales data creates a powerful understanding of factors and influences that drive a shoppers' behavior. There is value in understanding why consumers buy what they buy. At Massimo Zanetti, we pride ourselves on not only a valuable partnership but a team member that will reach consumers and grow sales.

Experience coffee at its best! Let Massimo Zanetti Beverage provide your store brand with the right coffee for your shopper. Leverage actionable consumer insights and convert more grocery shoppers to coffee shoppers.

For more information: www.mzb-usa.com



MBD

Marketing By Design

A company is only as good as the people working in it and we're blessed with a team of multi-talented individuals—combining skills in strategy, packaging design, production artwork, and project management. Our goal is to deliver creative value to our clients in the retail space.

Our goal is to always deliver commercial and creative value to our clients. For more information: www.mbdesign.com

Workflow By Design provides a cloud-based Total Workflow Solution that helps Enterprise teams – from Creative Services to Artwork Production – get products to market faster by bringing structure to chaos while allowing innovation and creativity to flourish. We deliver an automated workflow for the entire lifecycle – from project request, team communication, electronic routing approval, and file release, through archival and reporting. We recognize that ease of use, efficiency, and accountability are paramount to success, and keep this at the center of every implementation.

The Total Workflow Solution is flexible allowing each company to undertake as much or as little as they desire at launch. We are a team of industry experts that deliver client-based solutions, custom configured to fit your creative services, marketing, artwork production, and private brand teams.

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Gruppo Germinal

Organic is our tradition. We produce the authentic taste of organic.

We have been working to ensure the quality of what we produce for 40 years and became over time a benchmark for organic, gluten free, vegan products and baby food. This thanks to the R&D investments that allowed us to offer a wide range of products: from sweet and savoury products to fresh ready meals. In 2017, we began our adventure into the North American market with Germinal Organic brand. Germinal Organic is a line of organic and gluten free products developed after a long study and market researches.

Sustainability is our cornerstone: with our payoff “Nourish your health” we want to declare that sustainability is part of our DNA.

germinalbio.it
germinalorganic.com

OKA PRODUCTS

OKA Products has over 18 years production and distribution experience in the beverage and food industry. Our high quality portfolio of brands offers the most healthy product options at the best possible prices.

Retailers successfully sell OKA Products 10-20 percent below the cost of competing brands and still earn up to 20 percent more profit. For this reason, it is no surprise OKA Products is quickly becoming a leader in low-cost, healthy, private label product development.

"Making healthy, high-quality products accessible to all."

There has been a significant increase in the demand for healthy beverages and snacks as more and more people search for a better quality of life. This market was valued at \$1,548 billion in 2015, and it is estimated to grow at a compound annual growth rate (CAGR) of 4.4% to reach \$2,090 billion by 2022.

Avihu Schumacher, CEO / avi@okaproductsofficial.com
Sandra Blanco, COO / sandra@okaproductsofficial.com
 (+1) 786 547 4447

www.okaproductsofficial.com



PARAMOUNT ROASTERS

Paramount Roasters is an employee-owned company based in Lansing, MI with over 84 years of coffee roasting experience. Founded in 1935, Paramount has a rich heritage of distributing premium coffee, nationally and internationally.

Paramount holds a SQF level 2 certification and is additionally certified in the following programs: USDA Organic, Fair Trade USA, Kosher, UTZ, Rainforest Alliance, Swiss Water Process and Halal.

Paramount Roasters will be adding a single serve pod machine to their capabilities in the 2nd quarter of 2019 to complement their premium bagged coffee line.

To learn more about how Paramount Roasters can help grow your private brand coffee program, please reach out to **Steve Morris** or **Kara Miencier**.

The Paramount sales team looks forward to the opportunity to work with you!

For more information: www.mzb-usa.com



Steve Morris
 President / COO

517.853.2419
 smorris@paramountroasters.com



Kara Miencier
 Sales Executive

517.388.2020
 kmiencier@paramountroasters.com



SUSTAINABILITY TECHNOLOGY



REAL PROGRESS

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AIRLAID products are created with an innovative manufacturing process that allows to obtain a product similar to the fabric but with the qualities of the paper: exceptional performance in terms of absorbency and strength, capability to be re-used several times, either dry or wet.

FIBERPACK

Fiberpack® is the material obtained from recycling cellulose fibres forming part of beverage cartons, all thanks to the innovative and exclusive technology developed by Lucart. The production process uses an innovative technology, which separates the cellulose fibres found in beverage cartons from polyethylene and aluminium without using substances that are harmful to man or the environment.

PLMA

PLMA Celebrates 40 Years of Private Label Growth

The Private Label Manufacturers Association (PLMA) is a non-profit organization founded in 1979 to promote private label. It is the only organization of its kind, representing more than 4,400 member companies around the globe. Membership ranges from multinational corporations to small family-owned companies. Their products include food, beverages, snacks, health and beauty, household and kitchen, DIY, and personal and leisure products. Some manufacturers only do private label. Others are well-known brand makers who also have private label operations.

PLMA presented its first trade show in the United States in 1980, its first trade show in Europe in 1986 and its first trade show in Asia in 1994. Today, it provides services to member manufacturers in more than 70 countries. In addition to two annual trade shows in Amsterdam and Chicago, PLMA also offers conferences, executive education programs, market research, studies and publications.

For more information: www.plma.com



LISTEN TO THE BUZZ

21-22 MAY 2019
AMSTERDAM



PERRIGO

Perrigo Company plc, a leading global healthcare company, delivers value to its customers and consumers. Founded in 1887 as a packager of home remedies, Perrigo has built a unique business model that is best described as the convergence of a fast-moving consumer goods company, a high-quality pharmaceutical manufacturing organization and a world-class supply chain network.

Perrigo is the world's largest manufacturer of over-the-counter ("OTC") healthcare products and supplier of infant formulas for the store brand market. The Company also is a leading provider of branded OTC products throughout Europe and the U.S., as well as a leading producer of "extended topical" prescription drugs. Perrigo, headquartered in Ireland, sells its products primarily in North America and Europe, as well as in other markets, including Australia, Israel and China.

For more information: www.perrigo.com

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RED GOLD

For four generations, the Red Gold family has been working with local farm families to grow the highest-quality best tasting tomatoes in the world. Starting as a father and daughter simply trying to help their country – it's now become a full time operation with over 50 partnerships with Midwestern growers. The Red Gold family story begins in March of 1942 when the government asked citizens to step up and help the war effort by supplying food for our troops. When Grover C. Hutcherson heard this message, he and his daughter Fran purchased and rebuilt an old abandoned cannery building in central Indiana. The cannery had been destroyed on three separate occasions by fires and a tornado but they managed to rally the community and persevere.

At Red Gold we believe developing a successful Private Brand business requires more than applying your logo to a label. We know consumers re-purchase a Private Brand when they are confident they'll consistently receive a high-quality, national brand equivalent product. Our Private Brands Division is focused solely on Your Brand. We provide the quality and variety that your customers demand. By leveraging our value-added services, we help you build your sales and profits.

For more information: www.redgoldfoods.com



SENECA FOODS

Seneca Foods ensures US farm fresh goodness through our 26 facilities located in prime American growing regions. A leading global provider of packaged fruits and vegetables, Seneca's flexible packaging solutions meet evolving consumer needs: from traditional cans and frozen foods, to convenient pouches and plastic cups. Organic options also available.

At Seneca, we believe that everyone deserves year-round access to great-tasting food that's also great for you. That's why we're bringing families and organizations all over the world real food that's nutritious, affordable, and delicious.

By remaining committed to those we serve, we're going to continue growing as the leader in the fruit and vegetable industry. At Seneca, we're still doing things the way we always have- the right way.

Think globally, grow locally. We're proud to say, "We feed the world."

For more information: www.senecafoods.com



The 44th International Food and Beverage Exhibition

FOODEX JAPAN 2019



DATE March **5** (Tue) ▶ **8** (Fri), 2019 10:00~17:00
(16:30 on last day)

VENUE Makuhari Messe Hall 1-11 (Chiba, Japan)

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Where exhibitors from 80 nations and
85,000 visitors meet



Japan, the Gateway to Asian Markets



Check the F&B Market Trends in Japan!

<https://www.ima.or.jp/foodex/en/trends/today.html>



UNITED DSN

For over 25 years Lawrence Haggerty and Andy Johnson, United's founders, have focused on building Private Label Brands for retailers across the world that are unique, authentic and clearly differentiated. United has an innate understanding of how important it is to build innovative, engaging and meaningful stories that articulate a brand's unique point of difference all while elevating the retailer's perception in the mind of the customer and delivering against key financial targets. Through a process of discovery and analysis, brand strategy and design development, United creates and delivers the branded tools required to keep the brand moving and connected, bringing products and customers together in a precise fit.

For more information: www.weareuniteddsn.com

UNITED DSN



VELOCITY

Velocity will be held April 29 - May 1, 2019, at the Le Méridien Charlotte, in Charlotte, North Carolina, U.S.A. More than 150 attendees. Velocity represents an unprecedented gathering of retail leaders and the manufacturers, tech companies, service providers, brokers, agencies and researchers helping them define the future private brand.

The experience is intimate and engaging. Attendees mix and mingle throughout the day at breakfast, lunch and networking breaks with the night topped off with an exclusive cocktail party in the rooftop bar of the hotel. Velocity provides the ultimate opportunity to interact with the industry's most influential retail executives and private brand teams. NETWORKING is one of the most critical aspects of the conference, year after year!

The Velocity Conference is about the future of private brand, the future of retail and the future of manufacturing. The event is the most inspirational and comprehensive private brand conference of its kind.

Velocity: the My Private Brand Conference Europe
The inaugural event will be held 21-23 October 2019 at the Myriad by Sana Hotel in Lisbon, Portugal.

For more information:
mpbvelocity.com and velocityeurope.org



VELOCITY
THE MY [PRIVATE] BRAND CONFERENCE



VELOCITY
THE MY [PRIVATE] BRAND CONFERENCE
EUROPE

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NORTH AMERICA LAS VEGAS



Heads Collective

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VERTEX AWARDS

Six years ago, My Private Brand and Global Retail Brands magazine partnered to create the Vertex Awards. With the sixteenth anniversary, we're proud to be the preeminent private brand package design competition, celebrating and promoting the world's best retail brands.

Sponsors of the Vertex Awards will be spotlighted and associated with the best Private Brand design in the world. Print, digital, social media and in-person branding opportunities provide targeted impressions to leading retailers, agencies, and suppliers. Sponsorships available throughout the year.

The Vertex Awards Celebration and Exhibit US

Velocity: The My Private Brand Conference
April 30, in Charlotte, NC

The Vertex Awards Exhibit and Party Europe

Velocity Europe: The My Private Brand Conference
October 22, in Lisbon, Portugal

For more information: www.vertexawards.org



WISE

Women Impacting Storebrand Excellence™ (WISE) is a non-profit professional development organization within store brands. Studies have shown that increased gender diversity in top leadership roles positively impacts business and financial performance.

Mission Statement

The mission of Women Impacting Storebrand Excellence (WISE) is to foster diverse collaboration and provide leadership that drives the continued success of the store brands industry.

Membership

A WISE membership makes you a part of a vibrant network of enlightened professionals who believe that a higher level of diversity will not only strengthen the store brand industry, but also make it more profitable. Inclusion in this network is a remarkable professional link to experienced experts and those just beginning their private brand career. In addition to this valuable network, WISE membership provides resources to help you to reach your professional goals and to motivate and influence those around you to attain their own.

For more information: womeninstorebrands.com



"Our goal is that WISE will be synonymous with innovation, and that our efforts will encourage the entire store brands industry to think and act differently"

Peggy Davies
WISE Chair - Board of Directors



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WABEL AGENDA 2019

THE FASTEST WAY TO PRIVATE LABEL





PLMA's 2019 "World of Private Label" will Bring More Than 15,000 Visitors to the RAI Exhibition Center in Amsterdam



More than 15,000 trade professionals from 120 countries are expected to attend PLMA's 2019 "World of Private Label" International Trade Show, that will be held 21-22 May at the RAI Exhibition Center.

Visitors will include retailers representing supermarkets, hypermarkets, discounters, drugstores and department stores, as well as importers and exporters, manufacturers, consultants, sales agents and packaging and design experts.



On the trade show floor, they have the opportunity to visit more than 2,600 exhibiting companies, the largest number ever. The exhibitors are manufacturers and suppliers of fast-moving consumer goods, including food and non-food products from more than 70 countries.

Featured on the trade show floor will be 61 national and regional pavilions. New pavilions this year include ones from Israel, Dubai, Egypt, Latvia and South Africa.

This year's event features the widest assortment of products ever displayed on the exhibition floor.

There will be nearly 1,800 exhibitors of food and beverages, around 450 exhibitors of health and beauty items, more than 300 exhibitors of household products, and more than 300 exhibitors of housewares and DIY items.

The trade show exhibits also reflect the latest consumer trends. There will be nearly 600 exhibitors of organic products, more than 250 exhibitors of vegan and vegetarian items, nearly 200 exhibitors of lactose-free products and 150 exhibitors of sugar-free items.

