The Italian wine supply chain is complex and dynamic. In domestic market the consumption is lowering, the share of occasional consumers is increasing, especially among young people, the economic crisis has shift a large consumption share from supermarkets to discounts while export channel allows many companies to reach still successful results. However, many wine companies are taking advantage of what is happening on domestic market, especially in basic or popular wine segments. Specifically, wine merchands have acquired great market power by driving significant volumes, especially in mass market, and following multi-brand strategies such as new brands, umbrella brands, brand extension where there is often a lack in producer or merchand recognition while focusing on alliance between the "merchant brand" and origin, place/region or grape variety. The "merchant brand" is often a trademark easy to remember or a name evoking a terroir, a region, a well-known wine or, for highly promoted wines, a life style or consumer habits.

Brand strategies, namely branded wines, started by wine merchants have also been extended to many traditional wine companies. For instance, the Cevico group, located north-east Italy, accounts for about 24 brand lines (16 retail, 7 Horeca, 1 organic) and supply retailers through many private labels and reserve brands (wines bottled for a retailer only). This company has acquired 18 local wineries and its turnover reached 127 million euros in 2013, by increasing of about 30% in two years only. From an economic perspective, this company was able to reach a competitive advantage through economies of scale/scope, investments to increase the size, to improve the technology and logistics and to ensure wine/grape provision as well as immaterial investments in promoting its branded wines in order to increase the power on retail companies.

From a consumer perspective, the growth of branded wines may further increase the confusion in the consumer mind while the notion of brand does always not reflect factors building equity such as brand awareness and perceived quality (Viot and Passebois-Ducros, 2010; Spielmann, 2014). In the Italian wine market there is a sort of a jungle of brands from strong producer brands (wine companies with good reputation) to weak producer brands (small size companies), from merchand brand to private label or reserve/reference brands.

In the literature, there is a growing interest in brand equity issue that has special features in case of wines and especially in market such as Italy or France. In France, Viot and Passebois-Ducros (2010) showed that brand is associated with a set of attributes changing according to consumer wine knowledge or experience as well as the level of consumption. In Australia, Lockshin et al. (2006) found that consumers are brand sensitive even for low prices. Conversely, Polymeros et al. (2012) analyzed wine cask Greek market and they their results suggest that brand is less important than other wine attributes (price, packaging).

Our research questions are: what are branded wines? Can we better describe these brands as wine attributes? Do they have a brand equity as traditional brands? Can we measure their effect on wine market and especially on consumer purchase process?

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In this work we analyze Nielsen data from 2009 to 2012 in order to figure out the following aspects: i) wine brands or branded wines or group of them; ii) attributes associated with each brand; iii) consumer profile of each brand. The large dataset encompassing most of brands and covering all consumption areas, allow us to evaluate branded wines at different aggregation levels using a cluster models (eg. geographical denomination vs. table wines, national vs. regional, supermarket vs. discount, etc.). Indeed, each brand is estimated as volume and sales through consumer information, which is also helpful to better recognize not only who purchases but also what and how much he/she purchases. Unfortunately, Nielsen collects data about consumption only, i.e., opinions or information about wine knowledge (eg. novice vs. experts) or wine preferences can be partially inferred through wine purchases.

**Keywords:** branded wines, wine merchand, brand equity, purchase process.

**References**


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