

The Evolution of Retail Logistics in Italy. The Case of Coop Italia

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Key Words

Retail, logistics, Italy, vertical relationship

Abstract

The present paper examines on the basis of a single case-study the evolution of logistics in the Italian grocery industry. It analyses the effects of the reengineering the logistic system on efficiency and, in particular, on the manufacturer-retailer relationship. The paper sheds light on new logistic strategy made by the largest retailer in Italy. It shows also that the reorganisation of the supply chain affects the relationship between manufacturer and retailer. This reorganisation leads to important changes in the balance of power along the distribution channel. This paper is based on a specific case study, therefore it may not be generalised outside Italy. However, it represents a first example applying the principles of logistic centralisation in the Italian retail industry, which is characterised by a low level of innovation in logistics, due to its fragmented market structure. Our work aims to suggest managers of retailing firms operating in Italy the main operational guidelines to run their company. The study, in fact, provides important lessons on how the adoption of innovative logistic system can positively affect operational efficiency and vertical relationship.

Introduction

The present paper uses a single case-study to examine the evolution of logistics in the Italian retail industry, by analysing the impact of reengineering the logistic system on retailers' efficiency and on the manufacturer-retailer relationship. The reorganisation of logistics does not only impact the relationship between manufacturer and retailer in the form of a change in the balance of power in the distribution channel, but also affects the vertical relationship among retailers and manufacturers.

As retailers centralise their Distribution Centres, they centralise the negotiation phase and gain scale, thereby outpacing manufacturers through an increase in bargaining power. However, reengineering the supply chain requires vertical collaboration between retailers and manufacturers in the management of logistic activities; information-sharing regarding different activities amongst market partners and increased harmonisation are regarded as a performance driver to overcome the unsatisfactory profit situation of a stagnant grocery industry. In other words, logistics spurs manufacturers and large retailers to adopt a business model based both on competition and collaboration.

The paper is organised as follows.

First, it discusses the innovative features of the supply chain and compares it with the traditional logistic system, outlining the impact of reorganisation of the supply chain on the relationship between manufacturer and retailer.

Secondly, it describes the main characteristics of Italian retail industry which represents the sector under analysis.

Finally, it describes the restructuring of logistics implemented by one of the most important Italian retailers. The case-study examines the reorganisation carried out by the retailer under analysis. This reorganisation mainly consists in the creation of an important logistic hub for the Italian North West Area.

Literature review

Several works have studied the evolution of retail industry and the logistics strategies of grocery retailers (Ferne, 1999; Dawson, 2000, 2001; Sparks and Wagner, 2003). Ferne (1994, 1995, 1999) cites the main strategic factors to explain variation in supply chain network. The strategic factors are:

- a) the extent of retailers' power;
- b) the penetration of store brand in the market;
- c) the degree of supply chain control.

The balance of power between manufacturer and retailer has recently changed with retailers taking the control of many aspects of the value chain, including logistics (Dawson, 2001; Dawson Shaw, 1990; Ferne, 1997; Ferne 2003). The integration of logistics is implemented after the "Retailing Revolution" i.e., the development of large retail corporations together with the increase of market concentration.

In the past, logistics is controlled by manufacturers that had the responsibility for the physical distribution of goods from factory to the single points of sale (time 0).

As retailers grow in scale (Retailing Revolution), logistics becomes retailer driven. The process consists in integrating warehouse and transport activities and reengineering the entire supply chain (time 1). In this way, logistics becomes increasingly important in large retailers' value chain (Norek, 1997). By investing in their own regional (or interregional) Distribution Centres, many retailers take control of store replenishments from suppliers and wholesalers. The Distribution Centre becomes the barycentre of the logistic system in the distribution channel and it can be seen as the hub serving the single points of sale (spoke) of a certain catchment area: in other words, the integration of logistics made by the retailer is implemented by the consolidation of the main logistic activities at the Distribution Centre level (Ferne, 2003).

