MANUFACTURER AND RETAILER BRANDS IN FOOD RETAIL ASSORTMENTS

Notes from a shopping trip across Europe

Lars Esbjerg
Klaus G. Grunert
Tino Bech-Larsen
Hans Jørn Juhl
Karen Brunsø

The Aarhus School of Business

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INTRODUCTION

Food retailers present consumers with a complex market offering. They offer consumers an assortment of products sourced from numerous suppliers, along with various services within a retailer-controlled environment (Burt & Sparks 2002). Food retailers aim to offer an assortment of products and perform a variety of activities and services, which provide added value in the eyes of consumers (Burt 2000). In this connection, branding is becoming increasingly important, as food retailers develop their own brands within and across product categories. Many retailers are attempting to cultivate an overall brand identity in order to protect and identify their market offering (Burt & Sparks 2002).

The assortment of products food retailers offer typically includes manufacturer brands, retailer brands and generic or unbranded products. In recent years, increasing competition in food retailing has made food retailers focus on whether they offer the "right" assortment to consumers. Under headings such as efficient consumer response (ECR) and category management (CM), retailers have been readjusting their assortments, delisting many brands that were deemed to be under-performing and including retailer branded products in an attempt to differentiate themselves by offering goods only available in their stores.

Despite the importance of branding to retailers, the branding literature has focused on how manufacturers develop and maintain strong brands. Relatively little work has been done in the area of retail brands and even less about the interaction between retailer brands and manufacturer brands. In contrast, this paper develops a concept of *retailer brand architecture*, which captures that retailers typically offer an assortment of manufacturer brands, retailer brands and generic products. In doing so we adapt the concept of brand architecture to a retail context. The concept of 'brand architecture', as originally developed by (Aaker & Joachimsthaler 2002), describes how the different brands used to market a range of products from the same manufacturer are related. The concept of brand architecture is based on the assumption that brands are not evaluated in isolation, but are placed in and evaluated within a broader context. This assumption is also important in a retail context. Consumers do not look at an isolated product or brand on the shelf. Their evaluation of the individual brand depends on the context; for instance, what other products are offered in the product category and in the retail outlet, previous experiences with the product or other products from the same manufacturer, as well as previous experiences with the retailer in question.

In this paper, we take the concept of brand architecture and apply it to food retailers, conceptualising the brand architectures of food retailers as the portfolio of brands (generic, retailer and manufacturer brands), which are included in the assortment of a retail concept (ie, a retail chain). In addition to developing a concept of 'retailer brand architecture', we use this concept to investigate the brand architecture of a number of European food retailers in order to determine similarities and differences in brand architecture strategies.

The paper is structured as follows: firstly, the concept of brand architecture is presented. Secondly, the concept of brand architecture is applied to a retail setting and a number of other concepts important for understanding the brand architecture strategies of food retailers are introduced and discussed. Thirdly, the methodology used to investigate the brand architectures of European food retailers is discussed. Then, the findings from a shopping trip across Europe are presented. Finally, a discussion of the findings is provided and it is briefly considered how the findings of this study were used as input for a study of consumer perceptions of the brand architectures of food retailers. This subsequent study investigated whether consumers notice differences between the brand architectures of food retailers and how these are evaluated.

THE CONCEPT OF BRAND ARCHITECTURE

Aaker and Joachimsthaler (2002) define brand architecture as *"an organising structure of the brand portfolio that specifies the brand roles and the relationships among brands [...] and different product-market brand contexts"* (p. 134). They conceptualise brand architecture as having five dimensions: (1) the *brand portfolio*, which includes all brands and sub-brands attached to market offerings; (2) *portfolio roles* (strategic, linchpin, silver bullet and cash-cow), which specify the present and (expected) future contribution of brands to sales and profits; (3) *product-market context roles*, which specify the roles brands play in a particular product-market context; (4) *portfolio structure*, which specifies how the brands in the company's brand portfolio are related; and (5) *portfolio graphics*, which refers to the pattern of visual representations such as logos and symbols used across brands and contexts. From this description it is clear that Aaker and Joachimsthaler (2002) consider brand architecture from an internal management perspective.

In discussing the relations between brands, Aaker and Joachimsthaler (2000) introduce what they consider a *"powerful brand architecture tool"* (p. 8): the brand relationship spectrum. They identify four basic strategies. At one end of the brand relationship spectrum is the *house-of-brands* strategy, which involves a set of independent, stand-alone brands. At the opposite end is the *branded-house* strategy, where a master brand has the primary driver role across multiple offerings. In between these two endpoints, are the *endorsed brand* strategy, which is independent brands endorsed by another (typically organisational) brand, and the *subbrands* strategy, which is brands connected to a master brand and which augment or modify the associations of the master brand. All four strategies can be observed in food retailing.

Different meanings of brand architecture

Other writers than Aaker and Joachimsthaler (2002) have used the term brand architecture, although they tend to attribute slightly different meanings to it. Kapferer (1997) uses the term brand architecture without providing a definition of it, whereas Petromilli, Morrison and Million (2002) define brand architecture as *"the way in which companies organise, manage and go to market with their brands"* (p. 23). These writers consider brand architecture the external face of business strategy and argue that it must be aligned with and support the goals and objectives of the business. The management perspective is more explicit in this understanding than in Aaker and Joachimsthaler (2002).

Douglas, Craig and Nijssen (2001) provide a somewhat different definition of brand architecture, as they consider brand architecture to be both a process and a structure:

> Brand architecture […] refers to a formal process and outcome by which management rationalises the firm's brands and makes explicit how brand names at each level in the organisation will be applied. Brand architecture also indicates how new brands, whether acquired or developed internally, will be treated (p. 99).

Douglas, et al. (2001) distinguish between three different types of brand architecture: corporate dominant, mixed brands and brand dominant. This typology is similar to the brand-relationship spectrum of Aaker and Joachimsthaler (2000). Douglas, et al. (2001) distinguish brand architecture from what they term brand structure.

> Brand structure is used to refer to the firm's current set of brands across countries, businesses and product-markets. At any given point, brand structure is in large measure a legacy of past management decisions as well as the competitive realities the brand faces in the marketplace (p. 99).

This definition of brand structure corresponds more to the notions of brand architecture proposed by Aaker and Joachimsthaler (2002).

Three major factors are argued by Douglas, et al. (2001) to influence international brand architecture, but these should be more or less the same for national brand architecture: (1) firm-based characteristics such as administrative heritage, importance of corporate identity and product diversity; (2) product-market factors such as target market and competitive market structure and; (3) underlying market dynamics.

An internal management perspective is common to the different conceptualisations of brand architecture. The concept of brand architecture is used as a descriptive tool to characterise how a manufacturer's individual brands are related to each other and how these inter-relationships (are supposed to) influence consumers' evaluations of individual brands and of portfolios of brands. However, for our purposes it is more interesting how outsiders perceive the brand architectures of food retailers.

TOWARDS A CONCEPT OF RETAILER BRAND ARCHITECTURE

Food retailer assortments are combinations of manufacturer brands, retail brands and unbranded or generic products. In addition to physical products, retailers offer a variety of market and non-market services (ie, services that are offered to the market at explicit prices and services that are complimentary, respectively). This combination of manufacturer brands, retail brands and unbranded or generic products constitutes the brand architecture of food retailers.

Entrepreneurial food retailers are assumed to continuously match their assortments with perceived consumer demand for products and distribution services (Cadeaux 1997). Retailers offer assortments, which include products that are complementary in consumption, substitutive in consumption and independent in terms of consumption because consumers in their desire for one-stop-shopping purchase a range of products, which are complementary, substitutive and independent in consumption (Betancourt & Gautschi 1990).

When building their assortments, retailers are assumed to typically try to combine two conflicting demands. On the one hand, retailers try to differentiate themselves from competitors through the assortments they carry, for example by offering goods or services only available in their stores. At the same time, retailers to a large extent duplicate the assortments offered by competitors, as consumers expect retailers of a certain type to carry certain products in order to satisfy their demand for one-stop shopping (Cadeaux 1997). This is for instance often the case with the heavily promoted product lines of some manufacturers (Mittelstaedt & Stassen 1990) or products with a high degree of brand loyalty.

Constructing retailer brand architectures

How retailers create an assortment of products and services and determine the respective prominence given to manufacturer brands, retailer brands and unbranded/generic products, is assumed to depend on the strategies and policies of the retailer. Strategies come into being through the interplay of managers' and stakeholders' interpretations of the identity of the retailer and how it wants to present itself to and be perceived by internal and external stakeholders (eg, consumers, employees, suppliers, competitors or regulatory agents) (Esbjerg 2002b; Grunert, Skytte, Esbjerg, Poulsen & Hviid 2002). Interpretations are inter-subjectively constructed and as such enable organisational actors to generate some continuity of understanding in changing interactive circumstances (Ranson, Hinings & Greenwood 1980).

Strategies are constrained by the organisational structure of the retailer and by interpretations of the retailer's technical capabilities (Esbjerg 2004). In the strategy areas that are considered important for the future, policies are formulated (Esbjerg 2002b; Grunert, et al. 2002). Here a policy is understood as *"an important decision resulting from group processes within the organisation"* (Hall 1984, p. 909). Policies provide guidelines for action by describing what actions are considered legitimate and rational by the organisation (Esbjerg 2004).

Thus, the assortment of goods and services carried by a food retailer depends on the identity, desired image, strategies, policies, structure and technologies of the retailer. Retailers have different identities and develop different strategies and therefore build different assortments of goods and services. For instance, food discounters focus on offering a limited assortment of products at low prices in no-frills outlets, whereas other retailers operating supermarkets offer a wider range of products and product categories and focus more on the services offered to consumers and on the quality of the products they sell (Esbjerg 2004).

Product categories differ in importance for the retailer, for example, in relation to how it communicates with consumers through circulars and advertising (Esbjerg 2002a; Rindova & Fombrun 1999). Therefore, the brand architecture may differ between product categories; and retailers offer different combinations of manufacturer brands, retailer brands and generic/unbranded products in various product categories.

Manufacturer brands, retailer brands and generic products

Manufacturer brands can play different roles for the brand architecture of retailers. When consumers have strong preferences for and are loyal to certain manufacturer brands, it is important for retailers to include these brands in their assortments in order to meet consumer expectations. If some manufacturer brands have high brand equity, retailers can include them in their assortments because they hope that this may have a positive influence on consumer perceptions of the retailer. Manufacturer brands can also be used to build traffic, for example, by luring consumers into stores by having certain brands on offer. Furthermore, offering one or more manufacturer brands in a certain product category can help meet consumer expectations about being able to choose between a variety of brands when making a purchase decision.

Whereas manufacturer brands are included to an extent to maintain competitive parity, retailer brands can help differentiate the retailer from its competitors because retailer brands are only available in the stores of one particular retailer, while manufacturer brands are typically available in several competing retail chains. Retailer brands can be used to create brand equity for the retailer or retailers can transfer brand equity from their store to the brands they create and sell (Davies 1998). Retail brands are not simply retail brands, as the composition of retail brand ranges, how they are positioned in the market place, their origin and development may differ markedly (Burt 2000). Over the past 25 years, retail brand ranges have evolved from being mainly generic private labels sold primarily on price to also include added value products with quality and prices equivalent to or higher than the leading manufacturer brands (Laaksonen 1994). Most recently, the retailer as such has become the brand for some leading retailers such as Tesco or Sainsbury's (Burt & Sparks 2002).

In the literature, a distinction has been drawn between five generations of retailer brands (Burt & Sparks 2002; Laaksonen 1994). The first generation of retailer brands are basic and functional products sold without a name. These products are of a lower quality and inferior image compared to manufacturer brands and were intended to provide a choice in pricing. The second generation are so-called own label products sold under a retailer-owned brand. These are low price copies of medium quality but still perceived as inferior to leading manufacturer brands. The third generation are supported own brands, me-too copies with quality and image comparable to brand leaders. The fourth generation of retailer brands are extended own brands, the quality and image of which are equal to or better than the brand leader. Often, these products are innovative and different from the products offered by the brand leader. Finally, with the fifth generation of retailer brands, the retailer becomes the brand. These are corporate brands, intended to produce strong positive identity and practises throughout the organisation. All five generations of retailer brands can be observed in the assortments of different European food retailers.

