PRIVATE BRANDS IN CONVENIENCE

NACS | Research & Technology

Key Findings

Consumers are willing to purchase private-branded convenience products. This suggests that **there are opportunities to attract shoppers to a store's private-branded products.**

Convenience private-branded products **sales dollars, units sold, and all commodity volume (ACV) growth in 2022 outpaced national brands** in convenience as well as private brands in all other channels.

ACV percentage, as well as small changes in dollar sales and units sold as a percentage of total in-store category sales, suggests **that private-branded product expansion in convenience has room to grow**.

Private-branded **salty snacks had the most substantial sales dollar and units sold increase** year over year among in-store categories in 2022.

Private-branded bottled water was the top-selling subcategory in terms of sales dollars in 2022, although units sold declined.

Candy, alternative snacks, edible grocery, salty snacks, fluid milk, and other dairy products such as packaged cheese had the **largest ACV increase among private-branded categories** in convenience stores in 2022.

Proponents Moving Private Brands Forward

Historically, private-brand sales spike during challenging economic conditions and when the price of consumer goods increase. In fact, a February 2022 survey from Jeffries found that 80% of consumers were finding ways to reduce grocery spend. This indicates consumers will trade down to lower-priced items to stay within their budget.

In recent years, private brands have chipped away at the “lower price, lower quality” perception as retailers have partnered with higher quality manufacturers, elevated packaging, and improved merchandising of these products. A June 2022 study from FMI, The Food Industry Association showed that 40% of consumers have purchased more private branded products since before the pandemic. Nearly half (42%) of shoppers who are buying more private brands say they like the taste of private-branded products. Additionally, 66% of shoppers from the same study said that quality is important to them when choosing private-branded items.

40% of consumers have purchased more private branded products since before the pandemic.

Source: FMI, The Food Industry Association, June 2022.

Convenience retailers have also gravitated towards private brands due to supply chain issues. Kevin Smartt, CEO of TXB Stores and 2020-21 NACS chairman, explained that in February 2022 "out-of-stocks were averaging 12% to 13%. In a normal environment, it would be about 1.5%." While manufacturers of private-brand products also faced supply issues, some retailers have found that co-merchandising national brands with private brands helps reduce out-of-stocks.

More convenience retailers consider private-*label* products as private *brands*. As Kristine Modugno, director of category management at Nouria, shared at the NACS State of the Industry Summit in April 2022, "If you want to be a strong brand and you want your brand to become a destination then act like a national brand. Market it like national brands do. If you want your guests to believe in your brand, then show them that you do." Savvy retailers understand that leveraging private-branded products signals store quality and they embrace store-branded merchandise as an extension of the store's brand. Additionally, improved margins from private-brand products makes them an attractive option for convenience retailers.

Shopper awareness that convenience stores sell private-branded products increased 3.4 percentage points in 2022.

Shoppers are also receptive to private-branded products. According to the NIQ 2022 Brand Balancing Act Survey, 41% of global consumers are brand agnostic—further opening the door for private brands to make inroads with shoppers. The reasons that shoppers choose private-branded products vary. A McKinsey State of Grocery Consumer Survey (June 2021) indicates price was not the primary reason for buying these products. The survey also shows that over one-third of shoppers purchased private-branded products due to equal quality at a lower cost (35%).

