



The Coop case

MARKETING AWARD 2027

XXXIX EDITION

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THE CASE IN 20 LINES

Italian food retail is undergoing rapid change. Consumers are increasingly focused on affordability, but they also want quality, health, sustainability and transparency; they shop at more banners, making loyalty harder to sustain. Meanwhile, discounters continue to grow, and private label plays an increasingly important role in differentiating retail offerings and shaping banner identity.

In this scenario, Coop is one of Italy's leading food retailers, with 67 cooperatives, 6.2 million members, over 2,000 stores and approximately €17 billion in turnover. But Coop is not merely a retail banner: it is a system of consumer cooperatives whose members are also owners, and which has built its positioning by combining commercial activities, social responsibility and relationships with local communities.

Quality, food safety, consumer protection, sustainable supply chains and participation have shaped Coop's history and its relationship with food. Through private-label products, campaigns and initiatives, Coop has sought to interpret changes in society and consumption, translating values and emerging priorities into tangible offerings. After initiatives such as “La Tavola del Tempo” and “Storie a Tavola”, the next challenge is to look to the future and, in particular, to younger generations.

And now it's your turn: How can Coop, while remaining a cooperative of people rather than just a retail banner, make its brand a reference point for younger generations in Italy in the relationship between food, culture and society? Which segments would you target? What value proposition would you develop? And how would you translate it into assortments, private label, in-store experiences, communication, digital services and relationships with members and communities? Teams must develop an integrated, realistic marketing plan consistent with Coop's identity, with a marketing budget of €2 million for 2027–2028.

1.INTRODUCTION TO THE FOOD RETAIL LANDSCAPE IN ITALY

Food retail is one of the main sectors of the Italian economy and one of the most important competitive arenas for understanding how consumption is changing in the country.

Large-scale retail does not only perform a commercial and logistics function: it is a **system that increasingly shapes shopping habits, consumption practices and the everyday relationship between people, food products and local areas.**

In recent years the sector has shown a significant ability to adapt, despite operating in a context of inflation, falling household purchasing power, geopolitical instability and changing consumption habits.

According to the Mediobanca Observatory on Italian and international food-focused grocery retail, in 2024 the leading Italian modern retail groups achieved net sales of €109.8 billion, while sales are expected to grow by 4.3% in 2025. Modern retail in Italy today operates through about 54,000 stores across different store formats: hypermarkets, supermarkets, superstores, convenience stores, discounters and cash & carry.

Looking only at modern food retail (excluding cash & carry and specialist channels), in 2025 the network has **24,630 stores**, down 1.1% on 2024 and 11% compared with 2014, with a total sales area of about 18.2 million sq m (+0.2% on 2024). Discount is the only format in structural long-term expansion: compared with 2007, discount stores have grown by 61.7% and their sales area by 135.4%; in 2025 the channel also increased the average store size (768 sq m, +0.9%), with a net balance of 77 openings over closures. Hypermarkets instead continue to shrink (272 stores, -18.1% on 2019), self-service stores are sharply declining (9,465 outlets, -15.1% on 2019), while supermarkets (8,396) and superstores (645, +11% on 2019) are holding steady or growing. Average network productivity reaches €7,548 per sq m (+3.6% on 2024) (Table 1).

Table 1

Market shares by sales channel (% of value)

Channel	2007	2014	2024	2025
Self-service (100-400 sq m)	15.9	11.2	9.6	9.1
Supermarkets (400-2,500 sq m)	42.1	41.6	41.7	42.1
Superstores (2,500-4,500 sq m)	11.5	14.0	14.8	14.9
Hypermarkets (>4,500 sq m)	21.1	18.1	10.1	9.9
Discount	9.5	15.1	23.8	23.9

Source: Ufficio Studi ANCC-Coop elaboration on Nielsen GNLC data, March 2026.

In 2025 the discount share stabilises, supermarkets grow and hypermarkets continue their slight decline.

According to Rapporto Coop 2026, in the first half of 2026 consumer-goods sales in value grew by 1.9% in supermarkets (+2.4% like-for-like, i.e. excluding openings and closures) and by 1.8% in discount, which however stops at +0.5% like-for-like: much of its growth comes from new openings. Store size determines the breadth of the assortment: hypermarkets offer on average 19,521 packaged consumer-goods SKUs, superstores 16,372, supermarkets 9,032, discounters 3,972 and convenience stores 3,724; between 2020 and 2025, however, discounters expanded their assortment more than any other channel (+2.7% per year on average). In international comparison — based on NIQ data for the third quarter of 2025 — the weight of discount in Italy (22.9%) is intermediate: higher than in France (13.9%) and the United States (4%), but far from Germany (34.9%), Poland (46.4%), Belgium (53.3%) and Slovenia (54.2%).

The Italian market has distinctive features compared with other European contexts.

Alongside the large national operators there are cooperative groups, buying groups, multi-regional chains, local banners and discount operators, creating a complex competitive structure that differs strongly from region to region. Understanding how modern retail works therefore requires looking not only at individual banners, but also at the different organisational forms through which operators coordinate purchasing, assortments, services and commercial policies.

Within this scenario, **competition among retailers is now significantly more complex than in the past.** Price, promotions and assortment breadth remain central levers, but the ability to differentiate, build trust, offer services and strategically manage the relationship with consumers is becoming increasingly important.

NielsenIQ data also confirm a persistently strong focus on affordability: in 2024 promotional sales in Italian grocery retail reached 24.3% of packaged consumer goods, up on the previous year. At the same time, loyalty to banners appears fragile: according to Rapporto Coop 2026, in 2026 Italian households shop on average at 7.6 retail groups a year, the highest value among the five European countries compared (Germany 7.3, France 4.6), and compared with 2025 shopping frequency grows by 5.5%, especially among young households, while average spending per household rises by 1.6%.

One of the most important phenomena in this transformation is the **growth of private label** (also called store brand or own brand). In 2025 private label reached a record share of 30.4% in the omnichannel scope, with estimated sales of €31.5 billion, confirming that it is no longer just a cheaper alternative to manufacturer brands, but a strategic lever through which retail banners build identity, differentiation and competitive positioning. Through private-label products, retailers act directly on quality, supply chain, packaging, sustainability, segmentation of the offer and coverage of different consumer targets, turning a growing part of the assortment into a proprietary tool for retail marketing and branding.