Different types of retailer brands exist. The brand relationship spectrum introduced earlier (Aaker & Joachimsthaler 2000), can be used to analyse the relations between a retailer's different brands. A retailer can be said to follow a house-of-brands strategy when it sells its own brand merchandise under a variety of un-related names. At the other extreme, a retailer can be said to follow a branded-house strategy when all of its own merchandise is sold under the same name, typically the name of the chain.

A typology of different types of retailer brands is provided by Varley (2003), who distinguishes between four approaches retailers can use in relation to their own-label merchandise:

- *Exclusive brands* are produced for a specific retailer, but the brand identifies neither the manufacturer nor the retailer.

- *Own brands/house brands* are brands in their own right, although the association with a retailer is clear.

- *Own labels* are products that simply bear the retailer's name.

- *Own-label sub-brands* carry the retailer's name but the products have a unique positioning, indicated by similarity in packaging themes.

The latter strategy is equivalent to Aaker and Joachimsthaler's (2000) sub-brands strategy, while the own labels approach typically corresponds to the branded-house strategy, own brands are similar to the endorsed brand strategy, whereas the exclusive brands strategy is often found in house-of-brands strategies. The brand relationship spectrum and Varley's typology of approaches are thus overlapping.

Finally, generic or unbranded products are products where there has been no investment in creating brand equity. These products are typically sold primarily on price, as commodities. This has been the position of many retailer-named products. For instance, in most categories of fresh foods (eg, meat, fruits, vegetables), few manufacturer brands have been developed or brands have low brand equity. These products are often sold un-packaged, thus leaving only limited possibilities of branding, although it has been attempted (eg, Chiquita bananas, Dole fruit, Jaffa oranges). Furthermore, consumers often rely on sensory evaluation (appearance, smell, consistency/texture) when shopping for products in these categories and it is therefore important that consumers are able to touch or see the products before they make a purchase.

Dimensions of retailer brand architectures

Following these considerations regarding the construction of retailer brand architectures, we will now turn to considering in more detail the dimensions of retailer brand architectures. As we have seen, much of the literature on brand architectures takes an internal perspective. In contrast, we look at retail brand architectures from the outside. That is, rather than look at how companies can manage their brand architectures or how retailer brand architectures are developed and evolve, we focus on the elements of retailer brand architectures that are there for outsiders, most notably consumers, to see, experience and evaluate. We try to identify and describe a number of observable dimensions of retailer brand architectures.

As noted above, retailer brand architectures typically comprise manufacturer brands, retailer brands and generic brands. The retailer assembles an assortment of products and brands, which together are expected to appeal to consumers. We expect that the interplay between manufacturer brands, retailer brands and generic products is important for how consumers perceive and evaluate the brand architecture of food retailers and their overall evaluation of a retail concept.

It is possible to identify a number of potentially important dimensions of retailer brand architectures from the discussion so far:

- *Brand relationship spectrum* (Aaker & Joachimsthaler 2000). It is particularly useful to consider the 'brand relationship spectrum' in connection with retailer brands, since retailer brands are often found in many product categories whereas, with the exception of corporate brands such as Kraft, few manufacturer brands span more than a few product categories. Food retailers use one or a combination of the house-of-brands, endorsed brand, sub-brands and branded-house strategies in relation to their own brands.

- *Generation of retailer brands* (Burt & Sparks 2002; Laaksonen 1994). A distinction was drawn between five generations of retailer brands, depending on the type of brand and their position on two dimensions: price and quality. The branded-house strategy is similar to the fifth generation of retailer brands, since in both cases a master brand is used across a variety of products or even an entire company.

- *Generation of manufacturer brands*. As with retailer brands, it should be possible to distinguish between different types of manufacturer brands, depending on their position on price and quality dimensions.

- *Price and quality*. These two dimensions are important for classifying brands according to type or generation of retailer brands (Burt & Sparks 2002; Laaksonen 1994). Of course, these two dimensions are not independent, least of all in the minds of consumers, who often use price as an indicator of quality, frequently assuming a linear relationship between price and quality. However, quality and price are also relevant considerations in relation to manufacturer brands and generic products. It is important to consider how the different brands and their respective prices and qualities complement each other, together determining the positioning of the retail chain on these dimensions.

Other dimensions with a potential for describing retailer brand architectures are:

- *Number of product variants per brand*. If there are many variants of the same brand within a product category, the brand will be more visible than if there is just one or a few variants. In the literature, significant attention has been devoted to determining "efficient assortments" (eg, Amine & Cadenat 1999; Boatwright & Nunes 2001; Broniarczyk, Hoyer & McAlister 1998; Cadeaux 1999; ECR Europe 1998; Varley 2003).

- *Allocation of space*. The shelf space allocated to a particular brand might serve as an indicator of the importance of this brand to the retailer (ECR Europe 1998), as shelf space is a scarce resource for retailers (Varley 2003). Some retailers put considerable effort into determining the optimal placing of products and brands on shelves, for example, some retailers place premium brands on the top shelves, value-added retailer brands on middle shelves and generic products or low price copies on the lower shelves (Esbjerg, 2004).

- *Store design and visual merchandising*. Store design encompasses the physical attributes of the retail outlet. To mention a few: the material used, the use of space and atmospherics, lighting, signage and colour (Chung, Inaba, Koolhaas & Leong 2001; Varley 2003), while visual merchandising refers to the presentation of the products within the store (Varley 2003).

- *Neighbouring categories*. What product categories are physically positioned next to each other can influence consumer perceptions, cf the importance of context for consumer choice.

- *Overall positioning of product categories*. According to the ECR and category management literature, each product category should be assigned a role depending on the priority and importance of a category for a distributor's overall business and the resource allocations that will reflect those choices (Joint Industry Project on Efficient Consumer Response 1995).

- *Overall positioning of the food retailer*. The strategic position sought by the retailer reflects a combination of customer service, product and market decisions (Walters & Hanrahan, 2000).

- *Store type*. Often, discounters carry few if any national manufacturer brands, whereas supermarket and hypermarket chains often carry several manufacturer brands in each product category, as well as retailer brands.

- *Freshness*. Often 'freshness' categories, such as fresh meat or fruits and vegetables, are important for retailers' positioning efforts (Esbjerg, 2004; Skytte, 2004). Therefore, it is important to consider how food retailers use these product categories to position themselves. Are fresh products for example sold from service counters or as self-service (Esbjerg, 2004)?

We want to develop the concept of retailer brand architecture from a consumer perspective – an operational concept, which can be used both to observe the brand architectures of food retailers and to study consumers' perceptions and evaluations of these retailer brand architectures. The portfolio roles and product-market context roles dimensions of brand architectures are of little interest to us, since these focus on internal aspects that are unknown or of little interest to consumers.

Other aspects of food retailers' market offering

The brand architecture of a food retailer is but one aspect of the market offering of food retailers. We will therefore briefly consider which other aspects might influence consumer perceptions of retail stores or retail concepts. For instance, Ottesen (2001) provides the following long list of relevant elements of the market offering of a store: opening hours, location, parking facilities, shop appearance (outside and inside), product accessibility, staff, capacity – waiting time, customer handling in general, order handling, products, prices, ability to deliver, handling of delays, acceptance of returns/exchange, guarantees and treatment of complaints.

In the literature, concepts such as store image (Burt & Carralero-Encinas 2000) and store personality (Davies & Chun 2002) have been suggested as important concepts for understanding consumers' store choice decisions. Studies of store choice indicate that location is particularly important to consumers, as evident in the old adage that location, location and location are the three most important factors in retailing.

It is relevant to consider, which product categories the assortment of a retailer comprises, including aspects such as the depth, width, availability and continuity of assortment (Walters & Hanrahan 2001). In this connection, it is relevant to determine whether some product categories appear to be of particular importance to certain retailers.

Other aspects, which might be important, include the services that are offered to consumers (market/non-market, brand architecture); whether the retailer has loyalty cards; whether retailers have used their brand names for brand extensions outside the traditional domain of retailers, for example, by offering financial services, travel packages or electrical power under their corporate brand name, and finally the retailer's projections to consumers about the retail chain as a whole and with regards to particular brands or product categories, which are intended to influence consumers' perceptions and behaviour.

METHODOLOGY

In order to examine the brand architectures of European food retailers, the first author visited outlets of more than 20 food retailers in five countries (see Table 1). We chose to visit food retailers in Denmark, France, Germany, Sweden and the United Kingdom. An attempt was made to visit cities of similar size in order to make them as comparable as possible. Five cities with a population of around 250,000 inhabitants were visited. These were Aarhus, Strasbourg, Karlsruhe, Malmö and Nottingham.

Table 1 Retailers studied

DENMARK	FRANCE	GERMANY	SWEDEN	UNITED KINGDOM
Aldi	ATAC	Aldi	COOP Forum	Aldi
Fakta	Auchan	Lidl	ICA Kvantum	Asda
Føtex	Cora	Kaufland		Sainsbury's
Kvickly	Intermarché	Plus		Tesco
Netto	Lidl	Wal-Mart		
	Norma			
	Rond-Point			

We chose to visit stores in France and the United Kingdom because supermarket retailers in these countries have moved towards the branded-house end of the brand relationship spectrum. Food retailing in the United Kingdom is often regarded as the most advanced in relation to retailer branding in Europe, but leading French food retailers are not far behind. Of the other three countries, German food retailers are closest to the house-of-brands end of the brand relationship spectrum, with Danish and Swedish food retailers beginning to towards the branded-house end of the spectrum.

In each of the countries, a number of retailers were identified for study through discussions with external project participants (a major Danish food retailer and two Danish food manufacturers, who produce both retailer branded and manufacturer branded food and beverage products). We chose to focus on two retail formats, namely large supermarkets and discounters.

The retailer brand architectures were studied for eight primary product categories: beer, flour, fresh meat, fresh pasta, frozen vegetables, sliced meat, sliced yellow cheese and washing powder (see Table 2). In Denmark information was also collected for marmalade. The food categories were chosen because they reflect different levels of retailer brand penetration and because manufacturer brands were expected to vary in strength. Washing powder was included because it is an important product category to most grocery retailers and there is a long tradition of both manufacturer and retailer branded products in this category.

Table 2 Product categories

PRIMARY PRODUCT CATEGORIES	SECONDARY PRODUCT CATEGORIES
• Beer	• Dried pasta
• Flour	• Fresh produce
• Fresh meat	• Sugar
• Fresh pasta	• Tinned vegetables
• Frozen vegetables	
• Marmalade (Denmark only)	
• Sliced cheese	
• Sliced meat	
• Washing powder	

As part of each store visit, a long checklist was filled in and trial purchases were made, primarily of retailer branded products. Trial purchases were made in order to reduce the necessity of taking notes during store visits and in order to have exemplars of the various brands for future reference.

For each retail outlet, information was collected about the following elements: name, address, parent company, location, nearby stores and services, store type (hard discounter, soft discounter, supermarket), store appearance (materials, colours, order, cleanliness), visibility and appearance of employees, pricing (signposting, slogans, campaigns, coupons, etc), categories in the overall assortment, services, financial services, loyalty cards, opening hours, marketing communication (logos, spokespersons, colours, slogans, assortment of fresh foods) (see Table 3).

For each product category, information was collected about the following elements: the brands in the category, the number of product variations for each brand, the price range, whether certain products were on sale, how prices and offers were signposted. The information gathered for each retailer with the help of the checklist is summarised in Appendix 1.

Table 3 Information collected for each food retailer

ABOUT EACH PRODUCT CATEGORY	OTHER INFORMATION
• Brands	• Location
• Number of variants of each brand	• Other stores nearby
• Price range for each brand	• Store layout and décor
• Special offers	• Staff
• Shelf space allocated to each product category	• Overall price strategy
	• Overall assortment
• Allocation of space to each brand	• Food assortment
• Neighbouring product categories	• Loyalty cards
• Signposting	• Market communication
• Signposting of offers	

The information was summarised in a large number of tables. Two types of tables were constructed: firstly, tables summarising the brands included in each retailer's assortment across the eight product categories were prepared. In this connection, a simple distinction was made between retailer brands, manufacturer brands and generic products. Brands were only classified as retailer brands if the name of the retailer was mentioned on the products or if it was in some other way possible to identify the retailer as the sender. Secondly, tables were prepared for each product category, summarising the assortments of retailers in each country for the product category in question. In order to make the discussion of our findings more readable, the many tables on which they are based have been placed in Appendix 2.

