

Premium private labels (PPLs): From food products to concept stores

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18.1 Introduction

Private labels (PLs) or store brands are defined as brands owned, controlled, and sold exclusively by one retailer under its own brand name (Sethuraman & Cole, 1999). Their importance in the food sector has increased enormously over the past two decades, especially with Europe's shoppers (PLMA, 2016).

Traditionally, these products have been generally positioned as low price/good value for money offerings with a perceived quality differential with national brands (NBs) (Baltas, Doyle, & Dyson, 1997; De Wulf, Odekerken-Schroöder, Goedertier, & Van Ossel, 2005). But the role of PLs has evolved greatly over time (Martinelli, Belli, & Marchi, 2015): the width of PL offerings has enlarged to nonfood categories (e.g., clothes, appliances, etc.) and services (travel booking, broadband communications, etc.), while retailers have invested heavily in enhancing the control and quality level of these products. At the same time, the depth of PL offerings has increased, and retailers have introduced different lines of store brands in order to satisfy consumers' demands in different market segments (Sayman & Raju, 2004). This has brought a much more positive consumer attitude toward PLs in general, thanks to an increase in perceptions of their quality (Steenkamp, Van Heerde, & Geyskens, 2010).

On the basis of positioning differentiation, store brands can now be divided into three tiers: economy, standard, and premium PLs (PPLs) (Geyskens, Gielens, & Gijsbrechts, 2010; Lamey, Deleersnyder, Steenkamp, & Dekimpe, 2012). Under this strategy, PPLs are gaining increased interest, as the fastest-growing (IRI, 2016) and most profitable tier (Ter Braak, Geyskens, & Dekimpe, 2014). In Italy, their market share accounts for 7% of PLs, gaining the best increase year-on-year (+14% in the first nine months of 2016—Netti, 2016), and showing strong market potential. PPLs are defined as “consumer products, produced by or on behalf of retailers with high quality and priced close to NBs, that contribute to differentiating the retailer from its competitors” (Huang & Huddleston, 2009, p. 978). Examples are Tesco's “Finest” in the United Kingdom, Loblaw's “President's Choice” in Canada, and Conad's “Sapori & Dintorni (S&D)” in Italy (Lincoln & Thomassen,

2008). Actually, the growing importance that the PPL is acquiring in stores' assortments is leading some retailers to develop food concept stores branded with the PPL brand name. In so doing, PPLs are becoming an important tool that grocery retailers are now using to upgrade chain image and strengthen customer loyalty to the retailer as a brand.

Within this context, this chapter describes a specific organizational case study of PPL extension from food products to concept stores, analyzing, with a qualitative approach, the PPL strategies of the Italian-based retailer Conad Scrl, with particular reference to the launch and development of its PPL flagship stores, which are branded S&D.

The chapter proceeds as follows: first, Conad's company profile is briefly presented, followed by a discussion of the company's PPL strategies and the specific case of an S&D ice-cream concept store called "Cremerie S&D." The chapter then moves on to examine the organizational implications deriving from the case study, as well as the possible implications for consumers.

18.2 Conad Scrl: company profile

Conad Scrl, an acronym of Consorzio Nazionale Dettaglianti, is an Italian-based retailer founded in 1962 as a retail buying group. Retail buying groups are quite important in the Italian retailing sector. During the 1970s, a defensive reaction of small retail entrepreneurs against multiples gave birth to an increasing number of retail buying groups and voluntary chains. This trend was also supported by a law on the retailing sector (Law 426/71) that created an entry barrier for multiples. The result was a slowdown in retail evolution that explains the present specificities of the Italian retailing system, which is still fragmented and less developed compared to other EU countries such as France, the United Kingdom, and Germany.

Conad is the biggest Italian retail buying group with a corporate structure organized as a consortium of grocery store owners and arranged on the following three levels (Conad, 2017):

1. At the baseline, 2713 independent retailers; owners of the stores are associated with local cooperatives.
2. At the intermediate level, seven cooperatives operating on a regional/multiregional basis. Cooperatives maintain self-determination in logistics decisions, partly in buying and contract renewals for local products, in assigning category's roles, and in defining promotions.
3. At the top, there is the national buying center, which coordinates the system and to which the cooperatives delegate negotiation and buying terms with the main brand suppliers, as well as some marketing policies (communication, PLs, information systems, etc.).