The main reasons that spur retailers to integrate and consolidate physical and information flows related to the distribution of goods along the channel are:

1. efficiency/efficacy improvements in the bargaining process, by means of discounts made by sellers arising from the optimisation of load transport and delivery/replenishment processes;
2. efficiency improvements in operational processes by reducing stock levels and storing costs, by increasing labour productivity and the size of shelf areas at the point of sale;
3. consumer-service improvements by reducing the risk of going out-of-stock in the point of sales and by enhancing the service quality and the freshness of goods.

The integration and consolidation of logistics are not only pursued by big retailers to gain scale in the operational processes, but also in the negotiation phase (Bonet e Panchet, 2005), because they centralise purchasing activities from point of sale to regional, inter-regional or national level.

To gain strategic benefits and logistics cost saving, literature recognised that it is not enough to optimise retailers' internal operations; vertical collaboration between retailers and manufacturers in the management of logistic activities is a potential and fundamental competitive requirement (Kotzab, 1999; Kotzab, H., Teller, C, 2003; Soosay, Hyland, Ferrer, 2008; Barrat, 2004). During the 1990s, the main interest of the grocery supply chain management was the publication of the Kurt Salmon Report on Efficient Consumer Response, showing the "waste" activities in the grocery supply chain. In the 2000s, the ECR movement stresses the importance of new principles of collaborative management along the supply chain, aiming at gaining efficiency in the logistic process and serving consumers better, i.e., more quickly and at lower cost (Kurt Salmon, 1993; ECR, 2006). This result is called a "win-win-win situation" since all partners in the supply chain (manufacturer, retailer, and end-user) can gain profitability by doing more with less (Svensson, 2002a; 2002b).

Vertical collaboration takes place at different level of the supply chain and enables better physical and information flows, improvement in the trade-off between quality and average stocks, more economical inventory management and better transportation system (Caputo and Mininno, 1996; Soosay, Hyland and Ferrer, 2008). Vertical collaboration is a form of supply chain integration strategies, oriented towards the linkage of organisations with the purpose of reducing operational costs through asset-specific investments that yield superior efficiency (Caputo and Mininno, 1996).

Retailers have been more proactive in their approach, developing partnerships primarily in operational improvements such as delivery, storage and packaging patterns. Continuous Replenishment Project (CPR), Vendor Management Inventory (VMI), Co-Management Inventory (CMI), and Collaborative Planning Forecasting and Replenishment (CPFR) represent the strategic logistics projects in which the collaborative orientation prevails. Moreover, large manufacturers and large retailers are jointly testing the application of Radio Frequency Identification systems, in order to control physical and information flows from the factory to the point of sale (Jones, 2004; Prater, 2005).

The focus on logistics brings retailers and manufacturers to cooperate on other strategic activities of the value chain such as marketing and customer services (ECR, 2006).

This strategic orientation leads to Supply Network Strategies apt to activate relationships with suppliers in order to become more efficient and innovative. Since the late 1970's, a number of studies in relationship marketing have laid the bases for research in the organisational area that have shifted the focus from the internal process of organizations towards the organization-environment interface (Hakansson, Snehota, 1997). Thus, a new perspective of research in marketing and strategic management which stressed the importance of dyadic business relationships (Brandenburger, Nalebuff 1996) emerged; the dyadic perspective was then extended to networks in

which several firms are linked in interdependent relationships and governance structures (Hakansson, 1989). In the manufacturer-retailer relationship, the business model is moving towards co-opetition, which combines competition and cooperation between partners belonging to the same value-net (Achrol and Kotler 1999).

The case of Coop Italia, the leading firm in the Italian retail industry

Procedure

The paper is constructed on a single case study. Case-study research is an empirical inquiry that allows for a phenomenon to be analysed within its real context (Yin, 2003). The single case methodology is applicable for representative and revelatory cases. The case study organisation can be described as representative of Italian large retailers and as revelatory because it shows an innovative supply chain organisation for the Italian retail industry.

In order to construct the case-study, we interviewed three managers of Coop Italia: the head of Logistics of Coop Italia, the manager of Budgeting Control of Coop Liguria, the Logistics manager of the new body - North West District - that manages the retailer's physical flows in the North West of Italy.

Semi-structured interviews were used in data collection.