To augment observations and notes made during store visits, documentary information such as circulars were picked up during store visits and the homepages of food retailers were searched for general information about the retail chain, as well as information dealing more specifically with the retailer's assortments and own labels.

The findings are presented in the form of short descriptions of the brand architecture and brand architecture strategies of each of the food retailers studied. The brief descriptions can be characterised as 'realist tales', since they provide rather direct, matter-of-fact descriptions of the brand architectures studied (cf Van Maanen 1988).

THE BRAND ARCHITECTURES OF EUROPEAN FOOD RETAILERS

Above we have outlined a concept of retailer brand architecture by drawing on the brand architecture literature and the literature on retailer branding. We will now turn to the world of praxis, providing short descriptions of the brand architecture of European food retailers, country by country and product category by product category.

Denmark: Retailers

Two retail groups dominate Danish food retailing: COOP Danmark and Dansk Supermarked. Each operates a number of different retail concepts, including soft discounters and supermarkets. Foreign retailers play only a limited role on the Danish market, although Aldi has been active on the Danish market for many years. The brand architectures of the Danish food retailers we studied can briefly be described as follows.

ALDI. Aldi is a hard discounter following a very clear house-of-brands strategy. It mainly carries own labels in its assortment. These are so-called exclusive brands (Varley 2003), which are produced exclusively for Aldi but carry the name of neither Aldi nor the producer. Although Aldi is not mentioned on the packaging of these products, it clearly states on its homepage (http://aldi.dk) and on billboards in its stores that it sells own brands, which are produced exclusively for Aldi by reputable manufacturers.

FAKTA. Fakta is a soft discounter owned by COOP Danmark, the largest Danish food retail group. Fakta carries an assortment of both retailer brands and some manufacturer brands. Only a few brands are carried in each product category. In relation to retailer brands, Fakta has traditionally followed an endorsed own brands strategy. Fakta has sold a large number of distinct own brands that have been restricted to a single product category. On the packaging the consumer is informed in small print that the products have been produced for Fakta. Recently it has begun to incorporate branded-house elements in its retailer brand strategy, using the *Fakta*-name on several of its own labels and developing own label sub-brands in various product categories, for example *Mejeriet* [The Dairy] in the dairy category or *Frugtgården* [The Fruit Farm] in the marmalade category.

KVICKLY. Kvickly is a chain of large supermarkets operated by COOP Danmark. COOP Danmark in turn is part of COOP Norden, a pan-Nordic retail group created through the recent merger of COOP Danmark, COOP Norge and KF (a Swedish co-operative). As part of this merger, a uniform strategy for retailer branded products is in the process of being implemented across the different supermarket chains operated by these companies. Kvickly is therefore in the process of implementing a new strategy for its retailer brands, as part of which two category-spanning retailer brands will replace a plethora of category-specific retailer brands.

Kvickly carries a wide assortment of products, which in most food categories includes two retailer brands along with several manufacturer brands. It follows a branded-house strategy, although it is not Kvickly, which is used to identify own label products but the name of the parent company, COOP. This name is used on retailer branded food products of a quality and price comparable to leading manufacturer brands, signalling a commitment to quality and consistency throughout the organisation (third-generation retailer brand, cf Burt & Sparks 2002). The *COOP* own label spans all food categories. So does the *x-tra* own brand, which is a series of discount priced basic products, and a second-generation retailer brand (Burt & Sparks 2002). In addition to food products, the *x-tra* brand is also used in other large-volume product categories such as washing powder, tissue and toilet paper. On their homepage (www.coop.dk), COOP argues that with the *x-tra* brand they focus on price without compromising on quality. Members of COOP earn a 4% bonus on all retailer brands bought in Kvickly outlets.

NETTO AND FØTEX. Netto and Føtex both belong to the Dansk Supermarked group, the second largest Danish retail group. Netto is Dansk Supermarked's soft-discount chain, whereas Føtex is a chain of large supermarkets. Both Netto and Føtex follow an endorsed brand strategy ("Produceret for Dansk Supermarked af …"). Føtex and Netto often buy retailer branded products from the same manufacturers. However, the own brand names are not identical for Netto and Føtex. The own brands of both chains typically only cover a single product category. Being a soft-discounter, the assortment of Netto is narrower than that of Føtex and it has fewer manufacturer brands in its assortment than Føtex does.

The own branded products sold by Netto are mainly second- or third- generation retailer brands, whereas Føtex also has a number of fourth-generation own brands for niche products in image-forming product groups.

Rather than provide information about each of its own brands, Dansk Supermarked's homepage (www.dsg.dk) focuses on its labelling scheme *"Kend Varen"* (literally, Know the Product), which is used for retailer branded products by both Føtex and Netto. *"Kend Varen"* is intended as an informative label with information about the product, production methods, ingredients and nutritional facts.

SUMMARY. It is interesting to note that the two biggest Danish retail groups follow quite different strategies in relation to retailer branded products. While COOP's Kvickly and Fakta chains are moving towards a branded-house strategy by attempting to increase the visibility of the own label products, Dansk Supermarked follow a house-of-brands strategy and does not explicitly identify its own brands as being retailer branded merchandise. In addition to their retailer branded merchandise, both COOP and Dansk Supermarked include several manufacturer brands in their assortment in most product categories.

Aldi follows an even clearer house-of-brands strategy, selling mainly exclusive brands, although it informs consumers that products are made especially for Aldi.

Denmark: Product categories

BEER. The assortments of beer carried by Danish food retailers are relatively narrow. The discount chains carry three to four different manufacturer brands, whereas the supermarket chains carry between eight and ten. The assortments of Føtex and Kvickly include unsupported own brands (second-generation retailer brands) along with the most important manufacturer brands (*Carlsberg* and *Tuborg*) as well as other Danish brands. Føtex in particular also carries a number of imported brands.

Although the discount chains carry no own label products of beer, their assortments are dominated by low-priced brand beers of inferior image compared to market leaders *Carlsberg* and *Tuborg*. However, Fakta and Netto carry both the *Carlsberg* and *Tuborg* brands. Aldi only carries low-priced beers.

FLOUR. In this product category, there are obvious differences between the brand architectures of discounters and supermarket chains. Aldi only carries a generic product. In contrast, the brand architectures of the supermarket chains encompass both manufacturer brands and retailer brands. Both carry the same two manufacturer brands. In addition, Kvickly carries three retailer brands. *Natura* is its organic brand, whereas *Opal* and *Safir* are respectively second and third-generation retailer brands. It is to be expected that these brands will be aligned with the overall brand architecture of the chain.

FRESH MEAT. There are no strong manufacturer brands of fresh meat in Denmark. Aldi does not carry fresh meat and the assortment of fresh meat carried by Fakta and Netto is very limited. Nevertheless, Fakta has a number of second-generation retailer brands. The fresh meat sold by Føtex is sold under the name *Mester*, a brand that has been found to have considerable brand equity (Juhl, Høg & Poulsen 2000).

FRESH PASTA. Judged from the number of brands, this is not an important category in Denmark. Three retailers carry *Pastella*, the manufacturer brand produced by Tholstrup Cheese. Aldi only carries a retailer brand.

Both Føtex and Kvickly carry two retailer brands and one manufacturer brand. Interestingly, the retailer brands carried by Føtex and Kvickly are positioned differently. Føtex has a low fat (*Minimum*) and a value-priced retailer brand (*Daily*), whereas Kvickly has an organic (*Natura*) and a value-priced retailer brand (*COOP*).

FROZEN VEGETABLES. This category is dominated by retailer brands. Føtex has only retailer branded products in its assortment, ranging from second to fourth generation, while Kvickly has a second- and fourth-generation retailer brand. Fakta and Kvickly carry both retailer brands and manufacturer brands, although emphasis is clearly on the retailer brands.

MARMALADE. This product category was only studied in Denmark. The supermarket chains have quite a number of brands in their assortment, several of them foreign. The assortment carried by Kvickly is particularly broad. In addition to three retailer brands, it carries eight manufacturer brands of marmalade. In addition to its low-cost *x-tra* and value-priced *Rainbow* brands it also has an organic alternative, *Natura*. Kvickly carries three relatively narrowly positioned manufacturer brands, which can be found only in its stores.

Some manufacturer brands can be found in several retail chains. For instance, *Svansø* marmalade was found in four chains, while both supermarket chains carry a broad assortment from the market leader *Den Gamle Fabrik*.

SLICED MEAT. The assortments of sliced meat carried by Aldi and Fakta are relatively narrow, whereas the three other retailers carry quite broad assortments. Based on the number of brands and product varieties carried by the chains, sliced meat is deemed to be an important category to most Danish food retailers. It is apparently important for retailers to offer consumers a choice of different prices, qualities and specialties.

Føtex and Netto both have five different own labels of sliced meat. Although sold under different brands, the retailer brands sold by Føtex and Netto are more or less identical in quality and positioning. For instance, both *Minimum* (Føtex) and *Letvægter* (Netto) are positioned as low-fat alternatives, while *Søndagspålæg* (Føtex) and *Weekendpålæg* (Netto) are positioned as higher quality.

At the time of study, the assortment of retailer brands of sliced meat carried by Kvickly was clearly still in the process of being changed to the new retailer brand strategy, as it sold both *Et godt køb* and *COOP x-tra* (COOP has since been deleted from the name). Of the Danish retailers studied, Kvickly carries the largest number of manufacturer brands (eight), some of which were not found in other stores (eg, *Bernard Matthews*, *Gaudio*).

SLICED YELLOW CHEESE. This is an important category in Denmark, at least based on the shelf space allocated to it. Aldi differs from the other retailers by carrying five different second-generation own brands of sliced cheese in addition to a generic product. The assortments of the other retail chains are dominated by manufacturer brands. Interestingly, the *Cheasy* and *Riberhus* manufacturer brands are carried by all of the four remaining retailers.

WASHING POWDER. In this product category there are considerable differences between the assortments carried by different retailers. Whereas discounters carry very narrow assortments both in terms of number of brands and product variants, the assortments carried by Kvickly and Føtex are quite broad. The amount of shelf space allocated to this product category by the supermarket chains is also large.

Discounters Fakta and Netto each carry one own label of washing powder in addition to a limited number of manufacturer brands, four and two respectively.

Kvickly carries a bewildering number of own labels, some with seemingly overlapping positioning (price), namely *x-tra*, *Cyclon* and *Et godt køb* and *Mini Risk*. *Mini Risk* mirrors the *Neutral* manufacturer brand. Other than that, assortments of manufacturer brands are identical in Føtex and Kvickly.

SUMMARY. There is a similar pattern across the different product categories. Netto and Føtex have specific own brands for each product category, Aldi has different exclusive brands, while Kvickly was moving towards its new two-stringed brand architecture strategy and Fakta was beginning to implement its new branded-house strategy, although it still carried mostly own brands alongside a few manufacturer brands. Except for the different brand architecture strategies, most of the differences between the assortments of the five retailers studied can be attributed to different retail formats (hard and soft discounters versus large supermarkets).

France: Retailers

The French retail market is mature and highly competitive. The hypermarket format was invented here and out-of-town shopping levels are high. Hypermarket and supermarket groups dominate, but discounters play an increasing role following the economic slow down of the late 1990s (Mintel 2003).

ATAC. Atac is a supermarket chain operated by the Auchan group. On the group's website (www.auchan.com), the following description of the chain was found.

> As a local store, in terms of size and location, the ATAC supermarket is organised around sales advice and services. Each store offers an extensive selection of products mainly for everyday use (national brands, own-brand, discount). The stores also have entire sections given over to fresh foods staffed by a team of specialists (butcher, cold meat assistant, fishmonger, cheese assistant, etc).

Atac sells the same retailer brands as the Auchan hypermarkets, namely the *Auchan* own label and the *Thumbs Up* deep discount own brand. These retailer brands are discussed in connection with Auchan below. In addition to these retailer brands, Atac's assortment comprises a large number of manufacturer brands, particularly in the beer, sliced meat and washing powder categories.

