

Private labels in Spain and the challenge of sustaining sustainable FMCG markets

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Abstract

The purpose of this paper is to gain insights into the retailer's and the private labels' role in the growth of the sustainable Spanish FMCG market; in particular, it will describe the current situation of sustainable third-party granted labels (Organic, Fair Trade, FSC, MSC, Rainforest Alliance, Ecolabel and Leaping Bunny), based on Nielsen retailers' panel Scan Track (2012-13, Madrid region). To assess the current role of PLs in the sustainable market, it examines private labels and national brands' sales (units and €), numerical distribution (percentage of retailers selling the product), prices and sales in promotion (units and €). The findings show that national brands are still leading the sustainable market, but there is room for the development of growing and high-value niche markets by retailers.

Keywords

Sustainable labels, FMCG, private labels, retailer strategy. Spain

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1. Introduction

The sustainable market is booming (e.g. FIBL, 2014) Despite the current recession, demand for sustainable products keeps increasing, and Fast Moving Consumer Goods (FMCG) manufacturers and retailers are stating that sustainability is increasingly central to their business (BCG, 2009). In this paper sustainable products and sustainable labelled products are defined, following Carrero and Valor (2012), as those products with a social or environmental commitment, “having achieved, or being on the way to achieving, a better level of environmental or social performance than non-labelled products”. Sustainable products or sustainable labelled products include, inter alia, organic, fair trade, and environmentally friendly goods; sustainable is used here as an umbrella term to include green, environmental, animal testing, and other related denominations.

The idea that PLs would help grow the sustainable market is not new and has been advanced by many authors (e.g. Cliquet, 2009; Morschett, 2009; Reynolds, 2009); evidences have been found in the organic market (Nielsen, 2010; Organic Monitor, 2010) of the leading role of retailer labels and private labels in the market growth.

Sustainable private labels (PLs thereafter), embody an opportunity for setting up a win-win strategy for both consumers and retailers. First, they may represent an affordable alternative for consumers which would overcome the problem of a premium price, as well as the availability in stores. Also, the reputation of the retailer may help overcome the problem of lack of trust in the labels. Second, sustainable PLs constitute a worthy tool for retailers to build up a superior reputation/image and quality positioning, to improve loyalty or to differentiate its offerings from competing retailers (Ailawadi et al., 2004; Burt, 2000; Guptill and Wilkins, 2002; Laaksonen and Reynolds, 2004). Thus, retailers emerge as key agents in seizing this sustainable market, either by adding sustainable references to their portfolios or by creating their own sustainable brands -leading to a so-called “accessibility model”- (Dupupet et al., 2010; Puelles M. et al., 2011).

In Spain, sustainable brands have yet to reach the mainstream channels. Examining the organic market, the only one for which there is available data, supercenters and supermarkets account for less than one third of total organic sales (MAGRAMA, 2012); in contrast, specialist stores play a leading role (50-60%). This market structure is seen as a liability for the growth of organic products (Picazos, 2002; Sánchez et al., 2001; Schmid et al., 2007; Vega et al., 2007). Moreover, it is considered the main reason why the internal market does not get developed (Spain is one of the main global producers of organic goods, but the production is exported).

This study aims to describe the participation of national brands (NBs thereafter) and PLs in the sustainable market. Compared to previous studies this paper enlarges the number of analyzed sustainable labels (seven social and environmental labels are examined). The paper examines specifically NBs and PLs’ market share, availability (numerical distribution), price, and promotion. This is an area of limited research: regarding sustainable markets, most studies have focused on price and price-related strategies, specifically for organics and fair-trade products (e.g. De Pelsmaker et al., 2005; Hammarlund, 2002; van Herpen et al., 2012); beyond price, a significant part of studies concentrate on studying marketing strategies for

sustainable PLs (e.g. Bezawada and Pauwels, 2013; Rivera and Sánchez, 2002). Few studies have attempted to unveil differences in sustainable markets between NBs and PLs; to our knowledge, only Ngobo (2011) examined such differences in the organic market to conclude that consumers were more likely to buy organic PLs. This paper also contributes to the development of the suggested model of accessibility, by providing insights to FMCG retailers.

2. Obstacles for sustainable shopping in FMCG and PLs' opportunity

2.1. Obstacles for consumers to buy responsibly

The main barrier cited by consumers is the price (e.g. Jolly, 1991; Nielsen, 2010; Sánchez et al., 2001), although it is less mentioned by the most conscious consumers (e.g. Gil et al., 2001; Rivera and Sánchez, 2002; Sánchez et al., 2000); for some, it is even an indicator of quality, considered similar to gourmet products (e.g. Urbano and Temprano, 2004). Actually Ngobo (2011), in his study of organic products in France, found that demand reacts negatively to price cuts. There is also evidence that a significant group of consumers are willing to pay a premium price for sustainable products (e.g. Canavari et al., 2005; Deloitte, 2013; Royne et al., 2011).