There also will be more than 100 exhibitors in a number of specialty categories, including personal and leisure, pet food and pet accessories, ingredients and raw materials and packaging and related products. In addition, there will be nearly 250 exhibitors of kosher products and more than 200 exhibitors of Halal products.



The theme for this year's "World of Private Label" International Trade Show is "Listen to the Buzz". It highlights the thousands of conversations that will be taking place on the trade show floor between retailers and exhibitors at the world's largest private label exhibition.



The “World of Private Label” exhibition area covers 15 exhibit halls in the RAI Centre, divided over three main complexes. RAI’s Europa Complex is devoted to food products, while the Holland Complex has exhibitors displaying non-food products. Park Complex accommodates both food and non-food exhibitors.

A special trade show attraction is PLMA’s Idea Supermarket. It displays private label ranges of around 60 retailers in Europe, United States, Latin America, Africa and Asia. Also in PLMA’s Idea Supermarket area is a special display of the winning products of PLMA’s International Salute to Excellence Awards. The Awards give recognition to outstanding food and non-food private label products that have been introduced by supermarkets, hypermarkets, discounters, drugstores and specialty stores in the past year.

Nearby is PLMA’s New Product Expo, displaying more than 600 products presented for the first time on the trade show floor.

One day prior to the opening of the trade show, PLMA will hold a seminar programme at the Forum Zaal at the RAI. There will be presentations by industry experts as well as the announcement of the winners of the 2019 International Salute to Excellence Awards.



For more information about PLMA’s 2019 “World of Private Label” International Trade Show, contact Leonique White, Manager Trade Show Development, PLMA International Council, at telephone: +31 20 5753032 or email: press@plma.nl

Supermarkets are Making It Easier to Buy Quality Wines for Less Under Their Own Labels

American shoppers, who may be enjoying more wines than ever before, need look no further than their supermarket to find quality wines that cost a-third less than similar bottles from the country’s biggest wine producers, according to the Private Label Manufacturers Association.

“Why not buy the retailer’s own brands of wine at the supermarket and save?,” says Jeff Siegel, an award-winning wine writer whose blog The Wine Curmudgeon (www.winecurmudgeon.com) is one of the best-read wine websites on the Internet. “That’s the way it works in Europe. So why shouldn’t it work that way in the U.S.?”

Siegel’s point: European supermarkets have sold private label wines for years, to both critical and consumer acclaim. Tesco, one of Britain’s biggest grocery chains, won more than 140 medals for its wines at the 2018 International Wine Challenge, while labels from discounter Aldi – costing an average of just \$7 each – won 43 medals at a previous wine challenge.

“Imagine how happy their wine drinking customers would be hearing they can buy terrific sparkling wine for \$5? They’d be waiting in line for the store to open too.”



It’s more than speculation: Whole Foods Markets introduced their Sommelier Selects program last year featuring seasonal wine recommendations under its own labels along with suggested food pairings by the retailer’s Master Sommelier. And this year, Walmart launched its curated Winemakers Selection label at very popular prices, with wines that are curated from many of the best wine regions of the world.

Bottles from Costco, Trader Joe’s, and Aldi were honored at the Private Label Manufacturers Association’s 2018 International Salute to Excellence Awards, which reviewed more than 300 wines from 39 supermarket chains in 13 countries. The judges, who included Masters of Wine, sommeliers, wine writers, and retail industry professionals, gave awards to a \$9 chardonnay from Aldi, a \$10 sparkling wine from Trader Joe’s, and a \$22 cabernet sauvignon from Costco.



Heard it through the Grapevine: A New Premium Wine is Coming to Target and it's Only \$9.99



According to a Press Release from Target, "First came award-winning Wine Cube, followed by the best-selling line of \$5 wines California Roots. And next? Let us introduce you to The Collection: a new assortment of premium California wines with a price you'll want to raise your glass to. At just 9.99 per bottle, the line includes five perfectly balanced varietals that'll have you counting down the days until it arrives on March 3.

But wait, there's more to pour. In addition to the exclusive launch of The Collection, Target's introducing more sure-to-be faves, like a seventh varietal in the California Roots roster, Sauvignon Blanc. Also making its debut? Four-pack cans of Wine Cube in sparkling White Wine and sparkling Rosé, along with a new full-flavored 80-calorie spiked and sparkling beverage made with organic alcohol, Crook & Marker, which comes in eight fruity varieties with zero sugar, artificial flavors or gluten. You can find them all at Target starting March 3!"

Beauty Fans Listen Up, Target now has Even More Natural Beauty Products to Fall in Love With

What do Instagram-worthy face masks, innovative bath products and bubbling cleaners have in common? They're all new, natural beauty products now available in Target's beauty aisles and on Target.com—at amazing Target prices!

You may remember last summer when we added a ton of new-to-Target products to our natural beauty assortment. Well, guests just couldn't get enough. So we set out to expand that assortment again with even more brands we know you're going to love. The best part? Many of the new brands are cruelty-free and never use unnecessary chemicals (lookin' at you sulfates, parabens and phthalates) so you can look and feel your best. Adding natural products like these is just one way Target is working certain chemicals from all of our beauty products by 2020.

"At Target, our guests are looking for the best products that allow them to feel good about what they are putting on their skin, body and hair," said

Christina Hennington, senior vice president of Beauty, Essentials, Hardlines and Services at Target. "That's why we're continuously bringing in the latest natural beauty products that our guests can add to their daily beauty regimen, all at an incredible value."

So get ready to meet your new must-have products from Red Earth (their Pink Coconut and Green Rush collections are exclusive to Target!) Yuni, Tenoverten, Cocokind and Grace + Tonic, plus new items from two of our favorite natural beauty brands Native and Hello. Check out a few of our favorites, below!



**The reign of the National Brand is over.
Now is the time of the Private Brand.
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Forward thinking retailers should invest
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A Major Investment by German Supermarket Giant Lidl could mean Better Prices and Products for Customers in Danish Stores

According to the Local dk (www.thelocal.dk), "The coming years will see 103 new Lidl stores opening across Denmark, the German company's director for Denmark has confirmed.

Between 10-15 stores will be opened annually, and one billion kroner will be invested by the company in Denmark to that purpose in 2019, Lidl's Denmark director Dirk Fust told media Fødevarerwatch. The discount chain is one of the world's largest, with over 10,000 stores in 30 countries. It currently has 117 stores in Denmark.

"Our main focus is on Aarhus and Copenhagen," Fust told Fødevarerwatch. "We only have 5 stores in Aarhus and 20 in Copenhagen. I believe there is room for 60-80 Lidl stores in the capital region. That's a big challenge, and it costs a lot of money to open a store in Copenhagen," he added.

The move by Lidl will stiffen competition in the discount supermarket sector as it joins stores including Netto and Fakta in contesting market share. Netto currently has 100 stores in Copenhagen and 500 in total in Denmark.

German chain Lidl opened its first supermarket in Denmark in 2005.

"We have good stores in Jutland and on Fyn, but are under-represented in Copenhagen," the company's international CEO Jesper Højer, who is Danish, told Fødevarerwatch.

Aarhus University associate professor Lars Esbjerg, who has researched customer relations in the food sector, said Lidl is



one of a series of chain stores preparing to compete on the discount supermarket scene.

"All discount chains on the Danish market want to expand," Esbjerg said. "It is not the case that there is a gap in the market which Lidl can fill. They will take (a share) from the others and from small stores," he said.

Consumers can expect more than just low prices as a result of the competition, the associate professor added. "We can look forward to smart prices when we are shopping. But we can also look forward to discount stores focusing on other things than just prices: higher quality products and animal welfare, for example," he said."



Monoprix Launches Green Cleaning – Je Suis Vert

According to *My Private Brand* (mypbrand.com), French retailer Monoprix has introduced a new eco-friendly private brand, Monoprix Je Suis Vert (I Am Green). The line includes detergents, household cleaners, and dishwashing products. All of the packaging consists of a percentage of recycled PET.

The products are certified by Ecocert, which means that each product uses all natural fragrances and contain at least 97% natural ingredients.

Monoprix Je Suis Vert includes 'Leaping Bunny' accreditation, which assures customers that the products are not tested on animals.



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International Food Exhibition

PARMA.ITALY.10|11 APRIL.2019



CIBUS

20° SALONE INTERNAZIONALE
DELL'ALIMENTAZIONE

PARMA.ITALY.11|14 MAY.2020

WELCOME TO FOODLAND





BIOFACH Growth Continues

BIOFACH, the World’s Leading Trade Fair for Organic Food, and **VIVANESS**, the International Trade Fair for Natural and Organic Personal Care, have brought this year’s event at the exhibition centre Nuremberg to a close on a high note. More than 51,500 visitors, 50% from outside Germany, drew inspiration from the wealth of products on show from 3,273 exhibitors from 98 countries, and had the opportunity to discover novelties, trends and innovations from all around the world.

Besides Germany, the top five countries represented by this year’s visitors included Italy, Austria, France and Spain.

Petra Wolf, Member of the Management Board, NürnbergMesse, commented: “The atmosphere in all ten exhibition halls was amazing. The enthusiasm for the sector was palpable right from the outset – the level of energy there was fantastic.”

Best New Product Awards

Once again in 2019, the trade visitors voted for their favourites at both trade fairs to win the Best New Product Award in seven categories.

Käserebellen GmbH was one of the lucky winners at BIOFACH with its “Organic Pumpkin Rebel” (Fresh Products), as was **Schrozberger Milchbauern** with its “Cookie Ice Cream” (Frozen Products). In the category “Dry Products, Cooking and Baking”, “Pesto seaweed-wild garlic” from **Georg Thalhammer** was honoured with one of the sought-after awards. Landgarten impressed the trade visitors with “Almond-Rose Blossom for You”, “Berry-Selection for You” and “Amarena Cherry for You” in the “Dry Products, Snacks and Sweets” category. “HANS Coffee&Berry” from **HANS Brainfood** won a BIOFACH Best New Product Award in the “Other Dry Products” category. And primoza, one of the newcomers in the young Innovative Companies pavilion, impressed the trade visitors with “The Growing Calendar” in the Non-Food category.

In the Drinks category, **Nutraceut** proved a winner with **BIOHASKAP®** 100% pure organic haskap superberry juice, made of new haskap superberries, also known as Edible Blue Honeysuckle.

Well-known for its pro-health properties, the plant was traditionally used and recognized by Japanese Ainu aboriginals as “the elixir of life” (Thompson, 2006). Haskap berries are rich in bioactive compounds: polyphenols (anthocyanins: C3G; chlorogenic acid, luteolin, quercetin, catechins), vitamin C, and minerals (Rupasinghe 2018). They also contain iridoids rarely present in fruits (Kucharska 2016).



“We grow haskap berries the way which stimulates its pro-health compounds rich synthesis. Thanks to research done we know which cultivars are the best, how to grow them in optimal way, when do the harvest, how to store and process haskap berries in a way that preserves what is the most valuable in them. We control the whole chain for best quality. The juice is pure organic, cold pressed, gently pasteurized. No preservatives or sugar added.

For more information about BIOHASKAP®:

Nutraceut Sp. z o.o. Ul. Giewont 38a
92-116 Łód , Poland
NIP 728-280-71-47
www.nutraceut.com

Save the date for BIOFACH 2020: 12-15 February

Cannabis Queen Martha Stewart is Getting into the CBD Game



The lifestyle guru will use her knowledge “on the subject of living” to create a line of pet-safe CBD products.

A decade ago, Martha Stewart probably wasn't the first person you envisioned when you thought about taking a bong rip, unless, say, the bong was fashioned from a hollowed-out decorative gourd. But on Thursday, we learned that the lifestyle guru is taking the next logical step in her friendship with Snoop Dogg—which involves a cooking show the two host together that gave us the line, “Snoop’s Cornish game hens were the best ever”—and getting into the increasingly lucrative weed business. CNBC reports that Stewart has signed on as an adviser to Canopy Growth, one of the largest marijuana producers in the world, to develop a line of C.B.D. products for

animals. (Stewart’s own pets, which are often featured on her Instagram account, include Chow Chows, French bulldogs, Persian cats, a Fell pony, and Friesian horses.) “I am delighted to establish this partnership with Canopy Growth and share with them the knowledge I have gained after years of experience in the subject of living,” Stewart said in a statement. “I’m especially looking forward to our first collaboration together, which will offer sensible products for people’s beloved pets.” While Stewart says she herself doesn’t smoke, she has no problem with others smoking around her, which makes sense considering she’s just joined a pot company. “So someone smokes marijuana? Big deal! People smoke cigarettes and die from cancer,” she told *The Hollywood Reporter*. “I haven’t heard of anybody dying from cannabis. I’m quite egalitarian and liberal when it comes to stuff like that.”