Atac can be said to follow a branded-house strategy, although it is not quite as clear-cut as for Auchan, as it uses the own labels of the Auchan group.

Atac offers a broad assortment of food products as well as a narrow assortment of non-food products. Freshness categories are particularly important to Atac (www.atac.fr). In the outlet visited, fresh meat, fresh fish, delicatessen, cheese and bread were all sold from manned service counters.

AUCHAN. The Auchan Group is a family-owned retailer operating, amongst other things, Auchan hypermarkets and Atac supermarkets. The Auchan hypermarkets carry up to 100,000 products including groceries, clothes, consumer electronics and fast food. In most product categories, the assortment is very broad and deep. As described on their home page (www.auchan.com), the assortment includes both retailer and manufacturer branded products:

> Auchan offers an extensive product selection in highly varied ranges so as to ensure maximum customer satisfaction.
>
> Each product family contains brands with national and regional reputations, Auchan own-brand, and discount products. These products are picked on the basis of the markets, sales and trends. The buyers also work closely with the stores since they have their fingers on the pulse in terms of customer requirements.

In foods, Auchan have three main retail brands; *Auchan*, *Thumbs Up* and a brand for products produced according to integrated farming standards. The thinking behind the *Auchan* own label is described as follows on the company website.

> The aim is to meet the demands of consumers, but other factors are also taken into account when developing Auchan products such as pleasure, proximity, practicality, safety and the environment. Value for money is of overriding concern when designing the end product.
>
> The vast majority of Auchan products are identified on the packaging by a supplier visual on the top half, the bird logo forming the "A" in Auchan on the left-hand side of the product and the Auchan name running across the bottom. This allows products to be easily identified as Auchan products on the shelf.

The *Auchan* own label is a third-generation retailer brand. For some higher quality products there is a brand called *La Selection Auchan*, which can be classified as a fourth-generation retailer brand. *Thumbs Up* is a brand of deep discount products, which the Auchan group claims to have developed and launched in 2001 in order to meet customer demand.

> Easy to recognize because of their special packaging, with a yellow "thumbs up" and "kraft paper" wrapping, they have benefited from Auchan Production know-how and refer to the group's commitment to security, quality and ethics standards of Auchan products. Since the end of 2001, these products have gradually been available in hypermarkets and supermarkets, in France, Spain, Italy, Poland, Portugal and Hungary. The objective of Auchan is to offer 1,700 products in 2004-2005.

Finally, Auchan was the first French retailer to join FARRE (forum for environment-friendly integrated farming). It claims to have played a key role in promoting and developing this production method aimed at controlling the impact of farming activities on the environment and protecting animal welfare. In France, there are currently 180 FARRE products sporting the *Auchan* label.

The assortment of Auchan is very broad and in most product categories includes a very large number of manufacturer brands alongside the two main retailer brands. From the above discussion it is clear that Auchan follows a branded-house strategy.

Finally, it should be noted that the Auchan brand has been extended to insurance, banking and travel (under the names Assurances Auchan, Banque Accord, Voyages Auchan respectively).

CORA. Cora, a subsidiary of the Belgian Delhaize-group (www.delhaize.com), is a French hypermarket retailer, a format it helped pioneer. In most food and non-food categories, Cora carries a wide assortment of manufacturer brands. Cora follows a branded-house strategy, with most of its own-label products in foods carrying the *Cora* name, which was introduced on products in the early 90s. In addition, it has a specific brand for organic products, *Cora Nature Bio*.

Fresh foods are important to Cora. In the outlet visited, fresh meat and cheese were sold from both service counters and in self-service coolers, while fresh fish, delicatessen, bread and hot meals were sold from service counters.

INTERMARCHÉ. Intermarché is the supermarket chain operated by ITM Entreprises, which is a group of independent retailers, called musketeers. A musketeer features prominently in the logo of the chain and group. Intermarché is a traditional supermarket with a broad assortment of foods as well as a relatively narrow non-food assortment. Fresh foods are primarily sold from service counters, with only a narrow assortment of fresh meat available as self-service. Intermarché primarily sells both retailer and manufacturer brands. Following a house of brands strategy, Intermarché's retailer brands are not easily identified as such.

LIDL. The privately owned German discount chain has been active in France since 1970. With 1,100 outlets it is the largest hard discounter in France. It carries a very narrow assortment of typically one or two second-generation exclusive retailer brands in each product category. Lidl is not typically identified on the packaging.

NORMA. Norma is a German-owned hard discounter selling a narrow assortment of predominantly exclusive brands. Like other German hard discounters, its concept is based on offering products of a decent quality at low prices.

ROND-POINT. Rond-Point is the hypermarket chain operated by COOP Alsace, a regionally important retailer. It carries a wide assortment of manufacturer brands along with own label products under the *COOP Alsace* banner. It aims to offer products of the best quality at the right price (www.coop-alsace.fr), with particular focus on regional products.

SUMMARY. With the exception of Intermarché, the French supermarket and hypermarket retailers visited follow branded-house strategies, selling a combination of own labels and manufacturer brands. Intermarché differs from the other super- and hypermarket chains by following a house-of-brands strategy. Finally, discounters follow house-of-brands strategies, mainly selling exclusive brands.

France: Product categories

BEER. The French supermarket and hypermarket chains carry a very broad assortment of beer and devote a substantial amount of shelf and floor space to this product category. The different chains carry both domestic and imported brands. There is considerable overlap in the assortments, with the assortments of Auchan and Cora being particularly broad (offering 19 and 17 manufacturer brands, respectively).

With the exception of the discounters, which both sell so-called producer's brands (Varley 2003), there are very few retailer brands in this product category, although Atac carries one product under the *Auchan* own label and the Auchan hypermarket one product under the *La Selection Auchan* brand.

FLOUR. Two brands of flour can be found in most retail chains, namely *Francine* and *Gruau D'or*. Four chains also have retailer branded products. Atac and Auchan both carry products under the *Auchan* and *Thumbs Up* labels, while Cora and Rond-Point each carry one own label of flour. Overall, the assortments of flour can be said to be quite narrow.

FRESH MEAT. As opposed to the Danish retailers, several manufacturer brands of fresh meat can be found on display in French retail chains, although there is no overlap. In three retail chains, fresh meat is not sold under a brand. In three other chains, fresh meat is sold under own labels. Auchan carry fresh meat under both the *Auchan* and *La Selection Auchan* banners, Cora sells fresh meat under the *Cora* own label and Rond-Point has an own brand named *Gastronome*.

FRESH PASTA. In this category, several manufacturer brands can be found, four of which are found in two or more chains, namely *Boni*, *Hilcona*, *Lustucru* and *Giovani Panzani*. Auchan, Cora and Rond-Point all sell fresh pasta under their respective own labels. The assortments of fresh pasta carried by Lidl and Norma are very narrow.

FROZEN VEGETABLES. Again, several manufacturer brands can be identified. *Bonduelle* and *Findus* were found in all super- and hypermarket chains, while *D'Aucy* was found in four chains. Auchan and Rond-Point both sell products of six different manufacturer brands in this category. Atac, Auchan and Cora also sell frozen vegetables under their own labels.

Lidl only sell frozen vegetables under its *Green Grocers* exclusive brand, while the Norma outlet visited did not sell any frozen vegetables.

SLICED MEAT. Except for the discounters, the French retailers studied all sold quite a substantial assortment of sliced meat. In addition to their normal retailer brands, the supermarket and hypermarket chains all carried several manufacturer brands. With nine different brands in its assortment, Atac carried the highest number of different brands, while Rond-Point carried the fewest with five.

Aoste, *Fleury Michon* and *Herta* were sold by all of the supermarkets and hypermarkets visited, while manufacturer brands such as *Daniska*, *La belle Vende* or *Jean Caby* were sold by just one retailer.

Again, the discounters sell a very narrow assortment. Lidl's assortment is focused on its *Dulano* exclusive brand, of which it carries seven different variants. Norma sells sliced meat under several different exclusive brands, but in all it has about the same number of products on offer as Lidl.

SLICED YELLOW CHEESE. There is considerable overlap in the assortments of sliced yellow cheese found in French supermarkets and hypermarkets. *Fol Epi*, *Leerdammer* and *President* are all sold by three or more retail chains.

Norma did not sell any sliced yellow cheese, while Lidl only carried a few products of the *Hochland* manufacturer brand.

WASHING POWDER. French supermarkets and hypermarkets carry a large and virtually identical assortment of washing powder. Atac, Auchan and Rond-Point carried exactly the same 12 manufacturer brands, Cora only one less. Atac and Auchan also carry a third-generation own label (*Auchan*). Lidl and Norma only carry a few second-generation private labels in their assortment.

SUMMARY. Chains like Atac, Auchan and Cora follow a clear branded-house strategy, but in contrast with British chains carry a large number of manufacturer brands alongside their own labels.

Germany: Retailers

Food retailing in Germany is heavily concentrated, with the ten largest retail groups accounting for around 84% of total food sales. German consumers are often portrayed as price-obsessed, which plays into the hands of price-driven formats such as discounters and hypermarkets (Huff 1998). These formats have enjoyed considerable growth over the last decade. Discounters today account for around 30% of total retail food sales (Euromonitor 2003). When compared to other European countries, discounters are enjoying an exceptionally high market share in German food retailing. The dominance of discounters is a defining characteristic of food retailing in Germany and is an important contributor to the intense price competition in German grocery retailing.

ALDI. Aldi pioneered the discount concept. It offers a narrow assortment of about 600 products *"des täglichen Bedarfs"*. It prides itself of its quality philosophy. Aldi almost exclusively sells retailer brands, although it is not identified on the packaging. Aldi has a strong market position in Germany, where Aldi is among the strongest and most valuable brand names (Young & Rubicam, 2001). The outlet visited sold no beer or fresh meat.

KAUFLAND. Kaufland is a so-called *"Markenartikel-Discounter"*; in its large supermarkets and hypermarkets it primarily sells manufacturer brands. Typically, it offers consumers a choice of several manufacturer brands in each product category. In the fresh meat category, Kaufland is developing its third-generation own brand, *Purland*, indicating that fresh meat is an important area of differentiation for the chain. Part of the Schwarz Unternehmensgruppe together with Lidl, it is notorious for its price aggressiveness. The focus on price is evident in slogans such as *"Täglich billig!"* or "*Rabattlos billig"*.

LIDL. Like Kaufland, Lidl belongs to the Schwarz Unternehmensgruppe. Lidl is a hard discounter, focusing on low price and decent quality. It mainly sells exclusive brands and only has a few manufacturer brands in its assortment. Lidl emphasises the quality of its exclusive brand products by posting, on shelf fronts in stores and on the products, ratings from Stiftung Warentest and Öko-Test.

PLUS. Plus is the discount chain of the Tengelman Group. Plus is a so-called *Markenartikel-discounter*, selling both retailer and manufacturer brands. More than half of the 1,900 products typically sold in stores are manufacturer brands, while the rest are retailer brands. On its webpage (www.plus.de), Plus argues that with this concept it offers its customers a choice between *"qualitativ hochwertigen Eigenmarken zum kleinen Preis"* and manufacturer brands.

On its webpage, Plus claims to have 105 different retailer brands. In particular, the organic brand *Bio-Bio* is emphasised. Compared to the other German discounters, it is easier to identify retailer brands as such, as it is explicitly stated that they have been produced for Plus. Plus can be classified as following a house-of-brands strategy.

WAL-MART. The troubled German subsidiary of Wal-Mart has two own brands, which are used across different food categories: *Great value* and *Smart Price*. With the names of its retailer brands, Wal-Mart emphasises its focus on everyday low prices, a strategy which has proved very successful in the US, but with which it has had some difficulty in the fiercely competitive German market (Knorr & Arndt 2003).

Great Value is a third-generation own brand, while *Smart Price* is a second-generation own brand positioned solely on price. See Exhibits 1 and 2 for the descriptions of the two brands posted on the web by Wal-Mart. Furthermore, Wal-Mart has an own label sub-brand of fresh meat, *Wal-Mart frisch*.

