PLMA's 2026 Report On The Status
Of Private Label Across Europe

A MOSAIC OF MARKETS

- **Record sales: €387bn, up €15.3bn, 38.8% share**
- **PL outgains manufacturer brands in value, volume**
- **Shoppers attracted by innovation, quality, choice**
- **17 markets: Unique demographics, retail dynamics**

Presented by the Private Label Manufacturers Association International Council

Overview

2025 SALES DASHBOARD

EURO SALES (BILLIONS)	FY 2024	FY 2025	% CHANGE
TOTAL MARKET	968.3	999.6	3.24%
PRIVATE LABEL	372.1	387.4	4.11%
MANUFACTURER BRANDS	596.1	612.2	2.69%
UNIT SALES (BILLIONS)	FY 2024	FY 2025	% CHANGE
TOTAL MARKET	438.4	440.9	0.58%
PRIVATE LABEL	199.6	202.2	1.29%
MANUFACTURER BRANDS	238.8	238.8	-0.01%

Private label set the pace in value & volume gains

Given consumer concerns on inflation and the increased cost of items for daily use, it comes as no surprise that also in 2025 European shoppers appreciated private labels, offering real value for money. Both in value and volume, private labels outpaced in 2025 the overall annual sales growth in the grocery sectors of 17 European countries monitored for PLMA by NielsenIQ.

Overall, in these 17 markets in 2025, turnover of private label increased by 4.1%, while the total grocery market value in these countries grew by 3.2%. Quite a dramatic contrast with manufacturer brands, whose 2.7% euro sales increase remained well below average and lagged 1.4 percentage points behind private label sales increase.

In volume terms, the total number of unit sales increased last year by 0.6%, while European retailers registered a 1.3% increase in the number of private label items sold to shoppers. This is more than double the average and puts into context the slight decline in unit sales of manufacturer brands in 2025.

"As shopper demographics and retail dynamics vary among the different European markets covered in this report, it's encouraging and informative to see how private label development adjusts to each grocery retail context and prospers", says Peggy Davies, President of PLMA.

"Overall, the direction is similar: private label development is on track and establishes itself as an indispensable element in shoppers' baskets and as a strategic asset for retail brands. This also results from private label manufacturers' ability to cater to the needs of both shoppers and retailers in creating increasingly innovative and forward-looking food and non-food products that are healthy, sustainable and of high quality."

The Report

Private labels are 'firmly embedded'

Supermarkets are the most influential channel for private labels and branded goods in their efforts to win the hearts, minds and wallets of European shoppers. According to market researcher Circana, private labels are now firmly embedded in Europe's grocery market, with value shares of more than 40% in many European markets.

This can only be achieved by establishing private labels as private "brands" whose strategic relevance to retailers is clear. Carrefour's CEO Alexandre Bompard targets a 40% share of revenue for the French retailer's private labels. He is well on track achieving this ambition, as in recent years this share increased from 25% to 38%.

In the French trade magazine *LSA*, Bompard says this is a result of a strategy of renewing and innovating. "Each year, nearly a quarter of our product range will be renewed, with 4,000 innovations annually, 1,000 of which come from our Carrefour brands," says Bompard, who stretches his corporate aspirations even beyond innovation: "Half of Carrefour's revenue must contribute to healthier eating."

Shopper surveys across Europe report that more than half of consumers now actively opt for private label in at least five categories, reports *Grocery Trade News*. Shoppers are more aware of basket prices and choose private labels if cost savings feel meaningful. Retailers support this with clear price ladders, visible unit pricing and strong entry-tier ranges. The publication states that trust in what it calls "supermarket brands" is higher than before. Improved recipes, upgraded packaging, cleaner ingredient lists and transparent sourcing help reposition private label as a reliable everyday choice, both on the shelf and online.

PRIVATE LABEL VALUE SHARE (EURO) BY COUNTRY 2025

COUNTRY	PL VALUE SHARE 2025
Switzerland	52.3%
Portugal	48.2%
Spain	47.3%
Netherlands	47.0%
United Kingdom	44.4%
Hungary	43.1%
Germany	40.4%
Belgium	40.3%
Austria	38.3%
France	35.1%
Denmark	34.1%
Italy	30.3%
Czech Republic	28.0%
Sweden	27.1%
Poland	25.1%
Greece	23.9%
Norway	23.6%

PRIVATE LABEL VOLUME SHARE (UNITS) BY COUNTRY 2025

COUNTRY	PL VOLUME SHARE (UNITS) 2025
Switzerland	57.3%
Portugal	57.2%
Belgium	56.7%
Spain	55.3%
Netherlands	53.5%
United Kingdom	51.5%
Germany	51.0%
Hungary	48.7%
Austria	46.8%
France	45.2%
Denmark	38.7%
Italy	37.1%
Czech Republic	33.0%
Greece	30.6%
Poland	28.6%
Sweden	27.8%
Norway	25.4%

Manufacturer brands retain majority share in most countries

Despite the shift towards increasing market shares for private labels, manufacturer brands still have a larger value market share than private label in most European markets. Only in Switzerland do private labels have a majority market value share of 52.3%. In the other countries, value shares of private labels range from 48.2% in Portugal to 23.6% in Norway.