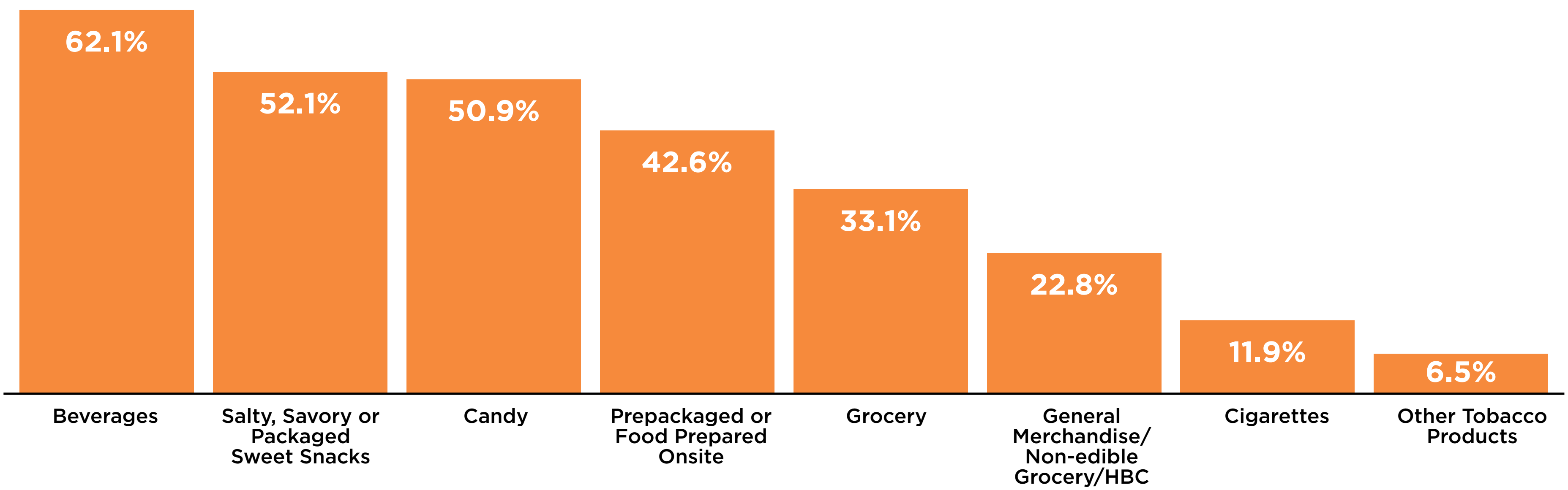
Awareness of private-branded products is increasing among convenience shoppers. Specific to the convenience channel, the 2022 NACS Convenience Voices study found that 26.1% of shoppers chose to shop at a convenience store for the selection of products offered. Of that percentage, 15.5% selected private-branded options as influential for shopping at the store. The Convenience Voices survey also showed that 82.7% of shoppers were aware that the store they shopped sold private-branded products, an increase of 3.4 percentage points relative to 2021.

Most convenience shoppers say they are likely to purchase a private-branded product (71.6%), an increase of 1.3% on a year-over-year basis. A high degree of variability exists in terms of whether shoppers consider buying store-branded products based on category. Figure 1 shows NACS Convenience Voices data that highlights the percentage of shoppers who are willing to purchase private-branded products from a convenience store.

Private-branded beverages rank highest in terms of products that convenience shoppers would be most willing to purchase. Additionally, over half of convenience shoppers express willingness to purchase salty, savory, or packaged sweet snacks or candy.

Several factors are attracting convenience retailers to offer private-branded products. The appeal of more control over the brand, the potential for higher margins, and additional supply options are moving convenience retail private brands forward. Shopper willingness to purchase private-branded products suggests that there is some affinity for private brands beyond these options being less expensive. Private brand sales in 2022 show these brands have potential staying power moving forward.

FIGURE 1: **PERCENTAGE OF CONVENIENCE SHOPPERS WILLING TO PURCHASE PRIVATE-BRANDED PRODUCTS**



Source: 2022 NACS Convenience Voices

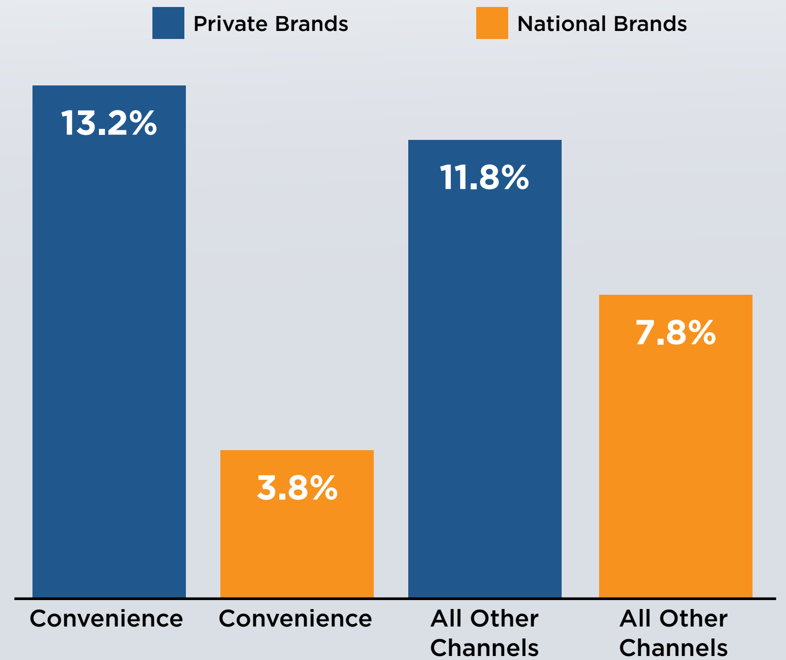
Convenience Private Brand Overall Performance

Overall, convenience private brands performed better in 2022 on a year-over-year basis than national brands within the channel, and experienced more growth than private or national brands in all other brick and mortar retail channels. This section reviews private-brand sales dollars in convenience, the change in number of units sold compared to 2021 and all commodity volume (ACV) percentages using NIQ data.

