NAPOLINA BRAND REDESIGN

DBA DESIGN EFFECTIVENESS AWARDS ENTRY

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FOR PUBLICATION

honey

EXECUTIVE SUMMARY

Napolina has a wonderfully rich history and had cemented its position as the No.1 Italian brand in the UK. But playing in multiple categories (notably tomatoes, pasta, oils and pulses) – a highly competitive brand landscape – and the strong rise of own label put the brand under pressure.

Prior to the rebrand, total brand sales had declined 22%, equating to retail value sales of £102m*.

The brand needed to break free of the "squeezed middle ground". Aided awareness remained relatively high (Tomatoes 74%, Pasta 69%, Oils 54%**), **but we needed to turn latent familiarity into genuine brand passion, desire and preference.**

We achieved a highly successful, full brand redesign that built on the key brand equities, whilst creating and amplifying new distinctive elements.

** Circana 52 w/e 26 March 2022 vs 2021*
*** MMR 2022*

Before

After

Key headline results following the redesign:

- **Value growth: +19.5% vs previous year**
- **Penetration growth: Household penetration increased to 38.8%**
  (from 35.3% the previous year)
- **Strong switching to Napolina from own label and branded players**
- **Largest switching from own label tomatoes went to Napolina**
- **Largest switching from own label pasta went to Napolina**
- **Second largest switching from own label oils went to Napolina*****

**** Kantar 52 w/e 18th May 2025 vs previous year*

MARKET OVERVIEW

Napolina was the creation of charismatic Italian, Marino Landiorio, in 1965. Soon after launching in Italy, the products arrived in the UK and over subsequent decades expanded across tomatoes, oils, pasta, pulses and beyond. Princes Foods acquired Napolina in 2001.

The brand was well positioned for the boom in Italian meal occasions. Kantar recently estimated the Italian category (excluding Pizza) to be worth £3.1billion, accounting for 8.2% of all main meals. Total Italian main meal occasions (excluding Pizza) annually is a staggering 2.6 billion, more than Indian and Oriental meal occasions combined*.

Competitive Context

In 2022, cost of living and inflationary factors had put family budgets under pressure, helping fuel the growth of own label, whilst premium brands enjoyed growth as consumers replaced eating out with "trade up" meals at home. The growth and attractiveness of the category brought new entrants to the UK, and strong marketing support packages from several brands in the respective categories.

The brand was vulnerable. From a high of £155m value sales in 2019, the brand had steadily declined over the subsequent years, suffering a 22% fall in value sales year on year in 2021/2022. Action needed to be taken.**

Following a new marketing structure and strategy, Princes Foods made a bold commitment to reawaken the brand through innovation, new communications and, crucially, packaging design.

We were given the responsibility of tackling the critical element of packaging design. The new designs were rolled out in phases across Q4 2023 and Q1 2024.

Competitor line-up: Tomatoes

Competitor line-up: Olive Oil

Competitor line-up: Pasta

Key headlines

Tomatoes: Mutti have gained significant traction in the UK market with sustained, heavy ATL marketing investment (76% share of voice in 2024. Source: Nielsen). Heinz also unveiled their culinary range in 2023.

Pasta: A strong own label offer combined well-established Italian brands.

Olive Oil: Fillipo Berio are the branded market leader with a wide range of products and ATL support.

** Kantar Usage Panel 52 w/e 23 Feb 2025*
*** Circana 52 w/e 26 March 2022 vs 2021*

DESIGN CHALLENGES

Challenge 1:

Inject more brand personality

Napolina translates as little Naples. Naples is a place of vibrancy and energy; the inspiration behind the brand. A place where passion for food runs deep. But the current design lacked the warmth and spirit of Naples.

That's why we introduced a new photography style that celebrated the food. Dramatic lighting, heavy shadows and interesting angles were all designed to amplify the character of the ingredients.