In volume terms, seven countries achieve majority unit sales with percentages ranging from 57.3% in Switzerland to 51% in Germany. In ten European markets, more manufacturer brands units are still being sold with private label minority volume shares ranging from 48.7% in Hungary down to 25.4% in Norway.

The 17 European grocery markets researched by NielsenIQ are by no means homogeneous. A closer look at the numbers per country show some remarkable differences, both in the dynamics between private labels and manufacturer brands, and in the development of private label value and volume.

PL AND BRANDED 2025 EURO SALES BY COUNTRY

COUNTRY	VALUE SALES PL (BILLION)	VALUE SALES BRANDED (BILLION)	VALUE SALES TOTAL (BILLION)
Germany	78.6	116.1	194.7
United Kingdom	86.3	108.1	194.4
France	50.1	92.7	142.8
Italy	30.4	69.8	100.2
Spain	41.1	45.8	86.9
Poland	14.9	44.6	59.5
Netherlands	22.1	24.9	47.0
Switzerland	14.5	13.2	27.7
Belgium	9.6	14.3	23.9
Sweden	5.6	15.1	20.7
Austria	7.9	12.7	20.6
Norway	4.1	13.4	17.5
Denmark	5.0	9.6	14.6
Czech Republic	4.0	10.2	14.2
Greece	3.1	9.7	12.8
Portugal	5.8	6.2	12.0
Hungary	4.4	5.8	10.2

In 12 countries private labels had a higher 2025 value growth rate than manufacturer brands. The top five private label growth markets are Portugal (8.2%), Hungary (7.9%), Norway (7.7%), Spain (7%) and Greece (6.5%). In these markets, however, branded products also increased their sales but at a lower level. Private label in Norway, where branded dominates the grocery market in both value and volume, is catching up. Also noteworthy is Spain where the 7% euro sales increase for private label is much higher than the 2.4% sales growth for branded products.

In five countries – Belgium, Denmark, France, Sweden and Switzerland – manufacturer brands performed better in 2025 than private labels, but it was a close finish as in four countries private labels had almost equal growth percentages as branded. The only exception is Belgium, where the 4.2% increase in euro sales of branded clearly outperformed the 2.8% private label sales growth. Brands still dominate categories where innovation and emotional equity prevail, like chocolate, beverages, cosmetics, and baby products. According to market comments, this environment holds especially true for Belgium.