Private-branded convenience retail products totaled $4.63 billion in 2022, up from nearly $4.09 billion in 2021. In terms of total convenience in-store sales, private brands represented only 2.7% of sales in 2022, although that percentage increased by 0.2 percentage points relative to 2021.

Compared to national-branded products and private brands in all other brick and mortar retail channels, convenience private brands had positive sales. Figure 2 shows the percentage change in sales from 2021–2022 for convenience private brands relative to national brands in the channel and relative to national and private brands in all other channels.

FIGURE 2: **SALES DOLLAR CHANGE PERCENTAGE BY BRAND TYPE AND CHANNEL, 2021–2022**

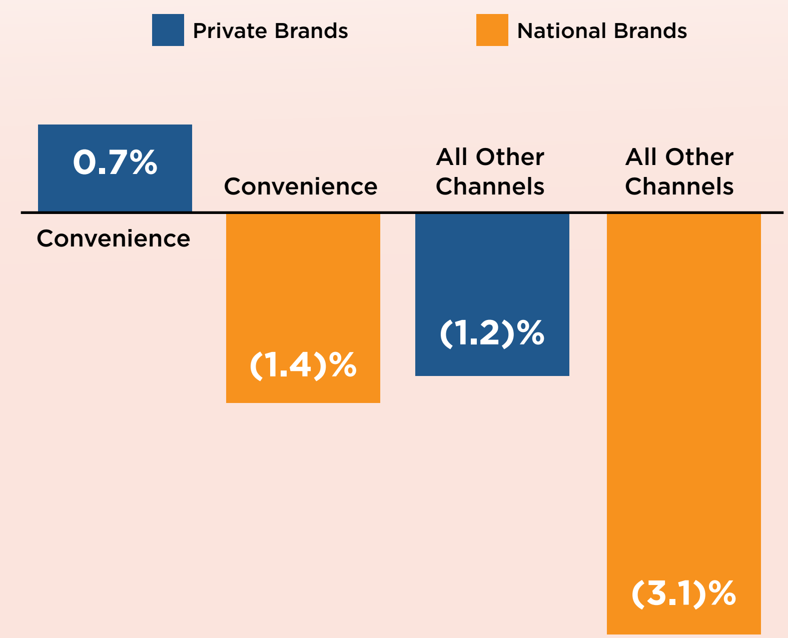


Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

While private-brand sales grew at a higher rate than national brands within the convenience channel and private brands in all other channels, the percentage of total store sales represented by private brands (2.7%) is small compared to the percentage of sales represented by private brands in all other channels (19.2%). This suggests that compared to other retail channels, convenience private-brand share has room to grow. The Consumer Price Index (CPI) of 6.5% across the 12-month period ending December 2022 suggests that a large portion of the increase in sales displayed in Figure 2 was due to inflation rather than increased unit sales.

Private-brand units sold in convenience also edged higher in 2022, although by a much smaller margin than sales dollars. In 2022, 1.83 billion private-branded units were sold in convenience, compared with 1.81 billion units in 2021. As shown in Figure 3, the small increase in units sold outpaces unit sales from national brands in convenience and national or private brands in all other channels.

