The Evolutionary Nexus of Supply Chain and Corporate Branding in Retail

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The authors dedicate this work to Dr. John J. Coyle (in memoriam) who sadly passed away shortly before the completion of this white paper for the initiation and advisory of this study, as well as for lifelong encouragement and dedication to education and research in supply chain management.
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INTRODUCTION

A major shift in the focus of branding has occurred in the last two decades. Traditionally, brands were associated with products, and consumers purchasing the products were often unaware of the company behind them. Today, a growing number of companies place greater emphasis on corporate brands and corporate-dominant brand architecture as a means to navigate the competitive and hyperconnected market environment. For these companies, the corporate brand becomes an expression of the corporate strategic intent that forms the epicenter of the firm’s identity and purposes behind its existence. As such, corporate brands become centric to strategic management, fostering a new way of thinking about business strategy and creating greater flexibility for future growth unbound by specific product or service categories.¹

Indeed, built and nurtured effectively, a corporate brand can provide a foundation for differentiation that is not as easy to imitate, and can bestow cohesiveness across global markets and broadening sales channels in the digital commerce era. Further, a corporate brand lends transparency to watchful 21st century consumers in terms of the company’s integrity and values. Such transparency is also valuable to attract and retain employees and investors in a world characterized by intense competition for talent and financial resources.² Echoing the power of a corporate brand, the Interbrand’s Best Global Brands 2022 report notes that it is through building businesses around their corporate-level brand, as opposed to around a product, that sets top-ranked companies such as Apple, Microsoft, Amazon, and Google apart from their peers.³

In line with the momentum towards corporate branding, the applicability and importance of corporate brands as valuable assets has been increasingly espoused in the retail sector. Retail branding strategies have evolved from “unbranded,” to “product as brand” (private labels and product selections), to “store as brand” (store outlets), and to “retailer as brand” (organizations).⁴ Largely ascribed to the rise of the ecommerce, retailer as brand (hereafter referred to as retailer brand) appear to be at an inflection point in its development in recent years. We observe that supply chain management, especially the distribution and logistics elements, has risen to become the forefront apparatus in retail branding strategies. Most notably, the roles of fulfillment and last-

¹ Brexendorf and Keller 2017; Chang, Chiang, and Han 2015; Interbrand 2022; Lilliehorn and Schönberg 2022; Marshall and Wise 2013; Mathews 2021; O’Keefe 2015
² Marshall and Wise 2013; Minter 2015; O’Keefe 2015
³ Interbrand 2022
⁴ Burt and Sparks 2002; Khan and Rahman 2016; Mitchell et al. 2015; Schmidt et al. 2017
mile logistics are expanding beyond the crucial enabler of brand promises delivery to be an extension of the retailer brand itself.

Given the foregoing shift towards corporate branding in general and in the retail sector in particular, the primary objectives of this white paper are twofold. Based on insights from literature, the paper provides a conceptual lens of strategic corporate branding that lays the foundational understanding of corporate brand–supply chain nexus in cultivating an authentic corporate brand. Additionally, the paper brings to light how distribution and logistics are revolutionizing corporate branding strategies in the retail sector. Examining Amazon as a best-in-class example, we discuss how this powerhouse retailer brand leverages the power of effectively crafted supply chain processes in enhancing the authenticity and value of its brand.

**Cultivating an Authentic Corporate Brand**

Despite the increased applications of corporate branding across business sectors, many organizations struggle to achieve the full potential of corporate brands. Shortfalls may be attributable to: the lack of a value proposition supporting the brand; inconsistency between brand values and those held by stakeholders; misalignment between internal and external efforts; and/or failure to deliver brand values.\(^5\) Essentially, these underperforming corporate brands lack *authenticity*.

On the contrary, an authentic corporate brand has the following defining characteristics:\(^6\)

- It has a clear sense of purpose conceived with both customer needs and corporate conviction in mind.
- It commits to be true to its established purpose in all manifestations of products, services, processes, internal culture, and stakeholder relationships.
- It aims to ensure the consistent delivery of brand values to enable intended images perceived by stakeholders that, cumulatively, lead to favorable brand identity and reputations of the organization as a whole.