Exhibit 1 Great Value

Great Value (engl. für „Großartiger Wert") steht für Markenqualität zu günstigen Preisen. Nur Produkte, die qualitativ mindestens so gut sind wie die entsprechenden Markenartikel, dürfen sich „Great Value" nennen. Zahlreiche analytische Tests und Verkostungen stellen sicher, dass dies der Fall ist. Qualität steht jederzeit im Vordergrund.

In unserem **Sortiment** finden Sie mehrere Hundert Great Value Artikel. Darunter: Tiefkühlgerichte, Molkereiprodukte, Konserven, Kaffee, Pasta, Fertiggerichte, Brotaufstriche, Gebäck, Räucherfisch, Trockenfrüchte, Wasch-, Putz- und Reinigungsmittel, Toilettenpapier, Küchentücher, Taschentücher, Müllbeutel, Kaffeefilter, Staubsaugerbeutel ...

Exhibit 2 Smart Price

„Smart price - clever kaufen"

Dieses Motto steht für die Tatsache, dass preisleistungsbewußte Käufer nicht zum Discounter müssen, sondern Ihren täglichen Bedarf auch bei Wal-Mart decken können. Der Preis ist knallhart kalkuliert.

In unserem **Sortiment** finden Sie mehr als einhundert Smart Price Artikel. Darunter: Grundnahrungsmittel (Mehl, Zucker, Salz,...), Getränke, Tiefkühlkost, Molkereiprodukte, Wurstwaren, Konserven, Cerealien, Instantgetränke, Kondensmilch, Brotaufstriche, Süfiwaren und Knabberartikel.

Wal-Mart emphasises price in its communication with consumers, including in-store communication such as posters and billboards and in the names given to its own brands.

SUMMARY. None of the German retailers follow a house-of-brands strategy. Retailer brands are less developed in Germany than in other countries, and are mainly restricted to second-generation retailer brands. However, some German retailers are strong brands in themselves, not least Aldi, which has become quite fashionable in recent years and is one of the most valuable German brands.

Price is extremely important for German food retailers (Esbjerg 2004), as is evident in the strong position of discounters and in the retailers' projections to consumers.

Germany: Product categories

BEER. The two low-price hypermarkets, Kaufland and Wal-Mart, both carry a broad assortment of almost exclusively German manufacturer brands of beer. In contrast, Lidl and Plus carry a narrow assortment of beer combining exclusive brands and a few manufacturer brands. The Aldi outlet visited did not sell beer.

FLOUR. All the German retailers visited only carry a few brands of flour. In addition to two manufacturer brands, Kaufland also sells two generic products. There is almost no overlap between assortments, indicating the absence of strong national brands.

FRESH MEAT. No manufacturer brands of fresh meat are found in the assortments of the German retailers visited. Discounters only carry a very limited number of fresh meat products; the visited Aldi outlet none at all. Kaufland emphasises its *Purland* own brand and Wal-Mart its *Wal-Mart frisch* own-label meat.

FRESH PASTA. Fresh pasta is not an importrant product category for the discounters, which only carry one retailer brand or a few generic products in their assortments, whereas Kaufland and Wal-Mart have a number of different manufacturer brands in their assortments.

FROZEN VEGETABLES. Kaufland only carry manufacturer brands, although these vary widely in terms of quality and price. In addition to several manufacturer brands, Wal-Mart sells frozen vegetables under both the *Great Value* and *Smart Price* banners. The discounters focus on their own labels, although with *Elbtal*, Aldi actually carry a brand that can also be found in other retail chains.

SLICED MEAT. Again, Aldi carries several brands that can also be found in other retail chains alongside its own brands. The other discounters also carry a combination of retailer and manufacturer brands. Plus' assortment comprises five retailer brands and three manufacturer brands.

In contrast, both Kaufland and Wal-Mart carry wide assortments of sliced meat. Their assortments include numerous manufacturer brands. Wal-Mart also offers sliced meat under its *Great Value* and *Smart Price* labels.

SLICED YELLOW CHEESE. Kaufland and Wal-Mart have very broad assortments of manufacturer brands of sliced yellow cheese. Wal-Mart carries no less than 21 different manufacturer brands, but no retailer brands. There is considerable overlap between the assortments of Kaufland and Wal-Mart; 11 brands are carried by both. The discounters all carry a quite narrow assortment, which for Lidl and Plus includes retailer brands and one or two manufacturer brands. Aldi stocks two retailer brands.

WASHING POWDER. Lidl and Plus carry the same three manufacturer brands along with their respective retailer brands. There is also considerable overlap in the (much larger) assortments carried by Kaufland and Wal-Mart. Both focus on manufacturer brands, although Wal-Mart also carries washing powder with the *Great Value* brand in its assortment.

SUMMARY. There are relatively few retail brands in the assortments of German hypermarket retailers, whereas most of the products sold by especially Aldi and Lidl are exclusive brands. The *Great Value* and *Smart Price* own brands of Wal-Mart can be found in several different product categories. Interestingly, one of the product categories in which own labels are being developed is fresh meat, which is a product category that German food retailers regard as important for their positioning (Esbjerg, 2004).

Sweden: Retailers

Food retailing in Sweden is highly concentrated, with ICA Handlarnes, COOP Sverige and Axfood having a combined market share of more than 70%. The discount sector in Sweden is under-developed compared to the rest of Northern Europe, but in recent years discounters such as Lidl and Netto (a joint-venture between Dansk Supermarked and ICA) have entered the market.

COOP FORUM. Coop Forum is a chain of large supermarkets operated by KF, which is part of COOP Norden along with COOP Danmark. COOP Forum carries a broad assortment of food and non-food products.

In COOP Forum, three retailer brands can be found across different food categories: *Änglamark*, *Signum* and *x-tra*. *Änglamark* is a brand used on organic food products. *Signum* is a third-generation retailer brand, which was introduced in 1995. Because of the COOP Norden-merger, *Signum* will be replaced by the *COOP* brand, meaning that COOP Forum will move towards a branded-house strategy, whereas it has hitherto followed a house-of-brands strategy. The pan-nordic *x-tra* brand was introduced in the fall of 2003 and replaces the *Blå-Vitt* retailer brand. *x-tra* is a second-generation retailer brand that is positioned almost exclusively on price. It is found on about 150 products across both food and non-food categories.

ICA KVANTUM. This is a chain of large supermarkets operated by ICA Handlarne, the leading Swedish food retailer. 50% of ICA was acquired by the Dutch retail giant Ahold in December 2000.

ICA has a number of retailer brands. *ICA* is a third-generation, value positioned own label, which consumers are supposed to perceive as simple, personal, safe, inspiring and modern according to the company website (www.ica.se). Since 2002, the *ICA* brand has also been used on selected fruits and vegetables as a guarantee of good taste and high quality. *ICA Ekologisk* is used on organic products, which meet the demands of KRAV, the Swedish organic mark. *Skona* is a brand of environmentally friendly variants of products, such as washing powder. Finally, *Euroshopper* is a brand of discount-priced, second-generation retailer branded products, sourced in collaboration between 11 European retailers.

ICA has a bank, offering a full range of financial services.

Sweden: Product categories

BEER. Both Swedish retailers carry a broad assortment of manufacturer branded beers of both domestic and foreign origin.

FLOUR. In this product category, both ICA and COOP Forum have an organic retailer branded product in their assortment alongside manufacturer brands of flour.

FRESH MEAT. Neither of the two retailers visited sell fresh meat under their own name. In the ICA Kvantum store visited, fresh meat was only sold from a service counter, while fresh meat was sold in self-service in COOP Forum. COOP Forum sold two manufacturer brands of poultry.

FRESH PASTA. The ICA Kvantum store visited did not sell fresh pasta, while COOP Forum had one manufacturer and two retailer brands of fresh pasta in its assortment, *Änglamark* and *Signum*.

FROZEN VEGETABLES. Both retail chains carry two brands of frozen vegetable as well as a few manufacturer brands.

SLICED MEAT. COOP Forum and ICA Kvantum both carry a large number of manufacturer brands of sliced meat. Also an own label sub-brand called *ICA Svenska Delikatess*, which can be classified as a fourth-generation retailer brand.

SLICED YELLOW CHEESE. This is not an important category for the visited stores, which only carried a few products under different manufacturer brands.

WASHING POWDER. COOP Forum carries three retailer brands of washing powder, but only four manufacturer brands. This is considerably less than what was found in the assortments of the other supermarkets and hypermarkets visited for this study. All four brands carried by COOP Forum are also in the assortment of ICA Kvantum, which is a little broader but only includes one retailer brand, the discount priced *Euroshopper* brand.

United Kingdom: Retailers

The big three, Asda, Sainsbury's and Tesco, dominate grocery retailing in the UK, although the market is not as concentrated as those in Denmark and Sweden. The big three mainly focus on supermarkets and hypermarkets, but have also developed other concepts such as high-street supermarkets and convenience stores. At the discount end of the market, a number of foreign retailers are active. Among them are Aldi, Lidl and Netto.

ALDI. As in the other countries, Aldi in the UK is a hard discounter offering a narrow assortment of retailer brands. Aldi is mainly positioned on price, its slogan being: *"Always saving you money."* Aldi does not sell any brands, which are identifiable Aldi retail brands. Aldi, however, makes clear that most of the products they carry are own-brand products:

> Go into an Aldi store and you'll discover a new shopping experience, where quality products and wide choice combine with prices that never fail to astonish first time shoppers. All products in the Aldi range, whether baked beans or fresh cut flowers, biscuits or daily delivered fresh fruit and vegetables, are sourced from the best suppliers. Our stringent selection

> process enables us to offer our customers own brand products whose quality matches that of leading brands. (http://www.aldi-stores.co.uk/about_us/about_nav.htm)

On its homepage, a section entitled *"What the papers say"* reports the (favourable) results of product comparisons involving some of Aldi's products. Besides their customary second-generation own labels positioned mainly on price, Aldi in the UK has developed a brand called *Balanced Lifestyle*, which is a series of low-fat products, where Aldi is more obviously the sender.

ASDA. Asda is a chain of large supermarkets and hypermarkets, which is owned by Wal-Mart and positioned on price. It claims to be *"Britain's Best Value Supermarket"* based on a comparison made by The Grocer, a trade publication. With the exception of the beer category, ASDA has only few manufacturer brands in its assortment, the bulk of which consists of its retailer own labels. *ASDA* and *ASDA Smartprice* are the two most important of these own labels and can be found in most food categories, as well as many non-food categories. In addition, there are a number of more specific or targeted retailer brands, such as *ASDA Good for you!*, which is a series of low-fat products. *ASDA Smartprice* is a second-generation retailer brand positioned on price, while the *ASDA* own label is used on third-generation, value-positioned products.

ASDA thus follows a clear branded-house strategy. The ASDA brand has been extended into other business areas and is used on different financial services.

ASDA offers customers a wide range of complimentary services (www.asda.co.uk). For instance, the Greeters will lead consumers to their cars under the shelter of an umbrella and are trained to identify when a customer's car has broken down, in which case they will direct customers to colleagues, who assist them in getting their cars jump started.

SAINSBURY'S. A number of different retail concepts are operated under the Sainsbury's banner. We visited a large supermarket, which carried a wide range of food and non-food products. In particular the assortment of ready-to-cook and ready-meals was very broad. Sainsbury's have more manufacturer brands in their assortment alongside their own labels than ASDA has. Sainsbury's wants to be the preferred food retailer in the UK.

Like the other big British supermarket and hypermarket chains, Sainsbury's follows a branded-house strategy. The *Sainsbury's* brand has been extended in several ways, for example through Sainsbury's Energy, Sainsbury's Telecom and Sainsbury's Bank. The latter is a full-service bank offering a full range of financial services, including insurance, loans, mortgages, credit cards, savings accounts and investments.

The most important own label sub-brands are *Sainsbury's Low Price* (second generation), *Sainsbury's* (third generation) and *Sainsbury's Taste the Difference*, which can be classified as a fourth-generation retailer brand. However, in some product categories there are additional sub-brands related to the Sainsbury's brand. For instance, there are no less than eight sub-brands in the sliced meat category.

TESCO. Tesco is the leading British retailer. It follows a very clear branded-house strategy with relatively few manufacturer brands in its assortment. As is the case with Sainsbury's, several different chain concepts operate under the Tesco banner. We visited a large supermarket.