Canopy—whose subsidiary, Tweed, unveiled a partnership with Snoop Dogg in 2016 that included a brand of weed called “Leafs by Snoop”—was founded in 2013 and received a major boost last year with the decision by Canada to legalize recreational pot, leading to such demand that there were supply shortages across the country. In its most recent quarterly earnings report, it said it sold 10,102 kilograms (10.1 tons) of pot and pot equivalents from October through December, boosting revenue by 282 percent, so you can understand why Stewart would want to get a piece of that! In a statement, Canopy Chairman and co-C.E.O. Bruce Linton said he was excited to bring in a host of new customers through a household name like Stewart’s, who could be viewed as a gateway drug. “As soon as you hear the name Martha, you know exactly who we’re talking about,” Linton said. “Martha is one of a kind and I am so excited to be able to work alongside this icon to sharpen our C.B.D. product offerings across categories from human to animal.”

From a report Vanity Fair’s HIVE, by Bess Levin





CONTINUED GROWTH FOR STORE BRANDS as **PLMA** CELEBRATES

By Elena Sullivan,
Global Correspondent

40

Over the past several decades, the global private label industry has changed drastically, developing from being considered generic or second-to national brands, to current day brand status on its own, competing closely with manufacturer and national brands and continuing to build consumer loyalty. The concept of private labels continues to evolve, with retailers creating closer ties to their brands, introducing new, innovative products and allowing the products to represent their image.

Global Market

Global perspective on private label and the type of retailers that are focusing on their own brands varies from country to country. For instance, the largest markets for private label products are found mostly in the mature European markets. Although growing in popularity, in North America PL penetration is still comparatively low. Additionally, in Latin America and Asia the private label market is small in terms of value share. However, there is room for growth in Latin America as the challenging economic situation may lead more shoppers to turn to private label for the value. Expansion in Asia may be more difficult as shoppers in Asian countries tend to be more brand loyal, according to research by Nielsen.

Global Data

A variety of reports illustrate the growth of private labels across the globe. The Nielsen Company in its 2018 report: *The Rise and Rise Again of Private Label*, states that information from over 60 countries shows that private label products continue to gain share across all major geographical industries. The value share of private labels in the European market grew to 31.4% in 2016, in North America it reached nearly 18%, Latin America 8.3%, and in Asia-Pacific 4.2%.

Specifically, in Europe, in which private label is well established, Nielsen data shows that market share for private label increased last year in 12 of 19 countries, and now stands at 30% or above in 17 countries.

Private label reached an all-time high in Europe's largest retail market, Germany, with its market share increasing to over 45% for the first time. Market share also

THEN



NOW

grew to its highest levels ever in six other countries: The Netherlands, Belgium, Sweden, Norway, Hungary and Turkey, according to Nielsen's report.

What is driving the growth:

Private label is being driven by both consumer interest as well as intentional focus of retailers to produce more private label products and better quality premium products. Furthermore, greater access to products via online platforms and global retailer expansion has also helped drive PL expansion. E-commerce and globalization of shopping trends has enabled customers to access a range of new products. For example, in the past few years, we have seen several European retailers in the US market with stores such as German-based retailers Aldi and Lidl. Additionally, we are seeing US-based retailers such as Amazon online and Walmart and Costco online and with physical locations expand across the world.

Retailer and Supplier Engagement:

Private label has been around since the age of commerce, but gained traction during periods of economic decline, especially in the last decade during the 2008 recession. However, instead of declining in sales and interest when the economy recov-

ered, retailers continued to garner interest in their own labels by adapting to consumer trends and attracting consumer interest with PL brand portfolios that are innovative, high quality and value competitive.

Within the private label market, global trends are evolving and we are seeing a shift of attention to premium private label and exclusive partnerships, as well as a tiered approach to provide consumers with as much choice as possible. Additionally, retailers are focusing on specialized trends such as clean label, environmentally-friendly and diet-specific products.

According to a report by Euromonitor International: The New Face of Private Label: Global Market Trends to 2018, premium lines are most common in developed markets such as the UK, Germany and the US due to the large investment needed to market and create innovative products. Private label trends in emerging markets tend to lean towards offerings of products that are value-based and lower priced options of popular brands as the idea of private label has not yet permeated the retail markets.

Globally, retailers and suppliers have realized the profit benefits of offering private label brands to compete with national or manufacturer brands.

From private label sales, retailers can make margins of 25-30% higher than from manufacturer brands. According to Euromonitor International, grocery retailers are expanding and re-launching their store brands to improve their margins, and suppliers are consolidating to increase their capabilities and economies of scale. Retailers are also building closer relationships with their suppliers and investing more time to partner with them to focus more on ingredient and product quality and packaging. Marketing and building a brand has also shown to support the growth of private label lines.

Billion Dollar Private Label Brands:

Suppliers and manufacturers seem to be gravitating towards increasing their private label output as well, as there continues to be evidence of profitability within the PL business. Retailers around the world are showing large gains in profits with their private brand lines, especially with premium lines. For instance, USA-headquartered Costco's Kirkland Signature line is bringing in about \$39 billion in sales, USA-based Kroger's Simple Truth line is generating about \$2 billion in sales annually, UK-headquartered Tesco's Tesco Finest range is said to be worth about £1.4 billion in yearly sales, and Amazon's private label lines are reported to grow to \$7.5 billion this year, just to name a few.



Globally, retailers and suppliers have realized the profit benefits of offering private label brands to compete with national or manufacturer brands.

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Women Impacting Storebrand Excellence™ (WISE) is a non-profit professional development organization impacting the store brand industry by championing diversity in leadership. We offer a number of programs to help you meet career goals, expand your network, enhance career development, and support corporate leaders with professional resources to foster growth within their teams.



wise

WOMEN IMPACTING STOREBRAND EXCELLENCE™

The Private Label Consumer and Changing Store Format:

Along with private labels, the typical private label shopper as well as the typical retail format has also evolved over the years.

The Consumer: Millennials now make up 24% of the global population, and in the next several years, they will replace the Baby Boomers as the generation with the highest discretionary spending power. Research from The Nielsen Company showed that Millennials differ from other generations as they are more open-minded to trying new products. They also do not tend to be as loyal to one brand and will choose private label products over manufacturer brands if they think the product is as good as the other brands. What's more, Millennial shoppers are looking for convenience, value and high quality products, they will pay a premium for products they trust.

While Baby Boomers and Generation X still hold purchasing power, and tend to be more brand loyal, it is crucial for retailers to pay close attention to the Millennial consumer and their interests when creating and marketing new products.

The Retailer: Retail formats have also been changing and illustrates areas of growth for private label. As mentioned earlier, E-Commerce is probably the most significant influencer in the past few years and has helped globalize shopping trends. According to data from The Nielsen Company's report, The Voice of Food Retail 2107, "By 2025, the share of online grocery spending could reach 20%, representing \$100 billion in annual consumer sales." To be in the game, retailers must have an online presence. Providing private label in both online and brick-and-mortar formats enables retailers to reach more consumers and also introduce their products across country lines.

Worldwide, there has been a growth of supermarkets and hypermarkets. This growth is driven by the consumer demand for convenience and value. The larger store formats enable retailers to showcase their brands and provide promotions and discounts to entice shoppers. Competition has also been heating up as supermarkets expand into new geographical markets, as is the case with German supermarket chains, Aldi and Lidl, which entered the US market in recent years alongside Holland-based Ahold that already had a presence in the US. In some markets, such as Asia, reports suggest that the convenience sector is growing more than others with Japan having the strongest penetration of convenience stores, led by 7-Eleven Japan.

As global economies continue to change and country demographics become more multicultural, the global private label industry seems stronger than ever.

PLMA SPARKS AN INDUSTRY

In the past several decades as private label has been evolving, there has been one organization that has been a steering force in supporting the industry to continue to reach its potential: The Private Label Manufacturers Association. PLMA is synonymous with private label. 40 years strong, PLMA has grown from an idea in 1979 to a powerhouse organization helping players in the private label industry hone their business and further their success. PLMA has also been instrumental in propelling private labels from being considered "generic" to becoming store brands/private labels considered as brands in their own right.

Where does PLMA fit into the private label industry? Simply put, in all aspects. The organization supports the private label world from its consumers to suppliers, manufacturers and retailers. PLMA has offices in Amsterdam and New York, and represents more than 4,000 manufacturers and suppliers worldwide, ranging from



Early Birds Grab 1982 Booths Before 1981 Show Even Closes.

One Last Look Back

As the Private Label Manufacturers Association (PLMA) celebrates its 40th anniversary, it is worth looking back at the organization's history. PLMA was founded in 1979 and has since become a leading voice for the private label industry. The organization has grown from a small group of manufacturers to a powerful industry association with over 4,000 members worldwide. PLMA's mission is to support its members and promote the private label industry. The organization has been instrumental in the growth of the private label industry, helping manufacturers and retailers to understand the benefits of private labels and to develop successful private label programs. PLMA's success is a testament to the power of the private label industry and the support of its members.

own manufacturer brands. PLMA offers a variety of services that are specifically designed for the private label industry, including trade shows, educational programs, and online video streaming platforms.



A Brief History: PLMA was created in 1979 and launched the Chicago trade show in 1980. In 1986, PLMA's "World of Private Label" International Show was organized in Amsterdam. Both of these inaugurations helped move the industry in a positive direction. According to Brian Sharoff, PLMA President, "the launching of the Chicago Trade Show in 1980 and its rapid expansion

companies that specialize in private label to those that produce private label products in addition to their



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Perrigo is proud to congratulate PLMA on its 40th anniversary.



to Excellence Awards to give recognition to retailers for innovation in store brands.

As private labels continued to expand around the globe and after considerable research, in 2006, PLMA decided to partner with PL industry players in mainland China and create a new trade show called, Shanghai Private Label Fair. PLMA continues to research international markets to identify future opportunities.

Currently, PLMA is focused on meeting the needs of a consumers with a different lifestyle than previous generations—needs that are centered on technology and e-commerce. To cater to these consumers, PLMA launched Store Brands USA, a unique video streaming news and information programming that goes directly to consumers. According to Sharoff, “Last year, Store Brands USA reached more than 1 million viewers with store brands recipes,

was the basis for the rejuvenation of retail brands in the US. PLMA’s “World of Private Label” International Show, organized for the first time in 1986 in Europe, helped solidify private label as a global phenomenon.”

The private label industry continued to develop as did PLMA, adopting new themes and trade show focuses to highlight the trends of private label. For instance, in the 1990s when store brands were evolving with the introduction of premium private label, PLMA centered its trade shows, conferences, publications and trade press advertising on this new phenomenon, helping drive interest in this new tier of private label.

By the beginning of 2000, PLMA’s Chicago and Amsterdam trade shows were rapidly growing, with Chicago reach-

ing 2000 booths in 2003 and the Amsterdam show reaching 3000 stands in 2007. Another development in the Private Label industry sparked excitement at PLMA and provided a new focus: Ready-to-heat/ready-to-serve had replaced traditional kitchen meal preparation. During this time period, PLMA also launched PLMA’s Salute



**PLMA:
40th Anniversary
Mile-
stones**

1979

Founding Meeting
Chemist Club, New York City



1980

First Private Label
Trade Show
Ramada Inn, Chicago

1981

First PLMA Gallup Report
“What America Thinks
About Private Label”



health tips, and lifestyle ideas.” Additionally, PLMA Live! was created about seven years ago to help suppliers, retailers, manufacturers as well as consumers to keep abreast of new trends in the industry. The platform features videos about specific product categories, and interviews about industry trends and data. PLMA Live! Can be viewed on PCs, tablets, and smart phones, enabling viewers to access relevant information from anywhere. Additionally, there is PLMA Live EU, which focuses on information pertinent to the European market. As the Chinese market continues to grow and private label expands in China, PLMA will soon launch a PLMA Live We Chat service to better support its members. The PLMA Live We Chat platform provides information about the private label industry to more than 2 billion people and is able to further illustrate how private label has become a world-wide phenomenon.

Furthermore, PLMA’s original website also provides members access to a vast wealth of information on the industry including The Internet Yearbook which is a searchable database of quarterly sales volume and dollar share information for all private label foods in the U.S. and the IDEA Supermarket, which is an extensive, searchable product and retailer database.

What’s Next for PLMA? PLMA continues to expand and offer opportunities to meet the needs of its members and



the private label industry. While it is focusing on China as a representation of the Asian market, the organization continues to research other viable markets such as India, Africa and South America to seek out future opportunities.

In addition, in the past several years, PLMA has been bringing a number of new educational and networking opportunities to industry players in conjunction with its annual trade shows. By providing a range of educational opportunities to members of the private label industry PLMA further supports the private label world, as better informed

members of the industry lead to better products, and more productive businesses. PLMA’s Executive Education Program, its University Outreach Program and its CEO Seminar Program were all developed with the goal of helping industry players become even more educated and knowledgeable.

Executive Education Program:

PLMA’s Executive Education Program was developed in 2001 in conjunction with Nyenrode Business Universiteit, a pioneer in European business education. Since its commencement, more than 1000 private label retailers and manufacturers have completed the courses. The curriculum is catered towards the needs of manufacturer and retailer executives to further enhance their businesses. Topics include: private label strategy, manufacturer-retailer relations, supply chain management, new product development, scenario planning, innovation management, promotion and trends around the world. Taught by both university level faculty and industry insiders, the classes combine interactive teaching techniques with traditional lectures and case studies.