Food retail is therefore at the centre of changes that simultaneously affect competitive structures, the organisation of the offer and the strategic role of banners in today's market.

2.FOOD CONSUMPTION

In recent years Italians' relationship with food has undergone major changes, driven by economic, social and cultural dynamics that have changed both shopping behaviour and expectations towards banners. Inflationary pressure, the rising cost of living and falling household purchasing power have increased the focus on affordability and spending control; at the same time, health, well-being, sustainability, quality and transparency of information have become increasingly central in food choices.

This evolution has made **consumption patterns more complex and fragmented.** Today's consumers often have heterogeneous and sometimes contradictory needs: the search for quality coexists with the need to limit spending; interest in healthy, sustainable or high-service products goes hand in hand with a strong focus on promotions, affordability. NielsenIQ data clearly show that this tension persists: in 2024 promotional sales in Italian grocery retail reached 24.3% of packaged consumer goods, up from 23.4% in 2023.

At the same time, attention to ingredients, supply chains, nutritional composition and product origin is growing. The GS1 Italy Osservatorio Immagino, which monitors over 145,000 products sold in Italian modern retail with a sell-out value of €48.7 billion, highlights the consolidation of many claims linked to well-being, Italian origin, sustainability, naturalness and nutritional control. In particular, segments linked to high-protein products, free-from foods, organic SKUs and products with health or perceived naturalness attributes are growing. **Food is therefore increasingly seen as an area linked to health, prevention and quality of life, and not just as a simple act of purchase or consumption.**



The relationship between tradition and innovation in food is also gradually changing.
According to Rapporto Coop 2026, compared with 2024 the share of people who identify only with a traditional diet falls (from 23% to 20%), as does the share of those who prefer a fully innovative style (from 30% to 24%), while the share of those who combine tradition and innovation grows from 33% to 42%; 14% do not identify with any of these styles.
Food consumption is therefore increasingly a hybrid space, where the search for authenticity, openness to change, attention to well-being and the need for affordability coexist.
Some data help to quantify these trends. According to the Coop-Nomisma consumer survey cited in Rapporto Coop 2025, almost half of Italians put saving first in their purchase choices (42%), followed by well-being (24%) and sustainability (13%). Demographic dynamics also weigh on the future of consumption: according to the most pessimistic estimates, the Italian population will fall by 6.7 million by 2050; the share of single-person households is expected to rise from 36.8% in 2024 to 41.1% in 2050, while couples with children will fall from 28.6% to 21.4% of households, with clear implications for formats, portions and services.
In terms of categories, in the first half of 2025 sales of organic packaged consumer goods grew by 4.8% year on year, more than the whole food sector (+2.9%). The categories with the highest growth in buyers in the year ending October 2025 point to a **shopping basket oriented towards well-being and experimentation**: cheese substitutes (+27.3%), kefir (+24.5%), seeds (+24.4%), ethnic specialities (+22.6%), exotic fruit (+21.3%) and packaged fresh salmon (+21.0%). The pet economy is also growing: 37.7% of Italian households own at least one pet and pet food is worth €3.3 billion (+4.5% in 2024).



Finally, shopping channels and times are changing. Grocery e-commerce grew by 12% in 2025, reaching €2.73 billion, or 6.5% of total sales; online food customers are more loyal (41% are regular shoppers), but the economic sustainability of the channel remains critical because of high logistics costs. About 80% of grocery retail companies have invested in digitalisation over the last two years, and generative artificial intelligence is seen as an emerging competitive lever, from supply-chain management to demand forecasting and the personalisation of the shopping experience.
These changes directly affect expectations towards retail companies. Retail banners are no longer asked only to ensure product availability and affordability, but also to address emerging needs, address issues related to health and sustainability and develop assortments that fit increasingly diverse consumers. In this scenario, food is gradually becoming not just a product to buy, but an area through which daily practices, identity, values and quality of life are defined.

3.COMPETITIVE DYNAMICS

Changes in food consumption have gradually also changed the competitive logic of modern retail. In a context of more selective consumers, growing pressure on prices and greater attention to quality and service, **banners tend to develop increasingly differentiated competitive models.**

Alongside traditional competition based on price, promotions and assortment breadth, elements such as private label, services, proximity, loyalty, shopping experience and the ability to build a distinctive identity are becoming increasingly important. Competition in Italian grocery retail therefore appears less and less uniform and increasingly based on the **building of specific competitive positions.**

Within this scenario, different competitive models are emerging. Some operators strengthen strategies focused mainly on operational efficiency and affordability, as in the case of discounters; others focus their positioning on assortment breadth, perceived quality and service; others again leverage local proximity, customer relationships, assortment specialisation or the development of private label.

The growing fragmentation of consumer behaviour thus tends to produce increasingly marked competitive differentiation among banners.

Market shares also show a particularly dynamic competitive balance. According to the latest available data, Selex, which operates as a commercial group through a number of national banners, accounts for about 16.4% of the Italian market, followed by Conad, a retailers' cooperative (14.9%), Coop Italia (10.9%), VéGé (8.5%) and Esselunga (7.2%). At the same time, discount operators such as Eurospin and Lidl continue to grow faster than many traditional retailers, confirming the strengthening of competitive models based on affordability, operational efficiency and growing perceived quality of the offer (Table 2).



Table 2

Market shares of the leading retail groups (% of value)

Group	2007	2014	2023	2024	2025
Selex	7.7	9.4	15.1	15.6	16.4
Conad	8.7	11.7	15.0	14.9	14.9
Coop Italia	14.7	15.0	11.4	11.1	10.9
VéGè Group	-	1.6	8.3	8.3	8.5
Eurospin	2.3	4.9	7.4	7.6	7.5
Esselunga	6.5	8.7	7.5	7.4	7.2
Lidl Italia	1.8	2.5	5.9	6.0	6.2
Agorà Network	1.7	2.4	4.2	4.5	4.7
MD	-	-	3.3	3.2	3.2

Source: Ufficio Studi ANCC-Coop elaboration on Nielsen GNLC data, March 2026.

