

**Impacts of the Production of Private Labels on the Food Retailing
and its Suppliers**

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1. Abstract

The appearance of store brands and their greater distribution has opened a new chapter in the relationships between producers and traders which are part competition and part co-operation. The newer generation development of store brands has speeded up in Hungary with the increasing concentration and globalisation of food retailing. The store brands were previously considered as “co-operators” but today they are actually “brand weapons”. The retailer's ability to find the ideal balance between the manufacturers’ and store brands is a key factor in business performance.

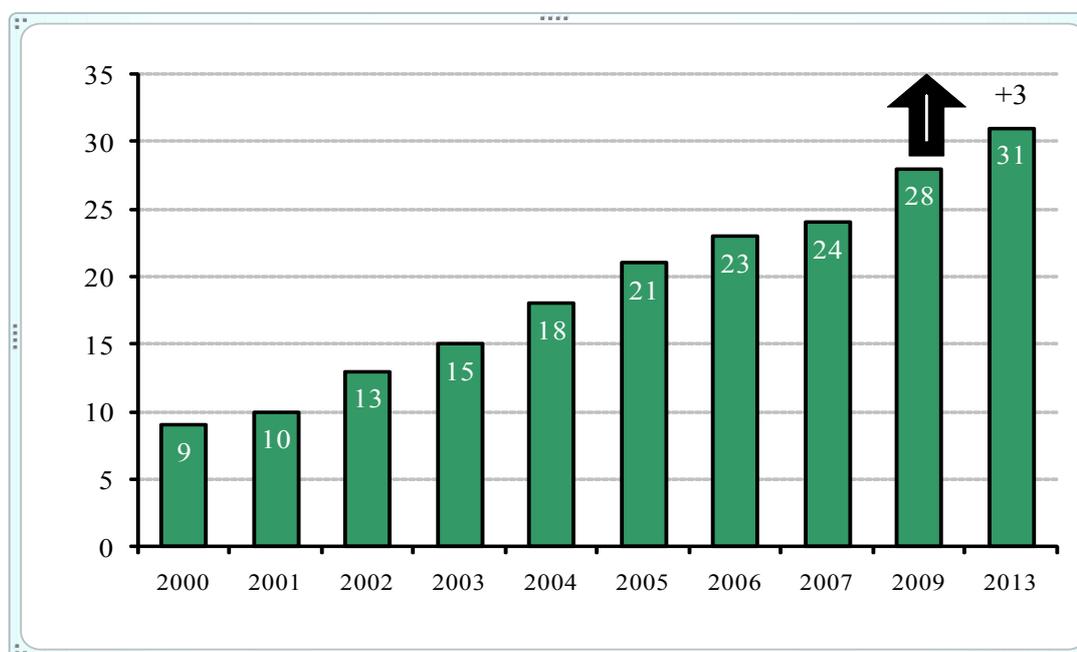
Examining manufacturers’ vs. store brands it was evident that one cannot reach a definitive conclusion or offer a solution for the producers in their struggle and co-operation with the traders. The situation differs from region to region, from country to country, and by commercial structure i.e. by product groups and products. Therefore, the only recommendation that we can make is that whether they are producing private label products depends on the company's own intrinsic abilities and strategic objectives. Furthermore the decision has to take into account the given market situation, demand and opportunities.

1. Introduction and Objectives

The share of the private label sales in the food retail trade has increased remarkably during the past five years, amounting to a considerable proportion throughout Europe, taking 10 to 45% of the total market from the manufacturer brands. In Hungary, the **share of the store brand products already approaches one quarter of the sales volume of the domestic market** (figure 1.). Store brands are not spreading in a uniform manner in all product groups; they have the **highest penetration in the so-called “utilitarian” product category**, where customers have no emotional attachment and therefore these products are less suitable for branding by manufacturers. These product groups include pet food, frozen food, breakfast products, basic milk and meat types, where already **almost half of the market** is dominated by private labels, including in Hungary. But even the category of “**hedonic” products**, such as sweets and alcoholic drinks, previously considered a secure stronghold of the manufacturers, is no longer exempt from the competition of private labels.

Figure 1.