1987
First PLMA
Consumerama
Conference Chicago



1988
PLMA Show Reaches
1,000 Booths
Rosemont Convention Center,
Chicago

1989
First PLMA
Roundtable Conference
Paris, France



1986
First “World of Private Label
” International Trade Show
Paris, France

The program is offered in various countries across the world: in the Netherlands, in conjunction with Nyenrode Business Universiteit; in the U.S., in conjunction with St. Joseph's University in Philadelphia; and in Asia, in conjunction with Jiao Tong University in Shanghai. A special program is also held in France in conjunction with LSA.

University Outreach Program: PLMA initiated its University Outreach program in 2016, and has been expanding yearly. The program was created to introduce undergraduate students to the private label industry and generate interest from a younger generation that may grow to be the industry leaders in the future.

Beginning with two schools and ten students, the program has grown to more than 60 students from 21 different colleges and universities from across the country. Class of 2018 represented a range of schools: Auburn University, Baruch College, Cal Poly San Luis Obispo, Grambling State, Howard University, Illinois State, Ithaca College, Niagara University, North Carolina A&T, Portland State, Saint Joseph's, Texas A & M, Tuskegee University, University of Arizona Courtney, University of Arkansas, University of Florida, University of Houston, University of Illinois, University of Mississippi, University of Missouri and Western Michigan. Feedback from the attendees was nothing short of praise. Peggy Davies, PLMA's vice president of asso-



Heath Rooks (left), Rachael Dickens, Amy Jo Carpenter, career planning specialist at the UM School of Business Administration, and Ryan Arneson attend the 2018 PLMA University Outreach program in Chicago

ciation relations, noted that some of the students' advisors stated that the students felt that the University Outreach program was "one of the best programs that they have ever attended."

University Outreach is held in November in conjunction with the PLMA's private label trade show in Chicago. The program provides an immersive experience in the grocery retailing and store brands industry and consists of 22 hours across two days of university level classes, along with two days on the trade show floor under the mentorship of practicing professions. The program was conducted at the Hyatt Regency O'Hare and the Donald E. Stephens Convention Center, in Chicago. At this year's program, the classes included an overview of retailing

and store brands development in the U.S., the role of manufacturers and retailers, generational marketing, store brands innovation, the e-commerce revolution, and career orientation, among other subjects along with a tour of three local supermarkets. All coursework was led by industry executives and experienced consultants. There were also directed visits and subsequent analysis of three nearby retail stores that offer superlative private label products. Participating retailers included Costco, Aldi, Ahold Delhaize, Topco, Wakefern, jet.com, Walgreens, CVS, Wegmans, Albertsons and Walmart.

The program is fully funded by PLMA and to further support the students who have graduated from the 2018 course, the students who were juniors at the time of completion were offered the opportunity to apply for a grant for \$1,000 a semester. The students had to write an essay explaining how they would be a private brand ambassador for the year and one student was chosen to receive the grant.

"We believe that learning about the various aspects of our thriving industry will encourage the students to consider the trade as a career choice following the completion of their education," says Brian Sharoff, PLMA president. "As in prior years, the 2018 students came away with a deeper knowledge and appreciation of store brands as well as of potential employ-

**PLMA:
40th Anniversary
Milestones**

1990
First PLMA
Washington
Conference



1994
First PLMA Show
in Asia
Hong Kong



1995
First international show
to reach 1,500
"World of Private Label"
RAI Exhibition Center.

1996
First PLMA Show in Japan
Chiba, Japan



ment and career opportunities. As store brands grow, both retailers and manufacturers know they must keep pace and expand their work force for today and tomorrow. With growth projections for store brands climbing, employment opportunities in all sectors of these corporations, from sales and marketing to operations, human resources, information technology and finance, will continue to expand."

CEO Training program:

PLMA's CEO Training program also commenced in 2016, and is held in conjunction with the PLMA's Private

Label Trade Show in Chicago. The CEO Seminar is exclusively for individuals who hold positions of Chief Executive Officer, Chief Operations Officer and other Upper Management titles by which they have overall responsibility for creating, planning, implementing the strategic direction of their companies. The program is also appropriate for emerging CEOs, CEOs in training or on a CEO track, and those with ambition to become a CEO in the future. According to Brian Sharoff, "PLMA's CEO sessions are intended to bridge the gap between what sales and marketing management feel is important

and what senior management feels is important."

Distinct from PLMA's other industry education offerings, the CEO Curriculum is focused exclusively on timely issues from the perspective of a company's ultimate decision-maker. At PLMA's 2018 CEO Seminar, speakers focused on topics such as succession planning, dynamics of passing down the family business, understanding of what's going on in the Millennial market and crisis management, and peer-peer discussions, just to mention a few.



Global Retail Brands had the opportunity to interview Brian Sharoff, President at PLMA since 1981. Brian Sharoff has been essential in the success of PLMA and helping to shape its direction and he provides GRB with some insight into the private label market and PLMA's ventures.

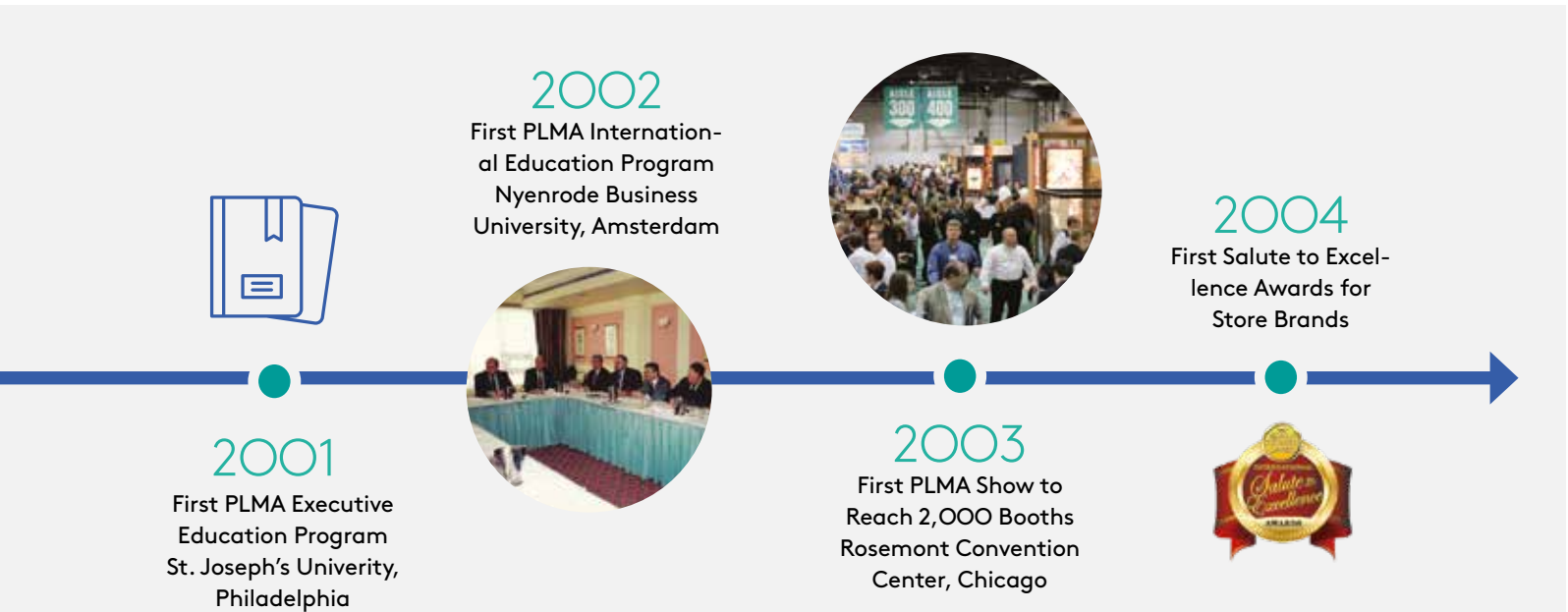
GRB The Private Label industry has greatly changed over the years, from once being seen as 'generic' to now being major competitors to National Brands, with many PL lines known as widely as NB lines. What role did PLMA play in this transformation?

BRIAN PLMA played a crucial but behind-the-scenes role. First, PLMA, feeling the pejorative impact of the

word "generics" used public opinion surveys by Gallup, among others, to replace the word "generics" with the phrase "store brands." It was a successful strategy which erased the negative connotation and replaced it with a strong positive phrase.

Next, PLMA aggressively promoted premium private label in order to demonstrate the high quality of store brands as compared to the low price/low quality image it had. The tool that PLMA used were public opinion polls conducted by Gallup for PLMA. This gave credibility and momentum to store brands.

GRB The average consumer of PLs has changed over the years, how has PLMA adapted to help manu-



facturers, suppliers and retailers cater to the changing consumer demographic?

BRIAN The relationship between retailers and their suppliers is a complex one. PLMA's role was to launch PLMA Live both in the US and Europe as a way to get insight and information about the changing consumer demographic into the hands of private label decision-makers. PLMA has used proven network news techniques to give store brands the production values and credibility that viewers expect.

GRB Over the years, PLMA has introduced several initiatives that have greatly contributed to the industry, such as PLMA Live and Store Brands USA, can you talk about these initiatives and their impact on PLMA and the industry.

BRIAN To understand PLMA Live and Store Brands USA, one must recognize the tremendous pressure that industry trade publications face and the severe decline in impact that printed media have. PLMA Live and Store Brands USA were designed to make sure that private label did not get lost in the media battlefield.

GRB In an era in which social media and technology play a large role in retail industry, do you foresee any additions to PLMA Live or PLMA's website content?

BRIAN Social media is still a horizon away for store brands. PLMA has experimented with several different approaches but I think it will take active retailer partnership to make social media work.

The relationship between retailers and their suppliers is a complex one.

Technology is a different story and PLMA is working on new concepts which will take advantage of breakthroughs in IT. Stay tuned for future announcements.

GRB PLMA expanded to Europe and Asia over the past years, what impacted the decision to first have a show in Amsterdam, and later China? Do you see expansion in other markets in PLMA's future?

BRIAN The decision to enter the European market came as a result of a request from European retailer to try to consolidate the market. Back in 1986, the retailers and manufac-

turers of Western Europe were so fragmented that they could not organize a trade fair for themselves. PLMA was asked to help and we were successful. China is similarly a story of fragmentation but in this case, it is the fragmentation of Asia: Japan, Korea, Thailand, etc. But in Asia, China's size dwarfs everyone else and therefore all eyes, including PLMA's eyes, go to China. PLMA has been fortunate to establish a partnership with PLSC, a private label organization with similar goals to PLMA. As a result, the Shanghai Private Label Fair was created in 2011 and it has successfully grown to more than 600 stands. The marketplace, however, is extremely complex and competitive. Whereas PLMA could help unify private label in Europe, in Asia we can be helpful but not decisive.

GRB PLMA also has its annual Roundtable Conferences and Leadership Conferences leading up the tradeshows, what benefit and impact do these Conferences have on the industry players and how do they reinforce the tradeshow benefits?

BRIAN PLMA's Leadership Conference was launched in 1982 as a place for manufacturers who wanted to be more involved than simply exhibiting in the Chicago trade show. The Leadership Conference gave them speakers and an opportunity to exchange ideas with their competitors and colleagues.

PLMA: 40th Anniversary Milestones



2006
Founding of PLMA Private Label Industry Hall of Fame

2007
"World of Private Label," Reaches 3,000 Stands RAI Exhibition Center, Amsterdam



2008
First PLMA-PLSC Private Label Fair in China Shanghai

2009
PLMA Launches PLMAlive! Video Newsdesk



The Roundtable was established for the international membership with a similar purpose in mind but it also morphed into an opportunity for manufacturers to actually see how their products were marketed and promoted in countries across Europe. In other words, the Roundtable was an extension of suppliers' oversight of their sales. While the differences are significant, both programs give members a chance to interact with their colleagues and competitors.

GRB Newer initiatives exist such as Continuing Education program, Student Program and CEO Training, how do these programs expand PLMA's role in the industry?

BRIAN As the Association matures, one discovers new challenges. One such challenge was how to reach out

for younger men and women and give them a sense of the store brands business. University Outreach accomplishes that very well. Last year, there were 60 students from 20 colleges who participated in the trade show, attended classes and visited stores. Hopefully, this experience will have a positive effect on their choice of careers and their understanding of the retail marketplace.

CEO sessions are intended to bridge the gap between what sales and marketing management feel is important and what senior management feels is important. PLMA's Executive Education Program has been going strong for more than 15 years. It was intended to help management who either have no experience in private label or have worked on the branded side to understand the

business. PLMA has worked with St. Joseph's University in Philadelphia and Nyenrode Business University in Amsterdam.

GRB From your vast experience in, and knowledge of, the PL industry, where do you see the Private Label industry going in the future and how do you think PLMA's role will change over time?