Challenge 2:

Increase relevance to key target audience

A consumer segmentation developed by Princes and MMR had highlighted a key opportunity with a segment known as "Passionate Variety Seekers" who make up an estimated 24% of buyers in the UK (3.7 million households). This segment is experimental and passionate about food. They love Italian food as part of a wide mix of cuisines. However, consumers' associations with Napolina were all a little vanilla. Comments like "safe", "reliable" and "been around for years" were all too common in qualitative research. Furthermore, the packaging failed to deliver on the quality assurance and authenticity that this ABC1 audience were looking for.

That's why we created quality seals that spoke of the brand's high standards, such as "100% Italian tomatoes", unique "die numbers" used for cutting each pasta shape and a more overt "Prodotto Italiano" message which signalled pride in the Italian-produced products. Additional dashes of Italian language played an important role in reinforcing the brand's authentic credentials.

Challenge 3:

Drive stronger range cohesion

The range is extensive, consisting of 63 SKUs across multiple categories. This led to real challenges in achieving brand consistency. Especially when considering the wide array of pack formats. Competing against so many brands needed a focus on how to drive strong recognition and clear range navigation.

That's why we increased the proportions of the wordmark and introduced the "Vesuvius seal", a graphic element inspired by the iconic silhouette of Mount Vesuvius, acting as a bold framing device.

Challenge 4:

Improve shelf impact

Research (Source: Cloud Army) **had shown that the current pack had issues with immediate recognition. The shelf impact study in 2022 showed Napolina considerably underperformed versus their core competitors. In Peeled Plum Tomatoes for example, it predicted the number of buyers that would notice Napolina in approximately 3–5 seconds was just 54% versus 76% for Mutti and 75% for Cirio.**

That's why we injected more colour intensity, clarity of messaging and bold new SRP to enhance cut-through. The research was repeated following the redesign, to reveal that stand-out had increased to 75%.

'we injected more colour intensity, clarity of messaging and bold new SRPs to enhance cut-through'

THE APPROACH

The original project encompassed creative concepts, range extension development, production and artwork.

Key steps in the strategy:

- Stakeholder interviews
- Market & category trend analysis
- Brand and design analysis
- In store shelf impact testing
- Visual positioning
- Brand hierarchy
- Semiotic analysis

Key steps in the design:

- Identity development
- Concept creation
- Photography
- Design development
- Range structure and design
- Brand messaging
- Brand guidelines
- SRP designs

THE RESULTS

"The honey team have been the perfect brand partners for us, on our mission to elevate Napolina in the many highly competitive categories we operate in.

They have brought creative confidence, an eagle eye for detail and boundless enthusiasm through the entire rebranding process."

Jeremy Gibson, Marketing Director

THE RESULTS

Objective 1:

Increase number of buyers by 10% in year 1.

The new designs smashed brand targets for the number of buyers across the key Napolina categories. This included both lapsed and new buyers.