Rate of Private Label products in sales of FMCG products in Hungary, %



Source: GfK Hungaria [2010]

2. Conceptual Framework

The proportion of own brands in the sales turnover is increasing from year to year but the process is far from over. Key issues are: (a) what does the emergence and spread of own brands mean and (b) what does this process hold for the producers and as well as traders in the supply chain. Will the processes of concentration and integration within the supply chain speed up, or just the opposite? It is obvious that the appearance of own brands is a consequence of the horizontal competition in a saturated domestic retail market but the competition has also been increasing vertically and even intensifies the horizontal competition among producers.

The aim of this paper is to explore the theoretical background of the history and development of Private Label products within Hungary and Europe, analysis the aspects and strategy both the suppliers and retailers, with special regard to food innovation and investigating the opinion of consumers. We tried to judge this phenomenon objectively as we experienced a lot of false judgements and information about PL products.

3. Literature Review

Distinction constitutes the **primary purpose** of brands, thus evidencing a product's individual and irreproducible character. Brands have therefore become a condensed symbol of the benefits granted by the goods to customers. They constitute one of the most important marketing tools and, if sufficiently strong, an embodiment of independent market value.

The evolution of private labels has already passed through several stages, and this also meant that the value of these products has increased [Maurer, 2006]. The so called first generation PL products had low quality, their price is 30-50% lower than the price of branded products. The further developing from the generation of "economic" cheap mass products to the high standard, innovative "individual" category resulted that third-fourth generation PL products can provide real **alternatives for any possible customer demands and segments**, thus becoming an efficient instrument available for the retail trade in bringing down the bargaining positions of suppliers with strong manufacturer brands.

We have identified four factors that have encouraged the spread of store brand products. These include: **concentration of the food retail trade** through establishment of scale efficiency conditions; **spreading of the heavy discount stores**, due to large volume sales of own-brand products; **commercial pricing** advantageously influencing the consumer price that has become a significant benefit due to the effects of the economic crisis; and finally the increasing **level of acceptance by customers** thanks to the constantly improving quality of private label products.

The main driving force of spreading of PL products is the demand of consumers. Though it is impossible to characterize the typical consumers of PL products by socio-demographical criteria, it is widely accepted in the available literature that the consumers of PL product are well informed, rational, price sensitive persons but does not listen to advertisements. According to Quelch and Hardling [1996] the spreading of PL products and the economic situation is in opposite position. Nandan and Dickinson [1994] proved that consumption of PL products increase in economic recession. Lamey at al. [2007] goes further stating that the consumption level never re-establish after the crisis.

The international and also the Hungarian literature tried to determine the typical suppliers of PL products.

Citygroup Smith Barney [2005] found three main categories:

- Big producers, which produce both PL and branded products,

- middle- or small producers which are specialised for producing PL products,
- Retailers and wholesalers which within their own plants or in vertical integration produce PL products for themselves.

Two Hungarian and a French research confirmed that the retailers preferred the bigger companies as suppliers of PL products [Dobos, 2007, Juhasz et al., 2010, Bunte et al., 2010]. Nevertheless it is important to underline that all the three researches found that the role of middle-sized and small companies increase in production of PL products.

The effect of PL products on innovation was one of the most important questions in our research. The international literature underlines the negative effects:

- The lower income of the suppliers due to lower price of PL products impedes the effective innovation [Olbrich et al., 2005, Sexton et al., 2002],
- the new products are copied so fast by the PL products, that the branded goods do not have enough time to earn the cost of innovation and this pulls back the innovation [Olbrich et al., 2005, Bernitz, 2009, European Commission, 2010].

Hungarian and international researchers found positive effects, as well:

- The source and motivation of the innovation is the demand, so the increasing demand for PL products creates innovation in the production side [Czibik-Makó, 2008, Dobos, 2007, Sebők, 2006],
- The new generations of PL products are not only copies of branded products, some of them real new products created by the retailers and suppliers in co-operation, as the retailers know very well the consumer desires from their vast database (scanned data, retail cards etc.) [Chunling et al., 2008, Maurer, 2006],
- In case of large producers the innovation may speed up as their PL products compete with their own manufacturer brands [Competition Commission, 2007].

4. **Research method**

The start point of the research was the exact definition of PL, exploring the sub-categories within this term, how changed the meaning and quality of PL products during the last decades.

