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ПРИВАТНА ТОРГОВА МАРКА НА ПРОДУКТОВОМУ РИНКУ У ПОЛЬЩІ

Визначено зростаюче значення приватних торгових марок роздрібних продавців як відповідь великих торговельних мереж на індивідуальні потреби споживача. Проаналізовано сегмент нових приватних преміум-торгових марок та оцінено стратегічне становище їх преміум-брендів.

Ключові слова: приватна торгова марка, приватна преміум-торгова марка.

PRIVATE LABEL ON FOOD MARKET IN POLAND

This paper indicates the increasing importance of private label retailers as a response of large retail chains to individual consumer needs. New private labels of premium segment are discussed and the strategic position of their premium brands is evaluated.

Key words: private label, retail chains, premium private label.

Problem formulation. The changes of the modern world, globalization, economic crisis, while individualisation of consumer needs are forcing major retailers to introduce different methods of management strategies appropriate for its own brand of FMCG products. Hence the attempt to evaluate the methods used by the operator's own premium brand positioning.

The changes which took place in the modern world concern all areas of life; has its economic, political, and social dimension. The relationship between economic and social factors translate into business strategies employed by market functioning. Big retail chains adapt market communications and product offering to consumer demands. Over the next 15 years, according to a report by Rabobank, the share of private labels for food products is expected to double and reach 50% of the world food trade. The factors that accelerate the development of private label from 25% to 50% include: consolidation of retailers in Western Europe, Australia and the U.S., the rise of modern retail in developing markets, particularly in Russia and Turkey. Additionally, the effects of economic crisis largely determines the development of private labels. It is predicted that the development of private labels will decrease, and thus, the disappearance of local brands on the market. It can be expected that the result of the disappearance of local brands can be a price battle between manufacturers [1]. Businesses have watched with great care and analyze the changing consumer behavior and preferences. In order to achieve high market performance, companies must adapt its offer to the evolving strategy and social structure, which one of the features is the increasing number of educated people with specific needs and expectations [2]. Changes in consumer behavior determine therefore the development strategies of enterprises. At the same time, thanks to modern technology, customers have unlimited access to information, compare deals and choose the best one from the point of view of their needs. As a result, they become active participants in the value creation process. Better chances of success in the market can bring accurate and fast market response to demographic and socio-cultural changes [3, p.78-84]. In 2011, the average life expectancy for men was 72.1 years and for women (more about eight years) and was 80.6 years. In comparison to the early 90s life expectancy has risen by nearly six years for men and 5.4 for women. Significant progress in extending the average life expectancy is attributed to extensive promotion of a healthy lifestyle [4]. In Poland, the dynamic growth of private label sales, compared to brand products, has been observed particularly in the three recent years. Such significant growth in the popularity of these products can be attributed mostly to discount chains such as Lidl, Aldi and Biedronka. In 2010, Poland has added more than 260 new locations, or several more than in the previous year. The largest increase is associated with Biedronka, where number of sales locations increased at a rate of 150-200 stores a year. In discount chains private labels represent already 56.8% for food products and 67.5% of chemical products. For comparison, in large supermarkets it is respectively 23.7% and 22.6% [5]. According to Nielsen's private label market is growing much faster than the market in general and in 2010 the value of sales of food products on the market increased by 1.5%, private labels in this segment – 18.1%, and chemical goods, respectively, 2.5% and 19.8%. At the same time we have to deal with globalization. This phenomenon favors consumer enthusiasm to particular needs and lifestyles, resulting in the creation of differentiated solutions in the international distribution [6, p.365-374]. "To meet the growing and increasingly diverse customer demands manufacturers expand the number of distribution channels – they initiate direct channels, which are based on such forms as personal selling and internet that give possibility to individualize the offer in customer service. Increasing expectations of clients as to the place or time range of shopping, makes the system to create multichannel commerce. Therefore, diversified choice results in high competition" [7,p.198]. Similarly, the introduction of a free market economy and Polish accession to the European Union led to changes in the trade sector. In a globalized market, this sector experienced an increased internationalization of business and the high rate of structural changes in the forms and types of business entities and entity structure. In the early nineties Polish consumers had limited purchasing power, so soon turned towards retail chains very active in terms of price policies. The following factors have the highest impact on it: offer a large variety of goods, attractive presentation of products and favorable ratio of value to price. As a result, the acceptance of large forms of sale spaces (such as hypermarkets, supermarkets and multi-specialist discount stores, etc.) contributed to the fact that the distribution of goods in Poland was quickly covered by the process of modernization [8]. The effect of the dynamic development of foreign investment in trade is the strong position of foreign operators in the segment of hypermarkets and supermarkets and discount stores. According to PRCH experts the interest in the development of international networks in Poland is growing. In 2011, as many as 30 foreign brands debuted in Poland [9]. At the same time product innovations require changes in the ways of offering them for sale to consumers. To adequately provide those products the retail chains adapts assortment to preferences and individual needs of consumers who buy in discount stores, small shops, supermarkets, etc., in e-commerce [10, p. 147]. The global crisis, which also included Poland makes consumers do shopping more rationally and distributes its own budget. They shop at discount stores or make purchases of private label retailers [11]. This choice is reinforced, in addition apart from the low price that networks also offer high quality of its products, as evidenced by independent research firms and experts. As a result of private labels, retail chains are becoming more popular among Polish consumers. This is evidenced by dynamic growth in sales of these products – for at least two years by 30%. In the coming years the growth rate is expected to even increase.