BRIAN If one looks 3-5 years down the road, one can see the role of e-commerce potentially growing. If this happens, PLMA will want to help retailers and their suppliers to appreciate the importance of store brands in this environment. I would list this as the most significant challenge ahead.



2012
PLMA Opens
Sky Hall for Exhibitors
Rosemont Convention
Center, Chicago

2016
PLMA Launches
University
Outreach



2011
PLMA Launches
Store Brands USA
for Consumers

2015
"World of Private Label,"
Reaches 4,000 Stands
RAI Exhibition Center, Amsterdam

2019
PLMA Celebrates
40th Anniversary
Pebble Beach, CA



ONLINE GROCERY:

The Discounters' Achilles' Heel

By: Matthias Queck, Research Director, Retailytics

Executive Summary

Grocery e-commerce is an enterprise that the discounters have been avoiding, if not repressing. Why this inactivity in the channel when superpowers such as Amazon keep increasing their focus?

Evidently, grocery home deliveries are costly, especially the last mile. But there's more: Discounters have a concept-inherent disadvantage online. Home delivery is the reversal of the self-service concept – the very concept that made store chains so successful, and that was driven to the extreme by discounters.

Sourcing aside, the challenges of online multiply for discounters: There is an above-average share of staples and no chance to compensate for this elsewhere owing to the typically low staff costs, low real estate costs, no-frills setup and streamlined

logistics. Going online, discounters lose their cost leadership.

But there are ways out. More elegant than simply increasing prices, discounters are beginning to team up with external service providers such as Instacart and newer delivery start-ups. These visibly separate partners can justify the higher costs of delivery, allowing the discounters to keep their slate clean.

It's a square and a circle that make Lidl's omnipresent logo, hanging from some 10,700 stores and counting. Trying to square the circle by taking food online, replicating what has been an unparalleled, but purely store-based success – that's what Europe's biggest grocery banner hasn't given up on: As its latest attempt, it has just launched a dedicated online health food shop in Finland. On Sportyfeel.fi, Lidl sells vitamins, protein shakes and nuts, as well as some promotional goods.

Lidl Prefers Non-Food Online

Remarkably, this speciality shop for ambient foods is a deviation from its publicly announced strategy to focus on non-food e-commerce, after scrapping a half-hearted attempt in Germany. There, it shipped ambient items via parcel service, accompanied with a special offer box similar to the Amazon Pantry service.

Since then, only non-food shops have continued to pop up online in various countries, complemented by some deli snacks and wines.

Selling food online is becoming incredibly hard not only to Lidl but also other discounters. What makes it so challenging for them? Is discount retail a one-trick pony?

Roughly a third of total e-commerce sales of the European grocers are generated from food banners. The discounters' share is negligible.

E-Commerce: All Channels vs. Discounters in Europe, Total vs. Grocery Sales in EUR mn, 2018



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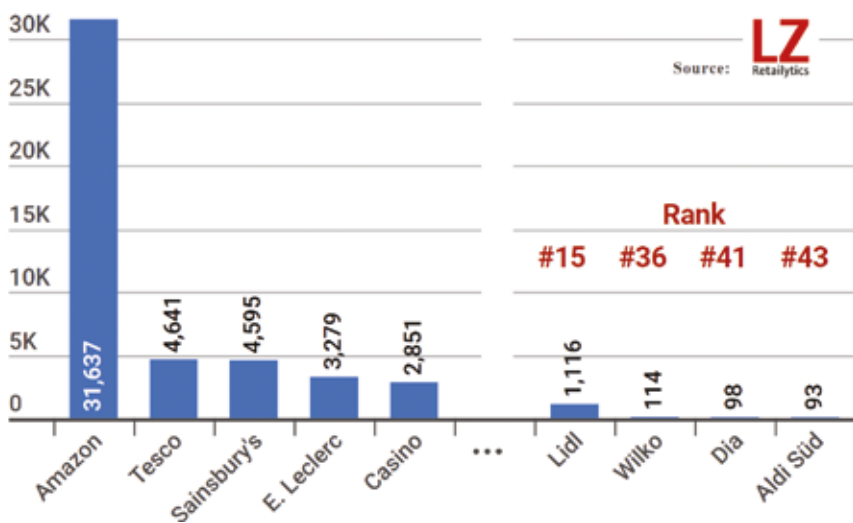
inherent to their concept are what makes online grocery unattractive to discounters: The higher-than-average focus on low-margin staples that are partly bulky and particularly costly to deliver.

While more upmarket retailers can influence the online shopper basket with a sophisticated range composition, discounters cannot further cut down on their limited, economy-priced assortment. Supermarkets can possibly charge more online or offer incentives, while discounters, due to their low-price philosophy, are finding it harder to charge more than instore.

More problematic: The discounters' efficiency and cost advantages are mostly generated instore and in logistics. Their killer KPIs such as staff hours or sales per sq m simply don't exist online.

Grocery and Non-Food E-Commerce in Europe:

Top 5 Retailers and Discounters, Sales in EUR mn, 2018



The advantages of low staff costs, no services, moderate real estate and maintenance costs, high turnover of goods and streamlined logistics processes are all null and void online.

In short: Sourcing aside, discounters have no cost leadership online. Instead, they have to lock horns with all other traditional competitors – only that those have a much broader and deeper assortment. (That said, a focused range can speed up the shopping process, online or offline.) Conversely, for supermarkets going online can allow them to win back shoppers, striking the discounters' Achilles heel.

Ways out of the Dilemma

Often, the discounters hold price sovereignty, meaning that due to their cost leadership they are the setters of low prices in each market. This bears a certain danger: Should they feel cornered by thriving e-commerce competitors, discounters could find themselves compelled to start price wars, ruining any delicate shoots of profitability.

While discounters Lidl (Schwarz Group) and Aldi have become Europe's grocery market leaders, they lag far behind in terms of e-commerce.

The two concepts are polar opposites: While discounting is the perfection of self-service and, hence, cost efficiency, e-commerce is the premier class of customer service – basically, the rever-

sal of self-service, which, after all, was the genius idea that turned grocery retailing into a decade-long growth business.

Squaring the Circle

Discounters selling food online would therefore be a contradiction in terms, and any such attempt would mean squaring the circle. The characteristics

Still, there are ways out of the online dilemma. As the price setters, the discounters could increase store prices to turn online ventures profitable.

Is discount retail a one-trick pony? The discounters in Europe keep betting on store expansion, for want of a promising grocery e-commerce strategy.

Online shoppers who recommend certain products - such as private label salt for EURO.18 - are offered a EURO.20 voucher by Dia in Spain.

Admittedly, this is not the old Aldi school of honourable discount retailing - but even Aldi is currently challenging its established success principles. Drugstore retailer dm seems to be going this way in Germany.

A more elegant solution is the co-operation with an external food delivery partner, such as Instacart and Aldi in the USA, or Buymie and Lidl in Ireland. One advantage is the outsourcing, of course, which still allows for learning.

Separating Product & Service

But the kicker lies in the shopper perception: In the consumers' understanding, the drawbacks - delivery fees, minimum order etc. - are attributed to the service provider, which makes a prominent appearance as an independent third party. The discounter's reputation remains untouched.

It is in the discounters' interests to shape this service to their own needs. The alternative, as can be seen through aggressive start-ups such as Home Run in the UK, is that ambitious new delivery services will begin listing and delivering on behalf of the discounters in any case.

Discount Stores vs. Discount Grocery E-Commerce: Absolute Sales Gains 2018 - 2023, in bn EUR

Source: **LZ** Retailytics



About Retailytics

LZ Retailytics is an international retail analyst group supporting the grocery retail and consumer goods industries with insightful information, data and analysis to facilitate business planning and decision making.

The group delivers these insights in the form of an innovative, fully mobile-enabled digital product as well as through workshops, inhouse trainings and advisory projects. LZ Retailytics is part of Lebensmittel Zeitung (LZ) the leading trade and business newspaper for grocery and consumer goods in Germany. LZ Retailytics's team of senior analysts is spread internationally and all are well known for their deep knowledge of the retail industry and their specialisation in new store formats, e-commerce and digitalisation, private label, hard discounter, retail technology and logistics.

Learn more about
LZ Retailytics:
www.retailytics.com





EST



1975

EARTH FARE

HEALTHY FOOD FOR EVERYONE

FOR MORE THAN 40 YEARS, EARTH FARE HAS DISTINGUISHED ITSELF AS A LEADER IN THE HEALTHY FOODS INDUSTRY BY DEVELOPING A UNIQUE FOOD PHILOSOPHY THAT INFORMS EVERY PRODUCT OFFERED IN THE STORE.

To further enforce Earth Fare's quality standards, all grocery items adhere to the Boot List, which bans hundreds of harmful chemicals and ingredients from its items.

In 2017, the Asberville-based grocer launched a bold new message and campaign called Live Longer with Earth Fare™-- encouraging Americans to choose only the cleanest and healthiest foods.

In January 2018, Earth Fare furthered its commitment to helping Americans Live Longer with Earth Fare® with the launch of *The Clean Plate* - Earth Fare's own guide to eating clean and living a healthier, longer life.

Earth Fare has committed to continued growth throughout the Midwest, mid-Atlantic and Southeast with more than 50

stores in Alabama, Florida, Georgia, Indiana, Michigan, North Carolina, Ohio, South Carolina, Virginia and Tennessee.

Earth Fare currently offers more than 1,000 private brand food products that are sourced using only non-GMO ingredients, and more products are being added daily.

Beyond groceries, most Earth Fare locations feature the Heirloom Café and Juice Bar, featuring coffee and cold-pressed juices. Shoppers can also enjoy choices from the salad bar, hot foods bar, pizza station, sandwich counter and pre-packaged meals-on-the-go.

We spoke with Brenda Stubby in Sales/Product Development at Villari Food Group about her relationship with Earth Fare.

EARTH FARE'S FOOD PHILOSOPHY

OUR Food PHILOSOPHY

WE PLEDGE OUR FOOD IS FREE OF:

- Added hormones
- Artificial fats and trans-fats
- Artificial sweeteners
- Bleached or bromated flour
- Antibiotics
- High fructose corn syrup
- Artificial preservatives
- Artificial colors or flavors

GRB: What do you like most about working with Earth Fare?

Brenda: Earth Fare supports healthy lifestyles, sustainable family farming, and humane treatment of livestock; all of which are beliefs that we share at Villari Foods. Both companies being North Carolina based, Villari felt Earth Fare would be a great partner and opportunity to market our Never Ever branded pork. We are grateful for the opportunity to align our resources to support Earth Fare's needs.

GRB: Explain your Supplier-Retailer relationship with Earth Fare, and other retailers if possible.

Brenda: Customers and our family farmers are Villari's top priority. Delivering the highest quality products at the best service level is what our business has been based on for over 90 years. We believe in open communication and strive for 100% customer satisfaction.

GRB: Can you elaborate on any collaboration and sourcing with Earth Fare?

Brenda: We have partnered with Earth Fare to promote both of our companies' joint efforts of local, sustainable sourcing. Through Earth Fare marketing programs, we have been able to convey our brand message and engage directly with the consumer. Villari has helped support new store openings / resets with on-site demos. Via social media we continue to promote Earth Fare's story with our followers.

GRB: What are 5 keys or tips to successful supplier/retailer relationships?

- Brenda:**
- Shared Values and Beliefs
 - Mutual Empathy (have the other party's best interest in mind)
 - Open Honest Communication
 - Transparency
 - Trust

“Delivering the highest quality products at the best service level is what our business has been based on for over 90 years.”





HOW SOCIAL MEDIA IS CHANGING PACKAGING DESIGN

Social media is no longer just a place to like, share and stay up to date with the goings-on of your family and friends.

It's a place where brands rule, influencers create, and transactions are made — quicker than ever!

Today, packaging is just one of the numerous pieces of branded content required to engage consumers with their brands. Packaging is now expected to connect with other branded content online to create a seamless consumer experience.

By using the pack as media, brands can create a long-term content journey that builds over time.

Visually driven social platforms like Instagram and Pinterest have changed the way consumers interact with brands. With just one tap on a smartphone, these platforms allow consumers to learn more about the brand and product details, and to compare prices before even landing on the brand's website.

While the goal of design-branded packaging is to make emotional connections between brands and consumers, the pack can often be the primary media channel for creative work. Brands must realize that packaging lives in a 360° multichannel brand world and, as such, make sure that it works in all spaces.

How does user-generated content impact packaging design?

We can't talk about social media without touching on the topic of influencers. This is the idea that consumers are becoming the marketers.

The 2016 Photography Trends Study revealed that nearly one in four consumers (24 percent) are taking up to 300 photos per month. Is your brand one of them?

Social media is now part of the consumer journey, with many consumers wanting to share their brand experience with their peer group. It's another example of high-visibility conspicuous consumption, with massive word-of-mouth marketing value when used by key influencers.

Being part of consumers' lives drives the lifestyle shot we see posted by many of these influencers. These vary from highly curated photography in brand-sponsored feeds to a much more immediate and raw "on-the-go" style from brand ambassadors.

Should we expect more minimalistic design online?