In order to explore the strategy of Hungarian suppliers and retailers regarding PL products we used three main methods during the research:

- evaluation and analysis of domestic and international literature,
- in-depth interviews conducted with experts of five retailer and 24 supplier companies,
- data collection of prices and other information available from retail leaflets and webpages in order to analysing the pricing policy of PL products.
- We assessed the effect of the spread of private labels on the domestic market on the food industry's market share and profit through interviews and collating balance sheet data.

Data collection covered the first half of 2010. In some product groups, we have also tried to assess the share of the private label and manufacturer brands, allowing conclusions to be drawn concerning the probable intensity of price competition as well as the share of store brands within the total sales.

The interviews were conducted in 2010, in the first half of the year we interviewed the retailers and small food industrial enterprises, in the second half we concentrated on larger supplier companies. Our sample should not be considered representative, on the one hand due to sample size and because one of the main selection criteria was that the company manufactures own branded food. Nevertheless, we tried to be comprehensive in the sense that we collected answers from all sub-sector if it was possible and we tried to choose every type of firms from small to large companies (Table 1). According to our opinion we were successful in giving a good picture about the situation of the Hungarian food industry from the point of view of producing own brand products. The representation rate was the highest in the meat and dairy industry if we consider the share of the firms in our sample from the total revenue of the sub-sector.

Table 1: The spread of interviewed companies according to their size and food industrial sub-sector

	Small firm (under 50 employees)	Middle-sized firm (50-250 employees)	Large firms (over 250 employees)	Together
Meat industry	0	0	6	6
Fruit- and vegetable processing	1	1	1	3
Dairy industry	0	3	1	4
Milling and flour industry	2	1	0	3
Sweet and beverage industry	3	3	1	7
Other	0	0	1	1
Together	6	8	10	24

5. Findings, discussion

Consumers' estimation of private label products

Although we did not conduct original questionnaires on this topic, we would have liked to have examined the consumers' attitude to private label products, because ultimately how successful the sales of these products are depends on the buyers' decisions. The trade literature indicates that, though it is hard to establish on the basis of socio-demographic criteria the identity of the consumers inclined to purchase store brand products, sales of private label products are principally increasing among **well-informed rational and price-sensitive consumers, less impressionable by promotions**. Both experiences and the international trade literature allow the presumption that **demand for store brands increases during an economic crisis** and this increased demand does not drop back to the previous level even after the crisis period.

Kolind [s. a] says that is no longer true that the private label products are purchased only by low-income households, or by those who are forced to save money which is why they are buying in bigger packages. It is true that low-income households are buying private label products as a higher proportion of their purchases, but for higher income households the proportion is not much lower. European data show that amongst total purchases low-income households buy 32% of private label products, and the high-income 28%. As the Belgian retailer Colruyt remarked: "Poor people need low prices, rich people will love the low prices" [JC Williams Group, 2008].

According to another, more complex approach the buyers of private label products recognise the good price/value ratio which is why they choose these, and they are even proud of themselves for choosing wisely (they are called "smart shopper" consumers). These consumers are the most difficult to entice back to the manufacturers' brands. Many authors survey in this topic the brand loyalty, loyalty and consumer quality in relation to the spread of private label products.

Thought we did not carry out own consumer market research, we asked the opinion and experiences of the interviewed experts about consumption trends. It is obvious from the answers that in Hungary the consumption of PL products increased significantly. It was also widely accepted that probably this trend will be stable as the consumers nowadays meet the third-fourth generation PL products which gives very favourable price/value ratio, so they do not have reason to switch back to branded products.

The interviewed experts from both the retail trade and supplier side mentioned the **price sensitivity of the Hungarian consumers** as an important factor, though this factor was more stressed by the retail trade side. Both sides agreed that the quality of private label products is improving and this strongly depends on the consumers' requirements. Also domestic customers show a **growing demand for Hungarian products**; as a result, an increasing number of **commercial chains indicate in a distinct manner the domestic origin of the private label products**.

Retailers' strategy on PL products

By spreading of PL products the importance of category management increased in the retailers' strategy.

There are **great differences among the rates of store brand product distribution by the different commercial chains operating in Hungary**, as this is strongly connected with their product range and price policies. Tesco had a leading role in selling private label products for nearly five years, until 2007. Even though doubling the rate of private label products during this period, by the end of the decade Tesco had lost its leading position, which was assumed by the quickly expanding Lidl which sells mainly store brand products.