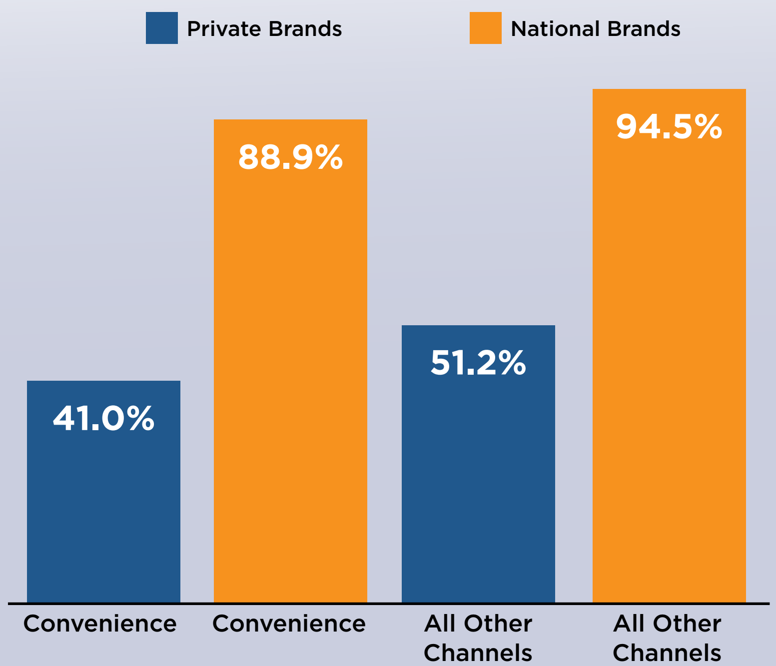
FIGURE 3: **UNITS SOLD PERCENTAGE CHANGE BY BRAND TYPE AND CHANNEL, 2021–2022**



Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

Private-branded units sold increased marginally in convenience (+0.7%), but still outpaced national brands in 2022.

FIGURE 4: **ACV PERCENTAGE BY BRAND TYPE AND CHANNEL, 2022**



Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

Private brand ACV percentage in convenience (41.0%) indicates there is further opportunity to expand.

Although sales improved for national and private brands across channels in 2022, declining unit sales aside from private brands in convenience suggests that the lift in sales dollars was driven largely by inflation rather than selling more units. Private-branded convenience products increasing in both sales and units is a positive indicator that growth for these products is more meaningful.

ACV offers an indication for whether the number of stores carrying private-branded products changed in 2022 relative to 2021. Unsurprisingly, the ACV percentage for private-branded products in convenience is much lower than national brands—41.0% for private brands compared with 88.9% for national brands. Figure 4 shows a breakdown for ACV percentage by brand type in convenience and all other channels.

Although private brands in convenience are not as prevalent as national brands, private brand ACV in convenience gained 0.36 percentage points from 2021–2022. National brand ACV in convenience declined by 0.19 percentage points in 2022 compared to 2021. Private and national brand ACV in all other retail channels was nearly unchanged year over year. While penetration of national brands across all channels is already high, supply issues limited suppliers from entering new markets or store chains the past few years.

Convenience private-label growth continued in 2022 at a higher rate than national brands in the channel and private or national brands in all other channels. Unlike national brands, convenience private brands increased in both units sold and sales dollars. Still, convenience private-brand sales and units sold as a percentage of the total channel remains far below that of private brands in all other channels.

ACV percentage also increased slightly for convenience in 2022, although it remains approximately 10% lower compared with private brand ACV in all other channels. Private brands in convenience performed well in 2022 relative to 2021, yet potential remains for private brands to gain a greater share of sales dollars, units sold, and increase ACV.

Although private-branded sales dollars increased in 2022, the limited expansion in units sold suggests inflation had the biggest impact on higher sales dollars.

Convenience Private-Label Category Performance

The following pages highlight 10 of the most prominent private-branded categories in convenience, rank-ordered by 2022 sales dollars. Each feature reviews sales dollars, units sold, and ACV percentage for the category along with an overview of the two largest subcategories within each category in terms of sales dollars.

The categories highlighted on the following pages include:

- **Packaged Beverages**
- **Other Dairy and Deli**
- **Fluid Milk Products**
- **Salty Snacks**
- **Edible Grocery**
- **Alternative Snacks**
- **Frozen Foods**
- **Candy**
- **Automotive Products**
- **Packaged Sweet Snacks**

$805,664,707
2022 SALES

+8.5%
YOY CHANGE

429,212,332
2022 UNITS SOLD

(5.8)%
YOY CHANGE

39.5%
2022 ACV

+0.1%
YOY CHANGE

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

PACKAGED BEVERAGES

Private-Branded Packaged Beverages Category Highlights

- **Sales dollars and ACV increased** for private-branded packaged beverages year over year, although units sold declined
- Private-branded packaged beverages represented **2.3% of category sales dollars**, no change year-over year
- Private-branded packaged beverages represented **2.9% of category units sold**, a 0.1 points decrease year over year
- Private-branded packaged beverages experienced a steeper units sold decline than national brands in convenience, although **private-branded sales dollars increased slightly more than national brands**