**The Strategic Corporate Branding Framework**

Founded on the foregoing premises of an authentic corporate brand, the strategic corporate branding framework depicted in Figure 1 consists of three key elements. They include corporate

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\(^5\) Jones 2010; McCoy and Venter 2016; McKinsey 2013  
\(^6\) Anisimova 2010; Kylander and Stone 2012; Mathews 2021; Miller 2014; Mokina 2014; O’Keefe 2015
brand essence (core identity) formulation, extended brand identity establishment, and brand-value fulfillment—each of which is guided by three respectively principles, namely vision-led, alignment, and consistency. The framework stresses the vital nexus between the brand value and supply chain management in delivering consistent brand promises. Description of the framework components is provided in Table 1.

**Figure 1: Strategic Corporate Branding Framework**

![Strategic Corporate Branding Framework](image)

Source: Center for Supply Chain Research®, The Pennsylvania State University

**Table 1: Description of Strategic Corporate Branding Framework**

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<th>Framework Element (Guiding Principle)</th>
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<td>Corporate brand essence formulation (Vision-led)</td>
<td>Corporate brand essence (<em>core identity</em>) formulation entails developing a defining idea or core concept that expresses the heart of the brand value proposition. It is led by corporate vision and incorporates optimal strategic fit between external environment and internal capabilities.</td>
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<td>Extended brand identity establishment (Alignment)</td>
<td>The extended corporate brand identity consists of dimensions that reflect the brand essence, and establish overall brand value propositions. Examples of extended brand identity dimensions are heritage, human personality, and corporate citizenship. Alignment is key among these multidimensions of brand value, and between internal and external branding efforts of these values.</td>
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Brand-value fulfillment (Consistency)

Brand-value fulfillment centers on keeping brand promises and consistently delivering brand values as expected by customers and other stakeholders across all touchpoints with the brand. In some cases, supply chain management (SCM) is an essential enabler of core processes, while in others, SCM is itself a core process to deliver brand values. In effect, every aspect of SCM is inextricable from the company’s ability to consistently fulfill brand promises.

Source: Balmer (2012); Chang, Chiang, and Han (2015); Foster, Punjaisri, and Cheng (2010); Hytti et al. (2015); Lilliehorn and Schönberg (2022); Mathews (2021); McCoy and Venter (2016); Minter (2015); Urde (2013)

Corporate Branding in the Retail Context

While the tech sector has consistently been home to top brands in several brand ranking reports (e.g., Apple, Google, Microsoft), the retail sector, boosted by the ecommerce boom, has continued to thrive. Many of the most successful corporate brands in the world, in fact, are retailer brands. In various cross-sectional brand ranking reports, top-ranked brands such as Amazon, Walmart, The Home Depot, and Ikea are among examples of retailer brands that have succeeded in building outstanding corporate brand over time. Undoubtedly, the equity of retailer brands as a basis of differentiation in the markets occupied mostly by similar products will continue to grow in the foreseeable future. According to Brand Finance, one of the world’s leading brand valuation consultancies, retail brand values have grown at a fast pace in the Brand Finance Global 500 ranking over the years, and has recently risen to become the second most valuable in its 2022 ranking report, crossing the US$1 trillion mark for the first time.

Cultivating an authentic corporate brand is complex, but it is even more so in the retail context due to the intricate amalgam of both products and services in the brand value propositions. In the context of the manufacturing and service sectors, one of the two components dominates and they are largely concerned with their own brands. In contrast, a retailer brand’s value propositions permeate a portfolio of goods of its own private brands and manufacturers’ brands, as well as extensive service encounters with customers across proliferating touchpoints within and outside physical store environments. Given the multi-faceted, product-service hybrid retail branding

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7 Brand Finance 2022; Interbrand 2022; Schmidt et al. 2017; Shamim, Ghazali, and Zulkipli 2016; Statista 2022
8 Brand Finance 2022
9 Martin Roll 2020; Mitchell et al. 2015
landscape, the pertinence of the corporate brand–supply chain nexus in delivering consistent brand promises is markedly heightened.