The historical series shows Coop's trajectory: the country's leading banner until the mid-2010s (15% in 2014), today a distant third, with its share down to 10.9%. In 2025 Coop's sales grew by 2.2%, better only than Esselunga (+1.7%) among the large groups, compared with +8.8% for Selex, +8.5% for Agorà, +6.8% for VéGé and Lidl, +3.8% for Conad and +3.6% for Eurospin. Coop is also the only large group to reduce both its sales area (-1.1%) and its number of stores (-1.3%).

The sector is becoming more concentrated: the share of the top seven national operators rose from 52.2% in 2010 to 71% in October 2025. Between 2022 and 2025, 4.3 percentage points of market share were redistributed among the national groups, and in 20% of Italian regions the local leader changed.

Scale, however, remains limited in international comparison: in the Deloitte global ranking, the leading Italian food retailer is Conad (62nd), followed by Coop (76th), Esselunga (125th) and Eurospin (135th). Finally, in December 2025 the Italian group NewPrinces completed the acquisition of 100% of Carrefour Italia, marking the exit of the French group from the national retail market (the Carrefour banners will be kept until the end of 2028 and then replaced by the GS brand).

One of the main tools through which banners build competitive differentiation is private label. In 2025 private label reached a record share of 30.4% in the omnichannel scope, with estimated sales of €31.5 billion.

Private label is no longer merely a lower-priced alternative to manufacturer brands, but a lever through which retailers define identity, segmentation of the offer, quality control and competitive positioning.

Through private label, banners act directly on supply chain, ingredients, packaging, sustainability, product origin and assortment structure, progressively strengthening the strategic nature of private-label products.

The internal structure of private label deserves a closer look. In 2025 private-label sales grew both in value (+6%) and in volume (+4%), with the strongest growth in the South and Islands (+13.8% in value). Private-label penetration is about 60% in discount compared with about 20% in hypermarkets, supermarkets and self-service stores; just under half of total private-label sales are made in discount. The private-label assortment reached 17.4% of total SKUs (12.2% in 2015). As for the mix, the mainstream segment accounts for 78.7% of private-label sales, premium and organic/eco lines for 17% and entry-price products for only 4.3%: private label therefore also attracts high-spending targets looking for quality, sustainability and supply chain, not simply low prices (Table 3).

Table 3

Private-label value share by product category (2025) and change vs 2024

Category	Value share (%)	% change 2024-2025
Meat	45.9	+7.7
Fruit and vegetables	36.5	+9.5
Frozen	32.0	+2.1
Fresh	31.0	+8.6
Home care	25.9	+1.5
Pet care	22.8	-1.7
Grocery	19.9	+5.0
Personal care	17.0	+1.5
Beverages	7.9	+0.2

Source: Circana Liquid Data, 22nd Report, in Area Studi Mediobanca (2026).

Compared with the rest of Europe, Italy still has room to grow: the private-label share is 51% in Switzerland, 44% in Spain, 42% in the United Kingdom, 39% in Germany, 37% in Belgium, 36% in the Netherlands and 34% in France, against a European average of 37.6%, the highest in the world. At the same time, competitive pressure keeps promotions and low-price strategies at the centre. According to NielsenIQ, in 2024 promotional sales in Italian grocery retail reached 24.3% of packaged consumer goods, showing that price sensitivity remains a structural component of shopping behaviour. Competition in food retail is therefore increasingly a complex balance between affordability, differentiation of the offer and the ability of retail banners to build recognisable and consistent positionings over time.



4.COOP: STRUCTURE, IDENTITY AND ORGANISATIONAL MODEL

Coop is one of the leading operators in Italian modern retail and, at the same time, an organisation with **an organisational model that differs from most banners** in national grocery retail. The Coop system is not a single centralised company, but a group of consumer cooperatives operating locally while sharing a brand, strategic guidelines, common tools and coordination activities developed at central level.

The origins of consumer cooperation in Italy date back to the second half of the 19th century and developed gradually through mutual-aid initiatives aimed at ensuring access to quality goods on affordable terms. Over the decades the Coop system steadily expanded its presence in Italian retail, accompanying the evolution of consumption and of modern retail until it became one of the main players in national grocery retail.

Today the Coop system brings together 67 member cooperatives, has about 6.2 million members and operates through a network of over **2,000 stores in 18 Italian regions.**

In 2025 the Coop system generated **total turnover of about €17 billion** — of which €15.1 billion from food retail alone, excluding the main diversifications such as fuel, mobile telephony, property management and other diversified activities — and employs **57,315 workers** (including business diversifications), confirming its place among the main operators in Italian food retail.

Coop's organisational structure differs from the models typically adopted by many traditional retail chains. The member cooperatives operate as autonomous entities in management and territorial terms, while sharing strategic activities, common tools and coordination functions developed at central level.

In this context, the **Coop Italia Consortium plays a particularly important role in defining and developing activities common to all cooperatives related to private label, marketing, communication, commercial policies and procurement processes.**

To learn more about the role of the different institutions of the Coop system:

For more detail on national structural data, economic performance and social activities:

In recent years, the marketing and communication coordination carried out by Coop Italia has led to higher advertising expenditure — entrusted to the media agency EssenceMediacom — which grew by about 10% in 2025 and is rising further, though more moderately, in 2026. As regards digital sales channels, the federated structure of the system seems to be reflected in an offer that is still organised by each cooperative or by groups of cooperatives: active services include EasyCoop by Coop Alleanza 3.0, with home delivery, refrigerated locker pick-up and subscription plans, and the online shopping portal developed by Unicoop Etruria.

A similar configuration characterises the presence on social media: the national banner channels, managed centrally by Coop Italia on Facebook, X, Instagram, YouTube and LinkedIn, are flanked by the profiles that individual cooperatives manage autonomously to look after the digital relationship with members and consumers in their areas. Social media communication therefore reflects the same two-level structure, national and local, that characterises the system's entire organisational model.

