



The Upside and Downside of Private Label Brands in Selected Developing Countries: Marketing and Economic Implications

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Promoting private label brands in developing countries turn to become a major concern for the consuming public and the grocery retail sectors. This study is designed to scan existing literature with key focus on some developing countries. The study critically reviewed previous and most recent academic evidence for insights into private label brands and its impact on the global marketing climates with specific reference to developing countries. Upon completion, the study could provide enough information to assist marketing practitioners and the grocery retail shop-owners. In developing countries where private label brands were not adequately developed to fully compete with other manufacturing brands. However, across developing countries, consumers still patronize private label brands though the multitudes of brands that are described as inferior, poor quality and low price unlike national brands especially in times of economic hardships. To compete globally, retail outlets need to pursue drastic investment policy framework and craft that are relevant to global marketing strategies.

Keywords: *Private label brands, developing countries, emerging countries, retail sector, market penetration, national brands.*



Introduction

While there are booming consumer markets in emerging economies, not much have changed to improve private label brands (PLBs) to offset existing national brands during severe economic slacks. Retailers dealing in grocery products across Africa are expected to have adequate understanding of marketing conditions relating to PLBs. Empirical research has shown that PLBs continue to show steady increase. Despite growing trends in PLBs, elsewhere outside the African continent and in several developing countries, still much is required (Global Nielsen Report, 2018). The study further revealed significant increase ranging from 2.3% to 3.2% as a further decline in contrast to other global settings. Besides, the growth in PLBs, the level of market penetration in 2016 slightly rose from 16.3% to 16.7% and a further 40% rate of penetration across the globe (Boyle and Lathrop, 2013; Global Nielsen Report, 2018).

By far, PLBs continue to expand the existing market share in contrast to other global brands of national significance; thus, representing vital trends in the retail sectors (Cuneo, Lopez & Yagiie, 2012; Girard, Trapp, Pinar, Gulsoy & Boyt, 2017). According to Cuneo, Benavante, Milberg and Palacios-Fenech (2015), within the global context, there have been huge increase of 90% in consumer products in terms of PLBs. In economic terms, PLBs are perceived as one of the marketing brands during economic difficulties. Taking these benefits into account, African countries utilizing PLBs still faced with enormous decline in penetration of marketing activities (Beneke, Flynn, Greig & Mukaiwa, 2013; Global Nielsen Report, 2014). Also, across Europe, there is growing surge in PLBs because of advanced retail sector within the high retail sector (Nielsen, 2014).

This study is designed to scan previous scientific evidence across developing countries on PLBs, provide discussion regarding the future of PLBs in developing countries ascertain the challenges and risks involved, methodology, discuss the research findings. Lastly, the study end with conclusions and recommendations.

Theoretical foundation

Branding has become a typical issue during the past 20 years so much so that private brands remain very scanty. Insights into how consumers and the retail outlets as well as consumer decision making are vital for branding of products. Drawing from scientific evidence, consumer decisions processes turn to be very complex based on numerous constructs of varying contexts. To fully comprehend decisions made by consumers of private brands, different perspectives of literature on consumer attitudes.

Several scientific evidence have outlined consumers' decision-making processes key significance of utmost value given variations in the global shopping environment (Li, Li, & Kambele, 2012; Chen & Chang, 2012; Grant, Clarke, & Kyriazis, 2010; Wang, 2010). The



perceived product value is broadly defined as the total rational evaluation of product utility founded on benefits as well as perceived sacrifices (Boksberger & Melsen, 2011). Similar studies also researched on human cognitive information as it evolves in consumers' mindset to interrogate assessment of product features (Lee et al, 2011; Hu, 2011; Espejel et al, 2009). Scientists over the years have highlighted the numerous process through which consumers made informed decisions namely emotional reaction, cognition and to respond to decisions regarding products.

Consumer decision-making can either be value-driven with focus on the ability of consumers to make and assess product performance based on trade-offs considering specific benefits and sacrifices. For instance, consumers' ability to purchase groceries based on indicators of prices and qualities (the benefits). These trade-offs at the time of product decision making are at time very problematic. In terms of judgement and the general assessment of trade-off could involve risks such as financial risks because of inability of product information.

Being founded on the cue utilization, the authors of this study is of the views that consumers are likely to reduce product risk levels through assessment of product cues namely the brand name, product price, product quality indicators and promotion strategies. The cue utilization theory states that the public could resolve the level of uncertainties problem as part of the value-driven plans.