Packaged Beverages Sub-Category Highlights

BOTTLED WATER

- Private-branded bottled water represented **$332.5 million in convenience sales** in 2022, 11.8% higher compared with 2021
- **162.8 million convenience private-branded bottled water units** were sold in 2022, a decrease of 7.7% relative to 2021
- **Private-branded bottled water ACV in convenience was 35.9%** in 2022, 0.2 points higher than 2021
- Private-branded bottled water **sales dollars increased more than national brands in convenience**, although units sold declined at a higher rate

BOTTLED JUICE DRINKS

- Private-branded bottled juice drinks represented **$180.9 million in convenience sales** in 2022, 4.3% higher compared with 2021
- **97.1 million convenience private-branded bottled juice drinks units** were sold in 2022, a decline of 9.6% relative to 2021
- **Private-branded bottled juice drinks ACV in convenience was 25.0%** in 2022, 0.2 points higher than 2021
- Private-branded bottled juice drinks **sales dollar growth and units sold decline mirrored national brands** in convenience

$451,180,293
2022 SALES
+20.6%
YOY CHANGE

245,408,203
2022 UNITS SOLD
+5.7%
YOY CHANGE

39.5%
2022 ACV
+4.2%
YOY CHANGE

OTHER DAIRY AND DELI

Private-Branded Other Dairy and Deli Products Category Highlights

- **Sales dollars, units sold, and ACV increased** for private-branded other dairy and deli products year over year
- Private-branded other dairy and deli products represented **25.7% of category sales dollars**, 1.4 points higher year over year
- Private-branded other dairy and deli products represented **37.2% of category units sold**, a 1.2 points increase year over year
- Private-branded other dairy and deli products had a strong year in 2022 as **sales dollars and units sold growth outpaced national brands** in convenience and private brands in all other channels

Other Dairy and Deli Products Sub-Category Highlights

PACKAGED CHEESE

- Private-branded packaged cheese represented **$25.3 million in convenience sales** in 2022, 23.1% higher compared with 2021
- **16.7 million convenience private-branded packaged cheese units** were sold in 2022, an increase of 18.5% relative to 2021
- **Private-branded packaged cheese ACV in convenience was 18.6%** in 2022, 2.5 points higher than 2021
- Private-branded packaged cheese **sales dollars and units sold growth in 2022 outpaced national brands** in convenience

EGGS

- Private-branded eggs represented **$21.3 million in convenience sales** in 2022, 39.5% higher compared with 2021
- **5.4 million convenience private-branded eggs units** were sold in 2022, a decline of 0.5% relative to 2021
- **Private-branded eggs ACV in convenience was 11.9%** in 2022, 0.1 points higher than 2021
- Private-branded eggs **sales dollar growth and slight units sold decline mirrored national brands** in convenience

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

FLUID MILK PRODUCTS

Private-Branded Fluid Milk Products Category Highlights

- **Sales dollars and ACV increased** for private-branded fluid milk products year-over-year, **although units declined**. National brands in convenience experienced steeper declines in units sold and flat sales dollar change in 2022
- Private-branded fluid milk products represented **14.7% of category sales dollars**, 1.3 points higher year over year
- Private-branded fluid milk products represented **13.2% of category units sold**, a 0.5 points increase year over year
- Fluid milk private brand sales dollars and units sold varied substantially by product. **Whole and 2% milk sales increased while 1% and skim milk sales declined**. Overall, private-branded fluid milk private brands in all other channels experienced higher sales dollars and units sold increases.

Packaged Fluid Milk Products Sub-Category Highlights

WHOLE MILK

- Private-branded whole milk represented **$130.3 million in convenience sales** in 2022, 20.8% higher compared with 2021
- **33.3 million convenience private-branded whole milk units** were sold in 2022, an increase of 0.1% relative to 2021
- **Private-branded whole milk ACV in convenience was 17.2%** in 2022, 1.0 points higher than 2021
- **Whole milk represents the largest and fastest growing** fluid milk product private-branded subcategory in convenience, outpacing national brands in sales dollars and units sold

2% MILK

- Private-branded 2% milk represented **$50.5 million in convenience sales** in 2022, 10.4% higher compared with 2021
- **12.8 million convenience private-branded 2% milk units** were sold in 2022, a decline of 7.4% relative to 2021
- **Private-branded 2% milk ACV in convenience was 14.2%** in 2022, 1.1 points higher than 2021
- Similar to whole milk, private-branded 2% milk experienced **moderate sales growth in 2022, although units sold declined** at a higher rate