Alongside Coop Italia, a central role is also played by the National Association of Consumer Cooperatives (ANCC-Coop), founded in 1955 to coordinate and represent the consumer cooperative system. **ANCC-Coop defines common economic, social, strategic and human-resource guidelines, helping to maintain the overall consistency of the system** despite the cooperatives differing in territory and size.

One of the elements that most distinguishes Coop from many other modern retail operators is the role of members within the cooperative model. Members are not just customers or users of the banner, but an integral part of the cooperative structure itself, as well as the actual owners of the cooperatives. This feature means the Coop system is characterised by a relationship that integrates the economic dimension, membership participation and local engagement.

The specific nature of the Coop model also derives from the coexistence of a **dual dimension. On the one hand, Coop operates as a large modern retail company,** in a highly competitive context and facing daily challenges related to price, assortment, efficiency, innovation and market positioning. **On the other, it keeps a cooperative and mutual nature** based on its relationship with members, its local roots and goals that go beyond the purely commercial dimension. Cooperative enterprises, for example, do not distribute profits but reinvest them in developing the cooperative and in providing benefits to members and to the communities where they operate, in the form of social initiatives. The relationship between these two components — entrepreneurial and cooperative — is one of the elements through which Coop has gradually built its identity within Italian grocery retail.





Over the course of its evolution, Coop has gradually developed a diversified presence in Italian modern retail, operating through different store formats and at the same time consolidating private label as one of the banner's central strategic assets. The cooperative structure, the relationship with members and the coordination developed through Coop Italia and ANCC-COOP are therefore some of the elements that help define the specific nature of the Coop model in the national retail landscape and that influence how the banner builds its positioning in its relationship with consumers and local communities.

The system's economic performance helps to understand the constraints and resources within which the strategic challenge is set. In the five years 2021-2025, the aggregate performance of the seven largest Coop consumer cooperatives shows fragile and fluctuating operating profitability: the operating margin (EBIT) remains negative in all five years, although 2025 shows a clear improvement on 2024 across all indicators (Table 4).

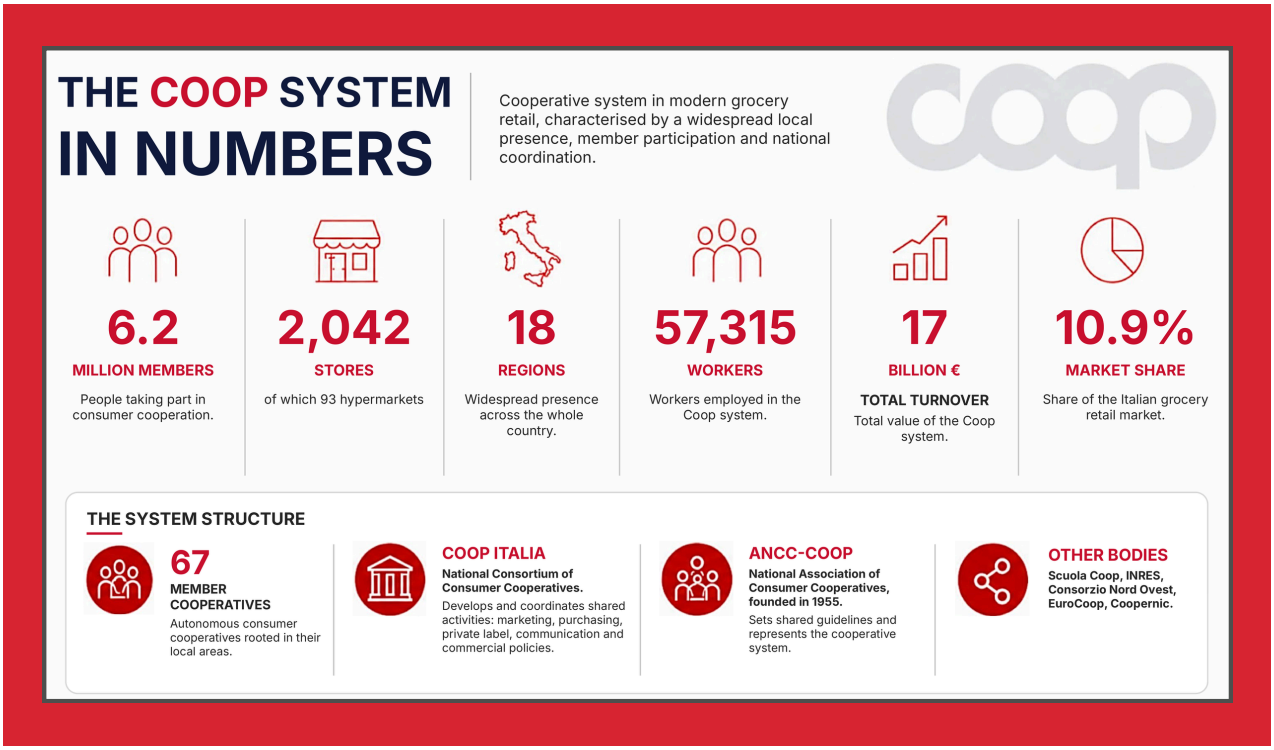
Table 4

Aggregate economic performance of the large Coop cooperatives (% of turnover, 2021-2025)

Large Coops (average)	2021 (%)	2022 (%)	2023 (%)	2024 (%)	2025 (%)
Turnover	100%	100%	100%	100%	100%
Value added	18.0%	14.9%	15.8%	15.6%	16.6%
EBITDA	4.6%	3.1%	3.7%	3.5%	4.4%
EBIT	-0.7%	-1.0%	-0.2%	-1.4%	-0.8%
Pre-tax result	0.6%	-0.5%	0.4%	-0.4%	1.9%
Net result	0.3%	-0.6%	0.2%	-1.0%	1.5%

Source: ANCC-Coop Economic and Social Report (2025).