THE NEXT FRONTIERS OF RETAILER AS BRAND AND SUPPLY CHAIN: FROM ENABLERS TO CORE PROCESSES TO BRAND EXTENSIONS

Any brand signifies certain promises that set customer expectations. With the emergence of ecommerce and the blurring of the physical and digital world, customer expectations have increasingly shifted from transactional to experiential emphasis such that managing experiences evoked through retailer brands across all touchpoints becomes more important. These “brand experiences” must manifest the retailer brand identity and value propositions in the whole gestalt of touchpoint experiences, including product experience (e.g., product quality and assortments), shopping experience (e.g., store atmosphere, website design, convenience), and services experience (e.g., store associates, service agents). In such a brand experiences endeavor, supply chain management has evolved and broadened the frontiers of retailer branding. Its roles are expanding beyond an enabler of core processes to deliver brand promises, to become core processes, and, recently, to become an extension of the brand itself.

From Enablers to Core Processes

For retail organizations, supply chain management has long been an essential enabler of their core business of retailing. In particular, distribution and logistics capabilities are essential to ensure effective and efficient store-based fulfillment such that an assortment of products are available at the right time, the right stores, and the right prices for shoppers. Their important role notwithstanding, these supply chain processes do not directly render the retailer brand’s touchpoint experience to customers. Things, however, have changed.

In today’s ecommerce era in which brand experience is no longer limited to in-store touchpoints, fulfillment and logistics have assumed expanding roles. They have become not only an increasingly important part of the brand promises but also a key vehicle for consistently producing intended end-to-end touchpoint experience. Retailer brands now offer more shipping choices and delivery convenience for their customers as a manifestation of their brand promises—including delivery speeds such as same day, next day, two to three days; and delivery modes such as home delivery, buy online pick up in store, click and collect. Results are expanding brand touchpoints both

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10 Khan and Rahman 2016; Martin Roll 2020; Schmidt et al. 2017
internal and external of retail stores. At the same time, logistics activities are no longer limited to store-based fulfillment, but span to delivering orders destined to individual customers’ residential or business shipping addresses as well as alternative pick-up locations (e.g., parcel lockers, package-holding sites, partners’ stores). Last-mile logistics has become core processes that directly deliver post-order touchpoint experience that customers expect.\(^{11}\) In other words, fulfillment and logistics are not just enablers, but are themselves a core process to deliver brand promises across the expanding post-order touchpoints.

**From Core Processes to Brand Extensions**

Over time, certain retailer brands may gain a reputation for having an expertise in the fulfillment and logistics areas. For these brands, their capabilities can play a role in their branding strategies beyond the core processes to fulfill brand promises; they can be leveraged to extend their brand outside the retail business where this core-process expertise is deemed important. That is, fulfillment and logistics can become an *extension of the core retailer brand*.

A successful brand extension enables companies to capitalize on strong core brand quality and reputation to expand into unexploited markets. In some cases, a brand extension reinforces or strengthens the core brand by enhancing a brand’s awareness and increasing customers’ perceived value of the brand. In others, it widens a brand’s attributes and adds value to a brand, thus creating positive reciprocal effects that enhance the equity of the core brand.\(^{12}\) For retailer brands, both potential advantages can be realized with an efficacious leverage of fulfillment and logistics expertise as an extension of the core brands.

Despite its nascent phase, this brand extension approach is beginning to emerge in the retail sector, pioneered by Amazon, one of consistently top-ranked, renowned retailer brands. Amazon has turned its *in-house* core process prowess into a *third-party* service under its brand name to other retailers and brands, enabling them to expand into markets beyond their core retailing businesses. In fact, Amazon that thus far focuses on Amazon orders is expanding its branded core processes to provide such services to retailers and brands not otherwise affiliated with Amazon marketplace.\(^{13}\) In other words, the roles of fulfillment and logistics have evolved to become a brand extension, alongside its significant roles as an enabler and a core process to deliver brand promises discussed previously.