The head of Logistics gave us an overview of the evolution of Logistics and Supply Chain Management in Retail in general and in Coop Italia in particular.

The second interviewee focused on the organisational problems that three Cooperatives met in pursuing the creation of the North West District, whilst the third explained the critical role of operational activities in the North West District.

Access to several internal documents on the evolution of logistics in Coop was provided by the head of Logistics. We also collected some information about the retail industry in Italy, analysing sectorial databases and specialised press.

The collected information allows us to answer the following research questions:

- a) what paths of logistic reorganisation are followed by the firm studied;
- b) what implications are delivered by these paths, in terms of operational efficiency and effectiveness;
- c) what implications in terms of manufacturer-retailer relationship.

Structural features of the Italian retail industry

The retail market in Europe has become increasingly concentrated both at national and EU level (Dobson, 2003). Highly fragmented retail markets, consisting predominantly of traditional independent retailers, have shifted towards high levels of market concentration, driven by a process of growth and mergers by leading retailers.

The results are: (i) the "marginalisation" of small independent retailers, which continue to act as convenience stores; (ii) market dominance by a limited number of large-format; (iii) multiple-store retailers that account for the main share of consumer spending. As they saturate their home markets and as opportunities for expanding their business arise, large retailers have also tried to expand their operations internationally.

However, with respect to the development stage and the type of business model, the European Union retail industry varies from nation to nation and region to region.

For example, the retail industry in Northern Europe is more concentrated and sophisticated than its Southern counterpart; Eastern Europe is a new emerging market, as European retailer giants have recently begun to invest in Russia. The most prominent are Germany's Metro, a cash-&-carry operator, and Auchan, the French hypermarket chain. Other major global retailers known to be considering Russia are Carrefour, Tesco and Wal-Mart.

Focusing on the Italian grocery retail industry, it is immediately clear that level of development are lower compared to other European countries.

The Italian retail industry is generally fragmented and is characterised by the presence of both traditional shops and large retailers (Table 1). Italian small shops account for 25% of grocery sales, while in France, Germany and the UK they have a considerably smaller sale ratio (respectively 4%, 5% and 17%) (Federdistribuzione, 2010).

Table 1: Modern channel vs traditional channel

2009	Italy	Spain	Germany	France	UK
Hypermarket	27%	30%	28%	55%	55%
Supermarket	48%	50%	68%	41%	28%
Traditional shops	25%	20%	4%	4%	17%

Source: Federdistribuzione 2010

Italian retailers can be classified in different group, namely (see Table 2):

- associations among small shops (retailers' cooperative, i.e. an organization of independent retailers with the aim of sharing marketing expenses and obtaining better discounts from upstream suppliers);
- Cooperatives among consumers, recognised by Art. 45 of the Italian Constitution, with the goal of protecting consumers' interest.

Table 2 - Sales Ratio 2009 (Grocery)

Retailer	% grocery
Coop Italia	15.2
Conad	9.7
Selex	8.3
Carrefour	8.2
Auchan	8.2
Esselunga	7.3
1. Despar	4.4
Interdis	4.0
Pam	3.6
Eurospin	3,2

Source: Federistribuzione (2010)

In 2009, the main retailers in the Italian grocery market are Coop Italia (a Consortia of Consumer Cooperatives), CONAD (a Consortia of Retailers' Cooperatives),

followed by international retailers (Auchan and Carrefour) and wholesales' association (Selex, Despar, Interdis).

Retail chains keep gaining share at the cost of independent stores, by exploiting economies of scale, which allow them to maintain lower prices and spend more resources on advertising. Non-store retailing continues to gain share in 2009, but accounts for less than 3% of total retailing in Italy.

As regards competitive structure, retailers (especially the large ones) mainly compete on price, especially in the food segment, where great attention has been given to price positioning, because of the economic crisis.

Consumers keep looking for the best price among different retailers and formats, therefore this shopping behaviour pressures retailers to obtain better deals from manufacturers

The logistic reorganisation pursued by Coop Italia in the North-West

Coop Italia is the largest Italian distribution chain; it is a Consortia of Cooperatives among consumers and operates in every Italian Region through 1,427 sales outlets and a staff of around 56,500 people. Coop Italia's shareholders total about five million people.