Historical perspectives of Private label brands

The retail sector of the global economy gave birth to PLBs due to rapid increase in brands of every product category. This revelation was in line with recent study that PLBs are presently viewed as the most significant brands within the retail sector (Huang & Huddleston, 2009). PLBs have gained heighten publicity over the past decades with rising market share and sales volume. However, given the present tough global economic activities, PLBs are in competition with nation-wide brands commonly known as national brands. The nature of competition focuses on features such as promotion, packaging, and distribution among others.

Through historical introduction of PLBs the retail sectors, the general window of opportunity is opened across the retail sectors to maximize sales volume for high profits (De & Singh, 2017). Despite growing profit margins, the study further identified overall lack of quality products and offering cheap substitutes to other products including manufacturing goods. Another scientific study by Ranga (2017) strongly suggested that PLBs were historically introduced with the view to market a wide range of different products to consumers. Another reason for introducing the PLBs according to prior study include growth in profit margins and rising sales volume. These historical views were severely argued by various researchers in the past. For instance, a study by Lin, Marshall and Dawson (2009) argued that not much was done

in terms of PLBs research activities in developing countries in contrast to the developed world that offers wide range of competitive and quality products. (Witek-Hadjuk & Grudecka, 2017). Comparing the developed and developing countries in historical terms, PLBs in the developed countries have gained 50% in market shares (Cuneo, Milberg, Fenech & Benavante, 2015; Global Nielsen Report, 2014). Yet in developing world not much is achieved. Recent scientific evidence by Herstein, Drori, Berger and Barnes (2015) revealed that PLBs account for roughly 10% market share in developing countries. Based on this scientific evidence, much can be learnt from experiences of the developed world strategies by the developing countries. Further reliance on both historical views and growing trends of PLBs, researchers are of the opinion that PLBs in 2025 are expected to reach significant levels between 25% to as high as 50% in global market share as the brand grow (Rabobank, 2011). Table 1 below extends the existing literature for more in-depth insights on the PLBs. Besides, the table illustrates the trends of PLBs evolution dating as far back from 1950s.

Table 1: Pictorial evolution of private label brands

Years in history	Literature	Sources
1950s	Lower costs with negligible levels of market share	Parker & Kin, 1997
1970s	Constant increase in market share	Kumar & Steenkamp, 2007
1970s	The PLBs are considered low priced, inferior products	Jonas & Roosen, 2005; Dobson & Chakraborty, 2008.
1980s	Newly created PLBs (the Pseudo brands), slightly low quality	Jonas & Roosen, 2005; Gabrielsen & Sorgard, 2007
1982	PLBs attained 60% of various product categories within the food industry chain	Raju et al, 1995
1990s	Increased in quality of PLBs to become more competitive, same quality as market leaders; market shares doubled; 30% increase in market shares than national brands	Jonas & Roosen, 2005; Quelch & Harding, 1996.

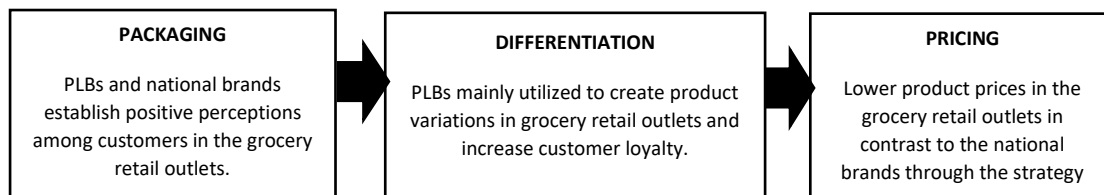
Source: Designed for the study

Conceptualizing Private label brands

Over the years of extensive studies, several researchers defined PLBs (Dhar & Hoch, 1997; Nielsen, 2003; Hoch, 1996). According to Dhar and Hoch (1997), PLBs are products that are owned and sold exclusively and controlled by individual retailing public. Nielsen (2003) on the other hand, defined PLBs as brands that are sold only to specific retailing public within the supply chain. Earlier in exploratory study Hoch (1996) add that PLBs are primary trademarks that are identified on the packaging of products. PLBs are commonly referred to as store, own, generics or retail brands that are found within the retail supply chain systems (Blazeska, 2013; De Wulf, Odekerken-Schröder & Goedertier, 2005). Mbaye (2009) on the other hand add that private labels are those products sold under specific brands by retailers not by the manufacturers. Manufacturing the products originate through contractual or third-party producers.

