

2012-2013  
Private Label  
SOURCING  
SURVEY

Survey Respondents

- **266** respondents from Apparel, General Merchandise and Grocery retailers
- **>75%** of respondents have annual revenues greater than \$100M
- **94** countries noted as sources of supply

Deloitte's 2012-13 Private Label Survey is one of the **largest** and **most comprehensive** Private Label sourcing studies to date.



### A Look Inside the Survey

- 44 questions on the following topics:
- Current Sourcing Landscape
  - Risks and Opportunities on the Horizon
  - Future Strategic Priorities and Responses
  - Governance and Organizational Design
  - Technology Trends
  - Tax, Trade / Customs Management

### Macro pressures are driving the strategic importance of Private Label Sourcing

**Population Growth**  
7 billion people driving raw material volatility and creating new low-cost labor markets

**Omnichannel Retailing**  
Pressure from online competition driving retailers to design and source more exclusive product

**Consumer Interconnectedness**  
A new, faster lens into retailer supply chains via social networking

Deloitte.