Analysis of current research outputs and publications. Private label of retail network can be defined in two ways. Firstly, it may be synonymous with the retail brand understood by consumers as a common sign for points of sale. Second, private label brand can be used by retailers to label a group of products manufactured exclusively for your network and sold only in its branches [12,p.17]. In Poland the first private label dates back to 1997 with the arrival of the brand in – know closed – *Robert* delicatessens under the same name and brand Aro in Makro Cash & Carry [13, p.28]. Initially, these were generic products at a low price. In 2001, began to appear better quality products at a slightly higher price, but less than the equivalent of brand manufacturers: Metro quality (over 500 products), Tesco Quality for you (more than 1 200 products), and Albert Q-Line (more than 100 products available in networks that no longer exist today Hypernova and Albert [14]). Currently typology of private labels can be presented on the basis of:

1. Positioning; between producer's brands and private labels in retail chains there is a significant difference in price which forces their competitiveness in the market. Considering the price positioning strategy of private labels, the following strategies can be distinguished:

a) positioning of private label on a single price level – is related to the positioning the price with the lowest prices available on the market. It leads to the fact that the product is more distinctive, expressive and thus easier to recognize for the consumer,

b)positioning on the two price levels,

c) positioning on the three price levels or complete positioning strategy.

2. Diversity of brands. Given the variety of brands, two strategies should be mentioned: the weak and the strong differentiation. Proposing a brand that relates to a variety of products is poor differentiation, while offering many private label for diverse products, is a strong differentiation. This makes the client to believe that the choice of good is highly variable.

3. Marketing communication between the brand of retail chain and private label. Clear and hidden relations are characteristic to the marketing communication between private label and chain's brand. Clear relations show a direct relationship between these brands and they are the same. Then the products are specially selected, has a specific color. The hidden strategy means that the sources of supply are controlled by the chain, which wants to create a brand which is automatically a strong brand.

Reach of brand. Coverage is defined by the width and depth of products offered under the same brand. Retail chains sell its own brands under one brand, or differentiate them by type of product [15,p.32]. Private labels can be divided also because of the role they play in the chain's strategy – where competitive advantage is the low price (flagship brand, first available price brand, discount brand) -brand followers (counter-brands parallel brands)-because of their identification with the same chain (Retail chain brand and double,. private labels replacement brands) [16, p. 271-279].