Whilst there are dissimilarities between national and PLBs, definitions of private labels focus on varying number of products distributed to the market through retailers' brands. By implications retailers are given exclusive ownerships of products that are labelled as private (Sayman & Raju, 2015). According to Berges-Sennou, Philippe and Vincent (2004), products that are identified as private labels are distributed by specific retailers that are not permitted to disburse labels that bears similar features. Other features of private label products that retailers control include pricing, promotion, and packaging (Scott-Morton & Zettelmeyer, 2004). Studies have shown that PLBs, and own label products (OLPs) and owners' brands are distributed through various retail outlets (Kumar & Steenkamp, 2007; Keller, 2013). Controlling private label brands is a significant means of securing maximum consumers' loyalty (Codron, Grunert, Giraud-Heraud, Soler & Regmi, 2005). Figure 1 below provide more insights regarding the various characteristics PLBs namely the strategies of packaging, differentiation, and pricing of private label brands across the retail grocery chain.

Figure 1: Characteristics of private label brands



Source: Authors work

Overview of private label brands

Several academics have researched in search of deeper insights regarding the growth of PLBs across countries (Cuneo, Lopez & Yague, 2012). These academics have sort to understand the



various benefits of PLBs in the retail sector (Wu & Wang, 2005). Consumers are willing to spend more on PLBs due to price variations between PLBs and manufacturing brands. Recent study revealed that more is spent on manufacturing brands than PLBs because consumers are willing to pay more for manufacturing brands (Steenkamp, Van Heerde & Geysken, 2010).

One of the primary concerns in marketing PLBs was the general level of risks. Risk is central in decision-making of products (Mieres, Martín & Gutiérrez, 2006; Erdem, Zhao & Valenzuela, 2004). Hence, PLBs like other products cannot be without risk elements (Gomez & Fernandez, 2009; Mieres et al, 2006). Previous empirical study revealed how consumers demand for PLBs was dependent on factors and the nature of product risks and product quality. Drawing from recent study commissioned by Baltas and Argouslidis (2007), it emerged that consumers' demands for products increase once there was rising quality of PLBs. This implies that the retail sectors in developing countries need to provide quality products that represents the brands. Product credibility according to scientific evidence increases once quality perceptions rose; thus, risk levels in general decline (Gonzalez-Mieres, Diaz & Trespalacios, 2006). Erdem and Chang (2012) posit that consumers are most likely to embrace PLBs once the level of risks decline. Moreover, consumers perceived PLBs as risky substitutes since they are less exposed to the products as well as very inferior to other manufacturers' brands (Erdem et al, 2004; Hsu & Lai, 2008).

Existing market share for private labels are at present very trivial; hence retailers continue to stock the labels due to profit margins are higher than the brands at national level. Often, most consumers who invest in private brands perceived them as alternatives and inferior to the national brands (Baldona & Wysong, 2007; Gonzalez, Mieres et al, 2006). Though private labels by far are considered inferior products that lacks the requisite quality features in contrast to national brands; its quality levels have significantly improved. Increase investment to enhance product quality levels to leapfrog the image of PLBs above other brands of national standings (Gomez-Arias & Acebon, 2008). Due to its high-quality features and prestigious nature, national brands are patronized by customers. These brands include jewellery, clothing, computers, and other technological appliances, among others. According to Gonzalez, Diaz-Martin and Trespalacios Gutierrez (2006), PLBs are less popular among product groups where differences in qualities depict higher than national brands. Similar research result add that private labels can perform better in particular product groups where price sensitivity tends to be higher (Hoch & Basenji, 1993; Raju, Sethuraman & Dhār, 1995). Researchers Cunningham, Hardy and Imperia (1982) have shown that despite its low penetration and poor-quality private brands provide consumers enormous benefits of low prices between 15-40% as compared to the national brands.



Private Label Brands in developing countries.