In response to the spreading of discount stores and private labels, all major domestic retailers reacted through **expansion, deepening and diversification of their store brand portfolio**. The "economic", "medium price" and "premium" brand lines appeared, but more companies mentioned that the lowest category PL products caused bad image for the retailer, so nowadays they try to quit these and advertise their more valuable PL products.

The good image of PL products is important for the advertisement of the retailer, for increasing the sales volume and for gaining bigger market share. This is why that the retailers are very rigorous about the quality and safety of the PL products. Their suppliers must meet high level food safety requirements, must invest in adaptation of food safety systems etc.

According to the experts of the retailers it is a very important strategical question, which products are sold as PL products as a successful product group can invite a lot of new consumers. (For example the good quality but cheap baby care products of Tesco increased the sales volume of the firm.) In case of international retailers the decision on the assortment policy of PL products is also international. The centre finds the products, test the market and if the product is successful it will be put to the market of other regions

In case of regional PL products the suppliers are usually chosen in (electronic) tenders. This can increase the import but also gives opportunity for Hungarian firms. Unfortunately most of the Hungarian food industrial firms are too small for supply a regional market so they are rarely successful in these tenders.

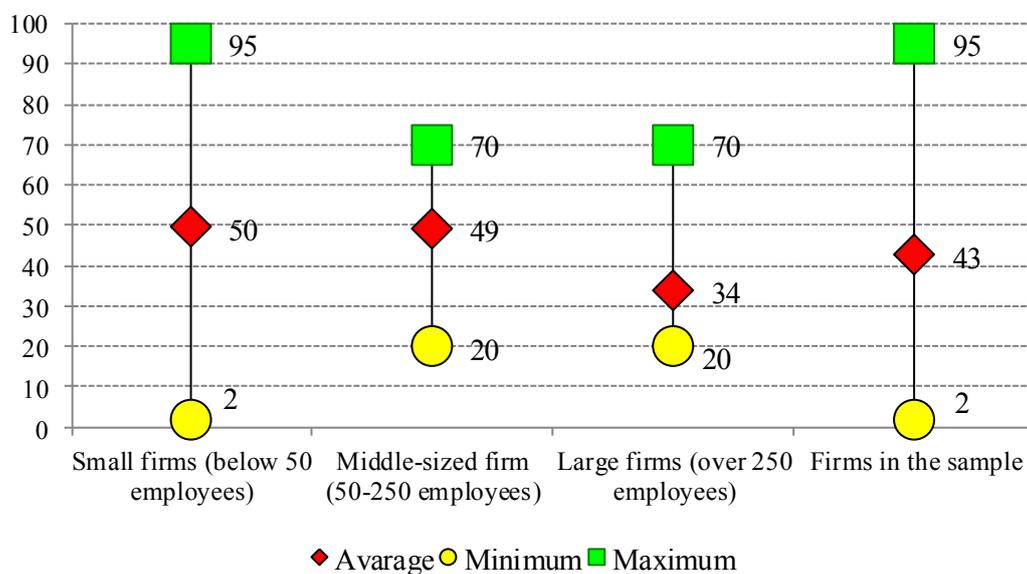
In case of foods where the national taste, tradition is more important it is more common that the retailer develop PL products especially for the domestic market in many cases in co-operation with a national supplier who is leader in the domestic market or has a strong national brand. This are gives more opportunity for the Hungarian food industrial companies.

Effects of PL products on the food industrial suppliers

The degree of spreading PL products is so high that it is impossible to stay out from the production of them. Nevertheless the rate of PL products within the food industrial firms’ production structure ranged widely. All the firms in our sample produced PL products; the average rate of their production was 43%. The larger companies produced less PL products, the smaller firms more, but the spreading was extremely high in case of small firms (figure 2.).

Figure 2.

Rate of PL products from the sales volume in the interviewed firms, %



Source: own survey

The food industrial companies apply different strategies in this context. **The first strategy we called “joining in order to save my market”, meaning a defence solution.** The second strategy was the opposition of this: it was typical in the case of smaller, follower firms which tried to gain market by winning the production right of PL products, imitating the products of a big food industrial firm. **This is a typical offensive strategy which we called “joining in order expanding my possibilities”.** We have found some examples of innovative small firms which still resist the production of PL products, but these companies valued their strategy hardly sustainable.