Audit studies have found that organic goods sell at premium prices, although the price differential varies across type of stores and product categories (Urbano and Temprano, 2004; Vega et al., 2007). In food, the premium price is approximately 20-40% (Vicente et al., 2007). This premium is much higher than the one accepted by consumers -between 10-20%- (e.g. CECU, 2010; Sánchez et al., 2001; Deloitte, 2013).

Other obstacles cited in the literature are the reduced offer and availability at mainstream stores (Gottschalk and Leistner, 2013) or the distrust and lack of knowledge about these products, and limited awareness of sustainability labels (Carrero and Valor, 2012; Grunert et al., 2014).

2.2. PLs and sustainable products

The price gap between PLs and manufacturers' brands has been found in several countries (e.g. Dimitri and Greens, 2000). In Spain, several researchers (e.g. Vicente et al., 2007; Puellas et al., 2008), have found that the price of organic PLs is higher than the non-organic PLs, but consistently inferior to NBs (between 15%-20%).

Although some authors contend that PLs are especially successful in low involvement products (Semeijn et al. 2004), the truth is that PLs are migrating from a standard segment, with a strong focus on price, towards value and premium segments -the so called "fourth generation" of PLs- (Laaksonen and Reynolds, 1994; Reynolds, 2009). In fact, many recent PLs' introductions in FMCG market focus on six innovative and targeted product segments: Green/ethical; Healthy; "Geo" -local, regional, ethnic, exotic-; Kids/baby; Food-to-go; and Premium (PLMA, 2014). Sustainable products are placed in this area of premium FMCG products. Therefore, the inclusion of sustainable PLs would be consistent with this stretching strategy and would help improve the positioning of PLs as quality brands.

3. Method

Data was obtained from the Nielsen retailers' panel called Scan Track (sample of 59 superstores and 770 supermarkets, all located in the city of Madrid, although they usually have stores in other regions as well). Stores not based on a "self-service" format are excluded

from the universe. Also, fresh food is excluded from the analyzed categories. Aggregated observations were given by Nielsen, differentiating between product categories and between certified and non-certified products, national brands (NB) and private labels (PL). Data cover a time span of 104 weeks, from January 2012 to December 2013. Five variables were given by Nielsen: sales (units), sales (€), numerical distribution (percentage of retailers selling the product), sales in promotion (units), sales in promotion (€). Prices are calculated by dividing sales value by sales volume. Therefore, price is given as a unit value, not actual price.

Given that sustainable labels are not coded in the bar code, an audit took place to identify the SKU carrying a sustainable label. Only third-party labels were considered: Organic, Fair Trade, Forest Stewardship Council, Marine Stewardship Council, Rainforest Alliance, and Leaping Bunny. Previous studies had found that these were the third-party labels with highest penetration in the Spanish shelves (Carrero and Valor, 2012). In the results section, data was computed for a selection of product categories. These were chosen as they meet two criteria: (i) Their share over total FMCG sales is significant (> 1%); (ii) The share of sustainable brands in these categories is above average (> 4.4%).

Table 1. Selected categories: penetration in FMCG and penetration in the sustainable market

	Share over total FMCG sales (%)	Share of sustainable brands over category (%)
Milk	6.8	21.4
Soft drinks	6.2	6.6
Yogurt	4.9	5.6
Wine	3.2	8.9
Sliced bread	1.5	4.3
Toilet paper	1.5	4.4
Roasted coffee	1.5	9.6
Soups	1.4	31.9
Juices	1.3	33.9
Ice-creams	1.3	13.2
Total	29.7	12.7

4. Results

Total share of PLs in the sustainable market is approximately 20%. This penetration is significantly lower than that of the non-sustainable market, where PL reaches 30.8% of the FMCG market (Nielsen, 2013). Sustainable brands account for 6.3% over total NB, but this figure halves in the PL (2.55%).

If we examine the share of NB and PL in each sustainable label, we conclude that NB dominates, with shares larger than 90% in most of the labels (Rainforest Alliance, 99.3%; Fair trade, 93.1%; Ecolabel, 92.3%). Yet, PLs have a larger penetration in MSC (41.2%), Leaping Bunny (27.4%), and FSC (25%).