The growth level of PLBs is focused on general distribution of modern trading activities. However, at present the level of penetration is very minimal (Boyle and Lathrop, 2013, Global Nielsen Report, 2018). In most instances, the penetration concentrates only in urban localities. South Africa as one of the developing countries is known as the custodian of the largest private label market with approximately 30% sales volume is released from traditional trading activities countrywide. In spite of its low penetration rate, PLBs is perceived to dominate its growth rate across the Middle East and Africa (Global Nielsen Report, 2014).

Across Southern Africa recent empirical evidence have shown that South Africa is able to advance quickly enough in the development of PLBs penetration (Global Nielsen Report, 2018). The study continued to expand its findings regarding the doubtful state of customers regarding primary problems of the brand. In other African countries including Morocco, Egypt and Zimbabwe, the state of RLBs seemed to be very poor due to rising famine and poverty. Yet, these barriers, there was- some token of growth by PLBs (Nielsen Global Report, 2014). Elsewhere in Africa especially in BIM (a Turkish entity) improved the level of trade over the years though the retail sector is in its infancy (Mostafa & Elseidi, 2017). Yet, in other Western countries, scientific evidence found rapid growth in RLPs mainly by retailers in the grocery sectors as they continue to innovate and improve existing PLBs by marketing quality products for competitive advantages (Nielsen Global Report, 2018).

Another study by Beneke (2017) revealed significant surge in PLBs during hasher economic times as the public become financially challenged. Hence in the African continent the bulk of customers remain skeptical towards pursuing PLBs in the market. As such the overall market penetration of privately labelled products are very low (Beneke, 2017). Of utmost concern was the fact that customers lack enough knowledge on PLBs on the African continent. Consequently, there is increasingly high negative views that impact on the growth of PLBs (Beneke & Carter, 2015). Similar study revealed that the retail sectors in developing countries need to advance the PLBs in line with customers' expectations (Sebri & Zaccour, 2017). In sum, retailers in Africa need to establish total level of improvement to RLPs to undo the negative perceptions that continued to engulf the market. In spite of the negatives, a study by Laaksonen and Reynolds (1994) confirmed that consumers have shifted to buying PLBs due to better price values. However, Hariprakash (2011) remarked that successful private labels were unable to exist where customers only seek better product prices not quality.

Otherwise referred to as "*store brands*", PLBs are aimed to increase market share volumes in terms of product differentiation and expanding present profit margins (Wu, Yeh & Hsiao, 2011). Many investigations have been conducted across the developed countries to understand issues of trust among customers about the PLBs as opposed to manufacturers' brands (Nielsen, 2014; Hyman, Kopf, & Lee, 2010). As indicated elsewhere in the study, developing countries



such as Asia and Middle East countries have experienced little awareness besides risk elements that are linked to the buying of unknown product brands (Nielsen, 2014). These barriers according to the study turn to stagnate the growth rate of private labels in developing countries including Egypt. The retail markets in Egypt are dominated by vast number of customers who are interested in PLBs. Similarly, consumers in Egypt expect to avoid risks in financial risks as they buy PLBs from the market (Nielsen, 2014).

Research Methodology

The review of scientific articles set sights on understanding what PLBs entails in developing countries, the authors employed semi-systematic approach to scan past and existing scientific literature. Literature scanning focused mainly on PLBs as a critical tool used in grocery industries in developing countries. As suggested by Palmatier, Houston & Hulland, (2018) and Waddington, White, Snilstveit, et al (2012), reviewing identified literature was performed with rigor and very transparent enough to demonstrate the hallmark of appropriate strategy. According to Snyder (2019), the semi-systematic approach was deemed suitable not only in reviewing but for a wider information search on PLBs. The review process identified, synthesis and conduct scientific literature assessment to unlock robust solutions that were empirically focused (Mallet, Hagen-Zanker, Slater & Duvendack, 2012). Considering the above, the authors decided to utilize semi-systematic approach to unearth past information for reasons of triangulation (Mayer, 2009).

To ensure the objectives were realized, previous scientific evidence on PLBs in few developing countries were scanned over a period spanning three weeks. Initially, extant literature on PLBs were summarized considering product quality, market share and the rate of product penetration among others as reported in past published scientific articles. Majority of scientific articles reviewed earmarked credible sources including Web of Science, Google Scholar and Science Direct. All the relevant keywords were employed to enhance the literature scanning process. In total over 200 published scientific evidence were scrutinized and summarized. Out of the total published scientific articles, 50 were relevant to unearth primary objectives of this review. Consistent with semi-systematic approach for set objectives to be realized, PLBs literature was extensively scanned across developing countries using different to enhance the content analysis process.