\(^{11}\) Gonzalez 2019; Hughes and Schreiner 2018; Johnson 2018
\(^{12}\) Childs 2017; Daye 2020; Goumas et al. 2018; Kalra 2019; Vukasovic 2012
\(^{13}\) Garland 2021; Howland 2022; Masters 2018; Unglesbee 2022; Waters 2021
RETAILER-BRANDING GAME CHANGER: A CASE OF AMAZON’S BRANDED SUPPLY CHAIN SERVICES

Founded by Jeffrey P. Bezos in July 1994 and headquartered in Seattle, WA, Amazon.com, Inc. is a multinational technology company that has built outstanding corporate brand over time as evident by its increasingly prominent positions across different brand rankings as depicted in Figure 2. At the heart of Amazon corporate brand from the beginning is the customer value, and it is this “customer obsession” corporate brand essence that the company has adhered to ever since. Today, Amazon continues its relentless pursuit of its vision to be “earth’s most customer-centric company.” Its mission correspondingly revolves around making “customers’ lives better and easier every day” as bespoken by its brand value proposition to always finding new ways to delight and satisfy customers’ desire for lower prices, better selection, and convenient services.

Figure 2: Amazon Brand Value Positions in Global Brand Rankings 2008–2022

Source: Data obtained from Ranking the Brands, a website by SyncForce
Note: European Brand Institute Global Top 100 Brand Corporations does not have pre-2011 data.

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14 In the very first annual letter to shareholder in 1997, it states: “From the beginning, our focus has been on offering our customers compelling value . . . We will continue to focus relentlessly on our customers.” Fast forward 25 years later in the most recent 2021 letter, it states: “We believe these customer experiences can always be better, and we strive to make customers’ lives better and easier every day. The beauty of this mission is that you never run out of runway; customers always want better, and our job is both to listen to their feedback and to imagine what else is possible and invent on their behalf” (Amazon 2021).

15 Amazon 2021, 2023
Appreciating its corporate brand essence and value proposition, we examine Amazon’s retail branding strategies that feature corporate-dominant brand architecture of various product brands (private labels), store brands (online marketplace and physical stores), and services brands (distribution and logistics operations). In particular, we highlight the uniqueness of its pioneered branded distribution and logistics services in the retail sector that play a major role in the brand’s authenticity and remarkable success.

**Amazon’s Retail Business and Brands Overview**

Amazon has organized its operations into three segments, namely North America, International, and Amazon Web Services (AWS). Amazon’s retail business operates within the North America and International business segments through North America-focused and internationally-focused online and physical stores, respectively. Its retail business has been and remains its primary source of revenue, with online and physical stores together accounting for the biggest share of its net sales in 2022 at approximately 46 percent.

The prominent moiety of its retail business, Amazon ecommerce comprises two retail models, namely first-party and third-party retail, both of which operate through Amazon-branded online stores. The first-party retail, or Amazon Retail, is a traditional retail operation where Amazon sources and owns product inventory for resales. Amazon Retail also includes sales from private-label brands. Amazon first entered the private-label business around 2009, with its Amazon Basics brand of staple goods. It has at least 118 private-label brands as of October 2022, according to DataWeave, an ecommerce analyst company. Some of its private-label brands carry the Amazon name or logo (e.g., Amazon Collection jewelry, Amazon Essentials clothing), while others do not (e.g., the paper goods label Presto, the food brand Happy Belly, and the fashion line Goodthreads). These private-label brands, however, account for a low single-digit percentage of overall product sales on its online stores.

In addition to the first-party retail, Amazon also operates the third-party retail which pertains independent online merchants selling their products on the Amazon ecommerce platforms. In this model, Amazon neither buys nor owns the inventory of products sold, but functions as a marketplace operator whose roles are to facilitate third-party sales. These marketplace sellers not only bring the catalog of products to Amazon platform, but also generate revenue from third-party

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16 Amazon 2021; CNN Business 2022; MergentOnline 2022
17 Conley 2022; Johnston 2022; Yuen 2022
18 Amazon 2021; Conley 2022; Coppola 2022; Dennis 2022; Gaster 2022
19 Del Rey 2022; Neenan 2020; Tarasov 2022
seller services that includes commissions on all third-party sales and any related fulfillment and shipping fees. Markedly, it is the marketplace retail that is the largest and most lucrative part of Amazon’s retail business. Third-party sales have accounted for more than half of the products sold on Amazon’s ecommerce platform since 2018, while third-party seller services revenue has consistently constituted the second largest share of its net sales in the past decade, recently presenting about 23 percent of the 2022 net sales.\footnote{Amazon 2021; Conley 2022; Coppola 2022; Dennis 2022; Gaster 2022; Supply Chain 24/7 2021}