Brands of the first group are introduced into the chain in order to obtain competitive prices for customers who do not expect high quality of these products. Brands do not represent value for the network's image. Most chain retailers both supermarkets and hypermarkets offer private labels characterized by a low price. These can be flagship brands mentioned above, and so-called brands of the first available price, whose main objective is to fight against discount stores and to offer customers a product with the lowest possible price. The logo or the name of the retail chain is not placed on these products so that the customer does not directly associate the product with the same chain, and is given a separate brand name or logo. The packaging is simple, one or two colors that suggest a low price: 1 in Carrefour, TIP in Real or Top Budget in Intermarche. One can also find the lowest prices with the logo of distributors but with a clear description of the low-priced product as Tesco Value or newly created brand Carrefour Discount.

The low price strategy is also adopted by discount stores offering exclusive discount brands. Their names do not refer to the name of the chain, while consciously become similar to manufacturers brands, proposing the name, packaging, colors, offer close to manufacturers' brands – so they are often called counter-brands [17, p. 280]. Discount usually offer several brands in one segment. These brands do not compete with national brands due to the very large difference in price and offer that satisfies only the first customer needs. However it is difficult to distinguish it among the offers of competitors who provide very similar products. An alternative to the manufacturers' brands and the quality of their products are private labels in the strict sense. These brands cover a category or product line. Each one is an independent brand and may cause the client to feel he has a greater choice, larger range and unique offering. They are often seen as more regional products, less known manufacturers or imported, rather than identified with the same chain. Retailers offering private labels have a chance to differentiate their offerings. However, this requires them to invest in research quality product, its creation and promotion. Examples of these brands are Intermarche chain brand, Kaufland and new brands introduced by Tesco. A specific category of brands in the strict sense are replacement brand so-called exclusive brands. These are sold by producers in the chain on the basis of territorial exclusivity for example Expert Club brand wines sold exclusively by Intermarche in countries where the network exists in other markets is sold as a brand producer. Do not forget about private labels sold on other chains or in networks focused only on the single brand Kuchnia Polki – a brand created for retail chain Piotr i Paweł also sold in other supermarket chains and hypermarkets in Poland and Krakowski Kredens Alma delicatessen private label. Other classification focuses on the architecture of the brand and developing its portfolio. Here we can distinguish individual brands (previously discussed as private) brand line of products (e.g. products wellness-fitness: Linessa in Lidl and organic products under the Tesco Organic brand) and brands – its umbrella covering diverse range of products from food to chemistry and appliances [18]. We can also classify them due to the range of the particular brand to international / global brand occurring in the same form in all countries in which the respective chain operates. These are mostly network or some private brands such as Apta – household brand in Intermarche or Cherooke – clothing brand at Tesco. There are also local, regional brands offered, created by the retailer to meet the needs of one country or region where there is a retail chain: Wiejskie Pyszności brand created by Intermarche in Poland and Monique Ranou offered by Intermarche in France. The share of private labels can vary greatly depending on the category of client involvement in the purchase. For years Polish clients have greater confidence in private labels of household segment rather than chemical products. According to the results given by Nielsen market share of private labels in 2010 increased in the chemical by 2.3 percentage points and amounted to 10.8%, while in the food segment by 2.2 percentage points and was equal to 12.4%. Retail chains in the past few years convinced customers about the quality of private label products in the economy and the mid-level segment. One of the elements to improve the image was the introduction of the largest retailers of products with the highest price segment. Premium products, functional and organic, where high quality is not in doubt consumers began to appear on the shelves of shops. Premium private label market is not only the grocery segment.

Article objectives. Premium products are products that differ in plus compared to standard products. Most difference is the composition, quality, recipe, place of origin, method of production and price. In addition to premium products understood as products of high quality at a slightly higher price also products related to health, ethics and origin of the product are offered. It is not only the product which is unique and challenging, but also its client. The premium products buyers are primarily the people most active, top earners with incomes higher than the national average who would rather not lose their jobs and will not save on the products of first necessity – it is most commonly young, single, childless family or managerial positions open to new trends, often leaders in their communities.