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

$226,130,237
2022 SALES

+13.9%
YOY CHANGE

65,091,864
2022 UNITS SOLD

(4.2)%
YOY CHANGE

19.1%
2022 ACV

+1.1%
YOY CHANGE

$158,412,953
2022 SALES

+20.0%
YOY CHANGE

75,693,505
2022 UNITS SOLD

+6.6%
YOY CHANGE

32.9%
2022 ACV

+1.2%
YOY CHANGE

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

SALTY SNACKS

Private-Branded Salty Snacks Category Highlights

- **Sales dollars, units sold, and ACV increased** for private-branded salty snacks year over year
- Private-branded salty snacks represented **1.9% of category sales dollars**, 0.1 points higher year over year
- Private-branded salty snacks represented **2.2% of category units sold**, 0.1 points higher year over year
- Private-branded salty snacks experienced **larger sales dollars and units sold increases** in 2022 compared with national brands in convenience

Salty Snacks Sub-Category Highlights

POTATO CHIPS

- Private-branded potato chips represented **$62.4 million in convenience sales** in 2022, 28.0% higher compared with 2021
- **32.6 million convenience private-branded potato chips units** were sold in 2022, an increase of 5.2% relative to 2021
- **Private-branded potato chips ACV in convenience was 25.0%** in 2022, 0.7 points higher than 2021
- Private-branded potato chips **sales dollars and units sold increased more in 2022 than national brands** in convenience

NUTS AND SEEDS

- Private-branded nuts and seeds represented **$30.0 million in convenience sales** in 2022, 7.0% higher compared with 2021
- **12.3 million convenience private-branded nuts and seeds units** were sold in 2022, a decrease of 0.4% relative to 2021
- **Private-branded nuts and seeds ACV in convenience was 27.7%** in 2022, 1.2 points higher than 2021
- Private-branded nuts and seeds **sales dollar growth exceeded national brands** in convenience and although private-branded units sold declined, the drop was less than that experienced by national brands

$121,754,076
2022 SALES
+8.7%
YOY CHANGE

39,301,873
2022 UNITS SOLD
(3.3)%
YOY CHANGE

40.8%
2022 ACV
+2.3%
YOY CHANGE

EDIBLE GROCERY

Private-Branded Edible Grocery Category Highlights

- **Sales dollars and ACV increased** for private-branded edible grocery year over year, **although units declined**. National brands in convenience sales dollars and units sold outpaced private brands in 2022.
- Private-branded candy represented **7.1% of category sales dollars**, 0.5 points lower year over year
- Private-branded candy represented **6.2% of category units sold**, a decline of 0.7 points year over year
- Despite private-branded convenience edible grocery **sales dollars increasing, units sold declined**. Meanwhile, private-label sales dollars and units sold increased at a higher rate in all other channels in 2022.

Private-Branded Edible Grocery Sub-Category Highlights

PACKAGED COFFEE/TEA

- Private-branded packaged coffee/tea represented **$28.4 million in convenience sales** in 2022, 5.0% higher compared with 2021
- **5.8 million convenience private-branded packaged coffee/tea** units were sold in 2022, a decline of 5.9% relative to 2021
- **Private-branded packaged coffee/tea ACV in convenience was 13.4%** in 2022, 0.2 points higher than 2021
- Private-branded packaged coffee/tea sales dollars and units **sold change in 2022 was similar to national brands** in convenience

CONDIMENTS

- Private-branded condiments represented **$13.4 million in convenience sales** in 2022, 9.5% higher compared with 2021
- **4.0 million convenience private-branded condiment units** were sold in 2022, a decline of 0.7% relative to 2021
- **Private-branded condiment ACV in convenience was 8.4%** in 2022, 0.1 points lower than 2021
- Private-branded condiments experienced some sales growth in 2022, although **units sold and ACV declines are greater than national brands** in convenience

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

ALTERNATIVE SNACKS

Private-Branded Alternative Snacks Category Highlights

- **Sales dollars, units sold, and ACV grew** year over year for private-branded alternative snacks
- Private-branded alternative snacks represented **3.3% of category sales dollars**, 0.3 points higher year over year
- Private-branded alternative snacks represented **2.9% of category units sold**, 0.1 points higher year over year
- Private-branded alternative snacks **sales dollars and units sold growth outpaced national brands** in convenience and exceeded private brand growth in all other channels