PL AND BRANDED 2025 UNIT SALES BY COUNTRY

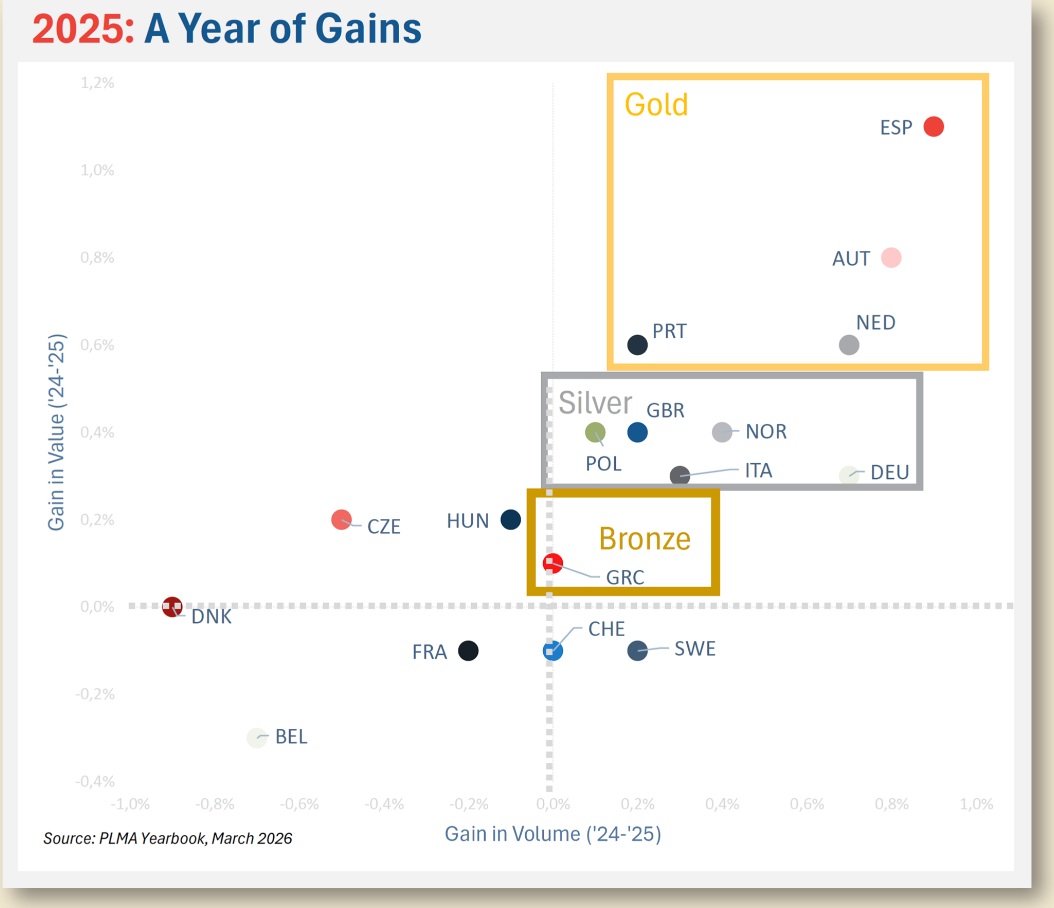
COUNTRY	VOLUME SALES UNITS PL (BILLION)	VOLUME SALES UNITS BRANDED (BILLION)	VOLUME SALES UNITS TOTAL (BILLION)
Germany	48.1	46.2	94.3
United Kingdom	37.9	35.7	73.6
France	22.3	27.0	49.3
Italy	18.2	30.9	49.1
Spain	22.8	18.4	41.2
Poland	11.7	29.2	40.9
Netherlands	10.4	9.1	19.5
Czech Republic	3.8	7.6	11.4
Austria	4.2	4.8	9.0
Belgium	4.7	3.6	8.3
Sweden	2.2	5.8	8.0
Switzerland	3.9	2.9	6.8
Hungary	3.2	3.3	6.5
Greece	1.8	4.1	5.9
Portugal	3.3	2.5	5.8
Denmark	2.2	3.4	5.6
Norway	1.4	4.1	5.5

This difference in value performance in Belgium may well be a result of the development in volume sales, especially in such specific categories. Belgium is the market where the 3.4% unit sales of branded is much larger than the 0.6% growth in unit sales achieved by private labels. In Denmark and Czechia, private label unit sales even declined in 2025 with -2.2% and -1.5% respectively, while unit sales of branded slightly increased. In Greece, volume sales of branded increased fastest with 4.4%, but in this Southern European market, which is dominated by branded, private label unit sales also increased considerable by 4.1%.

In 11 European markets, private label unit sales exceeded the volume performance of manufacturer brands in 2025. In Spain, private label already has a majority share in volume terms and in 2025 Spanish retailers strengthened this position. Unit sales of private labels in Spain increased by 3.6% while branded unit sales declined by 0.1% in 2025.

Portugal showed with 4.3% the strongest volume increase of private label sales, but here branded still managed an increase (3.2%). Also of note is Germany where unit sales of private labels grew by 1.6%, while volume sales of branded declined by 1%. Given the size of the German grocery sector this is a significant development.

Spain was Europe's private label 'gold medalist' in 2025



According to Ray Gaul, CEO of Retail Cities, Spain wins the gold medal as Europe's consumer market where private label gained most in value and in volume. "Spain clearly outshines other markets who also showed considerable private label growth, such as Austria, Portugal and The Netherlands," he said during the webinar of PLMA's Executive Education Programme. "These are the three runner-up golden markets. The silver medal goes to Poland, UK, Italy, Norway and Germany, who all gain in value, but more in volume sales."

In Gaul's matrix where he plots markets on value and volume performance, Greece wins the bronze medal. "There can't be only winners", he says. "In Belgium and France for instance, private label performed not very well. Especially in France where consumer confidence is low, last year's sales were disappointing."