Presentation of main materials. Polish international retailers while launching premium products on the market, take into account the experience of Western European markets. Here, the premium brand of the network, for example, embraces organic fruit and vegetables, dietary supplements, dietary products and technologically complicated ready meals. Organic products and light products have been present for many years in the UK Tesco outlets. Organic food line – Organic Tesco is present in almost every category of food. This is due to greater awareness of British customers for advantages of organic products and the benefits of their consumption. The British have also slightly different needs and food habits – more likely to buy diet ready meals, while the Poles still prefer to cook at home. Therefore, in its offer British Tesco also has two other brands of healthy products: Healthyliving Tesco and Tesco Free From. In addition to the products positively influencing the health or the environment on the shelves also Tesco Fair Trade products, and products of the highest quality Tesco Finest can be found. Premium food offer is almost 36% of the Tesco private label range, including 19% of the highest quality products and Fair Trade segment and 17% of pro-health and organic products. Also, the brand of clothing and exclusive lingerie F & F shouldn't be forgotten. Recentl, shelves were filled by the Tesco technology brand. It includes audio products, DVDs, TVs and accessories. Polish market leader in sales of premium private label is Alma, along with the brand Krakowski Kredens. Brand includes traditional Polish foods prepared according to traditional family recipes handed down from generation to generation. 130 products for customers include meats, dairy products, fruit and vegetables, honey, mustard, candy, liquor, tea and porcelain. Meats are often produced by small family businesses, and mustard in a small factory built before the War. Each product has individually credited tale telling the story of assortment of products. The brand besides of Alma stores is sold on the self stands in major Polish cities. Premium products can be found not only in grocery stores or supermarkets but also occasionally in discount stores. Lidl increasingly organizes weeks of the world, in which regional products imported from different parts of Europe, Asia and America are offered. On the other hand Biedronka offers products imported from Portugal like Porto, chocolate with a high cocoa content, meats Kresowe Przysmaki and wellness product lines – Fitness Just Fit brand. Retail chain offering premium private label is perceived by customers as an innovative, seeking and satisfying the clients' expectations. It offers the choice to its customers and the opportunity to learn new products, tastes and trends. Often the offer of premium products changes the image of the chain itself, and it begins to be positioned much higher. The greatest variety of products and brands can be found in Carrefour. While Tesco has a globally consistent strategies of private labels in Europe, Carrefour except for the chain's flagship brand, has a lot of variety of brands for the same product line, depending on the country in which they are sold. Premium brand, known in almost all countries where there is a chain is called Carrefour Selection. The promise of the brand is providing a client with pleasure and a sense of uniqueness. This includes non-traditional products with a very high quality, often exotic, and original. In France you can purchase as many as 150 of the brands, in Poland in 2008 79 articles were offered. Another brand well positioned is Reflets de France that guarantees the origin and originality of French recipes. The offer of 300 articles are products manufactured in France, only French ingredients and the French suppliers. In addition, they are mainly dishes of each region: the Vendée ham, white wine Bourgogne AOC Camembert from Normandy and the Guerande sea salt. The shelves in Polish shops where filled in 2008 with 23 products, among other things, cheeses, seafood and accessories. Both in France and in Poland you can also find products with reduced fat Carrefour Light brand. A new idea in a range of Carrefour, sold only in France are products with "non-GM products" (Sana OMG) and HALAL [19] products comply with all the rules and principles of Islamic diet, additionally certified and tested. Intermarche, in addition to Fair Trade products has widely developed premium shelf. The stores in of all countries contain products with a premium selection. It is present in almost all product categories and is placed in the box with the logo of the brand. It is a promise and guarantee of the highest quality products as well as its uniqueness. Today in France, there are 90 products marked with this sign, in Poland there are several products imported and five domestic segment premium in ice cream and fish. In addition, France offers its customers products signed under brand Le Gourmad. Polish Intermarche introduced to the domestic market line of premium sausage brand Wiejskie Pyszności Premium. These are the highest quality products, manufactured according to traditional recipes by the market leaders in this segment, such as the Sokołów or Balcerzak. In addition, you can find on the shelves many imported products positioned above the residual range: from French wine AOC under the brand Expert Club, typical French pastries and olive oil. Premium products in France is 7% of the assortment, in Poland it is 5% dedicated to private labels.