The major cooperatives are co-joined in regional district (Table 3):

Table 3 - The Coop Italia System

North West District

Coop Liguria (Genoa, Savona, La Spezia, Imperia, Alessandria, Cuneo);
 Coop Lombardia (Varese, Como, Milan, Monza e Brianza, Lodi, Pavia, Cremona, Brescia);
 Novacoop (Turin, Biella, Vercelli, Novara, Verbania, Varese, Milan, Cuneo, Asti, Alessandria).

Adriatic District:

Coop Adriatica (Belluno, Vicenza, Padua, Venice, Treviso, Rovigo, Bologna, Ferrara, Ravenna, Forlì-Cesena, Rimini, Pesaro e Urbino, Ancona, Macerata, Fermo, Ascoli Piceno, Chieti);
 Coop Consumatori Nordest (Piacenza, Parma, Reggio Emilia, Mantova, Brescia, Venezia, Treviso, Rovigo, Pordenone, Udine, Gorizia, Trieste);
 Coop Estense (Modena, Ferrara, Foggia, Barletta-Andria-Trani, Bari, Brindisi, Taranto, Lecce, Matera).

Tirrenic District

Coop Centro Italia (Arezzo, Siena, Perugia, Terni, Rieti, L'Aquila);
 Unicoop Firenze (Lucca, Pisa, Pistoia, Prato, Firenze, Arezzo e Siena);
 Unicoop Tirreno (Massa e Carrara, Lucca, Livorno, Grosseto, Siena, Terni, Viterbo, Rome, Latina, Frosinone, Naples, Avellino e Benevento).

Sources: Coop Italia

Coop Italia operates by means of hypermarkets (Ipercoop), large supermarkets (Coop), small supermarkets (inCoop) and discount stores (Dico).

In the past, this complex store system was usually replenished through a distribution network of local warehouses for dry grocery and fresh products.

With respect to the logistics, large cooperatives started to centralise their Distribution Centres from local to regional level (one for each Cooperative), with the aim of gaining economies of scale in warehouse management. Such process of centralisation is still ongoing and represents a key point in the process of reorganisation of the company.

It is important to underline that Coop Italia along with the biggest manufacturers negotiate at the national level to fix contractual national standards (discount and bonus criteria, new product penetration, price spread, etc.), while specific clauses pertaining quantity, quality, price and time of delivery are established at Cooperative level or, in case of particular products, at hypermarket level.

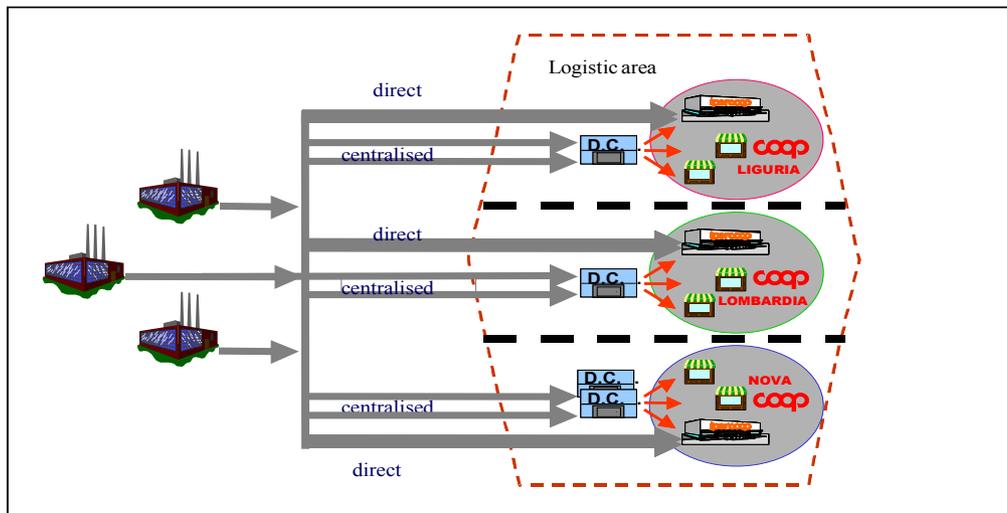
Since 2006, the head of Logistics in Coop Italia has been working to plan a new logistic system that has been tested so far in the North West District.