It is especially remarkable the case of Organics. PLs account for 11% of total organic sales. However, in other OECD-countries PLs are regarded as the major drivers of the market (Jaenicke et al., 2011). Both growth rate and market share are smaller than the figures reported in other countries, such as United States where PLs account for 25% of the organic market (Nielsen, 2010) or Germany -40%- (Jonas and Roosen, 2005). In contrast, sales of sustainable PLs have grown in other labels, such as Fair Trade (fivefold increase), MSC

(threefold increase), and Rainforest (twofold), whereas Ecolabel has not changed and sales of PLs certified with Leaping Bunny are decreasing¹.

Zooming on product category, we reach the same conclusion: NBs are dominant in most product categories. However, PLs are over average in juices and toilet paper. Both categories should be considered close to commodities, which could explain why PLs are dominant. Even when penetration is still low, the growth rate of PLs is remarkable in categories such as coffee (25%), wine (22%), or soft drinks (20%).

These results are not surprising when the numerical distribution is assessed (ND is the percentage of stores that over the period under examination has stocked or sold any sustainable brand). Most stores carry a certified NB product, although the figure drops in certain categories - one third of stores offered a sustainable alternative in toilet paper or two thirds carry a sustainable SKU in coffee. In contrast, availability of sustainable alternatives under a PL is marginal, except for wine. The only category for which availability is similar for both NB and PL is toilet paper. Pearson correlation coefficients show that there is a significant, positive correlation between distribution and sales for both NB and PL in most categories (table 3).

Apart from availability, the other main barrier to increased sales is price premiums. This study confirms previous evidence that there is a price premium for sustainable brands (even as much as three times the price of non-sustainable SKU in roasted coffee or ice-cream), although there is no premium in certain categories such as wine and toilet paper. Moreover, the price of sustainable brands, on average, has reduced compared to 2012 by 3.62% whereas prices of non-sustainable brands are stable (+0.7%).

As expected, the premium is mostly found in NBs rather than in PLs, except in soup and bread. PLs sustainable brands are up to 41% cheaper than NBs. Differences in prices between the two may reach 167% in coffee, 75% in soft drinks, 41% in ice-creams or 30% in yogurts. Even more, in some categories – e.g. soft drinks, ice-creams, milk, and juice-the sustainable PLs are cheaper than the non-sustainable NBs. Yet, the difference in price is shortening. The change in price differential suggests price convergence in most categories (only in ice creams price differential shows a significant growth).

Correlation coefficients are not consistent across categories. Therefore, it cannot be stated that there is a consistent negative relationship between price and sales; rather, this relationship differs when we compare NB and PL. In sliced bread, for instance, the correlation is negative for NB which suggests that sustainable brands are normal goods, whereas it is positive for PL, suggesting they are luxury goods. In some categories, the sign of the correlation coefficient is the opposite in NB and PL, whereas in other categories is the same. Variations are probably due to the product category which suggests that intrinsic features of the category or its market structure explain the differences in consumers' reaction to sustainable SKUs price. The findings of Bezawada and Pauwels (2013) or Ngobo (2012) show that sales of organic goods are higher in high purchase frequency, virtue goods, or those that come directly from the farm; conversely, sales were lower in concentrated categories and promotional categories (i.e. that feature prominently in store flyers).

¹ Leaping Bunny label has a very limited penetration in categories related to body care; its market share is marginal if calculated over the sustainable market (0.23%) or over total market (0.01%). Moreover, Leaping Bunny certification in Spain has lost relevance since a full ban by European Commission on cosmetics that have been tested on animals entered into force since March 2013. The ban, announced by the European Commission, extends previous restrictions and now outlaws the sale of products tested on animals outside Europe.

Table 2. Availability and price differential

	NB Numerical distribution	PL Numerical distribution	NB price	PL price	Differential price (NB/PL)	Change in differential (2013/12)
Sliced bread	93.5	1.7	3.57	6.26	0.57	-0.07
Ice cream	85.9	5.4	9.89	5.32	1.86	0.45
Juices	88.2	30.2	1.15	0.80	1.45	-0.14
Milk	95.1	26.3	1.01	0.78	1.29	-0.06
Roasted coffee	66.5	4.1	27.18	11.70	2.32	-0.34
Soft drinks	99.8	16.2	1.45	0.82	1.78	0.03
Soups	99.9	9.8	1.07	1.20	0.89	0.16
Toilet paper	29.6	11.2	0.25	0.17	1.53	-0.10
Wines	99.9	97	1.81	1.02	1.78	-0.05
Yogurt	99.8	4.4	4.36	3.44	1.27	-0.04