According to the Hungarian food industrial firms **the most important advantages of production of PL products is capacity utilization, the continuous, predictable production volumes which is important for the companies both technologically and for financial reasons (liquidity, predictable selling and income).**

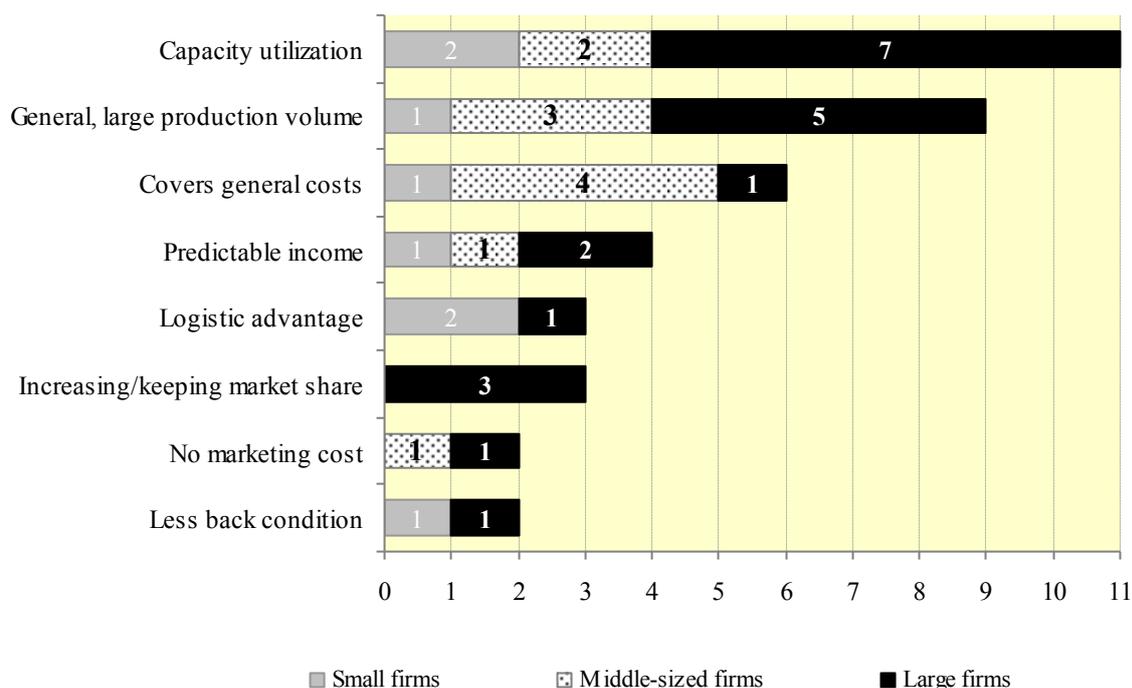
The answer is more nuanced, supported by a variety of contexts. One commented: “It would be foolish not to take advantage of this opportunity, the demand segment, because it brings market share, can be sold and brings returns. Capacity utilisation is helping to maintain market share, even if the revenues remain the same. It is important to maintain market share because it is much more expensive to regain it”. The capacity dimension is important as the store brand is bearing the overhead costs. The capacity utilisation is also important in view of the fact that in most sectors sales of manufacturer brands have decreased.

It is also an advantage that in case of those companies which produce PL products in large proportion or exclusively there is no need for marketing activity, merchandising and this means lower costs for the company. Lower back conditions, closer cooperation with the retailers, advantageous in-listing of other products were also mentioned as positive effects of PL products (figure 3.).

In our experience all of these benefits, however, might be a ‘double-edged sword’, so that besides the advantages of production of store brands, their production poses a risk to the supplier's manufacturers’ brand production.

Figure 3.