Private-Branded Alternative Snacks Sub-Category Highlights

MEAT SNACKS

- Private-branded meat snacks represented **$70.9 million in convenience sales** in 2022, 15.1% higher compared with 2021
- **17.7 million convenience private-branded meat snacks units** were sold in 2022, a gain of 1.5% relative to 2021
- **Private-branded meat snacks ACV in convenience was 22.2%** in 2022, 3.3 points higher than 2021
- Meat snacks represent **one of the most prominent subcategories for growth** among private-branded products in convenience, outgrowing national brands in 2022

GRANOLA-FRUIT SNACKS

- Private-branded granola-fruit snacks represented **$5.4 million in convenience sales** in 2022, 25.3% higher compared with 2021
- **2.9 million convenience private-branded granola-fruit snacks units were sold** in 2022, a gain of 15.1% relative to 2021
- **Private-branded granola-fruit snacks ACV in convenience was 12.3%** in 2022, 1.4 points higher than 2021
- Granola-fruit snacks represent a **small, but rapidly growing subcategory** among private-branded products in convenience

$99,328,718
2022 SALES

+12.6%
YOY CHANGE

29,610,016
2022 UNITS SOLD

+0.4%
YOY CHANGE

30.1%
2022 ACV

+1.5%
YOY CHANGE

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

$96,406,053
2022 SALES

+3.5%
YOY CHANGE

68,400,156
2022 UNITS SOLD

(14.6)%
YOY CHANGE

18.4%
2022 ACV

+0.7%
YOY CHANGE

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

FROZEN FOODS

Private-Branded Frozen Foods Category Highlights

- **Sales dollars and ACV increased** for private-branded frozen foods year over year, although units declined
- Private-branded frozen foods represented **16.4% of category sales dollars**, 2.6 points lower year over year
- Private-branded frozen foods represented **33.2% of category units sold**, a 7.1 points decrease year over year
- National brand frozen foods in convenience experienced **steeper increases in sales dollars and units sold** in 2022 than private brands

Private-Branded Frozen Foods Sub-Category Highlights

FROZEN ENTREES

- Private-branded frozen entrees represented **$33.3 million in convenience sales** in 2022, 2.4% higher compared with 2021
- **39.7 million convenience private-branded frozen entree units were sold** in 2022, a decline of 14.5% relative to 2021
- **Private-branded frozen entrees ACV in convenience was 12.8%** in 2022, 0.4 points higher than 2021
- **National brand** frozen entrees in convenience **sales dollars and units sold growth far outpaced private brands** in 2022

FROZEN PIZZA

- Private-branded frozen pizza represented **$4.0 million in convenience sales** in 2022, 49.9% higher compared with 2021
- **0.6 million convenience private-branded frozen pizza units** were sold in 2022, an increase of 30.5% relative to 2021
- **Private-branded frozen pizza ACV in convenience was 0.7%** in 2022, 0.1 points higher than 2021
- Frozen pizza represents a **small, but growing portion of private-branded frozen foods** in convenience

$96,269,966
2022 SALES

(11.5)%
YOY CHANGE

45,828,576
2022 UNITS SOLD

(21.5)%
YOY CHANGE

34.2%
2022 ACV

+2.4%
YOY CHANGE

CANDY

Private-Branded Candy Category Highlights

- Private-branded candy **sales dollars and units sold declined year over year**, although ACV increased on an annual basis
- Private-branded candy represented **1.4% of category sales dollars**, 0.4 points lower year over year
- Private-branded candy represented **1.4% of category units sold**, a decline of 0.4 points year over year
- Private-branded candy **sales dollars and units sold declined, performing worse that national brands** in convenience and private brands in all other channels

Private-Branded Candy Sub-Category Highlights

CHOCOLATE BARS/PACKS

- Private-branded chocolate bars/packs represented **$17.7 million in convenience sales** in 2022, 48.0% higher compared with 2021
- **7.6 million convenience private-branded chocolate bars/packs units** were sold in 2022, an increase of 35.2% relative to 2021
- **Private-branded chocolate bars/packs ACV in convenience was 15.0%** in 2022, 0.2 points lower than 2021
- **Chocolate bars/packs represented a bright spot in private-branded candy**, outpacing national brands in sales dollars and units sold in convenience

