

Table 6.9: Diffusion of scanning (number of scanning stores)
(measured in hundreds)

	1994	1991	1987	1981
Austria	47			
Belgium/Luxembourg	35	0.1		
Denmark	27	0.1		
Finland	32			
France	200	66	16	
Germany	149	73	10	0.2
Greece				
Ireland	3	1	0.1	
Italy	68	37	5	0.1
Netherlands	30	11	4	
Portugal	44	3		
Spain	115	50	2	
Sweden	60			
UK	180	60	8	0.1
EU Total	990			

Source: *Panorama of EU Industry, 1997, table 11, p21-19*

6.5 Increased upstream control by the retailers (Tables 6.10 - 6.12)

A number of the features already described have fairly obvious implications for the buying (as well as the selling) power of retailers, but this section considers three additional features.

- The retailers “private (own) labels” account for a significant and increasing proportion of total turnover.

The data reproduced in table 6.10 are taken from different sources which, once more, seem incompatible across a run of years. However, we have been able to locate two comparable pairs of years for most countries, together with an up-to-date picture for 1997 for the countries in which penetration seems most pronounced. This is sufficient to draw the following conclusions, which are best treated in an ordinal, as opposed to cardinal, manner. First, private label penetration is highest amongst a cluster of countries which includes the UK, France, Germany and the Benelux countries. Amongst these, it is most pronounced in the UK, least pronounced in Germany with the other three countries somewhere in between³⁷. Evidence for the other member states is rather more patchy. However, such as it is, it suggests that private labels are less pronounced in the southern and Nordic states. Second, all of the evidence shows increasing penetration in all countries over time. From the table, it is clear that this was particularly rapid during the 1980s for the four countries shown. Further advances were also made during the first half of the 1990s

37. It is worth noting that most studies of private label record penetration rates even higher in Switzerland than in the UK. Of course, Switzerland is excluded from all comparisons in this project.