This results in a complex network model, which is not easy to manage in an efficient way, but with the advantage of being locally rooted and very close to consumers. Conad's corporate values are based on social responsibility, listening, being professional and coherent, respect, participation, affinity, and orientation to change

and innovation. The aim to be close to customers is well supported by the advertising campaign of the retailer, which is based on the claim “*People beyond things*” (Conad, 2017). This aims to convey Conad’s core values, which are based on the daily work of the associated store owners who are physically present inside their stores and personally know and interact with each customer.

The store structure responds to this positioning. There were 3169 grocery stores in 2016 in various formats (Conad, 2017): convenience stores—Margherita (493 stores; 140 square meters and 1500 SKUs on average) and Conad City (970 stores; 400 square meters and 4500–5500 SKUs on average); supermarkets—Conad (1077 stores; 800 square meters and 7000–8500 SKUs on average) and S&D (17 stores; 500 square meters and 3500–4000 SKUs on average); superstores—Conad Superstore (205 stores; 1800 square meters and 10,500–12,000 SKUs on average); hypermarkets—Conad Ipermercato (25 stores; 4800 square meters and 16,000–19,000 SKUs on average); discounters—Todis (215 stores; 530 square meters and 5000–7000 SKUs on average); and other stores (169). Conad is strongly focused on small-medium sized stores, confirming itself as a market leader in the supermarket format in 2016, with a market share of 20.7%.

In the last decade, Conad also started to offer stores focused on specific product categories/targets in order to better respond to market trends and consumer needs. These include: pharmacies (108), petrol stations (36), pet stores (14), and opticians (19). All are branded with the retailer’s brand name, and are located in malls where a Conad hypermarket/superstore is also present. In 2016, Conad reached annual sales of €12.4 bn, reporting an increase of 1.5% on the previous year, and a market share equal to 11.9% (Conad, 2017). It is the second largest grocery retailer operating in Italy.

18.3 Conad’s PPL strategy: Sapori & Dintorni

The case study analysis was performed by examining company reports and documents and conducting semistructured interviews (in April 2017) with Conad’s brand manager and other important key informants involved in the PPL concept store planning, design, launch, and management—namely, Conad’s Store Marketing Manager and the Store Proximity Development and Innovation Manager—in order to understand goals and objectives, with particular reference to the role of PPL food products.

18.3.1 Conad’s PL architecture

Different PL types play different roles in Conad’s assortment strategy (Fig. 18.1).

On one hand, to support everyday low price (EDLP) positioning, the standard PL (Conad red logo) is positioned as a category leader in quality with a differential price which is 25%–30% lower than the NB category leader. On the other hand, the company’s ability to extend its control on the supply chain, to offer highly

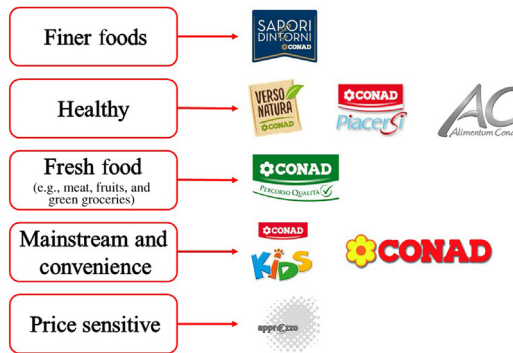


Figure 18.1 Conad's PL architecture.

selected quality and local products (S&D; Percorso Qualità), and to interpret successfully healthy (Piacersi), organic (Verso Natura), and “free from” trends, has rewarded Conad with a leading position amongst grocery retailers operating in Italy. Nowadays Conad's PLs account for €3 bn sales in 2016, with a market share of 29%: around one PL product out of three sold in the Italian grocery retailing system is branded Conad. In 2016, the Italian PL market accounted for €10 bn sales, with a market share of 19.2%; an increase compared to the 18.8% of the previous year (IRI, 2016). Within this context, Conad's PLs are particularly successful, as they performed 8.2% higher than the Italian PL average market share. Furthermore, in some product categories, Conad proposes an EDLP strategy named “bassi & fissi” (“low and fixed”), with the aim to communicate to its customers that they can find a valuable shopping option but at a low and fixed price on everyday shopping items.