In the physical retail space, Amazon launched its first physical bookstore in Seattle in 2015, and later expanded to include grocery stores with the acquisition of Whole Foods in 2017. Since then, Amazon has steadily expanded its brick-and-mortar footprint to include more locations across the United States and abroad. Amazon’s physical retail now includes \textit{Amazon-branded physical stores} such as Amazon Books (books and electronics), Amazon Fresh (grocery), Amazon Go (checkout-free convenience stores), Amazon Go Grocery (checkout-free grocery), and Amazon Style (apparel). Although physical retail sales figures are diminutive compared to its online counterparts, about 4 percent vs. over 40 percent of Amazon’s net sales in 2022, these physical stores are increasingly deemed invaluable as a convenient place to pick up products bought online or make returns.\footnote{Amazon 2023; Conley 2022; Perez 2022; Yuen 2022}

\section*{Delivering Brand Promises: Branded Ecommerce Fulfillment Services as Core Processes}

Amazon’s retail business serves two primary customer sets, namely consumers and third-party sellers. Amazon’s fulfillment and last-mile logistics are core processes to fulfill brand promises to both customer sets when it comes to delivery speed, reliability, and convenience for orders placed on Amazon.com. In the last decade and a half, Amazon has actively expanded its fulfillment network, and logistics and transportation capability not only to accommodate a greater selection and in-stock inventory levels, but also to meet anticipated shipment speed and volumes from sales on Amazon.\footnote{Amazon 2021} Notably, not only are the operational execution of order fulfillment promises no longer unbranded, but the now branded core processes are gaining increasing recognition.

Unlike most other retailers whose similar services are operated and provided by 3PLs like USPS, FedEx, and UPS, Amazon has developed and performed the services under \textit{Fulfillment by Amazon (FBA) brand} for its third-party sellers. Alongside its own first-party Amazon Retail orders, Amazon takes care of the entire processes for FBA sellers’ orders—from packing, shipping, customer services (e.g., delivery inquiries and requests for replacements, refunds), to reverse logistics of returns.\footnote{Amazon 2022a; Gordon 2022} As
of 2022, over half (68 percent) of third-party sellers on Amazon marketplace rely solely on FBA to fulfill their orders, with the remaining either use both FBA and commercial 3PLs or solely use the latter.\textsuperscript{24}

Two sub-brands have evolved in relation to the FBA brand, including Amazon Logistics (AMZL) and Amazon Air. Amazon Logistics, previously an unbranded core-process operation, has become known as Amazon-branded delivery service. Both assets (e.g., shipping packages, delivery vans) and delivery drivers (e.g., uniforms) of contracted companies under the Amazon Logistics franchise carry Amazon brand name. Orders shipped by Amazon Logistics will show as shipped with Amazon.\textsuperscript{25} Another sub-brand, Amazon Air, formerly known as Amazon Prime Air, is an Amazon-branded cargo airline operating exclusively to transport Amazon orders’ packages, complementing its ground-based logistics network.\textsuperscript{26}

Over the past few years, Amazon Logistics service has exploded with more than two-thirds of Amazon’s own packages being shipped and delivered using Amazon Logistics in 2022.\textsuperscript{27} Meanwhile, since its first flight in 2016, Amazon Air has rapidly grown, spurred by the expansion of Amazon Prime and its overnight and second-day delivery promises.\textsuperscript{28} By and large, with these growing branded core processes, Amazon retail business has more control over the customer experiences that are greatly affected by flexibility, speed, and quality of delivery.\textsuperscript{29}

**Beyond Brand-Promises Fulfillment: Branded Supply Chain Services as Brand Extension**

Amazon’s comprehensive distribution and logistics network and high caliber operations have established Amazon reputation in the logistics sector. Amazon’s rise in the logistics space gives it the opportunity to turn its in-house expertise into a new 3PLs business line and extend its brand beyond the core retailer brand. Largely nascent enterprising businesses, we observe that this brand extension approach is manifested across various logistics markets under a host of Amazon-branded 3PL services, including Amazon Freight, Amazon Global Logistics (AGL), and Amazon Supply Chain. These Amazon-branded 3PLs services are offered to all businesses and brands, regardless of whether they are affiliated with Amazon’s retail business line.