The impact of product labels and the chain of supply.

The general arguments that additional productive inputs are likely to be disapproved by the consuming publics is further confirmed by literature (Bonroy & Lemarie, 2012). This is true since labelling the product always influence marketing conditions. Based on alternative product inputs, marketers continue to be selective in terms of inputs for higher yields in returns per money spent on products. Hence, the ranking of every input of information in line with each



monetary yield is likely to differ from the actual amount spent on products. Taking this further to the farming environment, it is believed that better fertilization amounts to higher yields in production terms; however, the consuming public brand the quality of the end products to be highly inferior.

Equally the consumers are overwhelmed by information on products due to labelling. As such, information is processed by each consumer to form a potential attitude towards the label to make specific decision. Furthermore, based on the theory of Ajsen and Fishbein consumers' positive views of products labels does not march positive buying decision making to translate into buying attitudes (Grunert, 2011). By their nature, consumers are expected to know and understand the sustainability of each label prior to making buying decision (Hanss & Bohm, 2012).

Several households purchasing powers have been influenced adversely over the years due to economic challenges. As such, the product prices become the primary concern. Making product prices private labelling suggests challenges to the product brands for customers satisfaction. Though private labels represent alternative to consumer buying attitudes, it has not received the desired marketing attention from consumers. Despite these assertions, private labels are perceived more profitable in terms of minimal productivity costs and reduced research costs.

Discussion and conclusions

The primary objective of this study was to understand the factors that motivate consumers to use PLBs in developing countries. In search for maximum findings, the authors conducted extensive literature to ascertain credible findings through a semi-systematic approach. Retail outlets and manufacturers of other brands globally have demonstrated that PLBs is very critical for earning potential advantages. Growing interest by consumers of PLBs in the developed and developing countries have generated negative impact on national and manufacturers brand; thus, there are steady shifts in competition between national and manufacturers' brands as well as the retail outlets. In developing countries where PLBs are seen to experience low penetration and poor quality, retail outlets are in search of better ways to increase the brand performance and to increase the market shares. Similarly, manufacturers of product brands continue to struggle to craft competitive strategies. It emerged from this study that factors such as benefits, quality, and brand image rate of penetration among others influence consumers' decision making to access PLBs.

Different but relevant and credible findings emerged. These include risk avoidance by customers, the purchase of PLBs at low prices, poor quality products (Gabrielsen & Sorgard, 2007; Dobson & Chakraborty, 2008), and customers' decision making as grocery retail outlets continue to utilize PLBs despite low market penetration and insignificant market shares because PLBs is in its infancy (Mostafa & Elseidi, 2017). Initially, literature indicates poor product quality and low market penetration across developing countries including Morocco,



Zimbabwe, and Egypt. In South Africa for instance there is growing demand to develop PLBs to increase the present level of penetration among the grocery retail outlets. While products in developing countries conform to quality standards, the study found that in developing countries the customers are worried due to various risks including financial risks (Diallo, 2012; Beneke et al, 2013).

It can therefore be inferred that grocery retailers in developing countries invest more in producing PLBs. By investing in PLBs grocery retailers could improve product qualities and enhance the brand image to increase the overall patronizing of private label products. This finding is consistent with the literature that more innovative approaches are required to the current state of PLBs for competitive advantages (Nielsen Global Report, 2018). Within the developing countries, the study found increasingly more focus on the grocery retail outlets thus the outlets were unable to provide sufficient growth in market shares of PLBs. This finding is consistent with Sethuraman and Gielens (2014) which revealed that high level of concentration turns to trigger low market shares like the rate of penetration. It further emerged that grocery retail outlets within African States there are contributing factors that slow the patronage of PLBs. One common contributor was the fact that the brand is in its infancy thus it is impossible to reach many retail outlets to increase market shares (Mostafa & Elseidi, 2017).

While consumers in the developed countries continue to be identified with PLBs, the present literature search uncovered that much was done in developing countries in particular Turkey to increase market share through trading activities. In contrast, the study revealed that more is required in developing private brands in countries such as Zimbabwe, Morocco and Egypt. Risks factors are the primary inhibitors of PLBs in some African countries namely Morocco and Egypt. Further literature evidence suggests that customers are more loyal to national brands. Evidence based on literature search found that during severe economic difficulties, grocery outlets in developing countries including Africa grow their market share through the patronage of PLBs (Beneke, 2017). This position differs in South Africa where the rate of penetration continues to increase in spite of doubts by customers.