18.3.2 *Sapori & Dintorni*

In 2001, the company launched its PPL, S&D, which in Italian literally means “flavors & surroundings,” with a brand image inspired by some well-established values traditionally connected with the retailer's brand. From a strategic point of view, the company extended the traditional assortment in specific product categories (typically based on NBs with a branded alternative offering) with high-quality standards and good value for money.

In the launch stage, S&D appeared with attractive packaging, with colors supporting a “luxury” image (dark blue with gold writing). At this point, S&D covered 80 SKUs with a product strategy that was pretty much focused on fresh food and on a restricted number of grocery items such as cheeses, preserves, pasta, honey, salami, oils, and bread substitutes. These were selected among a basket of nearby 3000 products classified at that time as typical Italian food by the Italian Ministry of Agricultural Food and Forestry Policies (MIPAAF). However, in the early years (2001–04), S&D products experienced low rates of penetration in the PL market. The retailer identified problems both at the product range level, with a limited and

not always coherent number of assorted products, and at the communication level, since S&D products were not sufficiently supported by advertising and were not adequately promoted in-store and on flyers. Therefore, in 2005, Conad took the decision to undertake a “deep restructuring” of the PPL strategy, by revising the product range and the communication approach. To better accomplish the original brand mission, “to offer the flavors (Sapori) of the surroundings (Dintorni),” Conad revised its PPL strategy in order to favor greater involvement in assortment decisions from the local cooperatives and associated retailers.

The S&D assortment became increasingly and substantially based on products with quality logos, namely products with protected designation of origin (PDO), protected geographical indication (PGI), and traditional specialty guaranteed (TSG), as well as food products related to the various regional cuisines of Italy. The [European Commission \(2017\)](#) defines these quality logos as brands that “attest to the specific traditions and qualities of food, agricultural products and wines, aromatized wines and spirit drinks, produced in the European Union [...]. Through the logos, consumers can easily recognize these traditional quality products and can rely on their authenticity in terms of regional origin or traditional production.”

To date, S&D counts 250 SKUs, of which approximately 60% are PDO and PGI products. These quality logos generate almost 80% of the overall PPL turnover of €300 million. Conad offers its PPLs in some strategic product categories, and sometimes, if necessary, the same product category (for instance extra-virgin olive oils) can include two or more premium branded alternatives (e.g., Riviera Ligure DOP, Terra Di Bari DOP, Aprutino Pescarese DOP, etc.). The premium assortment strategy is not category driven, but it is based on product feasibility and on consumer demand. “*We consider the potential that each product that we want to include in the PPL assortment can have and its coherence with the S&D brand*” (Conad’s Brand Manager). Italy is the EU country with the highest number of food quality logos (293) ([MIPAAF, 2017](#))—and more than 4900 Italian agrofood traditional specialties are listed by MIPAAF ([MIPAAF, 2016](#)). Ninety-two percent of the 149 S&D suppliers are SMEs representing Italian food excellence.

The new brand strategy was successful and paved the way to double-digit sales growth for S&D products since the mid-2000s. In 2016, PPL made an increase of 10.1% compared to the previous year. The ability to reference and resell Italian regional food excellence has become the core competence for S&D’s strategy. “*We exchange food culture, as our associate entrepreneurs are widespread all over Italy and know perfectly the best local products*” (Conad’s Brand Manager). In fact, a distinctive trait of Conad as a retail service provider, which is strongly recognized by Italian consumers, relies on its ability to select high-quality fresh food such as delicatessen goods (e.g., salami and cheese) and match this with the specific needs of local markets. The S&D PPL enhances and builds on this strength.