PRIVATE LABEL VALUE SHARE CHANGE 2023-2025

COUNTRY	VALUE SHARE (%) 2023	VALUE SHARE (%) 2024	VALUE SHARE (%) 2025
Switzerland	52.5	52.4	52.3
Portugal	46.8	47.6	48.2
Spain	45.0	46.2	47.3
Netherlands	46.6	46.4	47.0
United Kingdom	43.9	44.0	44.4
Hungary	43.6	42.9	43.1
Germany	40.3	40.1	40.4
Belgium	40.7	40.6	40.3
Austria	37.4	37.5	38.3
France	34.9	35.2	35.1
Denmark	34.3	34.1	34.1
Italy	30.1	30.0	30.3
Czech Republic	25.5	27.8	28.0
Sweden	27.4	27.2	27.1
Poland	24.6	24.7	25.1
Greece	23.7	23.8	23.9
Norway	23.0	23.2	23.6

To assess the development of private label market shares in the 17 European countries monitored for PLMA by NielsenIQ, we take a broader perspective looking at value and volume share performance since 2023. In value terms, private label market share growth in Czechia (2.4 ppt) and Spain (2.3 ppt) clearly outperformed the rest. Austria and Norway, third and fourth growth markets, achieved much lower value share increases with respectively 0.9 ppt and 0.6 ppt.

PRIVATE LABEL VOLUME SHARE CHANGE 2023-2025

COUNTRY	VOLUME SHARE (%) 2023	VOLUME SHARE (%) 2024	VOLUME SHARE (%) 2025
Switzerland	57.5	57.3	57.3
Portugal	56.4	57.0	57.2
Belgium	57.5	57.4	56.7
Spain	52.9	54.4	55.3
Netherlands	52.6	52.8	53.5
United Kingdom	51.3	51.3	51.5
Germany	50.0	50.3	51.0
Hungary	48.7	48.8	48.7
Austria	45.6	46.0	46.8
France	44.9	45.4	45.2
Denmark	39.8	39.6	38.7
Italy	36.4	36.8	37.1
Czech Republic	30.8	33.5	33.0
Greece	30.8	30.6	30.6
Poland	28.0	28.5	28.6
Sweden	27.6	27.6	27.8
Norway	25.2	25.0	25.4

The two best performing markets show different dynamics, comparing their value share growth performance in 2024 and 2025. In Czechia, 2024 was the main year of growth with private label gaining 2.3 ppt market share in value. In 2025 the increase of market share was limited to 0.2 ppt, which may well be the result of declining volume sales last year.

In Spain, private label managed a constant, continued growth in both years, gaining 1.2 ppt in 2024 and a further 1.1 ppt in 2025. In Austria, the third value share growth market, 2024 was a year of modest 0.1 ppt growth, which accelerated the following year to 0.8 ppt growth.

Spain and Czechia also outperform the other markets in volume share growth for private label. Like in value, also in volume the picture is similar: in Czechia the volume share increased in 2024, followed by a decline in 2025. In Spain both 2024 and 2025 were periods of constant growth.

In 2024 and 2025 private label in ten European markets increased its value and volume market share, but for seven countries market share development showed mixed results. In Hungary private label value share was lower (-0.5 ppt) at a stable volume share. In Portugal the value share declined in these two years by -0.6 ppt, while the volume share increased by 0.8 ppt. The UK and Greece present the opposite picture with value share increases of 0.5 ppt (UK) and 0.2 ppt (Greece), but declining volume shares of -0.2 ppt in both markets.

In Switzerland, Belgium and Denmark, private label market shares declined both in value and volume. Switzerland is Europe's most developed private label market where market shares have plateaued well above the 50%. Slight changes aren't that remarkable.

In Belgium, as said before, brands were performing relatively well, which may account for the declining market share of private label. In Denmark, one explanation may be the market exit of Aldi in November 2023. Most of the Danish store network was divided among local retailers who also sell private label, but not to the extent of Aldi's overwhelming SKU total.

Health care a small but promising section for private label

A closer look at euro and unit sales in the different departments of grocery stores, reveals that private label shoppers in the 17 European markets are increasingly health conscious. In 2025, sales of health-care private labels by far outshined other departments, both in value (an increase in turnover of 13%) and in volume (10% more units sold). Health care is a relatively small department overall.

From a market share perspective, there is future growth potential in countries like Norway and Poland where value and volume shares are still relatively low. Notable is Italy, where the value share of health care private labels is lowest at 4.2%, while Italy's volume share ranks 12th at 21.8%. This indicates that private label in health care in Italy still consists of mostly commodity items.