In the North West, Coop Italia runs its business through three Cooperatives (CoopLiguria, CoopLombardia and CoopNova) that operate at regional level.

Until 2006, each cooperative was replenished by a specific regional Distribution Centre. Every single point of sales operated with a particular logistic system of replenishment, while Coop Hypermarket (Ipercoop) placed its orders directly to suppliers and had a personal warehouse; Supermarkets and Discounts sent order-forms to the regional Distribution Centre (D.C.) belonging to the same Cooperative.

Only for slow moving consumer goods, was the Hypermarket warehouse replenished from the D.C. (Fig. 1).

Fig 1: The previous Coop logistic system



Source: Coop Italia

Since 2006, Coop Italia's process of logistic reorganisation has created an important logistic hub for the Italian North West Area, shifting the logistic D.C. from a local to an interregional level. North West Consortium is the company owned by the three cooperatives belonging to North West District; it supplies storage and delivery services to the three aforementioned cooperatives (Table 4).

Table 4: North West Consortium – the shareholders

2009 - shareholders	%	Revenues (.000 €)	Total assets (.000 €)	employees
COOP LIGURIA SOCIETA COOPERATIVA DI CONSUMO	30	721	1.534	2.896
COOP LOMBARDIA SOCIETA COOPERATIVA	30	1.066	1.838	4.607
NOVA COOP SOCIETA COOPERATIVA	30	1.016	1.743	4.679
Others	10	129	142	714
	100	-	-	-

Source: Aida - Bureau Van Dijck Electronic Publising

The economic and financial profile of the Consortium is represented by the following table that shows the dramatic growth of the company, due to the progressive centralisation of supply and logistic services pursued by the three shareholders Cooperatives (Table 5).

Table 5 - The Consortium's Profile

	2009	2008	2007	2006	2005
	(.000 €)	(.000 €)	(.000 €)	(.000 €)	(.000 €)
Revenues	2,178,250	1,733,056	1,154,263	671,896	278,850
EBITDA	10,907	10,954	10,302	8,123	5,986
EBITDA/Sales (%)	0,49	0,62	0,87	1,16	1,99
ROS (%)	0,04	0,02	0,12	0,25	0,43
Net profit	0	0	0	0	0
Total Assets	590,352	616,680	389,367	202,389	222,497
Capital and reserves	6,000	6,000	6,000	6,000	6.000
ROA (%)	0.15	0.04	0.38	0.88	0.58
ROE (%)	0	0	0	0	0

Source: Aida - Bureau Van Dijck Electronic Publising

With the establishment of the new company, Coop Liguria, Coop Lombardia, Coop Nova are now co-jointed, from a logistic point of view, in a unique logistic area that covers the entire North West District.

The North West Consortium, consisting of an hub (D.C.) and four Regional Warehousing Points (Platform - P), manages the entire system and supplies each Cooperatives.

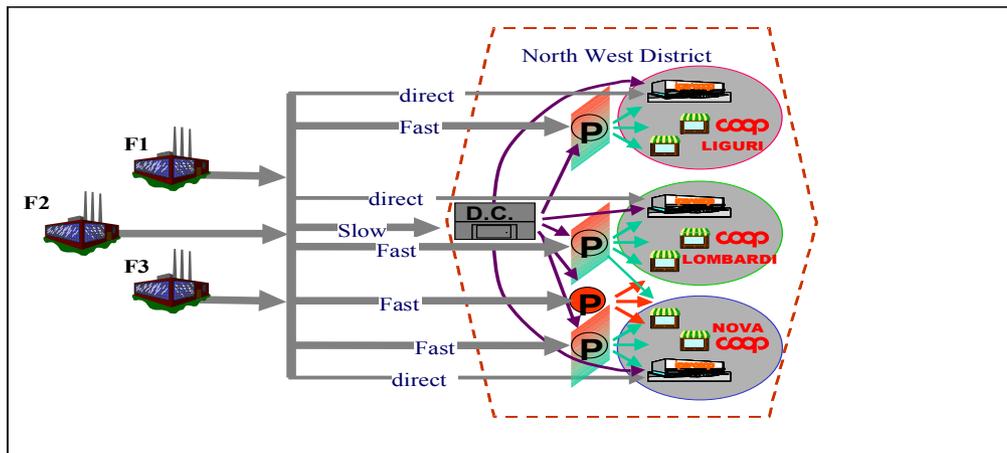
Different projects pertaining the logistics are carried on the base of:

- types of goods whose logistics requirements are similar with respect to the selling speed;
- the distribution format (supermarket, hypermarket, discount store).

However, this distinction is becoming less and less important as the North West Consortium is increasing the control on every process.

In the first years of activities, infact, the North West Consortium has stored and managed only slow moving consumer goods for the point of sales of the three cooperatives, while faster moving consumer goods (such as fresh products) have been stored by the Regional Warehousing Points (Fig. 2).

Fig. 2: The new coop logistic system



Source: Coop Italia

Since hypermarkets have wider and deeper assortments of goods, they are simultaneously served by the Hub for slower goods, by Regional Warehousing Points (Platform - P) for the fastest, and directly by manufacturers for goods that are sold only through this format, as, for example, non-food goods.

Every regional Platforms (P) is in charge of the storage and the transport of faster consumer goods up to the points of sale (supermarket, hypermarket and discount), while the North West District Hub takes orders and delivers directly to Hypermarkets and to the four regional Warehouse Points for slower moving consumer goods.

Faster moving consumer goods are replenished directly at the Warehouse Point (P.) or at hypermarkets.

Since 2009, North West Consortium has increased the level of centralization of deliveries to the hypermarket channel. Hypermarkets are replenished by North West Consortium for all products (food and non-food).

At the end of 2009 and during the whole 2010, the Consortium has increased the centralization of logistics for the three cooperatives, particularly in the area of fresh and dairy products. In the past, on the contrary, the hub was specialised only for dry products (Table 5).

Table 5: Packages moved by Consortium

	Packages	Packages	%	%	2009/2008
	2009	2008	2009	2008	
Dry goods	62.242.220	63.323.751	62	65	-1,70%
Frozen	4.600.647	4.449.583	5	5	3,40%
Fruit and vegetables	18.762.096	18.004.399	19	18	4,20%
Dairy products and salami	11.105.917	10.640.519	11	11	4,50%
Meat	3.508.090	1.513.635	4	2	131,80%
Total	100.218.970	97.931.887	100	100	2,30%

Source: Coop Italia

At present, the process of centralisation and reorganisation is ongoing and becoming critically important. The managerial team of the Consortium is now studying and designing the reorganisation of logistics for fresh products. The new logistic system for fresh products will be formed by one or two storage facilities for dairy products and by a single meat processing centre. The new logistic system should allow a substantial reduction of costs of the supply chain logistics of fresh goods.

The tasks of the Consortium have gone beyond the field of the logistics, aiming to promote innovative projects in accounting, human resources, consumer service, marketing etc.

Concluding remarks

We acknowledge that it is difficult to draw any final conclusions from the North West Consortium project of Coop Italia.

The project of reorganising the logistics is ongoing and subject to continuous changes to adjust the relationship between the Cooperatives and the North West District and to improve efficiency of the whole system.

Therefore, it would be too ambitious to assess the impact of the actions enhancing the logistics efficacy and efficiency of Coop.

However, we can attempt to make some preliminary observations that may allow to partially answer the research question addressed in this paper.

In terms of operational efficiency and effectiveness, the centralization of logistic management at the District level has provided significant opportunities for the three Cooperatives; more specifically, such opportunities regard: i) costs optimization and exploitation of economies of scale; ii) increase of the number of products sold by the points of sale; iii) enlargement of the sales areas of the points of sale; iv) improvement of the return on investment and of financial management.

The centralization of logistic operations at interregional level exploits economies of scale and optimises the use of resources and structural facilities; in particular, it responds to the need of gaining scale in the management of the warehouse and in the transport/delivery system.