Tesco has a number of differently positioned retailer own labels: *Tesco Value* (second generation, price-positioned), *Tesco* (third generation, value-positioned), *Tesco Finest* (fourth generation, top-quality) and *Tesco Healthy Living* (fourth generation, low-fat products).

As with the other British chains, the Tesco brand has been extended into other business areas, including Tesco Finance, Tesco Home Energy, Tesco Travel and Tesco.Net (an Internet Service Provide). Furthermore, Tesco is the world's leading Internet grocer.

SUMMARY. The top supermarket retailers in the UK all follow very clear branded-house strategies. It is interesting to note that in the UK, Aldi follows a slightly different strategy than in the other countries covered by this study, as, in addition to exclusive brands, it also has an own brand called *Balanced Lifestyle*, which is clearly associated with Aldi.

United Kingdom: Product categories

BEER. The British supermarket chains all have very broad assortments of beer. We focused mainly on pilsner or lager when visiting stores, because this type of beer is found in all five countries, but the British supermarket chains also have substantial assortments of for instance stout, bitter and ale. All three supermarkets visited had more than 20 different brands of lager in their assortment. Although these were mainly manufacturer brands, all three also had own label beers in their assortments. Sainsbury's even had a few products from a micro-brewery in London under the fourth-generation *Sainsbury's Taste the Difference* own label sub-brand.

Even in Aldi, the assortment of beer is quite broad compared to what was found in the other countries, as it has five exclusive brands of beer in its assortment.

FLOUR. In addition to their respective second- and third-generation retailer own labels, Asda, Sainsbury's and Tesco had the same two manufacturer brands in their flour assortments, *Homepride* and *McDougalls*.

FRESH MEAT. Retailer brands dominate in this category. Asda, Sainsbury's and Tesco all have third-generation own labels in this category. In addition, all have fourth-generation own label sub-brands for products of supposedly higher quality. Furthermore, both Sainsbury's and Tesco have own label sub-brands for low-fat meats and Tesco also has a low-price (second generation) sub-brand. Aldi sells a few exclusive brands of fresh meat.

FRESH PASTA. Asda and Tesco only sell own labels in this category. While Asda uses its standard *Asda* label, Tesco has a specific sub-brand for Italian foods like pasta and pasta sauces, namely *Tesco Italiano*. In addition to its third- and fourth-generation own labels, Sainsbury's also has two manufacturer brands in its fresh pasta assortment. Finally, Aldi has both an exclusive brand and a generic fresh pasta product in its assortment.

FROZEN VEGETABLES. In this product category, the assortments carried by the three supermarket retailers are almost identical. All three have second- and third-generation own-label sub-brands in their assortment, along with one to three manufacturer brands. Aldi has two exclusive brands in this product category.

SLICED MEAT. In this product category, Sainsbury's has no less than eight own label sub-brands, each apparently positioned slightly differently. In addition, Sainsbury's has the largest number of manufacturer brands (eight) of sliced meat of the British retailers visited.

Asda only has one manufacturer brand of sliced meat in its assortment, along with its second- and third-generation sub-brands. This brand, *Bernard Matthews*, is also in the assortments of Sainsbury's and Tesco. Sainsbury's and Tesco both have own label sub-brands aimed at kids, respectively *Sainsbury's Blue Parrot Café* and *Tesco Kids*. Two of the four manufacturer brands of sliced meat carried by Tesco are also aimed at kids, namely *Digimon* and *Thomas & Friends*.

Aldi's assortment of sliced meat is dominated by two exclusive sub-brands, namely *Courtway* and *Courtway Premium*. It thus has both second- and third-generation sub-brands in this product category. In addition, it carries the *Abraham* brand of smoked ham. This is a manufacturer brand also found in the assortments of other European food retailers.

SLICED YELLOW CHEESE. This product category is only slightly more important in the UK than in Sweden. Asda carries only two own-label sub-brands, while both Sainsbury's and Tesco have two manufacturer brands alongside their own labels. Tesco had two more or less overlapping own-label sub-brands in its assortment: *Tesco Healthy Eating* and *Tesco Healthy Living*.

WASHING POWDER. Aldi only carries one exclusive brand of washing powder, while the other retailers carry a mix of own-label sub-brands and manufacturer brands. With the exception of beer, this is the product category in which the supermarket chains carry the largest number of manufacturer brands – from Asda's seven to Sainsbury's ten manufacturer brands. There is considerable overlap in the assortments of manufacturer brands. The seven manufacturer brands found in Asda's assortment can also be bought in Sainsbury's and Tesco.

SUMMARY. In most of the product categories studied, British food retailers sell few manufacturer brands compared to their colleagues in other European countries, while the breadth and depth of their assortments of own label products are greater. It is also noteworthy that Asda, Sainsbury's and Tesco have the most developed branded-house strategies of all the retailers studied. In the UK, the retailer is the brand, and food retailers develop various own-label sub-brands in order to appeal to different market segments.

PRODUCT CATEGORIES ACROSS COUNTRIES

Having discussed each product category for each country, we will now take a brief look at similarities and differences across countries.

BEER. Assortments of this product category are dominated by manufacturer brands. Supermarket and hypermarket retailers in all five countries offer their customers a broad assortment of beer. The breadth and depth of beer assortments is greater than for other product categories, indicating that this product category is perceived by retailers to be important for their positioning.

With the exception of Germany, where the visited stores focused almost solely on German brands, the beer category is characterised by a large number of international manufacturer brands such as *Becks*, *Carlsberg*, *Foster's*, *Heineken* or *Pilsner Urquell*.

Apart from a few fourth-generation retailer brands in France and the UK, retailer brands are primarily second-generation retailer brands positioned solely on price. Discounters sell mainly exclusive brands, although some also have a few manufacturer brands in their beer assortments.

FLOUR. There are no international brands in this product category and there appear to be few national brands as well. To a significant extent, flour is a commodity. Retailers carry a relatively narrow assortment of plain white flour with assortments typically comprising one or two retailer brands and a few manufacturer brands.

FRESH MEAT. There are few if any strong manufacturer brands in this product category, which is dominated by generic products and retailer brands. Retailers increasingly attempt to create their own brands of fresh meat, most frequently as own labels, although there are exceptions to this rule, as demonstrated by Føtex and Kaufland, which have developed own brands with distinct identities. Because there are few manufacturer brands, fresh meat is a product category, which retailers can use to differentiate themselves with (cf Esbjerg, 2004), as is also the case with other freshness categories.

Fresh meat is making inroads into the discount sector. Most of the discounters visited carried a narrow assortment of fresh meat, typically stocking a few popular cuts.

FRESH PASTA. There are significant differences in the diffusion of retailer brands among countries in this category. In the UK in particular, retailer brands dominate. To a lesser extent, this is also the case in Denmark and Sweden, while in France and in particular Germany, manufacturer brands dominated assortments. In Germany, there are few retailer brands of fresh pasta, none in the hypermarkets visited.

FROZEN VEGETABLES. There are also considerable differences between assortments in this category. In Denmark and the UK, assortments are dominated by retailer brands. Manufacturer brands are typically reduced to filling gaps in the range of retailer branded products. In Germany and France, assortments of supermarkets and hypermarkets are dominated by manufacturer brands, although most retailers in these countries also have retailer brands. There are a few international brands like *Findus* in this product category, but most appear to be national brands only.

SLICED MEAT. This is a product category with many retailer brands, but also with some international brands (eg, *Aoste*, *Bernard Matthews*, *Böklunder*, *Herta*). Retail chains generally have a wide selection of sliced meat products. Assortments in the UK are dominated by own-label sub-brands, whereas only few manufacturer brands are included. In France, Germany and Sweden, assortments are dominated by manufacturer brands, although particularly in France retailer branded products are also important. In Denmark, assortments of retailer branded and manufacturer branded products are more or less equally large, although there appears to be a trend towards retailer branded products. For instance, the two Dansk Supermarked chains both have five own brands in this category.

SLICED YELLOW CHEESE. There appear to be considerable differences in the importance of this product category between countries. The breadth of assortment ranges from very narrow in Sweden and the UK to very broad in German hypermarkets. There are several national brands of sliced yellow cheese in Denmark, France and Germany, but there are also a few international brands, for example *Bonbel*, *Fol Epi* and *Leerdammer*.

WASHING POWDER. Although almost all of the retailers visited have one or more retailer brands of washing powder in their assortments, it is a category dominated by manufacturer brands, many of which are international (eg, *Ariel*, *Omo*, *Persil*).

It is interesting to note the extent to which assortments in this product category overlap between retailers in each country. In each of the different countries, supermarkets and hypermarkets almost carry exactly the same manufacturer brands.

DISCUSSION

In this paper, we have developed a concept of retailer brand architecture and used this concept to study the brand architectures of more than 20 food retailers in five European countries. We have defined retailer brand architecture as the combination of manufacturer brands, retailer brands and generic products in the assortments of food retailers. Retailer brand architectures can be studied along a number of dimensions, the most important being the so-called brand relationship spectrum, retailer brand generations, manufacturer brand generations and the overall positioning of the food retailer.

There are important differences and striking similarities in the retailer brand architectures of food retailers, both within and across countries, reflecting that food retailers simultaneously strive to be similar to and different from their competitors (Esbjerg 2004, cf Rindova & Fombrun 1999).

Retailers such as Auchan, Cora, Fakta, ICA, Sainsbury's or Tesco have developed clear branded-house strategies, where the name of the retailer can also be found on retailer branded merchandise. Other retailers sell their own merchandise under a variety of exclusive brands or own brands, where the relation to the retailer is not as obvious. This is for example the case with retailers such as Aldi, Føtex, Netto and Plus. It is interesting to note that mainly supermarket and hypermarket chains follow branded-house strategies, while the house-of-brands strategy is the one followed by many discounters. The retail format thus seems to play a role in the considerations retail managers have in relation to what branding strategy to follow.

At the same time, retailers such as Auchan, Cora, Fakta, ICA, Sainsbury's or Tesco can be said to be fifth-generation retailer brands, where the retailer becomes the brand. However, it is not just branded-house retailers that are brands in and of themselves. At least in Germany, a retailer such as Aldi, which follows a house-of-brands strategy, can also be said to be a strong brand in itself. Whether retailers are brands is thus not solely a question of the brand architecture strategy they follow. It also reflects other factors, such as whether the retailer is successfully positioned in the minds of consumers.

British supermarket retailers are widely regarded as being at the forefront of retailer branding and are acknowledged as a source of inspiration by other retailers, who mimic British food retailers through direct and indirect imitation (cf. Porac, Thomas & Baden-Fuller 1989).

There are obvious differences in the width and depth of assortments between different store types. Discounters have narrower assortment, have price as their most important competitive tool and typically focus on exclusive brands. For supermarket and hypermarket retailers, the picture is not so clear-cut. Some are mainly positioned on price (eg, Asda, Kaufland), while others are also positioned on the quality of the products they sell (eg, Sainsbury's, Tesco).

Selection is important, but whether this is between manufacturer brands, retailer branded products or both, differs from chain to chain and product category to product category. In the washing powder category, offering several different manufacturer brands appears to be necessary to achieve competitive parity, as evidenced by the striking similarities in assortments between competing chains. Except for their various retailer brands, competing retailers carry almost identical assortments of washing powder. Manufacturer brands make up the majority of assortments for supermarkets and hypermarkets. This implies that manufacturer brands are relatively strong in this product category, perhaps because of the large marketing budgets behind some brands.

It is more important for retailers to offer consumers a wide selection in some product categories than in others. In particular beer appears to be a product category, where it is important for supermarket and hypermarket retailers to offer consumers a wide range of products to choose from. On the other hand, flour is a product category, where few brands are offered and where there appears to be few strong brands.

Freshness categories seem to be of particular interest to retailers. Fresh products such as meat, fruits and vegetables have traditionally been sold as generic products with neither strong manufacturer nor retailer brands. This is a product category that is important for the positioning of many retailers. Many retailers have developed or are in the process of developing own brands or own labels in these product categories.

Suggestions for future research

This paper represents a first attempt to conceptualise and study retailer brand architecture. The concept needs to be further refined and many aspects of retailer brand architectures have not been explored. To end this paper, we will suggest some topics for future research on retailer brand architecture.