Table 3. Correlations between price, numerical distribution and sales

	NB Price –sales	NB ND-Sales	PL Price –sales	PL ND-Sales
Sliced bread	-0.21*	0.63*	0.47*	-0.03*
Ice cream	0.17	0.29*	-0.55*	0.80*
Juices	0.18	0.20*	-0.37*	0.33*
Milk	0.29*	0.34*	-0.57*	-0.40*
Roasted coffee	0.50*	0.62*	-0.75*	0.62*
Soft drinks	-0.10	0.09	-0.36	0.36
Soups	0.34*	-0.23*	0.05*	0.46*
Toilet paper	-0.55*	-0.04	-0.77	0.44
Wine	0.17	0.40*	0.15*	-0.04*
Yogurts	-0.50*	0.48*	-0.04*	0.47*

* significant at the 5% level

Even when there is a price premium, promotional intensity is similar to that of non-sustainable brands (23% vs. 22%). Wide differences are found between NBs and PLs: one third of NBs sales are in promotion, whereas this figure amounts to 10% among PLs. There are only NB-led promotions in labels such as Ecolabel, MSC and Rainforest. The only exception is soups: PLs sell more under promotion than NBs. Unsurprisingly, promotional reach of PLs is lower than that of NBs; actually, promotion of PLs is almost marginal (milk is the category with the highest reach and can be found in 1 out of 10 stores). There are important differences label wise; organic goods could have been found in promotion in 7 out of 10 stores distributing these goods. In contrast, reach of promotion is marginal for both, Fair Trade or MSC-certified goods.

Table 4. Promotion intensity: promotion width and reach

	Promotion width (% units sold in promotion over total sales)		Promotion reach (% of stores stocking or sold in a sustainable SKU in promotion)	
	NB	PL	NB	PL
Ice cream	36.6	1.4	47.7	0.2
Juices	10.7	4.6	27.2	5.3
Milk	14.3	10.9	49.2	10.4
Roasted coffee	37.4	0.2	23.6	0.3
Sliced bread	23.7	2.0	45.7	0.3
Softdrinks	31.6	2.1	57.9	3.4
Soups	25.4	27.4	42.6	1.4
Toilet paper	77.3	29.6	21.4	5.3
Wine	17.2	4.5	58.2	5.4
Yogurts	25.4	2.2	38.9	1.0

5. Concluding remarks and managerial implications

Retailers in Spain are missing the opportunity to drive the development of the sustainable market following the path of countries like Germany, Switzerland, or US. It is a fact that sustainable labels account for a great deal of FMCG growing: data shows that, in 2013, sustainable goods growth is nine times higher than that of non-sustainable labels. This opportunity is seized by NBs, whose leadership in the sustainable market is beyond doubt. Market share of PLs is much lower than the one observed in other countries. The percentage of stores carrying sustainable brands reinforces the idea that only a minority of retailers are introducing them in their portfolios and that these retailers are in all likelihood not the leaders in the industry.

This situation could be due to retailers failing to see a competitive advantage in adding sustainable goods in their portfolios or in creating their own sustainable PLs. Previous studies, as mentioned, confirm that added-value PLs (fourth generation) provide retailers with great opportunity to differentiate and improve quality/and responsible-conscious positioning. Sustainable PLs constitute, indeed, an innovative product segment. The offer of sustainable PLs allows retailers' response to new market requirements through new values (environmental and social consciousness, workers' rights defense, healthy), thus improving their own image and reputation in comparison with that of the NBs.

Besides, data shows a good demand reaction to lower prices for PLs; this suggests that retailers have an opportunity to tap on the price barrier in sustainable labels. Nevertheless, wide differences across categories can be observed. This suggests that intrinsic features of the category and/or its market structure explain differences in consumers' reaction to sustainable SKUs price. Further studies should focus on identifying these features and their influence on sales.

The great centralization in distribution in most developed countries contributes to an advantageous position for PLs in big retailers' portfolio by the substitution of NB with PLs. There are also gains for small or local suppliers due to direct contracts with retailers to produce PLs (Guptill and Wilkins, 2002). Centralization and globalization implies that retailers could foster the sustainable market by means of portfolio strategies, offering the same assortment in different countries. This appears to be the case in the Spanish market: retailers introducing sustainable labels in their portfolios do so as a result of a global strategy for their portfolio (Carrero and Valor, 2012).

Future lines of research should attempt to estimate panel data models to determine elasticities to price and ND, and assess if there are significant differences between PLs and NBs, as well as modelling consumer choice between PLs and NBs, identifying key factors driving demand for each type of brand. Also, differences across countries should be examined, as the positioning of PLs, seem to differ, together with the demand reaction.

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