The process of centralization increases the number of products for the entire system of the three Cooperatives. The North West Consortium moves 12,000 products, of which 6,500 are sold in supermarkets and hypermarkets and 4,500 only in hypermarkets, the rest is promotional products. The centralisation of logistics helps to widen and deepen the assortments of goods in the retail outlets as an important tool for customer satisfaction.

The centralisation also reduces the warehouse area in retail outlets and consequently enlarges the sales area. The hypermarket of Savona (Coop Liguria), for example, has expanded the sales area of more than 800 mq, thereby increasing its revenues.

Moreover, the North West District Hub becomes a profit centre since manufacturers offer discounts to the retailer in exchange of the economic benefits obtained by using this logistic system.

Coop Italia has evaluated in percentage terms the reduction of costs due to the adoption of different delivery processes as follows:

1. delivery costs from manufacturer to the single point of sale: 100;
2. delivery costs from manufacturer to hypermarket: 45;
3. delivery costs from manufacturer to regional DC: 17;
4. delivery costs from manufacturer to interregional DC: 12.

These benefits are transferred from manufacturer to retailer in terms of contractual conditions.

The centralisation at the District level has provided significant opportunities for the three Cooperatives to reduce costs, to generate better returns on invested capital, and to improve cash flows.

As regards the technological facilities, the integration/centralisation of the logistics has been supported by the implementation of significant investments in new technology. The North West District has implemented the Electronic Data Interchange (EDI) system in particular for the relationship with large and frequent manufacturers and extranet (web-enable) for contacts with small-medium or non frequent manufacturers. New Information and Communication Technologies are consistent with a supply chain managed as a pull and not a push system, according to the best practices defined by the Italian ECR initiative.

EDI allows the implementation of Fast Perfect Order (FPO). The application of EDI-FPO has decreased errors in orders (-23%) and invoices (-77.3%) and has reduced the average lead time (-1.5 days); the consequence is the reduction of the costs of legal disputes, of order management and billing.

The proliferation of the number of goods, the reduction of the average size of orders, the pressure on delivery times have increased the complexity of managing the operation at DC. Despite a complete automation of the management of DC is not currently feasible, in North West District, the application of Radio Frequency technology leads to a reduction of errors in picking activity from 1% to 0.01%.

The centralisation of the logistic activities for the three cooperatives has been followed by the centralisation of other activities of the value chain, such as purchasing and strategic marketing. As regards the marketing, the three cooperatives autonomously

manage their commercial activities, focusing on the specific needs in the catchment area where they operate (due to local differences in consumers' culture, preference and behaviour), while strategic activities are managed at District level.

Moreover, concentrating the activities of the value chain in a local area may help to set up virtuous circles, through long-lasting and consolidated collaboration between resources belonging to different value chain activities; this process could generate an increase in the competitiveness of the entire North West District Hub and, as a result, of the entire Consortia Coop Italia.

For example, the marketing and logistics departments cooperate in scheduling the promotions and in organising the category management.

These features show that the North West District Consortium differs from a mere D.C., because the former defines the negotiation process, as well as interregional marketing and commercial policies.

In terms of vertical relationships, the centralisation of the logistics implies a centralisation of the negotiation process which process was previously carried out individually by each Cooperative or hypermarket. Such reorganisation allows Coop to obtain better contractual conditions thanks to an increase in its bargaining power. However, the successful implementation of this logistic model needs the collaboration of all the manufacturers such that all the agents coordinate their delivery operations and delivery equipments that enable both cost cutting and enhancing consumer service.

Manufacturers, in fact, can benefit from the integration/centralisation of the logistic system implemented by Coop, thereby achieving efficiency results that might not be achieved otherwise. It is worth noticing that Coop Italia is the first retailing company in Italy that has bred a business model based on such co-opetition.

In conclusion, the case of Coop Italia and North West Consortium illustrated that logistics can improve operational efficiency and change the relationship with manufacturers.

As far as the reorganisation of the logistics is concerned, some ideas from this case study may be applied to other Italian big retailers (especially Cooperatives), which currently operate with a fragmented logistic system and base their vertical relationship on the mere negotiation.

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