Two main pillars have, thus, supported the growing penetration in the market of the S&D brand:

- *The retailer's expertise.* The organizational structure of the retail company, based on local cooperatives and store owners with a strong knowledge of the local supply market and a strong relationship with their customers, facilitated the selection of food products in the PPL assortment, as well as scouting the best PPL suppliers. In this way, Conad's pyramid structure guarantees professionalism in retailing and a strong ability to select local products that enrich the overall retailing offer.
- *The offer of a PPL strongly connected with the company's values.* In fact, the retailer has been able to establish a competitive advantage offering a PPL that reflects the origins and the historical identity of the company as a player "embedded in the territory." Therefore, the coherence between the company and the PPL values led consumers to a quick and strong acceptance of the premium offer proposed by Conad's S&D products. Conad provides products of high emotional value and a strong connection to the local territory. Correspondingly, consumers have consolidated over the time their willingness to pay a premium price for products with high-quality standards and produced by local manufacturers, which preserve the geographical origins of food production and culture and the heritage of local food recipes.

The contribution of the PPL brand to the overall strategy of the retailer has, therefore, significantly evolved over the time: from a traditional role of tactical support to category profitability, to a more strategic role as an autonomous value driver for the retailer.

18.3.3 From food products to concept stores: the Sapori & Dintorni store

The first two stores branded S&D were launched in June 2010 in Florence, on the basis of a corporate project aimed at:

1. Upgrading from a qualitative point of view the presence of the retailer in town centers: *"the proximity of our store is a must for us as we are the national market leader in the supermarket format. Thus, we started to think that we had to propose this specific quality format to our customers inside the town centers"* (Store Marketing Manager);
2. Addressing consumers' increasing demands for local products as synonymous with quality, and enhancing the presence of PDO and PGI products using a successful brand such as S&D.

Based on these considerations, Conad chose two strategic locations in Florence aimed at offering a concept store designed to enhance the idea of "quality" in assortment, consumption, and the consumer's shopping experience (Fig. 18.2).

At the beginning, we found two locations that suit the development of a high-standard, quality supermarket, able to provide a great shopping experience and where there was an area in which customers can 'eat in' the products bought. Thus, we needed to find a brand name capable of characterizing a store with these features. We took a brand well known by our consumers, Sapori & Dintorni, traditionally associated with product quality, and we made a store brand out of it. The reputation of the Sapori & Dintorni brand is very high among our consumers; accordingly our flagship S&D stores reflect the high quality standards of our PPL (Store Marketing Manager).



Figure 18.2 Florence's Sabori & Dintorni store.

Positioned in city centers with high footfall, and in the train stations of the main tourist cities such as Florence, Naples, or Rome; the retailer's flagship stores aim to bond the Italian passion for food with culture and art, offering a unique food shopping experience to Conad's customers and tourists. In so doing, Conad wanted to enhance its local roots and involvement and to grow the culture of quality, authenticity, preservation, and respect for traditional food and Italian cuisine, strengthening Conad's policies in supporting local products and suppliers. The identity of the S&D brand has been strongly built on its recognized ability to select quality products and to give cognitive support to consumers by keeping them constantly informed of products and the territories from which these originate. When extending the PPL from a product category to a new store format, the positive effect on consumers of the brand's ability to tell the story of a place by telling the stories of its products is amplified, since the physical attributes of the store (e.g., location, layout, etc.), in contrast to a traditional supermarket or hypermarket format, can be more freely used to create a vivid brand experience (see Figs. 18.3 and 18.4).

To date, Conad has opened 17 S&D stores, with a new store due to open this year. S&D offers a narrower assortment (3500–4000 SKUs) compared to that present in the average Conad supermarket (6000 SKUs). These S&D stores are greatly focused on Italian food excellence, especially fresh food (60%, compared to the average of 50% in other Conad stores), and with a particular importance given to PLs (7%–8% more than those present in a standard Conad supermarket) and local and regional products. Promotion intensity is lower but in-store communication is still the key: the concept must transfer the importance of the origins of food, stressing its authenticity in accordance with the Italian tradition. The concept should communicate an emotional journey of Italian flavors and culinary traditions to novices as well as food lovers (see Table 18.1).



Figure 18.3 The Saponi & Dintorni store in Milan.



Figure 18.4 The Saponi & Dintorni store in Naples.

Albeit with a consistent look and layout, every store has its own characteristics and architectural peculiarities that reflect the city and the place in where it is located, with the logic being to enhance the distinctiveness that each territory expresses. Some store owners have also started to develop a restaurant offer when space allows: *“The more space you have, the higher the possibility to invite important chefs and to arrange events with dedicated menus [. . .] Our Saponi & Dintorni store in Naples has become the city reference point for aperitifs [. . .] it is a “must” now among Naples’s upper class people”* (Store Marketing Manager).