Table 1

Opportunities

OPPORTUNITIES (O)	CARREFOUR	TESCO	INTERMARCHE	BIEDRONKA	LIDL
consumer sensitivity to price	4	3	5	1	2
prospects for some segments	5	5	5	3	4
increase in consumer purchasing power	2	4	3	5	4
wide communication	2	5	4	1	3
additional markings on products	2	3	5	1	4
Increase in the number of stores	1	2	3	5	4
import of premium and niche products	3	5	4	1	2
TOTAL	**19**	**27**	**29**	**17**	**23**

Source: Self-elaboration

Table 2

Threats

THREATS (T)	CARREFOUR	TESCO	INTERMARCHE	BIEDRONKA	LIDL
a highly competitive market	3	1	2	5	4
ongoing process of consolidation and concentration	3	2	4	1	4
very aggressive competition promotions	5	1	2	3	4
large product price sensitivity of customers	2	3	2	5	5
increase in raw material prices	5	5	5	5	5
increase of logistics production minimum	4	3	5	1	2
TOTAL	**22**	**15**	**20**	**20**	**24**

Source: Self-elaboration

Table 3

Strenghts

STRENGHTS (S)	CARREFOUR	TESCO	INTERMARCHE	BIEDRONKA	LIDL
presence in strategic ranges	3	5	5	2	4
developing brands in niche segments	3	5	4	1	2
good graphic identity	3	5	5	2	4
high quality of products	5	5	5	5	5
unique products	3	5	5	2	4
very good quality	5	5	5	5	5
good results of promotional campaigns	2	5	5	3	4
lower price than the market leaders	3	3	4	5	4
the ability to import	5	5	5	4	5
TOTAL	**32**	**43**	**43**	**29**	**37**

Source: Self-elaboration

Table 4

Weaknesses

WEAKNESSES (W)	CARREFOUR	TESCO	INTERMARCHE	BIEDRONKA	LIDL
difficulty in pronouncing and remember certain brands	1	3	5	2	4
inability to respond quickly to market innovation	3	5	5	4	4
incomplete range	4	2	2	5	5
concerns of producers from falling out of the market	5	4	4	3	3
Total	**13**	**14**	**16**	**14**	**16**

Source: Self-elaboration

Table 5

Company's strategy

X	**Maxi-maxi**	Mini-maxi	Maxi-mini	Mini-mini
PR	**> 0,5**	< 0,5	> 0,5	< 0,5
AR	**> 0,5**	> 0,5	< 0,5	< 0,5

Source: Self-elaboration

Table 6

Indicators

indicators	CARREFOUR	TESCO	INTERMARCHE	BIEDRONKA	LIDL
PR = S/(S + W)	0,71	0,75	0,73	0,67	0,70
AR = O/(O + T)	0,46	0,64	0,59	0,46	0,49
Strategy	**maxi-mini**	**maxi-maxi**	**maxi-maxi**	**maxi-mini**	**maxi-mini**

Source: Self-elaboration

Table 7

Graphic analysis

coordinates	CARREFOUR	TESCO	INTERMARCHE	BIEDRONKA	LIDL
X = S – W	19	29	27	15	21
Y = O – T	-3	12	9	-3	-1