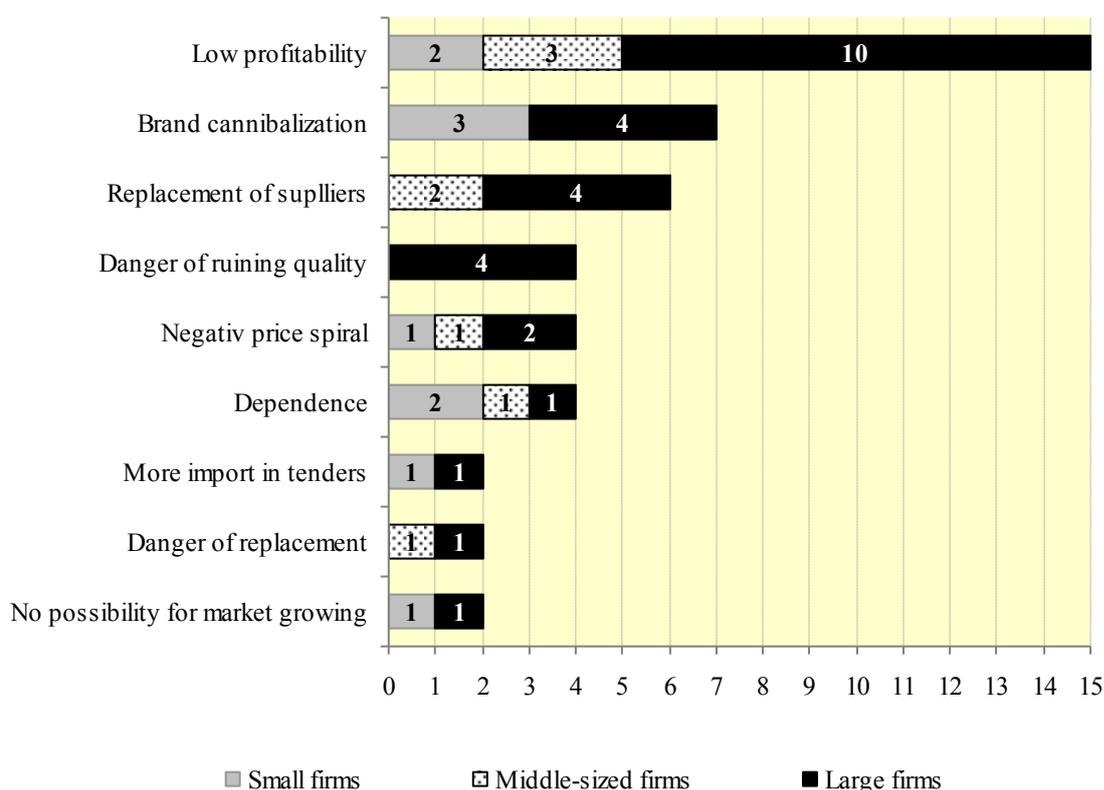
Advantages of production of PL products according to the suppliers



Source: own survey

Defencelessness and uncertainty have been cited as the most important and overall **disadvantage** by the suppliers interviewed, caused by the full **replacability** of the product and of the manufacturer. The danger of replacing supplier and of de-listing the product exists in the case of private labels without customers' reaction, if there is no quality change. At the same time, losing a large volume order of store brand products may cause serious difficulties for a supplier, especially if packaging material or even private label products already manufactured and therefore not marketable elsewhere remain in stock. In the case of **on-line tenders** generally used for procuring store brand products, several objective problems emerged at the domestic companies, including for example their insufficient capacity. However they often mentioned that even in case of having sufficient capacity and proper quality they were not invited to tenders in the Central-European countries, while manufacturers of the neighbouring countries may participate in the domestic tenders as competitors (figure 4).

Disadvantages of production of PL products according to the suppliers



Source: own survey

In the case of manufacturer brands of insufficient brand value, it emerged several times that the **store brand produced by the supplier raised competition against the supplier's own manufacturer brand**. As several people noted: the commercial chain's private label production "**cannibalised**" the market potential of their manufacturer brand. This danger is also increased by the fact that the composition and quality of the private label brand is often very similar to that of the manufacturer brand and customers quickly get to know this through the rational-minded (non brand-dependent) and "curious" consumer groups.

From among the commercial practices mentioned in the **domestic and international trade literature**, the enterprises interviewed **confirmed** the importance of the different pricing, the less extensive background conditions and the more advantageous shelf positioning. At the same time, they did not consider typical the comparative marketing.