There has been a move to a more minimal branding approach in packaging design for several years. This plays out well in digital channels, as the impactful, graphic look and feel is easy to recognize and stands out in a fast-moving scroll-through.

Often, the "less is more" tactic is necessary for consumers browsing products online, where you only have less than a second to impress.

The minimalist trend in packaging is finding its way to social media product shots. Take the Rxbar packaging overhaul, for example.



Photo credit: Rxbar Instagram

The packaging offers clear benefits on the pack without unnecessary information. This provides an authentic look at how this product fits into the consumer's life and communicates value instantly.

How are brands leveraging social media trends?

Traditionally, brands have utilized social listening tools to evaluate hashtags that are being used alongside their products. Now, we see brands using social media as a general tool for trend evaluations. Take for example, Kellogg's Limited Edition Unicorn cereal that was recently launched for those craving a magical breakfast.

Unicorns and rainbows alike have seen a lot of hype on social media: Think about the rainbow effect filter on Snapchat or the Unicorn Frappuccino product rolled out by Starbucks last summer.

Brands are paying close attention to these preferences and are incorporating them into not only their marketing strategy, but their packaging design elements.

What does the future look like for connected packaging?

As consumers have become “connected,” designers have shifted their approach to reflect this — increasingly viewing packaging as a valuable owned media channel and opportunity for brands to engage.

Snap, scan, tap a pack: We’re seeing connected packaging go live across categories — from QR codes on KitKat, to Shazam on Fanta, to Snap and Facebook codes on leading water brands.

Connected packaging provides a flexible canvas that can adapt when the physical packaging can’t — whether through visual content, augmented reality or direct connection to social channels.

CASE STUDY

In the case of Anthem’s Jaffa Cakes redesign, consumers’ own distinctive and entertaining approaches to eating the product — often shared on social media — influenced the “big idea” on-pack.

Consumers are encouraged to ask themselves which one of the four kinds of Jaffa Cake eater they are:

Each of these four expressions is showcased on the top panel of the pack in a playful and mischievous way in line with the brand’s character.

How are brands going beyond the pack to deliver incredible brand experiences?

The speed at which a trend can now surface and then disappear is driving the design industry and brands to move faster than ever before. We see brands become more agile in responding to trends, rather than trying to adopt long-term visual styles.



Instagram provides real-time insight into visual consumer trends, which is really valuable to the design industry, stimulating hashtags that allow others to easily find specific themes, trends and content. Instagram Stories has also become an effective way to promote brands through short videos.

Everything we do now has to look good on Instagram. Designers need to make sure the product looks beautiful in social media environments as well as in the hands and in-store.

How does this fit into the e-commerce piece of the puzzle?

Brands are concerned with the “thumbnail-ability” of package design, specifically when it comes to e-commerce. Until there are no stores left, designers will still design for the shelf, but channels such as Amazon (or even internal e-commerce platforms) aren’t being used to their maximum.

From a visual communication standpoint, beyond just showing how the pack looks and functions, brands should be demonstrating the brand, the benefit and the product name in a beautiful way — whether through photography or videography. For designers, the focus on how products look online will only increase.

How will these packaging trends change the way brands advertise?

With the explosion of new social channels to reach consumers along with the deluge of data and the rise of

technology, brands are having to re-evaluate how they stay relevant and front-of-mind for their audiences.

With the application of technology to FMCG products through connected packaging — allowing a conversation with products that can then be shared in social channels — transforms packaging into a marketing channel and one of a brand owner’s most valuable owned media assets.

Many will argue the case for investing in owned media, where you can control the messaging and interaction. With packaging, the owned media is in close proximity with the customer. It’s not remote or restricted by time. You’re removing any intermediary between the consumer and the brand.

It’s commercial dynamite.

Brands are now re-examining how they use their own packs to connect with people throughout the sales cycle — before, during, after and always.

Consumers are rewarding each other and brands for the ability to create great content. This is forcing brands to consider high-quality, relevant content across every touchpoint and packaging is a perfect connection point to unlock brand content.

Smart designers are very aware of the impact digital marketing and social media have on the way consumers shop. What’s important now is ensuring your product stands out both on-shelf and online with exceptional packaging design.

As Group Managing Director of SGK in Europe, Mark Hewitt oversees the European brand development operations of Anthem and Brandimage. With 25+ years experience in brand development, digital strategy and integrated marketing for many of the world’s most popular brands, Mark is in a unique position to advise on and create connected brand experiences that help drive brand performance. www.sgkinc.com



IMITATION VERSUS EMULATION

Why Imitation Is Not The Sincerest Form Of Flattery

They say that imitation is the sincerest form of flattery, but when it comes to own brands, this is simply not true. Imitation has a nasty connotation, and in the world of retail branding we have been fighting to shake this expression for years, as it conjures up notions of “knock-off”, “copycat” or “follower” - private label baggage from the 70’s and 80’s.

The Gen Z and Millennials of today are giving the industry creative degrees of freedom to innovate that we have never really seen before, and many retailers are taking advantage by developing unique food products.

But when we look at the non-foods private brand development, we are unfortunately seeing “imitation” in its most blatant form, copying the intended brand targets through visual language, look/feel and functionality. Whether this meets the legal definition of being “too close” you can decide for yourself, but I don’t think it propels the industry perception forward that private brands are establishing a unique and differentiated role.

Three recent examples, all non-food.

Target created a brand called Wild Fable and they have done some very forward-thinking things to market it, but this hasn’t necessarily translated to the product. Vans is currently



(Source Vox.com, Dec 26, 2018). Wild Fable and Vans are pictured.

suing them for copying their Old Skool skater shoe.

Amazon recently stopped selling certain furniture designs in its Rivet brand that West Elm claimed were literally too close for comfort.

Aldi who has had a number of issues of being intentionally too imitative of

known CPG or name brands, is also reportedly being sued by Bath & Body Works across their seasonal candles portfolio.

None of these non-foods examples advance the notion of private brands’ originality, invention and differentiation.



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HAVE A QUESTION?

See 2 Answers ▾

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Assembly options: Expert assembly of 1 chair | See more options for alternative quantities. More options

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(Source : Business Insider, Dec 18, 2018).

Pictured above are both their versions of the Orb chair.

The lessons for the future.

There are some lessons to be taken from all of this, as it shows that private brands still have a lot of room to be strengthened in the Non-Foods sector of the store.

- Retailers have to make the trend investment that is required, which is different for lifestyle and fashion-leaning products than it is for food. While many retailers have invested in Culinary & Innovation infrastructures, they need to do this more intensely in non-foods.

- Sourcing is clearly different in non-foods, but you cannot purely outsource the product development function. Don't outsource the infrastructure.

- Finally, and this is more than nuance, emulate and learn from the best, but don't just imitate. Emulation has a positive bent, it means that you are aspiring to model yourself after leaders. Imitation is the easy way out, and consumers can sniff out copycat behaviors and don't give them much credit.

In the words of Herman Melville, "it is better to fail in originality than to succeed in imitation", a message that is particularly apt for big retailers who are trying to be successful in non-foods.



(Aldi's Huntington Home candle on right; Source: S&P Global, Nov 22, 2018)

Perry Seelert is retail branding and marketing expert, with a passion for challenging conventional strategy and truths. He is the Strategic Partner and Co-founder of Emerge, a strategic marketing consultancy dedicated to helping Retailers, Manufacturers and Services grow exponentially and differentiate with purpose. Please contact Perry at perry@emergefromthepack.com

FRED'S THEN AND NOW: HOW PRIVATE BRAND IS LEADING FRED'S INTO THE FUTURE

By Brent Tininenko

Tracing our history back to an original store in Coldwater, Mississippi in 1947, Fred's has been a part of the fabric of communities in the Southeast for over 70 years. Fred's success was built upon offering a broader assortment of quality merchandise at lower prices than a typical drug or dollar store, combined with a more convenient shopping experience than big box retailers. Additionally, Fred's carried a variety of closeout merchandise at prices not found anywhere else.

By getting back to our heritage and combining the value and convenience of a hometown discount store with the excitement associated with a "treasure hunt" for great closeout deals, we can differentiate ourselves and give customers a reason to spend their money with us.

In order to do this, Fred's determined they needed to significantly improve their private brands, and they needed to bring in a leader for the endeavor. The position was ideally suited for me given my hyper-competitive nature. It sparked a passion to work on products where the only success criteria are packaging, product, shelf position and price. Literally the product has to stand on its own merits unlike National Brands that are supported by large advertising and media budgets.



However, the success of our Private Brands goes beyond great products. Every product innovation strategy session starts with a reiteration of Fred's company values:

We are grateful for our customers and the role we play in the communities we serve.

Our private brands will connect with our customers and give them the

quality and values that they have trusted at Fred's and we guarantee all of our great products.

We are humble and value hard work.

We partner with our suppliers and the entire Fred's team (Merchants, Operations, Logistics) and are open to working together to develop the best products possible.



We have a bias towards rapid action. We love innovation from our supplier / partners and changing for improvement. Our new packaging direction, led by MBD, is a great example. Our packaging builds on the trust that our customers expect and connects to our heritage in our communities.

This year, we launched over 200 SKUs with a brand that communicates

trust, value, and heritage in less than 6 months. Our rapid action activated our suppliers, merchants, and buyers working in the same direction to grow sales and private brand participation in sales.

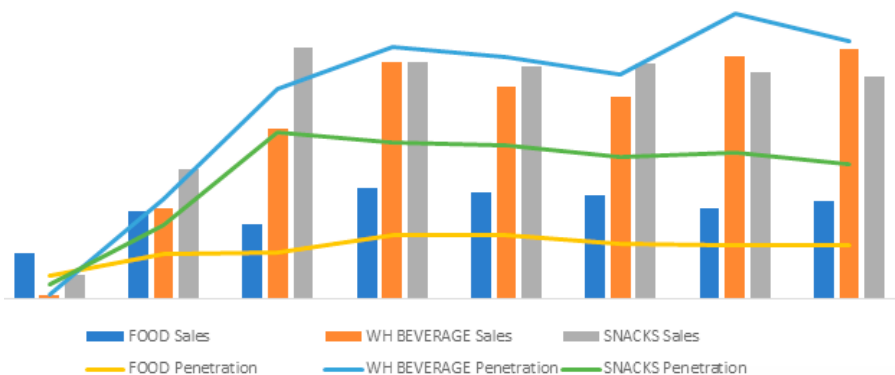
To connect with our customer, we had grass-roots taste tests and compared our new private brands with the National Brand items. These taste tests grew excitement

from our store associates and carried over with sales!

In addition, our suppliers are bringing innovation to us because of our action. Example, we launched a Chicago Mix popcorn, where there isn't a national brand match, through our partnership with our supplier, and it is currently our best-selling new item. Also, we launched a salad-ready tomato in a beautiful can that doesn't have a brand equivalent and is achieving sales success!

We have high standards and are accountable.

For over 70 years, Fred's has delivered value. We continue to develop our team and feel that we now have the right team in place that will build on our rich history and deliver on our customer's expectations.





BRICK BY BRICK: REBUILDING PUBLIC SCHOOLS IN CÔTE D'IVOIRE

After Years Of Civil War, Côte d'Ivoire, The World's Largest Producer Of Cocoa, Works To Rebuild Its Education System

Last October, the school year at Ecole Primaire Publique (Public Elementary School) of Konan Koffi in Côte d'Ivoire began with music. Dancing, clapping, singing, beating Djembes, or drums, and beaded Shekeres, or shakers, all welcomed the start of a new school year as students received brand new school kits with basic school supplies.

The school kits were funded, and the school itself was built in 2014, using Fair Trade Community Development Funds: funds earned with every purchase of Fair Trade Certified™ chocolate. The school currently offers

six elementary school classes for children in the area. This school year (2018-19), 145 students are enrolled, a nearly even split between the number of boys and girls.

Rebuilding schools and expanding access to education, including availability of textbooks and basic teaching materials, is the first step in a long road to recovery since the civil war which started in 2002 in Côte d'Ivoire, destroying the country and its education system. According to the Education Policy and Data Center (EPDC), before the civil conflict, 31%

of girls and 49% of boys completed primary school; after the civil conflict, only 14% of girls and 18% of boys completed primary. The country's literacy rate is 48% among the youth population; lower than the average youth literacy rate in other lower-middle income countries.

It would be easy to become discouraged, but parents like Conan Kouassi, a cocoa producer in a Fair Trade cooperative, still believe in the importance of education and want to be able to provide that for their children.





positively impacted many children in the area.”

Even so, a shortage of teachers continues to be a challenge. The EPDC reports that in Côte d’Ivoire, on average, there is one teacher for every 41.7 primary school students, whereas in other lower-middle income countries, it’s more like one teacher to 29 students.

“It’s a big concern for many families,” says Koffi Kouame, a teacher at the newly opened Public Elementary School of Botindin in the Oumé section of Côte d’Ivoire. Due to the lack of teachers in the area, the school needs to send some children to other schools located farther away. “But I am confident that someday soon we will have more teachers and be able to create enough classes for all of the children in the area.”