The cooperative model is also reflected in the financial structure: member loans amount to €7.1 billion and the portfolio of cash, securities and equity investments to €8.8 billion (including the 38.6% stake in Unipol Gruppo), both gradually declining from the peaks of the last decade.
At territorial level, the average productivity of the Coop network (€7,558 per sq m in 2025) is in line with that of competitors (7,547), but with very strong regional differences: Coop outperforms competitors only in Tuscany (€15,832 per sq m versus 9,562) and Liguria (9,392 versus 9,008), as well as in Campania, while the largest negative gaps are in Lombardy (5,454 versus 8,486), Lazio, Sardinia and Trentino-Alto Adige. **Strong roots in its historical regions therefore coexist with competitive weakness in large parts of the country.**



Source: elaboration on Coop data, Economic and Social Report 2025

5.COOP: POSITIONING AND ROLE IN CONTEMPORARY FOOD CONSUMPTION

Coop's specific organisational nature is also reflected in the way the banner has built its positioning in Italian food retail. In Coop's case, positioning is not limited to the combination of prices, assortment and local presence, but **develops around the ability to integrate the commercial dimension, social responsibility and the relationship with members and consumers.**

Throughout its history, Coop has gradually associated its identity with themes such as quality, food safety, transparency, consumer protection, sustainable supply chains and accessibility of the offer. These elements are not just communication attributes, but some of the ways in which the banner's cooperative nature has been translated into market choices, product policies and initiatives for consumers.

The **Coop Charter of Values** refers to principles such as mutuality, democracy, solidarity, fairness and social responsibility, outlining a business model aimed not only at meeting economic needs, but also at creating value for members, consumers and local communities. From this perspective, consumption is not seen only as a commercial act, but as a space where needs for protection, awareness, quality and participation can be expressed.

To explore the Coop Charter of Values in detail:

To explore Coop's sustainability policies:

These same principles are also expressed concretely in the role that stores play in local communities, beyond their purely commercial function — with mutual-aid initiatives that individual cooperatives develop autonomously, while sharing a common cooperative identity. Coop Alleanza 3.0, for example, involved members and consumers in supporting almost 700 local third-sector projects in 2025 through the "Più Vicini" initiative (over 6 million "tokens" collected in stores); Unicoop Firenze promotes similar programmes for food recovery ("Buon Fine") and shopping support for elderly people ("Progetto Ausilio"). **In many areas, the Coop store thus becomes a hub of proximity and social cohesion, not only a point of sale.**

One of the tools through which this positioning has been most clearly expressed is **private label**. For Coop, private label is not just a lever for low prices or assortment differentiation, but a tool to make tangible quality standards, controls, supply-chain policies, transparent information and choices consistent with its cooperative identity. Private label thus becomes one of the main points of contact between stated values and the offer actually available in stores.

The evolution of the **Coop lines** also reflects the gradual widening of expectations linked to food consumption. Lines focused on organic products, well-being, fair trade, the promotion of agri-food excellence or children's nutrition show how private label can play a broader role than price competition alone, helping to address diverse needs and emerging sensitivities.

Coop's positioning therefore develops along a path that combines market, responsibility and consumer culture. Product quality, food safety, attention to supply chains, sustainability, member involvement and consumer protection are not separate elements, but components of a **value proposition that sees food as an economic, social and cultural object at the same time.**

This approach is particularly relevant in the current phase of change in food consumption. If food is increasingly a space where health, identity, sustainability, memory, social relationships and quality of life are expressed, retail companies do not only take part in selling products, but also help to make certain consumption models visible, accessible and legitimate. In this sense, a retailer's role can extend from selecting the assortment to building meanings, orientations and consumption practices.

It is from this perspective that Coop's positioning can be read as the result of its dual nature: the original one, as a cooperative whose members come together to buy quality food at advantageous prices, and the one that developed later, as a modern retail company. This dual nature underlies the role the banner has gradually taken on in the relationship between consumers, food and society.

This relationship is the starting point for understanding not only what Coop has represented in the past, but also the role it can play in the future of Italian food culture.



The most recent research on the perception of the banner makes it possible to describe this positioning more precisely. According to the RepTrak study, in 2025 Coop recorded a **reputation score** of 72.7 points, a statistically significant increase of 0.7 points: a turnaround after three years of decline. Esselunga remains the leader (75.3), Lidl grows significantly (73.4, +1.9 on 2024) and Conad is essentially stable (72.9, -0.5). The reputation gap between banners has gradually narrowed: excluding Esselunga, the differences are below one point (only 0.7 points between Coop and Lidl) and the gap between mainstream retail and discount has almost disappeared. Reputation translates into behaviour: for Coop, the benefit of the doubt and the willingness to work for the banner are getting stronger.

In terms of rational drivers, Coop is perceived as strong on five of the seven reputation drivers, with product (quality and response to needs), performance and leadership growing; innovation is the weak point (the lowest score), while conduct is the area that needs most attention. In the perception of the retail mix, the most appreciated elements are well-stocked and tidy shelves (75.8), the safety of private-label products (75.1), the fresh-food assortment (74.9) and the pleasantness of stores (74.5); the most critical ratings concern offers with very high discounts (63.2), the frequency of discounts and promotions (66.7) and the pricing policy to tackle the cost of living (67.0).

All campaigns carried out by Coop have a positive impact on reputation; value-based initiatives (Close the Gap, Foresta Blu, Verde Speranza) generate the highest reputational uplift, but public awareness of them is limited, as they have never had TV and radio support.

Among channels, direct in-store experience is the main touchpoint for both memorability and reputational impact. In the fourth quarter of 2025 a new touchpoint emerges, artificial intelligence: for Coop, recall is 2% with almost no reputational impact, a potentially risky exposure if the banner fails to benefit from it while other players in the sector do.

Consistent indications emerge from the brand equity research carried out with the BrandKite™ model (2,423 CAWI interviews with consumers in the Coop trading area, summer 2025). The equity of the banner is positive and above the market average (index 111, grocery retail average = 100), second only to Esselunga. Its foundation is «care», i.e. the value-based, ethical and social-role dimension (index 120, peaking at 124 on commitment and social responsibility), together with a high level of trust (117) supported by the perceived quality of the offer. The image also shows a strong link with local areas and Italian identity, the relevance of private label and the value for money associated with the membership card. The relatively weaker areas are perceived distinctiveness in terms of innovation, style and dynamism (where Lidl prevails), customer experience (time saving, facilitating services, Esselunga's and the discounters' strength) and affordability, where discounters lead (Table 5).