Table 18.1 Sapori & Dintorni store concept guidelines

Assortment	<ul style="list-style-type: none"> • 4500 SKUs: 3000 groceries; 1100 fresh food; 250 frozen food; and 150 nonfood • Focus on food quality, local and regional products, and store experience • Strong presence of Premium and Standard PL products: around 300 SKUs of PPL food products Sapori & Dintorni; 1300 SKUs of PL Conad
Layout	<ul style="list-style-type: none"> • Warm and traditional atmosphere; display made with wood or cardboard; special end caps and displays; store areas specifically dedicated to: PPL products; local products, wine, and food tasting
In-store communication	<ul style="list-style-type: none"> • Videos on the counters narrating food and its origins • High presence of the logos of the brand • End caps panels focusing on local foods, food authenticity, food origin, and Italian traditions
Customer service	<ul style="list-style-type: none"> • High level: no queues; no stock-outs; and clean and neat stores • Expert personnel in fresh food, able to give suggestions on how to cook and eat it • Long opening hours • Home delivery • Food product tasting

18.4 Cremerie Sapori & Dintorni

Subsequently, Conad launched “Cremerie S&D,” an ice-cream shop branded with Conad’s PPL. The first one opened in Rimini in 2012 on the basis of two considerations:

1. The possibility of utilizing free space in the mall gallery in which one Conad hypermarket was already present;
2. The tradition and reputation of the local town for ice-cream production: “*the ice-cream raw-material producers are all based in the Romagna area; the most important exhibition for ice-cream (SIGEL) takes place in Rimini; Italy is the ice-cream world leader*” (Store Proximity Development and Innovation Manager).

Currently, Conad has 12 Cremerie outlets, most of them located inside a mall gallery outside the hypermarket, in order to create synergy with the store and to deseasonalize ice-cream consumption. The concept—25–50 square meters of retail space offering 12–24 ice-cream flavors—was developed through an external agency with the purpose of evoking an image of tradition, as shown in [Fig. 18.5](#).

Using S&D in the naming of these stores works well because ice-cream features are pretty much consistent with the S&D brand: local origins and Italian tradition (the pistachio flavor is made with Bronte’s pistachios, a PDO product typical of the Sicilian village of Bronte, the lemon flavor with Sicilian lemons, etc.). At the beginning, Conad carried out the overall production process internally. The local



Figure 18.5 Cremerie Saponi & Dintorni.

supplier helped a lot in the launch phase as he coached one store employee on making the ice-creams and supported the local cooperative in devising the ice-cream recipes; *“today, this is no longer necessary, but it was necessary at the beginning in order to create a standard for all the other stores”* (Store Proximity Development and Innovation Manager). In fact, due to the high manufacturing costs, space and equipment requirements, and possible problems of quality standardization, the ice-cream bases are now sourced from a local manufacturer and whipped in-store. The concept is performing very well, assuring good profitability.

18.4.1 Implications for organizational strategy

Analysis of the S&D case offers some insightful implications for retailers engaged in extracting more value from their PPL strategy. First, we observe that the S&D brand extension strategy can be represented as an evolutionary process whose driving forces reside mainly in two aspects:

1. The creation of specific brand values that could be recognized by customers as distinctly different from those typically associated with the economy or standard PLs;
2. The retailer’s ability to establish strong relationships with consumers by leveraging on the distinctive traits of the PPL.

In the early years after the S&D launch, Conad worked hard to identify the core values of the new PPL brand and to find better fine-tuning with the changing needs of consumers and with their growing interest in food excellence, regional cuisine, and ancestral ties with territories. Once the relationship with consumers had consolidated and reached a critical mass in sales volume and number of

SKUs, the brand extension strategy was progressively implemented over time: from an initial product-based extension to a new and malleable store format (S&D stores), then the creation of a new ice-cream concept (Cremerie S&D), and finally moving toward an institutional high-end brand used for all the events in the Conad world. Thus, the S&D experience can suggest to retail managers that a brand extension strategy cannot only address finding a new avenue for sales growth and higher profitability, but can also be used to strengthen the positioning of the overall identity of the retailer.