Effects of PL products on innovation

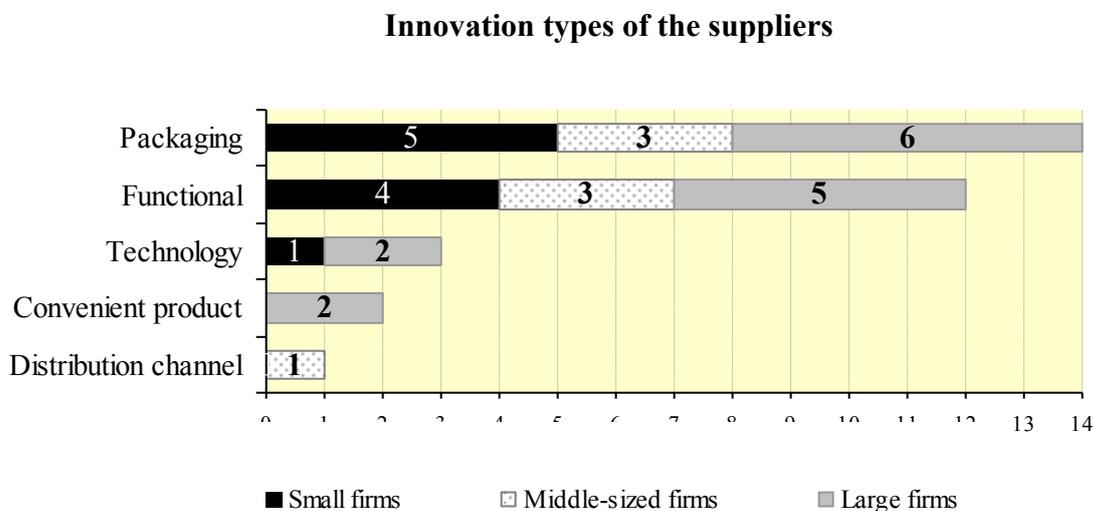
Neither the trade literature nor our own research **confirmed that the innovation in the European or the domestic food industry was at a very low level.** However, there are already some **warning signs** – the low proportion of real innovations or the falling innovation rate in Spain – that forecast possible negative effects of the further expansion of the private label brands to the introduction of new products under a certain combination of market conditions.

Many food industrial firms had the opinion that PL products increase the innovation. They gave two main reasons: first, the classical imitating of other firms' brands can be called a kind of innovation. Second, that innovation can be one of the most important defence strategies against the fast spreading of PL products: if the food industry develop new products with better quality and new function this can save their own brands for a while. But it is an important fact that only innovation is not enough! Good marketing, market research policy is also inevitable factors for the pre-flight, offensive strategy.

Though it is also true that the strong competition and the new desires of retailers for creating PL products bound the sources of the food industrial firms and no sources and energy remain for „real” innovation (figure 5).

It also pulls back the innovation that the smaller profit due to lower prices of PL products reduces the financial sources of the firms.

Figure 5.



Source: own survey

Probably the picture is not only black or white. The innovation strategy and how it is affected by PL products depends on the characteristic of the firms. Large companies with enough capital and/or with strong brands try to continue their innovation policy, while the smaller firms may concentrate on “staying alive” by copying other brands or winning tenders of production of PL products. In case of them we can not speak about real innovation.

The private label products from the retailers’ point of view

The retail chains introduce private label products only in product areas with high sales turnover and/or those products with high added value. Before the introduction of a private label product they carefully plan to which segment of the market, what price range and quality requirements can be a private label be effective. The goal of the share of private labels is the strengthening of the suppliers’ relationships in the interest of long term co-operation. In this context, the customer (retailer) obliges the supplier to produce the ordered food product (specific composition, packaging and labelling). The supplier often cannot indicate its own name on the packaging. This can be done also at the request of the manufacturer, if it is concerned that this information can reduce the demand of its manufacturers’ branded products (apart from this one could easily retrieve this on the basis of the EU processors code number).

The retail chains establish a longer-term technical cooperation with the suppliers of store brands. Multiples consider it to be positive if the supplier also delivers manufacturers’ brands as well as store brands in the listed assortment. In the case of private label products, the quality is guaranteed by the retailers, the quality of the products sold has random checks in its own or an independent laboratory (Aldi does not accept the results of Hungarian laboratories). The advantage of private label products is that the specific advertising cost of the product is low so it can be marketed more cheaply. In addition, retailers can thus strengthen their position against the large suppliers.

CONCLUSIONS

We have identified four main factors that have encouraged the spread of store brand products. These include:

1. Concentration of food retailing through establishment of conditions of scale efficiency
2. Expansion of the hard discount stores due to large volume sales of own-branded products
3. Commercial pricing advantageously influencing the consumer price that has become a significant benefit due to the effects of the economic crisis, and finally
4. The increasing level of acceptance by customers thanks to the constantly improving quality of private label products.