\textsuperscript{24} Statista 2022
\textsuperscript{25} Amazon 2023; CB Insights 2022; Cox 2019; Denning 2019; Jansen 2019; Lewenberg 2019; Simons 2021
\textsuperscript{26} Amazon 2023; Banker 2021; Schwieterman and Walls 2020
\textsuperscript{27} Amazon 2023; CB Insights 2022
\textsuperscript{28} Amazon 2023; Banker 2021; Schwieterman and Walls 2020
\textsuperscript{29} Cox 2019; Denning 2019; Jansen 2019; Kenney 2020; Lewenberg 2019; Simons 2021
In the truckload sector, *Amazon Freight*, launched in 2019, provides branded services to shippers of all size, leveraging its technologically-advanced network of 50,000-plus trailers and carriers.\(^{30}\)

Meanwhile, in the freight forwarding sector, *Amazon Global Logistics (AGL)* provides branded end-to-end ocean and air freight services, including local pickup, palletization, labeling, cargo insurance service, and customs clearance at origin and destination. AGL services are currently available for freight from mainland China and Hong Kong to the United States, the United Kingdom, and the European Union.\(^{31}\)

Additionally, under *Amazon Supply Chain* brand, Amazon offers suites of 3PL solutions called Multi-Channel Fulfillment (MCF) and Amazon Warehousing & Distribution (AWD). The former, MCF leverage Amazon’s world-class fulfillment network to help businesses handle ecommerce fulfillment and last-mile logistics. Amazon Supply Chain provides the same fulfillment services for MCF sellers as it does for FBA sellers, except without customer services. Another difference is that MCF sellers have options of having their orders shipped in an unbranded, blank box, instead of an Amazon-branded one, for eligible items. They can also block the use of Amazon Logistics as a carrier for their orders. MCF sellers can display “Fulfilled by Amazon” statement and/or badge on their website, provided that they meet Amazon usage policies. Meanwhile, AWD is Amazon Supply Chain’s new 3PL solution that provides low-cost, long-term upstream bulk inventory storage and automated distribution of the inventory to various channels such as wholesalers, manufacturers, and brick-and-mortar stores. Essentially, AWD serves warehousing and middle-mile logistics needs.\(^{32}\)

**FINAL THOUGHTS**

This paper underscores the relevance of and momentum towards corporate branding, with a particular attention to retailer-as-brand strategies in the ecommerce era when brand touchpoints expand beyond retail store boundaries. Retailer brands are at an inflection point in its development in recent years as supply chain management has evolved and broadened the frontiers of retailer branding. Most notably, fulfillment and last-mile logistics processes have risen to become the forefront apparatus in retail branding strategies not only as crucial enablers and core processes of brand promises delivery, but also as an extension of the retailer brand itself.

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\(^{30}\) Amazon Freight 2022  
\(^{31}\) Amazon 2022b; Brett 2022  
\(^{32}\) Amazon 2022c, 2022d; Gordon 2022; Jaekel 2022; Tarasov 2021; Waters 2021
Over the past decade, Amazon has been investing heavily not only in expanding its fulfillment and logistics infrastructure, but also in improving operational capabilities with new technologies. These investments are fundamental to Amazon’s ability to gain an increasingly solid control of brand touchpoint experiences it provides to customers. As a result, it has garnered unparallel success in enhancing the authenticity and value of its retailer brand by leveraging the power of effectively crafted supply chain network and processes.  

Taking a page from Amazon branding strategies, organizations beginning to develop a corporate brand should create propitious conditions for brand authenticity through the explicit and early focus on critical supply chain capabilities. Critical supply chain capabilities to fulfill brand promises, either as enablers or core processes, must be clearly understood and explicitly identified early in the branding effort. To those that have already made progress in building critical supply chain capabilities, the key lessons to sustain authenticity of the corporate brand are continuous improvement of supply chain operations. To this end, the right investments in capability development and the pursuit of continuous improvement of these critical supply chain capabilities will be what separates brands that consistently deliver on their promises from those that fail to do so.

33 CB Insights 2022; Jansen 2019; Martin Roll 2020; Ryan 2021; Simons 2021
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