The existing literature takes an internal perspective on brand architecture. In contrast, we have attempted to look at brand architectures from an outside perspective. Because retailer brand architectures are intended to influence consumer perceptions about a retail chain or specific products, studying how consumers perceive and evaluate brand architectures is the next logical step. (Tentative results of a consumer study can be found in Esbjerg, Grunert & Juhl 2004). This can help clarify whether there are aspects missing in our conceptualisation. It can also help retailers and manufacturers design brand architectures that are evaluated more favourably by consumers.

It would also be interesting to study how retailers construct their brand architectures and why. One possibility would be to study how retailers make sense of their assortments, why and with what consequences (Weick 1995).

Finally, the term "brand architecture" implies an affinity with architecture. The connection between architecture and retailer branding has not been explored in this paper. It would be interesting to explore the relation between store design, visual merchandising (Varley 2003) and consumer perceptions of the store, its brand architecture and individual products. In this connection, it might be possible to build on the architectural literature on store design (eg, Chung, et al. 2001) and how brands are expressed through architecture (eg, Reiwoldt 2002).

Is brand architecture the wrong metaphor?

As a final comment, let us briefly reflect upon whether the term “brand architecture” is a suitable metaphor. The term “architecture” implies a static whole, which is difficult to change. However, retail assortments are in constant flux. New products and brands are launched; some products are repositioned or given more prominent shelf positions, while still others are delisted by the retailer.

Is brand architecture the wrong metaphor? Would it be better to speak of brand galleries? The term “brand gallery” implies that while there might be a stable core (a permanent exhibition if you will), the products and brands on display change over time.

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APPENDIX 1 – CHECKLIST

Information was collected about both the general and product category specific aspects of the market offering of retail chains.

General information

The following general information was collected for each store visited:

- Name and address of the store
- Location (city centre, outskirts of town, outside town, mall)
- Neighbouring stores and service providers
- Store format (discounter, supermarket, superstore, hypermarket)
- Store décor (materials, colour, cleanliness)
- Allocation of shelf space
- Placement of specials
- Staff (visibility, appearance)
- Prices (price tags, slogans, posters etc.)
- Categories in overall assortment (breadth of assortment)
- Services offered (market, non-market)
- Loyalty cards, credit cards
- Financial services offered
- Opening hours
- Marketing communication (logo, spokespersons, product names, colours, slogans, symbols)
- Fresh food assortment (service, self-service)

Category-specific information

For each product category, the following information was collected:

- Brand
- Number of variants per brand
- Price range for each brand
- Shelf space allocated to each product category
- Placement on shelves
- Neighbouring product categories
- Signs
- Posting of prices
- Posting of offers
- Generation of retailer brands and manufacturer brands (interpretation)

APPENDIX 2 – TABLES

Brand architecture: Denmark

Brand architecture, beer, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands		Dansk Pilsner	Original Pils	Pokal Star	
Manufacturer brands	Krudtugle Ren Pilsner Vestfyen	Carlsberg Grolsch *Tuborg*	Budvar Budweiser *Carlsberg* *Ceres* *Faxe* Fosters *Heineken* Pilsner Urquel *Tuborg*	*Carlsberg* *Ceres* *Faxe* *Heineken* Thy (ecological) *Tuborg*	*Carlsberg* Harboe *Tuborg*
Generic products					

Brand architecture, flour, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands		Møllemel	Bagerens Hvedemel (generic)	Natura Opal Safir	Bagerens
Manufacturer brands		*Kornkammeret*	*Amo* *Gluten*	*Amo* *Gluten*	*Kornkammeret*
Generic products	Hvedemel	Hvedemel			Hvedemel

Brand architecture, fresh meat, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands		Fjerkræs Friland	Mester	COOP	Den glade gris Dansk Kalkun Hakket okse
Manufacturer brands			Antonius		Harboe Farm Rose
Generic products		"No name"			

Brand architecture, fresh pasta, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands	Delicato		Daily Minimum	"Sløjfe" Natura	
Manufacturer brands		*Pastella*	*Pastella*	La Buona	Pasta Luigi *Pastella*
Generic products					

Brand architecture, frozen vegetables, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands	All Seasons	Sunrise	Farmer Grønt *Luksus Grønt* Marco Polo	Coop X-tra Danefrost	Green House Køkkengrønt *Luksus Grønt*
Manufacturer brands		Ardo Frigodan		*Frigodan*	
Generic products					

Brand architecture, marmalade, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands	Tamara	Frugtgården		Natura Rainbow X-tra	Plantage
Manufacturer brands		*Den ægte* *Svansø*	*Den gamle fabrik* Mackeys *Skælskør* *Svansø* *Vendelbo*	*Den gamle fabrik* *Den ægte* Koo Robertsons *Skælskør* *Svansø* St. Dalfour *Vendelbo*	Rebild *Svansø*
Generic products	"No name"		Jordbær		

Brand architecture, sliced meat, Denmark

	Aldi	Fakta	Føtex	Kvickly	Netto
Retailer brands	Delicato Guldsegl	Kabaret	Daily Familiepålæg Minimum Silkeskåret Søndagspålæg	Coop x-tra Et godt køb GoMan	Defco Det gode bord Egelykke Letvægter Weekend-pålæg
Manufacturer brands	Abraham	Christiansfeld My Favourite *Skare*	*Böklunder* *Den grønne slagter* *Pålækker* *Skare*	Bernard Matthews *Böklunder* *Den grønne slagter* Gaudio Larden *Pålækker* Sandsteede *Skare*	*Böklunder* Principe
Generic products	"No name"				

Brand architecture, sliced yellow cheese, Denmark

	Aldi	**Fakta**	**Føtex**	**Kvickly**	**Netto**
Retailer brands	Gouda Havarti Jermi Jogging Kordonnet	Mejeriet	Minimum	”Sløjfe”	Tasty Cheese
Manufacturer brands		*Cheasy* *Lillebror* *Malthe* *Riberhus*	Bredebro *Cheasy* Den gode Samsø *Malthe* *Riberhus* Stærk Jyde	*Cheasy* *Lillebror* *Malthe* *Riberhus* Økologisk Samsøe	*Cheasy* *Riberhus*
Generic products	”No name”				

Brand architecture, washing powder, Denmark

	Aldi	**Fakta**	**Føtex**	**Kvickly**	**Netto**
Retailer brands	Aktiv Vask Una	Domino	Grøn linie	Bluecare Coop x-tra Cyclon Et godt køb Mini Risk	Net-Op
Manufacturer brands		*Biotex* *Omo* *Neutral* Proff	*Ariel* *Biotex* *Dynamo* *Neutral* *Omo* *Persil*	*Ariel* *Biotex* *Dynamo* *Omo* *Persil*	*Ariel* *Dynamo*
Generic products					

Brand architecture: France

Brand architecture, beer, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands	Sterling ("Bird")	La Selection Auchan			Fink Bräu Grafenwalder Premium Pils Schwaben Bräu	Beckers Feldbräu Kaiser Kroner Obertager	
Manufacturer brands	*Ancre* Buckler *Carlsberg* *Fosters* *Heineken* *Jenlain* *Kanterbräu* *Kronenbourg* *Meteor* *Ottweiler* *Schutzenberger* Spaten Tourtel	Ackerland *Ancre* *Carlsberg* EKO Fisher Fosters Fritz Bräu *Heineken* *Jenlain* *Kanterbräu* *Karlsbräu* *Kronenbourg* *Löwenbräu* *Meteor* *Ottweiler* Pilsner Urquell Sapporo *Schutzenberger* *Stella Artois*	Becks Duvel *Fosters* Grolsch *Heineken* Henninger *Jenlain* *Karlsbräu* *Kronenbourg* *Loburg* *Löwenbräu* *Meteor* Mützig Sam Adams *Schutzenberger* *Stella Artois* Votsberg	*Carlsberg* *Coruna* *Fosters* *Heineken* *Jenlain* *Karlsbräu* *Kronenbourg* *Loburg* *Metor* *Schutzenberger*			*Ancre* Brauperle Brugs Budweiser *Corona* *Fosters* *Heineken* *Karlsbräu* Krombacher *Kronenbourg* Riegeler
Generic products							

Brand architecture, flour, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands	*"Bird"* *"Thumb"*	*"Bird"* *"Thumb"*	Cora		Cambino		COOP
Manufacturer brands	*Francine* *Gruau D'or*	*Francine*	*Francine* *Gruau D'or*			*Gruau D'or*	*Francine* *Gruau D'or*
Generic products			Farine Blanche			Farine de ble	"No name"

Brand architecture, fresh meat, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands		Auchan La Selection Auchan	Cora		Dinde	Pere Quentin	Gastronome
Manufacturer brands			Charal	Jean Rozé Louis d'Armel			Le Gaulois Père Dada
Generic products	"No name"				"No name"	"No name"	

Brand architecture, fresh pasta, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands		”Bird” ”Thumb”	Cora Cora Nature Bio ”Smiley”			Rigoletto?	COOP Alsace
Manufacturer brands	*Lustucru*	*Giovanni Panzani* *Lustucru* Rana	*Boni* *Giovanni Panzani* *Hilcona* *Lustucru*	Fiorini *Lustucru*			*Boni* *Giovanni Panzani* Grand Mere *Hilcona* *Lustucru*
Generic products					”No name”		

Brand architecture, frozen vegetables, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands	*”Bird”*	*”Bird”* *”Thumb”*	Cora Cora Nature Bio		Green Grocers		
Manufacturer brands	*Bonduelle* *D’Aucy* *Findus*	Aviko *Bonduelle* *D’Aucy* *Findus* *Knorr* *Royal Champignon*	*Bonduelle* *D’Aucy* *Findus* *Pasfrost*	*Bonduelle* *Findus* Saint Etol			*Bonduelle* *D’Aucy* *Findus* *Knorr* *Pasfrost* *Royal Champignon*
Generic products							

Brand architecture, sliced meat, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands	*”Bird”* *”Thumb”*	*”Bird”* ”Fugle Tranche Fio” *“Thumb”*	Cora Cora Nature Bio		Dulano	Compagnie de Scheir Dufuare & Fils	COOP Alsace
Manufacturer brands	*Aoste* Daniska *Fleury Michon* *Herta* Jeca Justin Brideu Min Iller *Montorsi* Stoeffler	*Aoste* *Fleury Michon* *Herta* La belle Vende *Madrange* Tempé	*Aoste* *Fleury Michon* *Herta* Jean Caby *Madrange* *Montorsi*	*Aoste* *Fleury Michon* *Herta* Metzger Müller Monique Ranau Roulade Poivras Mathuri Onno			*Aoste* *Fleury Michon* *Herta* Jean Gautain *Madrange*
Generic products					”No name”	Blanc de Poulet Jambon de Paris Jambon Halivn	”No name”

Brand architecture, sliced yellow cheese, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands		”Bird” ”Thumb”	Cora	Paturages	Hochland		
Manufacturer brands	*Leerdammer*	Degustation *Fol Epi* La Bonne Vache *Leerdammer* *Passendale* *President*	Damtaler *Fol Epi* Le Centurion *Leerdammer* *President*	*Leerdammer* Van Floris			*Fol Epi* Frica *Leerdammer* *Passendale* *President* Rambol
Generic products							

Brand architecture, washing powder, France

	Atac	**Auchan**	**Cora**	**Intermarche**	**Lidl**	**Norma**	**Rond-Point**
Retailer brands	*”Bird”*	*”Bird”*			Maxistrat W5	Toptil	
Manufacturer brands	*Ariel* *Axion* *Bonux* *Dash* *Gama* *Le Chat* *Mir* *Nettymatic* *Omo* *Skip* *Super Croix* *X-tra*	*Ariel* *Axion* *Bonux* *Dash* *Gama* *Le Chat* *Netty* *Omo* *Persil* *Skip* *Super Croix* *X-tra*	*Ariel* *Axion* *Bonux* *Dah* *Gama* *Le Chat* *Omo* *Persil* *Skip* *Super Croix* *X-tra*	Apta *Ariel* *Bonux* *Dash* *Le Chat* *Persil* *Skip* *X-tra*			*Ariel* *Axion* *Bonux* *Dash* *Gama* *Le Chat* *Mir* *Omo* *Persil* *Skip* *Super Croix* *X-tra*
Generic products							