Second, implementation of the S&D strategy has also highlighted some specific, highly valuable marketing learning processes concerning consumer behavior and changing attitudes toward a PPL. Knowledge has been acquired about how, in the late 2000s, supermarket consumers behaved in relation to S&D products and other PL items and has been transferred and applied by the retailer to the formal design phase of the S&D stores in 2010. Then, learnings from the first S&D stores have allowed Conad to gain a deeper knowledge of how consumers behave when S&D products are offered in a store environment specifically designed to stimulate more involving and experiential approaches to the brand, and more complex relationships between consumers and brand associations. Recently, starting from what was learned in the S&D stores, and capitalizing on the understanding of which store characteristics more directly explain positive consumer experiences, Conad has identified some new guidelines for designing layouts and assortments, and for the use of materials that the retailer is gradually transferring back to the traditional formats:

Today, the Saponi & Dintorni concept is used in Conad at 360°. Also in our supermarkets, it is no more simply a product positioned on a shelf; it is rather a concept that drives us in formulating new marketing strategies, in designing in-store events and promotional campaigns, in innovating the visual merchandising. By exploiting brand values strictly associated with the PPL brand, we are spreading marketing innovation in our traditional formats (Store Marketing Manager).

Thus, lessons from the S&D case study suggest to retail managers that PPL formats can be conceived as learning platforms for more intensive and bidirectional cognitive relationships with customers and from which innovative practices for the overall format portfolio can be implemented. For example: the visual merchandising and layouts used in the S&D supermarkets are now adapted in Conad supermarkets and Conad City stores in order to create special areas devoted to the Conad PPL.

In general, the Conad case study can help retailers to understand that the PPL's brand extension strategy cannot be simply formulated and implemented in a unidirectional mode: from core business (e.g., supermarkets) to new businesses (new formats and new concepts) and to new businesses again, in line with the traditional value-capturing scheme of a diversification process. PPL's brand extension is a more complex strategy in which learning and innovation are also relevant outcomes for retailers, and are not secondary to economic and financial results.

18.5 Implications for consumers

In the development of the PPL S&D, Conad showed a great ability to interpret the search for tradition to modern consumers, highlighting the reciprocity between the growth of the retailer and the growth of the PPL brand itself. In fact, it was able, on the one hand, to enhance its company's brand values in order to transmit the image of a retailer strongly connected with its territory. On the other hand, it was successful in interpreting the spread of new consumption trends by offering to consumers traditional and local PDO and PGI products. Acquiring the right expertise needed to offer a sufficiently extensive PPL assortment, Conad developed a concept store where the company's values, its constant connection with the territory, and the search for quality products were prioritized. Thus, the S&D concept stores and, subsequently, the Cremerie ice-cream shops have been able to offer to Conad's customers a unique shopping experience. In fact, as usually happens in NB flagship stores, the consumer experience with a brand is amplified in a dedicated store (Jones, Comfort, Clarke-Hill, & Hillier, 2010).

Another important strength of S&D is in its marketing strategy. As stated by a Conad's manager:

we develop promotional and communicational campaigns, with specific flyers aimed on the one hand to promote S&D products, and on the other hand to let consumers know the origin of products and the history and traditions connected with those territories and their products. Moreover, through visual merchandising strategies performed in-store, we emphasize not only the brand and the product, but also the values connected with the brand (Store Marketing Manager).

Once again, Conad's strategies are designed to strengthen its bonds with its members, with the territory in which its stores are present, with the territory from which its top products originate, and consequently with its customers.

Finally, the case of the S&D flagship stores confirms that the great experience that consumers feel during their grocery shopping reinforces the strength of the connection between consumers and the retailer, having a robust and durable effect on brand attachment. In fact, the main scope of this new format store is to enhance store image and brand attachment by increasing the "in-store brand experiences by appealing to consumers' emotions, senses, behavior and cognition" (Dolbec & Chebat, 2013, p. 460). As confirmed by both the rise of Conad's national market share and by the average PPL market share, the brand extension strategy has consolidated consumers' attachment to the S&D brand.

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