Table 5

Brand equity ranking in the Coop trading area (BrandKite index, 2025; market average = 100)

Rank	Banner equity	Index	Private-label equity	Index
1	Esselunga	128	Coop	114
2	Coop	111	Esselunga	107
3	Eurospin	97	Eurospin	100
4	Conad	97	Lidl	100
5	Lidl	96	Conad	95
6	Aldi	81	MD	86
7	MD	80	Aldi	80
8	Carrefour	77	Carrefour	75

Source: Brand Kite Coop and Competitors 2025 – Beyond Research Group, Coop Italia Marketing Department.

Coop private label has higher equity (114) than the banner (111) and is the absolute leader among private labels in the trading area, ahead of Esselunga: **it is the only case in which the private label drives the banner and not the other way round.** Coop private label is consistent with the overall positioning (care at 120) and conveys distinctiveness (114) and relevance (112) better; it is associated with ethics, a wide offer of Italian and organic products and variety for different needs.

Its main assets are guaranteed quality and taste, authenticity and tradition; the stimulus to try new products, innovation and on-shelf recognisability come across less, while on affordability Coop private label lags behind the private labels of discounters and other supermarkets (Table 6).



Table 6

Equity of Coop private-label lines by dimension (index; average = 100)

Dimension	Coop	Fior Fiore	Vivi Verde	Gli Spesotti	Bene.Sì
Distinctiveness	98	121	108	87	105
Reputation	105	122	109	86	101
Care	99	114	117	86	113
Relevance	105	122	105	87	97

Source: Brand Kite Coop and Competitors 2025 – Beyond Research Group. Base: people who know the lines.

Private-label equity rests above all on the premium lines: Fior Fiore is the most distinctive and rewarding line, represents the excellence of the offer and has the greatest impact on the overall perception of private label, though it is bought less often. Vivi Verde achieves good awareness and equity, with lower penetration linked to the specific nature of its offer. Bene.sì, the least known, has positive equity and the potential to express some key values of the banner.

Gli Spesotti plays a functional role with good awareness and purchase, but weak equity, as low prices are its only driver. Finally, the «core» Coop line remains at average values and risks being undifferentiated from the store brands of other supermarkets, partly losing its ability to strongly represent the banner's distinctive values: an important finding for anyone wishing to work on private label as a lever of the plan.



6.COOP AND FOOD: A HISTORY OF INTERPRETING CHANGE

Coop's history can also be read as the history of an organisation that has gradually interpreted, and turned into concrete choices, some of the main changes in Italians' relationship with food. Over recent decades, food consumption has taken on increasingly broad meanings beyond the purely functional or nutritional dimension, incorporating themes related to health, safety, sustainability, social responsibility, cultural identity and quality of life.

In this context, **Coop has developed initiatives, products, campaigns and tools that have progressively sought to respond to these changes, in some cases helping to anticipate issues that later became central in public debate and in the food market.**

The path followed by the banner can be read through some of the main tensions that have marked the evolution of contemporary food consumption.

TRANSFORMATION	EVOLUTION OF THE RELATIONSHIP WITH FOOD	EXAMPLES OF COOP'S RESPONSE
SAFETY AND TRANSPARENCY	Growing demand for **control**, **information** and **protection** for consumers.	Labelling campaigns Commitment on GMOs Consumer information initiatives
SUPPLY-CHAIN RESPONSIBILITY	Greater attention to **origin**, **workers' rights** and production methods.	Solidal (fair trade) SA8000 certification Focus on traceability
HEALTH AND WELL-BEING	Growing interest in **balanced** and **organic** food and prevention.	Vivi Verde (organic) Bene.sì (well-being) Well-being-oriented lines
FOOD QUALITY AND IDENTITY	Promotion of **excellence**, **local identity** and food culture.	Fior Fiore (excellence) Quality and supply-chain initiatives
PARTICIPATION AND TRUST	More **engaged** and **aware** consumers.	"Approved by Members" Involving the member base

Taken together, these initiatives show how Coop has gradually seen **the consumer** not only as a buyer, but **as a person with information needs, ethical sensitivities, quality expectations and a need to participate.** Campaigns on food safety, supply-chain initiatives and attention to sustainability and well-being cannot be read only as promotional activities, but as ways in which the banner has helped to make certain issues gradually more central in the consumption experience.

In this area too, **private label** has played a particularly important role for Coop, as it has gradually changed from a simple cheaper alternative to manufacturer brands into a **tool to address emerging needs, lifestyles and new food sensitivities.** Through its lines, Coop has gradually structured its offer around different consumer expectations, helping to turn cultural and social changes into concrete market offers (Table 7).

Table 7

The main Coop private-label lines

Line	Positioning	Need/transformation addressed
Coop	Affordable quality, safety and transparency	Everyday affordability and reliability
Fior Fiore	Gastronomic excellence and premium quality	Search for experience and enhancement of food heritage
Vivi Verde	Organic and environmental sustainability	Attention to health, the environment and responsible consumption
Bene.Sì	Well-being, nutritional balance and functional food	Centrality of health and prevention
Solidal	Fair trade and supply-chain responsibility	Ethical sensitivity and attention to producers
Crescendo	Nutrition and products for children	Attention to children's diet
Gli Spesotti	Affordability and guaranteed safety	Saving without giving up quality and safety

Source: authors' elaboration on Coop Italia data and materials.

Alongside product policies and supply-chain initiatives, **communication** has also been one of the tools through which Coop has interpreted the changing relationship between Italians and food.

Over time, the banner's communication has not been limited to commercial promotion, but has helped to make issues related to food safety, quality, conscious consumption, sustainability and consumer participation accessible and understandable (Table 8).