Brand architecture: Germany

Brand architecture, beer, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands			Grafenwalder	Fürsternburg	
				Schloss	
Manufacturer brands		Alpirsbacher	*Bitburger*	*Becks*	*Becks*
		Bitburger		*Dinkelacher*	*Bitburger*
		Brauhaus Pforzheim		*Tuborg*	Fürstenberg
		Dinkelacher			*Germania*
		Eichbaum			Hafferader Hoepfner
		Gemüder			*Holstern*
		Germania			*Jever*
		Jever			Karlsberg
		Ketterer			König
		Krombacher			*Krombacher*
		Löwenbräu			*Löwenbräu*
		Meister			Moninger
		Oettinger			*Oettinger*
		Pilsener			Raderberger
		Moninger			Rössel
		Stuttgarter Hofbräu			Veltins
		Tuborg			Warsteiner
		Ureich			Wernes Gründe
Generic products					

Brand architecture, flour, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands				Osna	Smart Price
Manufacturer brands	Sonnenstrahl	*Aurora* *Gold-Puder*	*Aurora*	Diamant	*Gold Puder*
Generic products		Qualitäts-weizenmehl Weizenmehl			

Brand architecture, fresh meat, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands		Purland	Guknecht Landjunker Oldenländer	Salomon	Wal-Mart frisch
Manufacturer brands					
Generic products					

Brand architecture, fresh pasta, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands				La Cappenina	
Manufacturer brands	Rehm	Buitoni *Bürger* Hilcona Landmann's Settele			*Bürger* Di Carlo Schlemmerli Steinhaus Steinhaus BR Zimmerman
Generic products	"No name"		"No name"		

Brand architecture, frozen vegetables, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands	Gartenkrone		Green Grocers	Bio Bio	Great Value
			Landgut	Green Gold	Smart Price
			Le Chef de Cuisine		
Manufacturer brands	*Elbtal*	Ardo		*Iglo*	Bonduelle
		Blue Moon			*Elbtal*
		Elbtal			*Frosta*
		Frosta			Golden Crown
		Iglo			*Iglo*
		Tavola			*Volmer Frentzel*
		Volmer Frentzel			
Generic products					

Brand architecture, sliced meat, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands	Glachen-Beune Jamon Prosciuteria Italiana Savels		Duland Gebirgsjäger Wufa	Gourmet Lindenhof Sinkendich Willems Wein	Great Value Smart Price
Manufacturer brands	*Abraham* *Adler* *Kupfer* *Ponnath*	*Abraham* *Adler* Böklunder Carona Don Jaime Gutes aus Mecklenburg *Herta* Kleinemess Küpfer Montorsi *Ponnath* *Reinert* Tulip Westfalen	*Herta*	*Adler* Kemper *Zimbo*	*Abraham* *Adler* Aoste Du darfst Fratelli Beretta Gotfried Handl *Herta* Höll Metten Family Pro Vital *Reinert* *Zimbo*
Generic products					

Brand architecture, sliced cheese, Germany

	Aldi	Kaufland	Lidl	Plus	Wal-Mart
Retailer brands	Kordonnet		Alpengut	Hofmaier	
	Sonnenhof			Landfroh	
Manufacturer brands		Aggerstein	*Hochland*	*Hochland*	*Allerum*
		Allerum	Milbona		Arla
		Apelbyer			Bayernland
		Bonbel			*Bonbel*
		Du darfst			*Du darst*
		Fol Epi			*Fol Epi*
		Frico			*Frico*
		Friendship			Grünland
		Karwendel			*Karwendel*
		Kraft			*Kraft*
		Landliebe			*Landliebe*
		Leerdammer			*Leerdammer*
		Miram			Milchland
		Westland			*Miram*
					Nazareth
					Passendale
					Rich Monts
					Romance
					Scharf Kaes
					Westland
					Wildberg
Generic products			Gouda		

Brand architecture, washing powder, Germany

	Aldi	**Kaufland**	**Lidl**	**Plus**	**Wal-Mart**
Retailer brands	Kürfein		Maxistrat	Bravil	Great Value
	Tandil		W5		
Manufacturer brands		*Ariel*	*Ariel*	*Ariel*	*Ariel*
		Dalli	*Persil*	*Persil*	Coral
		Dash	*Spee*	*Spee*	*Dalli*
		Frosch			*Dash*
		Lico			Feva
		Lunika			*Mr. Proper*
		Mr. Proper			*Persil*
		Persil			Rei
		Spee			*Spee*
		Sunil			*Sunil*
		Vizir			*Weißer Riese*
		Weißer Riese			
Generic products					

Brand architecture: Sweden

Brand architecture, beer, Sweden

	Coop Forum	ICA Kvantum Malmbergs
Retailer brands		
Manufacturer brands	*Carlsberg* Catsberg DAB Dansk Pilsner Falcon Gässler *Heineken* *Koppabärs* *Lapin Kulta* Lyckholms *Mariestads* *Pripps Blå* Starobrno *Tuborg* *Åbro*	*Carlsberg* *Falcon* Faxe *Heineken* *Kaltenberg* *Koppabärs* Københavns *Lapin Kulta* *Mariestads* Pilsner Urquell *Pripps Blå* *Tuborg* Zeunerts *Åbro*
Generic products		

Brand architecture, flour, Sweden

	Coop Forum	ICA Kvantum Malmbergs
Retailer brands	Änglamark	ICA Ecologisk
Manufacturer brands	Cerena *Kungsörnen*	*Kungsörnen* Ramlösa Kvarn
Generic products		

Brand architecture, flour, Sweden

	Coop Forum	ICA Kvantum Malmbergs
Retailer brands		
Manufacturer brands	GuldFögeln Kronfögel	
Generic products	”No name”	Only service counter

Brand architecture, fresh pasta, Sweden

	Coop Forum	ICA Kvantum Malmbergs
Retailer brands	Änglamark Signum	
Manufacturer brands	Fam Dufgård	
Generic products		

Brand architecture, frozen vegetables, Sweden

	Coop Forum	**ICA Kvantum Malmbergs**
Retailer brands	Änglamark	Euroshopper
	Signum	ICA
Manufacturer brands	*Findus*	*Findus*
	Frigodan	*Frigodan*
	Nutan	Tjæreborg
		Topp
Generic products		

Brand architecture, sliced meat, Sweden

	Coop Forum	**ICA Kvantum Malmbergs**
Retailer brands	Änglamark	Euroshopper
	Signum	ICA
		ICA Svenska Delikatess
Manufacturer brands	Böklunder	Bernard Matthews
	Carte Buena	*Clark*
	Clark	Fiorucci
	Den grönna Slagter	*Onsala*
	Majesty	*Pärssons*
	Onsala	Saan
	Pärssons	Samfæd(?)
		Tunnenhof
		Vyglarps
Generic products		

Brand architecture, sliced yellow cheese, Sweden

	Coop Forum	**ICA Kvantum Malmbergs**
Retailer brands		
Manufacturer brands	Arla	Delite
	Billing	W. Kloster
	Kraft	
	W. Kloster	
Generic products		

Brand architecture, washing powder, Sweden

	Coop Forum	**ICA Kvantum Malmbergs**
Retailer brands	Änglamark	Euroshopper
	Blå-Vitt	
	Coop x-tra	
Manufacturer brands	*Ajax*	*Ajax*
	Ariel	*Ariel*
	Persil	Ecover
	Via	Napa
		Neutral
		Persil
		Skona
		Via
Generic products		

Brand architecture: United Kingdom

Brand architecture, beer, UK

	Aldi	Asda	Sainsbury's	Tesco
Retailer brands	Brassarie Galahad Saint Etienne Saracen Steinhausser	Asda Extra	Sainsbury's Sainsbury's Taste the Difference	Tesco Tesco Value
Manufacturer brands		*Amstel* *Budweiser* Caffery *Carling* *Carlsberg* *Castlemagne* Faxe *Fosters* *Grolsch* *Heineken* Herald Hollandia *Holsten* Kaliber Karlsbräu *Kronenbourg* *Michelob* *Miller* *Pilsner Urquell* *San Miguel* *Skol* Staropramen *Stella Artois*	*Amstel* *Becks* Budvar *Budweiser* *Carling* *Carlsberg* *Castlemagne* Duvel *Fosters* *Grolsch* *Heineken* *Holsten* *Kronenbourg* Löwenbräu *Miller* *Pilsner Urquell* Red Strip *San Miguel* *Sol* *Stella Artois* Tennants Threlfalls	*Becks* Biere D'or *Budweiser* *Carling* *Carlsberg* Cobra *Fosters* *Grolsch* *Heineken* *Holsten* Kingfisher *Kronenbourg* *Michelob* *Miller* Nastro Azurro *Pilsner Urquell* Rolling Rock *San Miguel* *Skol* *Sol* St Omer *Stella Artois* Tiger
Generic products				

Brand architecture, flour, UK

	Aldi	Asda	Sainsbury's	Tesco
Retailer brands	White Mill	Asda Asda Smart Price	Sainsbury's Sainsbury's Low Price	Tesco Tesco Value
Manufacturer brands		*Homepride* *McDougalls*	*Homepride* *McDougalls*	*Homepride* *McDougals*
Generic products				

Brand architecture, fresh meat, UK

	Aldi	**Asda**	**Sainsbury's**	**Tesco**
Retailer brands	Ashfield Nature's Isle Oakhurst	Asda Asda extra special	Sainsbury's Sainsbury's Be good to yourself Sainsbury's taste the difference	Tesco Tesco Finest Tesco Healthy Living Tesco Value
Manufacturer brands				Swedish Crown
Generic products				

Brand architecture, fresh pasta, UK

	Aldi	**Asda**	**Sainsbury's**	**Tesco**
Retailer brands	Pastaria	Asda	Sainsbury's Sainsbury's Taste the Difference	Tesco Italiano
Manufacturer brands			Giovanni Rana The Stamp Collection	
Generic products	Italiano			

Brand architecture, frozen vegetables, UK

	Aldi	**Asda**	**Sainsbury's**	**Tesco**
Retailer brands	Four Seasons Scotch Frost	Asda Asda Smart Price	Sainsbury's Sainsbury's Low Price	Tesco Tesco Value
Manufacturer brands		*Birds Eye*	*Birds Eye* *Findus*	Aunt Bessie's *Birds Eye* *Findus*
Generic products				

Brand architecture, sliced meat, UK

	Aldi	Asda	Sainsbury's	Tesco
Retailer brands	Courtway Courtway Premium Kuber	Asda Asda Smart Price	Sainsbury's Sainsbury's Be good to yourself Sainsbury's Blue Parrot Cafe Sainsbury's Low Price Sainsbury's Organic Sainsbury's Premium Sainsbury's Taste the Difference Sainsbury's Thinly sliced	Tesco Tesco Finest Tesco Kids Tesco Value
Manufacturer brands	Abraham	*Bernard Matthews* Mattesons	Arden *Bernard Matthews* Danepak Helen Brownings totally organic Herta Rannech Tom & Jerry Tweety	Aoste *Bernard Matthews* Digimon Thomas & Friends
Generic products				

Brand architecture, sliced yellow cheese, UK

	Aldi	Asda	Sainsbury's	Tesco
Retailer brands	Continental cheese Gourmet	Asda Asda good for you	Sainsbury's	Tesco Tesco Healthy Eating Tesco Healthy Living
Manufacturer brands			Cathedral City *Pilgrims Choice*	Leerdammer *Pilgrims Choice*
Generic products				

Brand architecture, washing powder, UK

	Aldi	**Asda**	**Sainsbury’s**	**Tesco**
Retailer brands		Asda Logic Asda Smart Price	Sainsbury’s Sainsbury’s Low Price Sainsbury’s Perform + Protect	Tesco
Manufacturer brands	Almat	*Ariel* *Bold* *Daz* *Dreft* *Fairy* *Persil* *Surf*	*Ariel* *Bold* *Daz* *Dreft* *Ecover* *Fairy* Filette *Persil* Sur Care *Surf*	Acdo *Ariel* *Bold* *Dreft* *Ecover* *Fairy* *Persil* *Surf*
Generic products				