In conclusion, it could be stated that findings that emerged from the literature reviewed would add significant scientific knowledge to product branding as a marketing concept. This study therefore supports marketing theories including the Transaction Utility Theory (TUT). The central reason for these final outcomes may be since consumers in developing countries consider PLBs as inferior product that lacks the requisite quality features; instead, utility is the main consumer motivating tool to PLBs to do the joy derived from the products. Considering the authors' observation, it seems as if customers try to avoid national brand to its value and quality and quality for PLBs which are inferior and cheap. It can be concluded that in several developing countries, consumers are more interested in PLBs. Due to the popularity of PLBs retail outlets in developing countries especially in Africa are on the verge of improving their



products. It can be concluded that more consumers utilize PLBs during harsher economic climate across developing countries; thus, generating poor level of product penetration.

MARKETING AND ECONOMIC IMPLICATIONS

Marketing implications

Based on the literature review, the authors provide practical insights for retailers. The overall implications according to extant literature is that retail marketing needs to invest more private labels to increase market share and sales volume. Furthermore, the retail sector utilizes private labels to create attractive private product labels contrary to national brands in partnership with other suppliers for product quality.

This study further assists the retail outlets in developing countries in addressing some important questions that concern the present consumer market. In the shortest possible period more need to be accomplished through aggressive marketing strategies to increase consumers' use of PLBs and to increase competitive advantages in marketing PLBs in developing countries. Manufacturers' brands in developing countries pose high threats to retail outlets in developing countries. Drawing from extant literature across developing country-level, there are various factors at play that impede PLBs development and manufacturing. Key impediments include poor PLBs penetration and lack of quality products in markets across developing countries in competition with quality products from the developed world. However, whereas some countries such as South Africa and Egypt continue to do well in developing PLBs still the time frame during the developing process and improvement to the product labels to attain similar penetration and quality in developed countries (Reardon, Henson & Berdegue, 2007). This implies that as manufacturers in developed and developing countries to preserve each brand in the competitive climates as penetration remain low, products become more inferior and market shares diminishes, managers of brands need to continue their search for strong strategies to be ahead of the many brand challenges in developing countries.

Several developing countries experience low market penetration of PLBs as such as these countries are unable to withstand the harsh realities of global competition due to low growth and lack of strategies to develop private brands. Besides, developing countries experience market opportunities since there are market limitations. This further implies that the development of PLBs in developing countries is very limited; as such market attractiveness is reduced for manufacturers' brands as well as national labels. Developing countries that are faced with poor penetration levels are likely to be "*safe havens*" since distribution, logistics channels and the global retail outlets remain very low. In sum, the literature reviewed so far displayed sufficient managerial insights of PLBs in developing countries and its competitiveness in the global market.



Economics implications

During economic downturn consumers focus more on private labels. Products become easily affordable because of lower buying prices. Adopting positive attitude towards private labels amid growing economic imbalances by consumers persists even after the negative economic activities. The consuming public therefore continue to accept private labels as the potential marketing choice. In developing countries where economic activities steadily decline, the private labels become the only source that enables consumers greater access to products at the same time, attain increased market share in contrast to national brands.

Introducing private labels in developing countries accord retailers the privilege to purchase products at lower. It is assumed that private label products are of lower quality in contrast to available products in the market. The general economic perspective is that private label brands offer greater price margins for the consuming publics than manufacturing brands provided the brand is well-managed to control cost structures of production.

Suggestions for future study

Given the scope of these findings, the authors suggest several empirically designed areas to be considered in the future. Initially, the empirical research could be of more values based on field information instead of literature scanned across developing countries with more focus on retail outlets and consumers from different countries in contrast to literature drawn from various countries. Further empirical research from additional countries would be deemed valuable in comparison to the developing countries where there is high concentration of retail outlets with implications. For instance, since PLBs limitations are common in vast number of developing countries, instead of providing findings based on scientific evidence, more empirical results could be designed with key focus on the wholesale sector to understand the PLBs from the sector. Lastly a more quantitative study is required for generalization and to validate the final outcomes.



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