SEASONAL CANDY

- Private-branded seasonal candy represented **$10.1 million in convenience sales** in 2022, 1.0% lower compared with 2021
- **5.0 million convenience private-branded seasonal candy units** were sold in 2022, a decline of 13.7% relative to 2021
- **Private-branded seasonal candy ACV in convenience was 15.3%** in 2022, 1.8 points higher than 2021
- **National and private-branded seasonal candy experienced similar declines in units sold** in 2022, although national brand sales dollars increased slightly

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

AUTOMOTIVE PRODUCTS

Private-Branded Automotive Products Category Highlights

- **Sales dollars and ACV percentage grew** year over year for private-branded automotive products, **although units sold declined**
- Private-branded automotive products represented **8.3% of category sales dollars**, .6 points higher year over year
- Private-branded automotive products represented **8.3% of category units sold**, no change year over year
- Private-branded automotive products experienced **higher sales dollar growth in 2022 than national brands, but units sold declined at a similar rate**

Private-Branded Automotive Products Sub-Category Highlights

MOTOR OIL

- Private-branded motor oil represented **$37.4 million in convenience sales** in 2022, 9.0% higher compared with 2021
- **5.2 million convenience private-branded motor oil** units were sold in 2022, a decline of 16.8% relative to 2021
- **Private-branded motor oil ACV in convenience was 18.8%** in 2022, 1.8 points lower than 2021
- **National brand motor oil units sold declined less than private brands**, although national brand sales dollar growth was lower than private brands

ANTI-FREEZE/COOLANTS/ WINDOW SOLVENTS

- Private-branded anti-freeze/ coolants/window solvents represented **$21.9 million in convenience sales** in 2022, 26.4% higher compared with 2021
- **3.3 million convenience private-branded anti-freeze/coolants/ window solvents units** were sold in 2022, a gain of 4.4% relative to 2021
- **Private-branded anti-freeze/ coolants/window solvents ACV in convenience was 11.0%** in 2022, 0.6 points lower than 2021
- Private-branded anti-freeze/ coolants/window solvents represent a **growing portion of private-branded automotive products**, although units sold increased at a lower rate than national brands in 2022

$83,296,529
2022 SALES

+20.2%
YOY CHANGE

11,639,661
2022 UNITS SOLD

(5.0)%
YOY CHANGE

27.8%
2022 ACV

+0.4%
YOY CHANGE

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

$20,296,775
2022 SALES

+15.7%
YOY CHANGE

8,568,902
2022 UNITS SOLD

+4.2%
YOY CHANGE

+10.8%
2022 ACV

(0.9)%
YOY CHANGE

Source: NIQ Retail Measurement | US NACS Total Store, 52 Weeks Ending December 31, 2022

PACKAGED SWEET SNACKS

Private-Branded Packaged Sweet Snacks Category Highlights

- **Sales dollars and units sold increased** for private-branded packaged sweet snacks year over year, **although ACV declined**
- Private-branded packaged sweet snacks represented **0.6% of category sales dollars**, no change year over year
- Private-branded packaged sweet snacks represented **0.5% of category units sold**, no change year over year
- Private-branded packaged sweet snacks experienced a **similar sales dollars increase as national brands** in convenience, although private-branded units sold increased at a lower rate than national brands

Packaged Sweet Snacks Sub-Category Highlights

MUFFINS AND DONUTS

- Private-branded muffins and donuts represented **$8.3 million in convenience sales** in 2022, 21.3% higher compared with 2021
- **3.6 million convenience private-branded muffins and donuts units** were sold in 2022, an increase of 8.2% relative to 2021
- **Private-branded muffins and donuts ACV in convenience was 2.3%** in 2022, 0.1 points lower than 2021
- Private-branded muffins and donuts **sales dollars and units sold increased more in 2022 than national brands** in convenience

COOKIES

- Private-branded cookies represented **$7.3 million in convenience sales** in 2022, 7.5% higher compared with 2021
- **3.4 million convenience private-branded cookies units were sold** in 2022, an increase of 0.3% relative to 2021
- **Private-branded cookies ACV in convenience was 8.6%** in 2022, 0.6 points lower than 2021
- Private-branded cookies **sales dollar growth lags national brands** in convenience, although units sold declined at a faster rate among national brands in 2022

About this Study

This research is based on data from **NIQ** retail measurement total U.S. convenience store data comparing calendar year 2022 to 2021 private and national brand sales dollars, units sold, and ACV percentage.

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