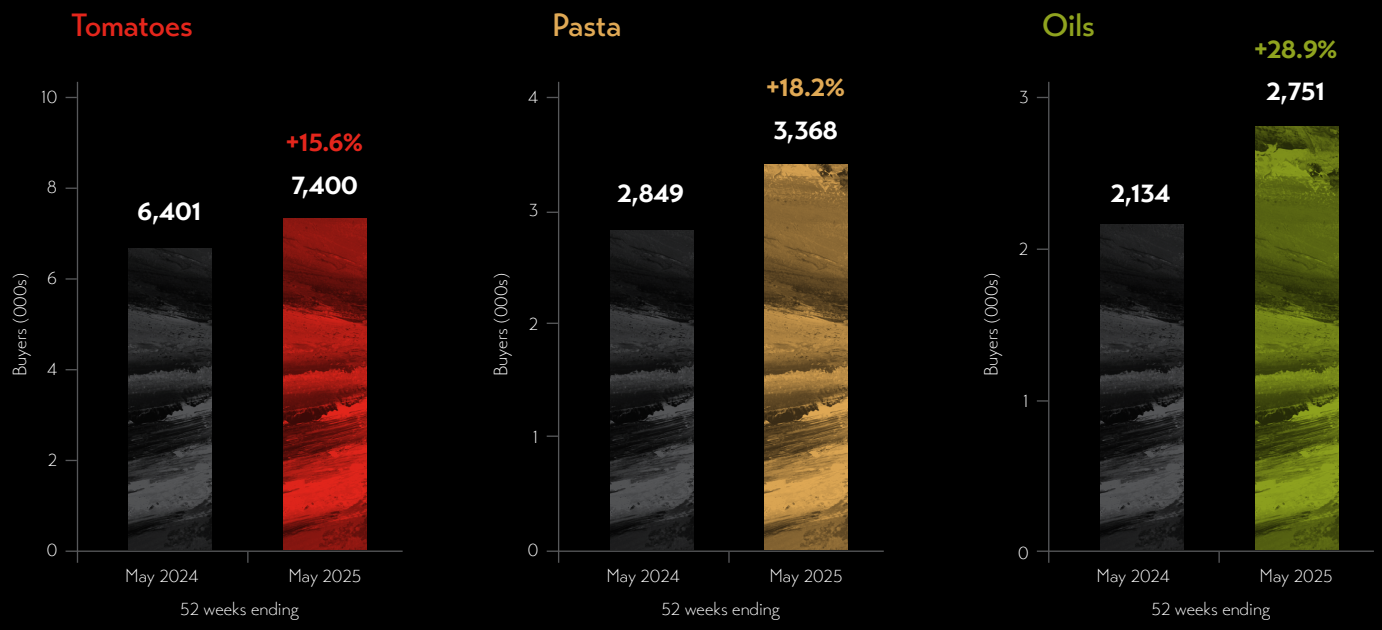
Results:

Napolina Tomatoes: **15.6% increase in buyers**

Napolina Pasta: **18.2% increase in buyers**

Napolina Oils: **28.9% increase in buyers**

BUYERS



(Source: Kantar 52 w/e 18th May 2025 vs previous year)

- The brand has taken back the ground that had been lost to own label.

- In tomatoes and pasta the largest switching from own label was to Napolina.

- Within oils, Napolina achieved the second largest switching from own label

THE RESULTS

Objective 2:

Stop the decline in sales!

RETURN THE BRAND TO GROWTH

The long-term plan was to double the value of the brand in 5 years. But before that could happen we needed to return the brand to growth, following 3 years of decline.

Results:

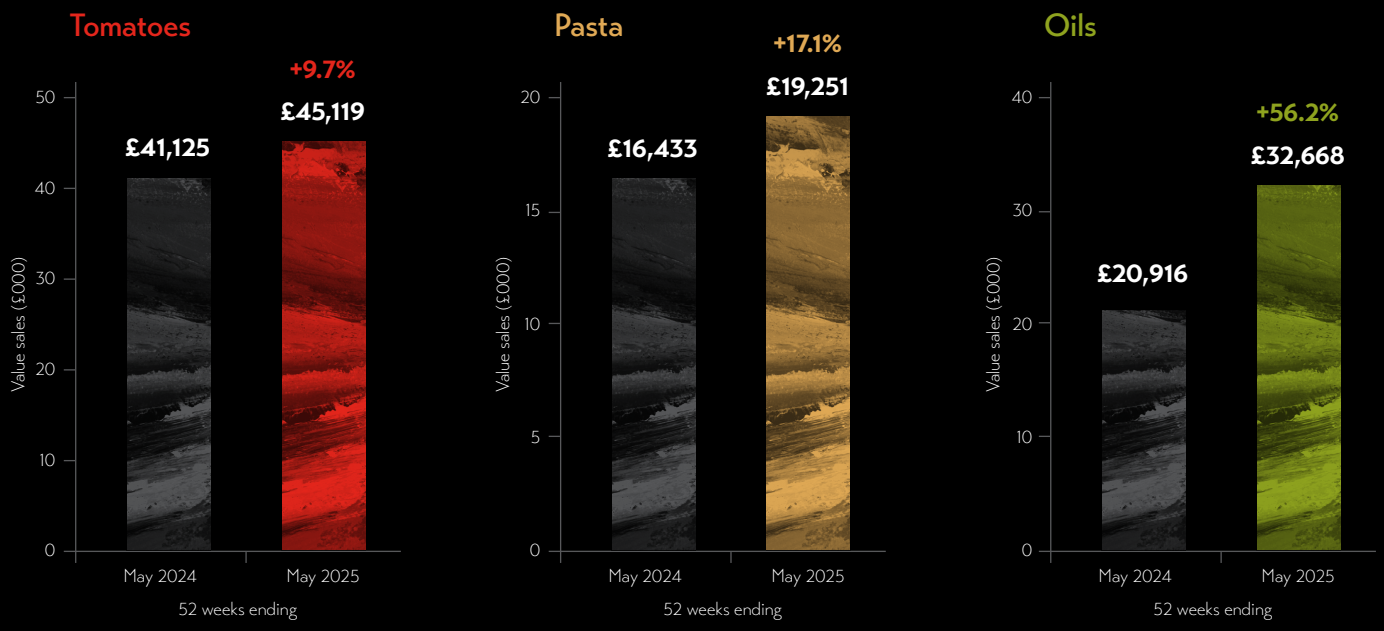
Following the brand redesign total brand sales rose to £109.5m from £91.7m in the first year. A 19.5% increase. A significant increase in value sales was seen across the key categories:

Napolina Tomatoes: **+9.7%**

Napolina Pasta: **+17.1%**

Napolina Oils: **+56.2%**

VALUE SALES



(Source: Kantar 52 w/e 18th May 2025 vs previous year)

THE RESULTS

Objective 3:

Increase quality perceptions

As part of the commercial growth strategy and to build brand value, increasing quality perceptions were strategically important.

Results:

There were positive improvements on key brand health tracking measures pre versus post redesign. The data below shows percentage of respondents who agree with attitudinal statements related to Napolina.

Is it worth paying more for

44% May 2023 **55%** March 2024

Offers good value for money

57% May 2023 **68%** March 2024

Make high quality products

78% May 2023 **83%** March 2024

(Source: MMR Brand Tracking)

FURTHER IMPACT AND ACHIEVEMENTS

The impact of the redesign goes beyond the tangible commercial results. The connected results have been wide reaching.

1. Expansion plans
UK success has helped drive demand internationally with plans in place to expand across Europe and further afield.

2. Renewed internal passion and belief
Success has fuelled enthusiasm and commitment to future growth plans.

3. Increased levels of cross-sell
More shoppers are buying the brand across multiple categories. Dunhumby data shows in Tesco there are an additional 100,000 Tesco shoppers buying Napolina Tomatoes, Olive Oil and Pulses*

OTHER INFLUENCING FACTORS

Advertising
Napolina ran OOH advertising bursts in June and September 2023, and January 2024.

Sales Promotions
As is the norm in many FMCG categories, sales promotions play an important part in the marketing mix. However, the percentage of volume sold on trade promotion at a total brand level has remained broadly consistent pre and post redesign (+1% higher vs previous year).**

Price Increases
Average price has increased at a category and brand level. But the brand has justified price increase and delivered significant growth. For example, Napolina Oils' average price increased 14.6% and increased volume by 36.3%*.**

** Dunhumby 52 w/e June 2025 vs previous year*
*** Circana 52 w/e May 2025 vs previous year*
**** Kantar 52 w/e 18th May 2025 vs previous year*

CREDITS

PRINCES

Marketing Director: **Jeremy Gibson**

Napolina Head of Brand: **James Crorie**

Napolina Brand Manager: **Ellis Duncan**

Project Team: **Jaime Jones, James Fennah & Charlene Davidson**

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Executive Creative Director: **Greg Vallance**

Head of Strategy: **James Crabb**

Design Director: **John Madden**

Account Director: **Chandi Hayward-Fogg**

Design Team: **Zannya Castillo, Lizzy Tasker, Shaun Boylen, Emma Bell**

Production: **Steve Burdekin**

Photography: **Andy Grimshaw**

And a big thanks to the many other talented hands that helped along the way

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