For a complete overview of the communication initiatives carried out by Coop over the years:

Table 8

Some milestones of Coop communication

Period	Campaign/Initiative	Strategic meaning
1970s	First TV commercials directed by Ugo Gregoretti	Building a cooperative, popular language
1980s	"La Coop sei tu"	Centrality of participation and cooperative identity
1990s	Campaigns with Woody Allen	Strengthening quality, controls and distinctiveness of the Coop brand
2000	"Approvato dai Soci"	Direct involvement of consumers in product choices
2010	Campaigns with Luciana Littizzetto	Strengthening closeness and recognisability of the banner
2014	#ChiediloallaCoop (#AskCoop)	Shift towards dialogic and participatory communication models
Expo 2015	Supermercato del Futuro	Innovation in the shopping experience and digitalisation of retail
2019	"Una buona spesa può cambiare il mondo"	The shopping basket as narrative protagonist: individual shopping as an act of collective change on sustainability, work and the environment.

Source: authors' elaboration on Coop institutional communication materials.

Taken as a whole, the path followed by Coop shows that the banner has built its identity not only through the distribution of food, but also through its ability to interpret social, cultural and value-related changes linked to consumption. From food safety to sustainability, from supply-chain responsibility to new models of well-being, many of the tensions that are central today in the relationship between consumers and food have been gradually translated by Coop into policies, products, initiatives and tools for its relationship with members and customers.

It is precisely in the light of this path that the challenge of this case takes on its meaning. If in the past Coop was able to interpret some of the main changes in Italians' relationship with food, the question today is no longer only what the banner has represented, but the **role it can play in accompanying the future evolution of Italian food culture.**

7.THE CHALLENGE

As we have seen, today the relationship between consumers and food in Italy is going through a **new phase of change,** marked by sensitivities, expectations and tensions that are very different from the past.
Health, sustainability, affordability, cultural identity, well-being, quality of life and supply-chain responsibility coexist within increasingly fragmented and complex consumption patterns. In In this scenario, the question is not only whether retail banners can respond to emerging needs, but also what role they can play in interpreting new ways of living, choosing and consuming food, and in making them culturally relevant. Coop has developed an initiative structured in two phases.

The first, concluding in September 2026, looks **at the past and present of the relationship between Italian consumers and food:** it includes the project "La Tavola del Tempo" — a seven-episode vodcast retracing the evolution of Italian food consumption from the post-war period to today — and the contest "Storie a Tavola", which collected 700 stories and recipes from members and consumers and whose three winners were awarded at an event held during Slow Food's Terra Madre - Salone del Gusto in Turin (24-27 September 2026), of which Coop is a partner.
The second phase, starting in October 2026, **looks instead to the future and younger generations.**

It is precisely within this horizon, that of the second phase, that the challenge of the 39th edition of the SIM Marketing Award is set.

How can Coop, while remaining a cooperative of people rather than just a retail banner, make its brand a reference point for younger generations in Italy in the relationship between food, culture and society?

The question therefore asks the teams to imagine how Coop can continue to represent the positive individual and collective values that food carries with it.

8.GUIDELINES FOR DEVELOPING THE MARKETING PLAN

The teams are asked to develop an integrated strategic Marketing Plan that interprets the challenge set out in this case and imagines the role Coop can play within today's changes in the relationship between consumers and food.
The proposal must start from the banner's cooperative identity, the historical and cultural heritage developed by Coop over the course of its evolution and the role it has gradually built in the relationship between modern retail, food consumption and Italian society.
However, these elements should not be used in a purely narrative or celebratory way: teams must propose how Coop's historical, cooperative and value heritage can be reinterpreted to build new forms of relationship, relevance and engagement with today's consumers.

Specifically, acting as Coop's Marketing Team, each team must:

1. Analyse the competitive context of grocery retail, consumption dynamics and cultural trends in consumers' relationship with food in Italy.
2. Choose the primary target consumer segment(s), explaining the choice in terms of attractiveness and consistency with Coop's values.
3. Define the proposed positioning in detail, through a value proposition that is clear and consistent both with Coop's history and cooperative identity and with the profile and characteristics of the selected segments.
4. Develop the operational plan across several marketing levers, including (not exhaustively):
    - store assortment, by expanding, reorganising or enhancing existing product categories;
    - product and private label, through new packaging, supply-chain initiatives or offers aimed at specific emerging needs;
    - in-store experience, through customer journeys, activations, local initiatives, educational activities or new ways of relating to consumers;
    - brand communication and campaigns, through new languages, narratives, editorial formats, engagement initiatives or integrated communication projects;
    - digital services and tools, with particular reference to platforms, content, personalisation of the experience or tools that support conscious consumer choices and improve/extend the customer experience;
    - relationship with members and communities, through participatory initiatives, co-creation activities, dedicated programmes or tools to engage the member base.
5. Assess the expected impact and identify the most appropriate performance indicators (KPIs) to evaluate the proposed initiatives.

N.B. In developing their proposals, teams may not introduce new private-label lines or products.
Changes to pricing are also excluded, so the Marketing Plan must not include changes to prices or price lists, nor changes to the structure of promotions.

Proposals must follow an integrated approach that combines several dimensions of the marketing mix and of the relationship between the banner, members and consumers.

The Plan must be strongly consistent with the identity and structure of the Coop system. The proposed solutions must therefore be compatible with the banner's cooperative nature, with the role it has historically developed in its relationship with consumers and with the positioning it has built over time in the Italian food retail market.
Proposals must also be realistic, feasible and consistent with the competitive, organisational and economic dynamics of modern retail, avoiding abstract solutions or solutions inconsistent with the role Coop has built in the relationship between food consumption, society and local communities.
Teams may target different groups of consumers, members or communities, consistently explaining their strategic choices on the basis of the changes in consumption analysed in the case.

For the Marketing Plan for the two-year period 2027-2028, each team will have a **total budget of €2 million.** This amount must be used to cover **marketing costs only.** Any other costs (e.g. IT work on digital, costs borne by any partners, costs of building physical structures, etc.) are not to be counted in the budget.



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GLOSSARY

- **Assortment:** The set of products offered by a store or a banner. It can be described in terms of **breadth** (number of product categories) and **depth** (number of alternatives within each category). The characteristics of the assortment also vary depending on the store format.