Compared to health care, health and beauty is a much bigger department for private label, with overall 3.9% sales growth in value and 2.6% in volume. This is relatively a good performance with health & beauty private labels ranking 6th in value growth and 3rd in volume growth. In the fresh food departments, private label is traditionally dominant. Then it's even more remarkable that perishable food ranks 4th in value growth (5.7%) and 2nd in volume growth (2.7%).

2025 PL EURO SALES BY DEPARTMENT

DEPARTMENT	2025 PL EURO SALES (BILLION)	% CHANGE VS. YA
Alcoholic Beverages	17.5	-1.70%
Confectionary & Snacks	29.5	7.05%
Food - Ambient	84.8	2.41%
Food - Frozen	28.0	4.23%
Food - Perishables	144.5	5.67%
Health & Beauty	9.2	3.88%
Health Care	0.7	13.14%
Home Care	10.7	1.21%
Non-Alcoholic Beverages	36.2	6.88%
Paper Products	18.8	0.14%
Pet Food	7.5	-1.72%

"In fresh food private label grows fast as consumers remain increasingly health-conscious", says Gaul of Retail Cities. "An excellent example is Spar Italy who achieved in 2025 a strong sales increase with its 'Passo dopo passo' range of fresh foods."

'Passo dopo passo' is Italian for 'step by step' and this is the private label for fresh fruit and vegetables, meat and fish for which Spar Italy established certified sustainable supply chains. It is aimed at conscious shoppers who want transparency and quality assurance, especially in fresh and perishable categories.

"Private labels keep growing in fresh and healthy foods categories, while 'bad for you'-categories like packaged bread, alcoholic beverages, tobacco and sugary snacks see rapid declines," Gaul continues. Data in the PLMR on unit sales across the 17 European countries, show a decline in alcoholic beverages (-3.1%) and confectionery & snacks (-1.4%), with the latter showing a 7% increase in euro sales due to inflation and increasing prices of ingredients like cocoa.

2025 PL UNIT SALES BY DEPARTMENT

DEPARTMENT	2025 PL UNIT SALES (BILLION)	% CHANGE VS. YA
Alcoholic Beverages	5.9	-3.10%
Confectionery & Snacks	16.9	-1.36%
Food - Ambient	53.0	1.49%
Food - Frozen	10.0	1.05%
Food - Perishables	63.2	2.68%
Health & Beauty	5.4	2.61%
Health Care	0.4	9.91%
Home Care	5.6	0.93%
Non-Alcoholic Beverages	29.3	1.49%
Paper Products	7.8	-0.12%
Pet Food	4.8	-3.46%

Private label an 'essential element for any shopping basket'

According to international research from Simon Kucher, a consultancy focused on pricing and top-line growth, almost all consumers (96%) say that private label is essential in today's shopping basket. "92% of shoppers think private label of equal quality than branded and 83% consider private label equally sustainable", said Alexander Bilsing, partner at Simon Kucher, during a presentation in March 2026 at PLMA's Executive Education Programme.

"For basic items 88% buys at least regularly private labels. For higher value products this is 68% and even for exquisite products a majority of 52% of shoppers choose at least regularly a private label item."

A closer look at the departments informs that by far most shoppers (59%) have a private label focus when looking for non-food household items such as trash bags, aluminum foil or batteries. "Also, in canned/dry goods, dairy products, detergents for laundry and household cleaning and breakfast and bakery products, most shoppers primarily look at private labels", adds Markus Goller who is also a partner at Simon Kucher. "In pet food and pet accessories, baby products and alcoholic beverages, the majority of shoppers are still focused on brands."

Summary

Both in value and volume, private labels outpaced in 2025 the overall annual sales growth in the grocery sectors of 17 European countries monitored for PLMA by NielsenIQ. Turnover of private labels increased by 4.1% in 2025, while the total grocery market value in these countries grew by 3.2%.

The private label narrative in each of the 17 European grocery markets last year was unique to that country. In 12 of them private labels grew faster in 2025 than national brands, but in five national brands performed better. In some markets, private label is so well-entrenched that additional gains are hard to achieve, while in other markets where private label has more growth potential, retailers are succeeding in increasing sales and shares.

European shoppers are also increasingly aware of the real value for money private labels offer. Not only in commodity categories but more in value-added categories where healthier living and sustainability are key concerns and triggers to purchase for shoppers.

In conclusion, Europe's grocery markets are by no means homogeneous. All together they form a mosaic of national markets where private label develops in different conditions, dynamics and speed. But the direction is clear, as private labels are now firmly embedded in Europe's grocery market.

Credits

A MOSAIC OF MARKETS

PLMA's 2026 Report On The Status Of Private Label Across Europe

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