Source: Self-elaboration

Conclusions and perspectives for further research. Premium private labels of Tesco and Intermarche should use aggressive strategies in order to strongly develop already existing in Poland premium range of products. In both cases, the strengths outweigh the weaknesses, and the opportunities dominated over threats. Taking advantage of favorable market situation, companies should develop a portfolio of their products, to strengthen its position by extending offer range, greater imports of products from home and even more communication in the store and outdoor. First of all, Tesco stores lack of communication. This network has greater potential in imported products, because the UK market is much more developed in the premium segment than the French. Additionally, most products are marked with the same brand of retail chain and customers have no problem with identification. Premium brand Intermarche are perceived slightly different – difficult, often French-names associated with local suppliers rather than with a sign. The big threat to these networks, as well as for Carrefour and Lidl is the strength of the development of Biedronka. Other networks despite operating in attractive sector are less competitive. Their chances of development are related to the prospects posed by the development of the sector. There are also limitations to their growth, which is associated with low potential and little competition among enterprises. Depending on the potential of changes which they have and what goals are important to them, they should fight to maintain or improve the position in the sector by selection of products, improvement of competitive products, developing new products, finding new markets. The best position to distinguish itself among competitors has Lidl, which offer a number of premium brands, but the offer is seasonal, occasional and does not give a chance to get customers loyalty. In addition, like Biedronka, this is seen as an inexpensive chain with network of base products, not necessarily unique, even though the premium offer is relatively large in relation to the entire range. Potential for this network is to increase communication of premium products and expansion of sustainable portfolio of products, predominantly imported. Carrefour despite the huge offer of premium products in home country does not use the force on the Polish market. The product range is very narrow, and their communication outlets negligible. The threat to the chain is also a very weak development in our market. Despite the great potential of being able to import a number of niche and innovative products, and have a brand easy to remember, Carrefour does not invest in this segment. Biedronka chain has the biggest purchasing power in our market and experiences the fastest development. However, at the same time it has an image of the cheaper retail chain and does not have too many premium brands in its range. If, however, this discount chain improves to become a supermarket, as announced, and it will invest in premium products, then it has the potential to become a leader in private label sales in this segment.

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ВИКОРИСТАННЯ КОНЦЕПЦІЇ АРХЕТИПІВ У СТВОРЕННІ МІЖНАРОДНОГО БРЕНДУ ЖІНОЧОЇ НИЖНЬОЇ БІЛИЗНИ

Представлено концепцію архетипів у контексті побудови міжнародного бренду жіночої нижньої білизни. Архетипи є елементом стратегії бренду, яка є основою для будь-якої діяльності у сфері брендингу. Розглянуто 12 основних архетипів бренду та представлено три підтипи архетипу «Чарівниці». Ці субархетипи можуть бути успішно використані виробниками жіночої білизни (класичної або еротичної).

Ключові слова: міжнародний брендинг, архетипи бренду, ринок білизни.

THE USE OF THE CONCEPT OF ARCHETYPES IN BUILDING AN INTERNATIONAL BRAND OF LADIES' LINGERIE

The article presents the concept of archetypes in the context of building an international brand of ladies' lingerie. Archetypes are an element of brand strategy which is the basis for all the branding activities being conducted. The present paper discusses the 12 basic brand archetypes. Moreover, three subtypes of The Enchantress archetype are presented. Those sub-archetypes can be successfully utilised by the manufacturers of ladies' lingerie (classic or erotic).

Key words: international branding, brand archetypes, lingerie market.

Formulating the problem. Creating a strong brand is currently the main tool of competitive battle. It might seem that every company who has an appropriate marketing budget is able to introduce a brand that sooner or later will become successful in the market. However, it is not true because branding is a complex and long-term process. Many companies make a mistake hoping that a perfectly designed logo and an attractive name put on the package will automatically become a brand. Even if the quality of the product stands in proper relation to its price and even if it satisfies the essential needs of the customer, is intensively promoted and widely available, even then it cannot be called a brand yet. According to K. Polak from the Semiotic Solutions company the physical attributes of the product are often semantically empty, not filled with any material content [1]. On the other hand strong brands constitute an important part of many people's everyday life. It does not only mean buying and using the products of this particular brand. Many brands are discussed with friends, dreamt about, influencing our personal lives and so on. Some of them are cultural icons, which – according to D.B. Holt – means that they are a widely accepted symbol representing the ideas and values that society deems important [2, s. 2].