- **Brand equity:** The value a brand holds in consumers' minds, deriving from the set of perceptions, associations, experiences and relationships built over time. High brand equity can translate into greater trust, preference, relevance and distinctiveness. In the case, it is measured both for the Coop banner and for its private label.
- **Specialist channels:** Distribution channels made up of stores that focus their offer on specific product categories or consumption needs (e.g. consumer electronics, household products), generally offering a deeper assortment in their area of specialisation than general stores.

- **Cash & carry:** A self-service wholesale format aimed mainly at professional customers, such as retailers, food-service businesses and other economic operators. The customer chooses the products directly, pays and normally takes care of transporting them.
- **Buying groups:** Organisations through which several companies or retail groups pool part of their purchasing, increasing their bargaining power with suppliers. They may also coordinate activities such as negotiating commercial terms, promotions and, in some cases, assortment policies.

- **Media agency:** An agency specialised in planning, buying and managing advertising space across the different media. It supports the company in choosing channels, allocating the budget, negotiating space and optimising campaigns. In the case, Coop's media planning is entrusted to EssenceMediacom.

- **Consumer cooperative:** A cooperative enterprise in which consumers can become members and take part, according to cooperative rules, in the governance and activities of the organisation. In the Coop system, the member cooperatives are autonomous entities that share a brand, activities and common coordination tools.

- **Discount:** A store format focused mainly on price competitiveness, traditionally characterised by high operational efficiency, a relatively limited assortment and a strong presence of private label. In recent years the discount retail model has progressively expanded its assortments, services and perceived quality of the offer.
- **Modern retail:** An expression used to indicate all the forms of distribution organised according to managerial logic and on a larger scale than traditional retail. It includes different formats, such as self-service stores, supermarkets, superstores, hypermarkets and discounters. In the case it is used as a broader category to describe the evolution of Italian food retail.

- **Organised retail:** A form of distribution in which legally independent retail companies cooperate through common structures — for example buying groups, consortia or other forms of association — to carry out certain activities jointly, such as purchasing, promotions, marketing or banner management.
- **Store format:** The model through which a retail company shapes its offer to the market. It is defined by the combination of elements such as store size and location, assortment, level of service, pricing policy and shopping method. Supermarkets, hypermarkets and discounters are examples of store formats.
- **Large-scale retail:** A form of distribution in which a company or group directly manages a number of stores, generally through centralised decisions on purchasing, assortments, marketing and commercial policies.

- **Large-scale organised retail:** An expression commonly used to indicate the system of large-scale retail operating through store networks. It includes both **Large-scale Distribution** companies and different forms of **Organised Distribution** and is a key channel for fast-moving consumer goods.

- **Banner (retail brand):**
  The name and identity under which a network of retail stores operates and presents itself to consumers. More than just the name displayed on a store, the banner is a brand with its own identity, positioning and reputation.

- **Hypermarket:** A large retail store, identified in the case as having a sales area of more than **4,500 sq m**, with a very wide assortment that generally includes both food and non-food products.

- **Packaged consumer goods:** The set of packaged goods frequently purchased by households and sold mainly through modern retail channels. It includes many food and non-food categories and is a scope frequently used in market surveys on grocery retail.

- **Self-service store:** A store format in which consumers take products from the shelves themselves before paying. In the case, the term more specifically identifies small self-service food stores with a sales area of between **100 and 400 sq m**.
- **Mainstream/mass market, premium and entry-level price:** Expressions used to distinguish different tiers of the offer. Mainstream/mass market identifies the offer aimed at the central part of the market; premium identifies products with superior quality, characteristics or image and normally higher perceived value; entry-level price identifies offers focused above all on the lowest possible prices. In the case these categories are also used to structure the private-label offer.
- **Private label:** A brand owned or managed by a retail company, whose products are sold mainly through its own network. It is also referred to as **store brand, own brand or private label**. Beyond low prices, it can contribute to the perceived quality, differentiation, identity and positioning of the banner.
- **Omnichannel:** An approach that integrates in a coordinated way the different physical and digital channels and touchpoints through which consumers interact with a company. The aim is to offer a consistent and seamless experience regardless of the channel used.
- **Penetration:** An indicator measuring the share of individuals, households or customers in a given market who buy a brand, a category or a type of product in a given period. It does not indicate how much each customer buys, but how many customers are reached.
- **SKU:** A single identifiable product within an assortment, distinguished from others by characteristics such as brand, size, variant, flavour or pack. The number of SKUs is therefore a measure of the size of the offer available in the store.
- **Retail mix:** The set of main levers through which a retail company builds its offer and the customer experience, including, among others, assortment, prices and promotions, services, store characteristics and communication. In the case it is also used to analyse the competitive perception of Coop.

- **Retailer:** A company that carries out retail activities, selling products or services directly to the end consumer. In the case the term is used as a synonym for retail company or operator.

- **Sell-out:** Sales made by the retailer to the end consumer. It differs from **sell-in**, which instead indicates sales made by the manufacturer to the retailer. Sell-out therefore measures what is actually bought by the end market.
- **Supermarket:** A food store mainly based on self-service, with a wide assortment of consumer goods. In the case this category includes stores with a sales area of between **400 and 2,500 sq m**.

- **Superstore:** A store format that is intermediate in size between a supermarket and a hypermarket. In the case it includes stores with a sales area of between **2,500 and 4,500 sq m**, generally with a wider and deeper assortment than a supermarket.

- **Touchpoint:** Any occasion or point of contact through which consumers interact with a brand or a banner: store, advertising, website, social media, app, customer service or other experiences. In the case, the store emerges as Coop's main reputational touchpoint.
- **Trading area:** The geographic area from which a store or banner mainly attracts its customers; it is also called the **catchment area**. Its size depends, among other factors, on the store format, the attractiveness of the banner and the presence of competitors.
- **Sales value / sales volume:** **Sales value** measures the turnover generated by sales, expressed in money; **sales volume** instead measures the quantities sold. The distinction makes it possible to understand whether market growth comes from an increase in quantities purchased, in average prices or both.