Some suggestions for improving the position of suppliers in market situations dominated by store brands:

1. Elaborate an information programme calling the attention of consumers to the production and origin of food in general. During this campaign, the benefits of locally produced food could be emphasised, together with the importance of knowing the identity of producer and the origin of the ingredients.
2. Support policies providing assistance to the supplier side could be an efficient instrument in the medium term. Maintenance or even expansion of the already existing R+D competitions is considered of outstanding importance. The same applies to restarting basic food industry research, perhaps through encouraging active co-operation between the existing research centres and universities and enterprises.
3. The interviewees hardly experienced any direct positive effects of the short term statutory changes introduced until now for the benefit of suppliers. Several possibilities for evasion have been mentioned even in the case of the most successful measure concerning the regulation of payment terms. However we do not consider statutory regulations as a method to be entirely rejected, as they may also have positive effects by calling the attention of the consumers to the complexity of the supply chain and imposing moral barriers to the more powerful players of retail trade.

6. Limitations

One of the main limitations of our research is the low number of the interviewed experts, especially among the retailers. On the other hand the chosen method (in-depth interviews with a lot of open questions where we wanted to learn their opinion, experiences about the PL products as a phenomenon) did not make possible to meet a lot more experts. In case of food industrial firms we were successful in covering all the sub-sectors, every type of firms were represented in our sample, except the producers of pet foods who were not willing to give their opinion.

In case of retailers the sample is not only small but some types of retailers are not represented at all, though their role in PL sales is important (for example foreign discount chains, foreign supermarket chains). Unfortunately the policy of these companies usually does not allow them to give out information even for scientific researches.

We also aimed to investigate and analyse the price policy of the retailers regarding PL products (compared to “normal” product prices and “sales” prices of branded products), but

this turned out to be impossible as in Hungary, the available public databases (HCSO and AKI PÁIR consumer price collections) do not differentiate between prices of retail and manufacturer brands. Therefore we have used the promotional leaflets of the commercial chains for comparing prices.

Last, but not least our purpose was to evaluate the PL products as a phenomenon from the point of view of consumers, retailers and suppliers. We wanted to judge it: if it is a “good”, “useful” thing or “bad” for the different actors of the food supply chain. By the end of our research we have learnt that it is impossible to give a simple evaluation for PL products: it depends on several aspects (the strategy, the characteristics of the actors), for some of them it is disadvantageous, for others it is a success story, again others can live with it.

It was also very hard task to give any advice for the policy makers regarding PL products, but even, we tried to compose **suggestions for improving the positions of suppliers in market situations dominated by store brands:**

The first package of suggestions consists of two parts and has been entitled “**raising consumers’ awareness**”. On the one hand, we suggest elaborating an information programme calling the attention of consumers to the production and origin of food in general. During this campaign, **the benefits of locally produced food** could be emphasised, together with the importance of knowing the identity of producer and the origin of the ingredients. The second package includes the scheme elaborated after the pattern of the “Fair Trade” trademark. This would provide a guarantee that on the one hand the **trademarked products provide “fair”** revenues for suppliers and on the other hand the consumers can be sure to buy from fair suppliers as the trademark guarantees the strict and regular self and independent control of suppliers regarding their compliance with all legal obligations (tax, labour and quality-related regulations).

Support policies providing assistance to the supplier side could be an efficient instrument in the medium term. Maintenance or even expansion of the already existing R+D competitions (for example within the framework of the Széchenyi Scheme or from EU funds) is considered of outstanding importance: The same applies to restarting basic food industry research, perhaps through encouraging active co-operation between the existing research centres and universities and enterprises. In addition, based on the failures of launching innovative products, we emphasise the importance of having available funds under the R+D

competitions for supporting not only the development but also market introduction and marketing activities related to the product. Under the actual conditions of abundance of goods neither the retail trade nor the consumers would accept new products without effective advertising campaigns!

7. Further Research

Our purpose is to continue the research by interviewing more companies, especially in the field of retail.

In 2008/2009 we analysed the pricing policy of retailers, in 2009/2010 we investigated the food safety systems as an other important aspects of the connection of suppliers and retailer. Next year we would like to search the logistic of foods in Hungary and our long-term aim is to connect these researches into one mega-study which could give a good and correct picture about the food chain in Hungary.

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