As Côte d’Ivoire continues to work toward making primary education accessible to every child, you can help by choosing Fair Trade Certified chocolate. With every purchase, additional money is sent to the community whose livelihoods depend on it.

As Content Manager at Fair Trade USA, Elise helps deepen understanding of Fair Trade, support businesses selling Fair Trade products, and engage consumers about power of purchase.

When he spoke to us, Conan had recently returned from training in the field where he learned how to improve his plants and received fertilization resources to help improve quality and volume. He said he appreciates opportunities to learn and looks forward to providing similar opportunities for his children.

“I began working in the cocoa fields in 2000,” he says. “Both of my parents are gone, so I take care of ten people in my household, including my six children. The oldest is 27 and works with me in the cocoa fields, but my two youngest are in their senior year of school. I am excited to see them graduate.”

Whether children stay to work in the cocoa industry or pursue further education and jobs away from home, a basic quality education enhances the quality of life, according to UNICEF—“it ends generational cycles of poverty and disease and provides the means for sustainable social, economic and political development.”

Education is a crucial component of an effort to end child labor in Côte d’Ivoire. In combination with Fair Trade standards that help protect the mental and physical development of children and their right to attend school, accessible education provides incentive for children to be in school instead of working in the fields.

“Fair Trade USA insisted on the fact that no child should work in the field and helped us ban child labor altogether,” says Phillippe Kouakou, a cocoa producer. “They helped us build a school in our zone, which has





THE SENSORY REVOLUTION:

Strategically Create Memorable Private Brand Distinction and Win Loyalty Through Emotional Connections

In his *Manifesto for a Private Brand Revolution*, industry colleague Christopher Durham of *My Private Brand* has wisely advised the industry of specific revolutionary private brand absolutes.



Several of the *My Private Brand Manifesto for a Private Brand Revolution* beliefs directly relate to the significance of a sensory branding fragrance strategy. When it comes to your brand's sensory revolution, consider these Manifesto Revolution beliefs:

Manifesto Belief - Brands Must be Unique and Ownable – As sensory experts, we know distinct, unique, and creatively designed fragrances will establish an inimitable product attribute that makes your brand memorable to her. A thoughtfully designed proprietary fragrance for your brand becomes a matchless trait, an identifier that she exclusively links to your private brand. The consumer emotionally connects this specific scent to your brand; the most powerful physiological, emotional driver is the sense of smell, and this establishes an unrivaled relationship bond with your brand. Fragrance design and signature fragrances are as unique and ownable

as an exclusive package design or logo, with even more emotional significance.

Manifesto Belief - Great Design is Essential to our Success – Fragrance creation IS great design. A winning fragrance is the most significant emotional design element that taps into memories and most easily bonds her to your brand. Whether this is bath and body products, shampoos, baby care, cleaners, and household products, or your laundry lines – great fragrance design moves the product from shelf to the shopping cart. Just watch her smell the product in the store aisles. Experienced perfumery and scent design teams create fragrances that reflect your brand's unique strategy and positioning; elevating your brand design message.



Manifesto Belief - Meaningful Innovation is Critical to Success – Buying a product is an emotional decision. Shoppers have high expectations for product technology and performance, which they evaluate rationally. However, the real decision is about the “emotional experience” the product offers. This is what a beautifully developed, innovative fragrance design creates –

the emotional experience. Moreover, that's what makes the product part of the consumer's life. Meaningful fragrance design, delivery, and formula are innovation markers, and it is this sensory innovation that has proven time and again to positively impact sales success. Creative fragrance innovation establishes category leaders and achieves the ultimate private brand goal – win the hearts and emotions of customers for life!

In game-changing sensory branding strategies, the consideration of these particular Manifesto beliefs starts with controlling your fragrance ingredients approach. Alongside your private brand product development priorities, intentionally aligning your sensory elements to your brand's unique offering and competitive position is always a proven loyalty success multiplier.

Lori Miller Burns, Director of Marketing Relations and Communications for Arylescence, has worked in the personal care and fragrance industry for decades. She knows first-hand how the power of thoughtful sensory strategies builds and establishes winning brands in the marketplace. Arylescence's talented team of perfumers, scent designers, and marketers are proud to partner with leading brands around the globe to successfully connect customers to their products and establish brand loyalty through the most powerful emotional ingredient – an original and distinctive fragrance. To learn more, contact Gary Sycz – VP of Sales and Business Development – garysycz@arylescence.com



IMPROVING TRANSPARENCY AND SUSTAINABILITY THROUGH TECHNOLOGY INNOVATIONS

The demand for greater transparency and sustainability in retail continues to grow at an ever-increasing rate.

The demand for greater transparency and sustainability in retail continues to grow at an ever-increasing rate. In part, this is being driven by the proliferation of consumers who desire products that align with their personal values and beliefs. For example, Daymon research has shown that more than a third of Millennials and Generation X consumers prefer buying sustainable products.

To meet these demands, retailers and manufacturers must start at the source: the supply chain. Fortunately, they have help — namely, in a number of technological innovations that hold promise in delivering transparency, while also driving sustainability efforts. Blockchain — a highly secure digital ledger system that virtually eliminates fraud — is one innovative technology several leading retailers have already

likely to buy sustainable items, this increased transparency helps promote more sustainable practices throughout the supply chain.

Artificial intelligence (AI) is another technology several retailers are investigating. Carrefour, for example, is testing the technology to help better forecast stocking needs, with the goal of reducing food waste. Meanwhile, U.K. grocery chain Waitrose & Partners is trialing a series of “farmbots,” with the goal of developing an AI system that will allow the small robots to farm autonomously. Because the robots are lighter and more efficient than traditional farm equipment, their use could deliver significant environmental benefits.



But they’re not alone. More and more companies and business leaders are also demanding change. For example, in late 2018, more than 50 CEOs from industry-leading companies — including CPG brands such as Unilever, Heineken and Maple Leaf Foods — released an open letter pledging to reduce carbon emissions and increase sustainability, and calling on others to join them. Similar themes were also seen at the recent World Economic Forum in Davos, Switzerland.

begun tapping into in order to improve their supply chain transparency. For example, multinational grocery retailers Auchan and Carrefour both began rolling out the technology in select markets in 2018 to improve transparency for products such as meat, poultry and citrus fruits. The technology allows the retailers — and their shoppers, via QR codes on packaging — to trace the entire lifecycle of a product from farm to shelf. Because consumers are more

Ultimately, this prioritization of transparency and sustainability in the supply chain is a key pillar of success in the new era of clean label. It’s no longer enough to use simple ingredients or to make “free-from” promises. Today’s consumers expect the whole package: safe, transparent ingredients produced in socially, economically and environmentally

Rita has led Daymon’s International Retail Consultancy, Branding & Design team, located in Lisbon, Portugal, for over 6 years. She oversees Daymon’s areas of Strategy, Insights, Category Management, Research, Marketing, Branding, Design & Communications in the European Resource Center.

CUSTOMER COMPLAINTS LEAD TO PARTNER COLLABORATION



Private brand retailers have often viewed customer complaints as negatives. Some have even used them to gain advantages in renegotiations with suppliers.

However, there are positives to complaints which can be highly useful. They provide insights into customer preferences and product performance. They spotlight situations in which a product isn't living up to the brand's promise.

However, in order to gain maximum benefit, retailers need to share complaints in near real-time with suppliers.

Private brand suppliers are the experts in their field. If they have knowledge of customer feedback, they can investigate, react and respond quickly. They can also identify future opportunities. Retailers need to leverage suppliers to produce differentiated and winning products.

What are some common complaints? They include packaging being hard to open or tough to reseal; products appearing unusual in color; bran cereal lacking enough raisins, or diapers having problems with absorption or tabs. Potentially more

serious are complaints related to allergy concerns or food safety.

Suppliers often look at the big picture in reviewing customer feedback data. They can identify consistency shortfalls. They will recognize that a product once perceived as satisfyingly spicy is now being viewed as bland.

Complaints aren't the only important kind of feedback. Consumers often take the time to reach out with requests or improvement suggestions. Sometimes this appears within product reviews. "This product is great, but..." It's what follows the 'but' that is really important.

Retailers need to share this type of information with suppliers as well to work as a team. It's not enough to just share negative input.

There's another reason suppliers are so important in these situations. Retailer private brand teams typically receive a lot of customer feedback, but the teams are often small and able to act only on the 'worst' issues, the tip of the proverbial iceberg. These might include safety issues, or those with the highest complaints per million (CMPU).

Engaging more closely with suppliers in effect adds these partners to the retailer's private brand team. Suppliers become additional resources to act and help prevent an escalation in complaints. Moreover, they can allow retailers to respond to customers with in-depth explanations, providing transparency and building confidence in the brand. The result is that retailers and suppliers form 'one team' to collaborate and improve products.

Not only is this possible to do, it's already being successfully achieved in select cases. Some retailers are using technology platforms such as Affinity to aggregate a wide range of customer feedback and share it with suppliers.

In addition to engaging with suppliers, retailers need to make it easy for customers to provide feedback. This requires providing a range of options to get in touch with a retailer, which might include a dedicated help line or customer engagement center.

Once feedback is received, sharing and engaging with suppliers is the key to boosting performance. So next time a private brand retailer wants to improve product performance, it should remember that complaints aren't always a bad thing, as long as these are shared with suppliers.

James Butcher is CEO of Solutions for Retail Brands (S4RB), a leader in consultancy-led software solutions for retail private brand collaboration. The company's cloud-based Affinity™ platform brings retail teams and their suppliers and customers together to work collaboratively as one team around successful private brands.

A CLOSER LOOK AT FAIR TRADE COFFEES, UNFORGETTABLE TRIPS TO ORIGIN



I've recognized the value of the fair trade industry for many years. However through my recent trips to fair trade farms and cooperatives in Mexico and Peru, I developed a deeper insight into the positive impact of fair trade coffees. Like many of you, I had a high level knowledge that fair trade supports growers, provides for education, healthcare etc. I understood there were good reasons to purchase and support fair trade products. However, once I was able to meet the people in remote villages, climb steep hillsides to touch a coffee tree, and witness production processes, and the lifestyles of the small coffee grower, my understanding of the value of fair trade has risen to an entirely different level. Let me share with you why fair trade is so important to the coffee industry.

In August, 2018, green coffee prices fell to less than \$1.00/lb. on C-Market. This is the lowest the market has been since 2006. Understanding the C-Market can be confusing, but what's important to realize is the impact, and ripple effects of these low prices. Globally it's estimated that approximately 50% of coffee is grown and produced by small growers. Depending on the region, coffee can range from \$1.05 to \$1.40/lb. to produce. Approximately 70% of that cost is labor. For the 25 million coffee growers this means they are making less per pound on the product than it is costing them to produce. Coffee growers have no control on the C-Market, so it is vitally important they can create sustainability for those times when the market drops. Fair

trade plays an integral role in creating systems that provide for this.

Given the complex supply chain process for coffee, it's nearly impossible for small growers to bring their harvests to market on their own. Coffee growers who are part of a fair trade cooperative are able to tap into a supply chain system that



enables them to get their coffees exported from, oftentimes, remote regions, and then make their way to the U.S and European markets. I've come to appreciate what it takes for a coffee cherry to be grown, harvested, dried, processed, cupped (tested) transported, exported, imported, cupped again by roasters, purchased by roasters, roasted, ground, packaged and brewed before I take one sip. And all for generally \$1.00 per cup.

No doubt you've heard about premiums farmers receive for fair trade products. To you and me a premium suggest first-class, elite, high-end. To

the coffee growers, like those I met in Peru, premiums they receive have an entirely different meaning. In being part of a fair trade cooperative, coffee growers are provided access to lower interest rates on financing, enabling them to purchase equipment and make other capital investments to their farms. Premiums offer access to education for the farmers, teaching them how to improve their coffee crops. They are able to increase yields, and continually develop higher quality plants and coffee fruit, which will result in better prices for their harvests in the marketplace. Premiums are invested into fertilizer for their land, or learning ways to boost productivity like better drying practices. Perhaps most importantly, by being part of a fair trade cooperative, farmers learn how to run their coffee farms as a business, and to pass their practices on to a younger generation that will care for their lands in the future.

Visiting these fair trade co-ops and spending time with the fair trade co-operatives was an experience I'll never forget. I met people with barely an elementary education convey an in-depth knowledge and pride for the coffee products they grow, and a stewardship for their land that was remarkable. Choosing to purchase and offer fair trade coffees is a way of supporting the coffee industry at its very core. I encourage you to think about this as a way of providing your customers with a high quality cup of coffee. As any coffee grower would suggest... this is a treasure of the earth.

HOW TO EXTEND YOUR PRODUCT LINE TO THE HOT TREND OF PREMIUM TEA



As wellness and organic categories continue to trend upward, many brands (and even smaller businesses which aren't product-focused) are extending their offerings to appeal to sustainable and healthy lifestyles. Tea can be presented as an attractive complement to many brands, and is a natural choice for companies looking to promote well-being.

Specialty tea is booming with premium tea products being one of the key emerging trends in the global tea market. In retail, wellness tea sales are up 5.8 percent while premium green and white tea sales are up more

than 33.3 percent in the bagged and boxed tea categories, according to SPINSscan Data, which tracks total tea sales across all SPINS-tracked retail channels in the U.S.

Wide varieties of brands—ranging from coffee roasters, spice and gourmet food stores, to holistic wellness practitioners, spas, yoga studios, hotels, restaurants, major retail brands and even airlines—have created their own private label tea lines with OEM partners. Private label tea is sourced, blended and packaged by a co-packer and sold at wholesale prices to another company. This company

then sells the tea under their own brand. Private label has grown rapidly in recent years as more businesses recognize the market opportunities, reasonable costs and profit margins in tea—which can be twice as high as the margins on coffee.

Tips for Selecting a Private Label Tea Partner

Here are some key points to consider in the process of selecting an OEM tea partner and setting up your private label with them:

- Do you want a line of teas, or just one tea product? Do you wish to choose an existing tea blend you've tried, or do you wish to create your own unique tea concept?
- Do you want a pure single-estate tea, an iced tea blend, a classic blend like a breakfast tea or earl grey, a traditional cultural blend like chai or Moroccan mint? Or are you planning to do a functional tea such as a detox, energy, sleepy, matcha or turmeric blend?
- Does your tea vision concept include functional ingredients or special tea types? Are you looking to use microgreens, hemp, etc. in your tea blend? Are you planning to have flavoring added to your tea?
- Is your OEM partner facility SQF and/or HACCP certified (Hazard Analysis and Critical Control Points)? Will you want your product to be certified organic, kosher, non-GMO or gluten-free?



The Tea Spot, for Weight Watchers



Sky & Wyatt, CBD Herbal Teas, formulated and co-packed by The Tea Spot as a private label tea.

- What is your desired cost point? Will your tea be a giveaway, or a product you intend to commercialize? What minimum order quantity are you prepared to take on? Do you plan to reorder on an ongoing basis, or will this be a one-time offering?
- What form factor will you choose: loose leaf tea, pyramid sachets, paper tea bags? Do you need your sachets individually overwrapped to maintain fresh single-servings? Will you require retail-ready packaging? Will you want to market branded tea accessories with your tea?

A Private Label Partner Can Bring Your Tea Product to Fruition

The advantages to doing a private label tea product with an OEM partner are that start-up costs, including staffing and lead times, are greatly reduced or even eliminated. A brand is what distinctively differentiates a business in the marketplace. Doing

private label allows a business to focus entirely on building and marketing their brand, without the expense and distractions of setting up a new line of labor-intensive production, making the immediate profit returns greater.

Taking the OEM route is also a good way to initially test the market with a tea product, even if a business decides to take their tea manufacture and future developments in-house sometime in the future. Before making the significant expenditures required to set up a tea line, an OEM partner can execute the R&D to formulate a company's vision for their tea line. A brand may not have tea and herbal experts on staff, but they may know that their requirement is, for example, to help people energize, or get into a restful state of relaxation, or satisfy hunger cravings, or whatever other functional requirement they may be looking to support with a tea blend. The proper private label partner will

have the skills to bring that vision to fruition.

Through economies of scale an established OEM partner can provide competitive wholesale pricing, R&D costs, and lead-times that will be unmatched for a new brand trying to enter the market from scratch – most notably in raw material sourcing, R&D skills, production, packaging, and supply chain management. By letting an OEM partner help bring your product to life, clients get to benefit from their partner's experience, efficiencies of operations, sourcing connections (not to mention buying power at scale), and baseline knowledge of the industry and trends.

In sum, OEM clients get to benefit from all their OEM partner's past experiences, successes and failures alike, so that they can gain the most from their tea product launch right out of the gate, without the learning curve of a tea industry newbie. There are many established OEM tea companies that can easily help you along this complicated journey so that you can successfully execute your go-to-market strategy. The tea market is wide open for new products, new voices, and new ways to promote health and wellness to the mass market in an ultimately simple form – tea.

Maria Uspenski is the founder and CEO of The Tea Spot, where her mission is to advance healthier living through the everyday enjoyment of whole leaf tea. An MIT mechanical engineer by trade, Uspenski is the innovative force listed on three U.S. patents for Steepware inventions, which promote the ease of tea preparation. She is the author of *Cancer Hates Tea*, and was recognized as the "Top Tea Health Advocate" at the 2017 World Tea Expo. She is called on to lecture at universities and conferences nationwide and has been featured in the Huffington Post, television, radio and podcast interviews for her success as a social entrepreneur and certified tea and fitness nutrition expert. To learn more about The Tea Spot, visit <http://theteaspot.com>.



VELOCITY: THE MY PRIVATE BRAND CONFERENCE

The trailblazing private brand retail and event, has released its groundbreaking 2019 agenda and initial lineup of more than a dozen executive speakers that includes: Gil Phipps, VP of Branding, Marketing & Our Brands, Kroger (below left), Tim Cox, Director of Creative Services, Publix Super Markets (below right), Jeff Gamsey, VP of Private Brands, Boxed.com, Professor Jan-Benedict Steenkamp of UNC Kenan-Flagler Business School and Marie Horodecki-Aymes



Director, Design, and Packaging for Metro Canada.

Velocity will be held April 29 - May 1, 2019, at the Le Méridien Charlotte, in Charlotte, North Carolina, U.S.A. More than 150 attendees. Velocity represents an unprecedented gathering of retail leaders and the manufacturers, tech companies, service providers, brokers, agencies and researchers helping them define the future private brand.

The experience is intimate and engaging. Attendees mix and mingle throughout the day at breakfast, lunch and networking breaks with the night topped off with an exclusive cocktail party in the rooftop bar of the hotel. Velocity provides the ultimate opportunity to interact with the industry's most influential retail executives and private brand teams. NETWORKING is one of the most critical aspects of the conference, year after year!

Now in its third year, Velocity is widely credited for establishing a timely and vital industry-defining narrative for private brand that is focused on private

brand innovation and differentiation. Each year, Velocity's agenda presents the retailers, and trends that are transforming private brand. These perspectives are shared in a single powerful track of the world's best retail icons, geniuses, and Mavericks.

The Velocity Conference is about the future of private brand, the future of retail and the future of manufacturing. The event is the most inspirational and comprehensive private brand conference of its kind.

Conference attendees will experience:

World Class Speakers

Velocity will offer a single-track schedule full of keynote speakers from Kroger, Publix, Boxed, Food Lion, Schnucks, Fairway Markets, My Private Brand and more. Every one of our speakers is a retail executive, world-renowned expert, author, or up-and-coming maverick, helping us become the best private brand conference of 2019.



Vertex Awards Gala

The Annual Vertex Awards Celebration Party, which was held in Amsterdam in the past, will be expanded and reimagined at the Velocity Conference. There it will evolve and grow to become the Vertex Award Winner's celebration.

Innovation Zone

Velocity will feature a curated collection of sponsor exhibitors displaying new innovative goods and services.

Network & Engage

Attendees will have the opportunity to network and engage with retailers, manufacturers, suppliers, and agencies to exchange ideas, share best practices, build strategic partnerships and make lasting connections.

Don't miss Velocity: the My Private Brand Conference Europe (velocityeurope.org). The inaugural event will be held 21 – 23 October 2019 at the Myriad by Sana Hotel in Lisbon, Portugal.



POSITIVE RESULTS FOR MARCABYBOLOGNAFIERE 2019:

More than 10,100 in attendance (+6%) plus an increase of 17% in the number of foreign operators.

In line with the success of the Private Label market, which has experienced uninterrupted growth since 2012, MarcabyBolognaFiere concluded having hosted in excess of 10,100 professional operators at the event (+6% compared with 2018), in addition to an increase of 17% in the number of foreign operators, providing further confirmation of the strong interest in 'made in Italy' products.

"We are celebrating the first 15 years of MarcabyBolognaFiere with some very positive results..." commented Antonio Bruzzone, General Manager of BolognaFiere, "and very encouraging feedback from the exhibitors, who were satisfied with the both the visitor flows and the importance of the issues discussed at the conventions. MarcabyBolognaFiere has further consolidated its position as a networking event for the entire industry, and attending has become increasingly strategic for anyone involved in the sector."

The Global Retail Brands' team visited many of the exhibitors at Marca, here are some product highlights:





10|11 APRIL 2019. PARMA, ITALY

CIBUS CONNECT

Is a B2B Event Entirely Dedicated to The Best of Made in Italy Food

Discover CIBUS CONNECT 2019, a new and dynamic format for a 2 day export- oriented professional event dedicated to Made in Italy food. During the Food & Wine Week more than 1,000 exhibitors are expected in Parma for complete products offers, more than 50 cooking stations, innovation area, and much more.

The Hosted Buyers Program reserved offers to selected top buyers, special activities and benefits for a great and complete experience in Italian Food Business.

A complete products offer: from Grocery to fresh, deli meats, dairy products, bakery, confectionery, snacks, frozen food, ready to eat, regional specialities and niche products.



Cibus Connect is a focused event for both Italian food companies and influential international buyers, such as these that have already confirmed their participation:

Food Retailers; Department Store; Supermarket, Hypermarket Chain, Specialty Store; Restaurant and Hotel Chains; Wholesalers, Distributors and Importers and Food Service.

For more information: www.promo.cibus.it



WABEL FROZEN SUMMIT

Vegan, Healthy, Natural

The Consumer Trends in the Frozen Market

A new year means an exciting new Frozen Summit. The category has gone through major changes for the past few years, and consumer habits are changing at a rapid pace.

Vegetarian and vegan alternatives are ruling the top of the list, followed by health and wellness attributes, organic and natural ingredients, sustainability and clean label.

In a changing market, connecting with digital consumers and the importance of multi-channel opportunities are key growth drivers and value-adding opportunities for frozen food. Companies having major success based on future minded products are UK's Iceland with their 'No Bull Burger', a sustainable option to the traditional hamburger making it a new classic and a strong disrupter. Another valuable mention is Norwegian Pizzabakeriet's grilled organic vegetable pizza, which has already become a popular choice on the Norwegian frozen market. Are you on top of this year's market trends and demands?

Wabel Frozen Summit, Europe's leading event for private label & brands suppliers and buyers, will open its doors on March 26th, at the Hilton Hotel Paris Charles de Gaulle. World-wide buyers and suppliers will meet for the 7th Frozen Summit to connect over current consumer demands regarding frozen products. In addition to this important opportunity, you will also be fed with the latest insights and information you need to succeed in this exact field of foods in 2019.



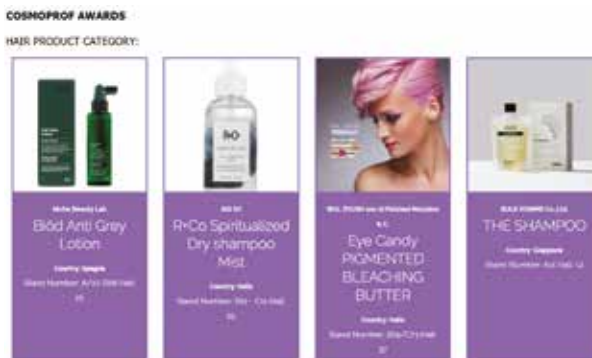
AT COSMOPROF WORLDWIDE BOLOGNA 2019

The excellence and innovation of finalists at Cosmoprof and Cosmopack Awards

The finalist projects for the Cosmoprof and Cosmopack Awards 2019, the Cosmoprof Worldwide Bologna initiative curated in partnership with Beautystreams, have been announced. The competition is gaining more and more recognition among opinion leaders and key players of the cosmetic industry, and it involves all segments of the sector.

The 2,947 exhibitors of Cosmoprof Worldwide Bologna 2019 have sent 608 proposals. Twenty entries for finished product were selected among those on show at Cosmo | Perfumery & Cosmetics and Cosmo | Hair & Nail & Beauty Salon, based on the innovation of their brands, communication projects, marketability and marketing impact. Twenty projects and solutions are the finalists for Cosmopack, based on the innovation, creativity and sustainability of each proposal. Proposals

have been divided into 6 categories for award, and for the first time, in addition to 28 international leading exponents of the sector, the Cosmoprof Worldwide Bologna 2019 public will be part of the jury, too, who will have the chance to express their vote and interact with the products.



From 14 to 18 March at the Service Center the installation The Store, designed in collaboration with the design agency centdegrès, will offer an interactive customer experience. Avant-guard technologies proposed by international companies in the beautytech sector (Signify, Elsecorp, Holofil, Viewtoo and Reveal) will allow visitors to test products, discover exclusive materials and information and closely observe their new packaging.

Winners will be announced during the ceremony scheduled for Friday, March 15th at Cosmotalks - Service Center and they will receive a trophy exclusively designed by centdegrès.



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offering the entire industry an opportunity to come together, make new relationships, and foster collaborations.

After sixteen successful editions, we are proud to announce the addition of Cosmopack North America. The "show-within-a-show" will host companies across the cosmetics supply chain: ingredients & raw materials, contract & private label manufacturing, machinery and packaging.

For more information: cosmoprofnorthamerica.com



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