



# Branding apples in the Dutch horticulture sector



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## Preface

This report contains the results of my bachelor thesis for the MCB department of Wageningen University. The subject of research is branding horticultural products, while specifically focusing on 5 cases of club branding in the Dutch apple sector.

The road of this report has not been easy for me, since I didn't had a lot of knowledge about the Dutch horticulture sector, which is a quit complicated sector. But with help from my supervisor, lots of reading and research and the help of an expert, I managed to give an overview of the current ability to brand in the horticulture sector through club organizations.

I'm especially grateful for all the patience and support of my supervisor Frans Verhees; he encouraged me and gave me many useful insights. Secondly, I like to thank my second reader Dianne Hofenk for her critical review. And thirdly, I like to thank Leonard Kampschoër for the interview, which has been of great help for me and the research.

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## Table of Contents

1. Introduction .....	5
1.1. Problem statement .....	5
1.2. Research questions .....	6
1.3. Outline report .....	6
2. The Dutch vegetable and fruit sector .....	7
2.1. Organization of the vegetable and fruit sector .....	8
2.1.1. Producers .....	9
2.1.2. Wholesaler and middle man .....	9
2.1.3. Retail/customer .....	10
2.1.4. Product Board .....	10
2.2. Marketing in the fruit and vegetable sector .....	11
2.2.1. Product board .....	11
2.2.2. Branding or labelling .....	11
3. Strong brands .....	13
3.1. Managing a strong brand .....	13
3.1.1. Brand manager system .....	13
3.1.2. Marketing agency .....	14
3.2. Building a strong brand .....	14
3.2.1. Identify and establish brand positioning and values .....	15
3.2.2. Planning and implementing brand management campaigns .....	15
3.2.3. Measuring and interpreting brand performance .....	15
3.2.4. Increase and sustain brand equity .....	15
4. Branding of fresh food products .....	16
4.1. Shift from product focus to market focus .....	16
4.2. Brand sensitivity for fresh food products .....	16
4.3. Dilemma's when branding fresh food products .....	17
4.3.1. Individual company branding or branding of chains and/or networks .....	17
4.3.2. Characteristics of fresh food products .....	17
4.3.3. Horizontal branding or vertical branding .....	17
5. Branding in the apple market .....	18
5.1. Club varieties .....	18
6. Framework of branding fresh food products through a club organization .....	19

7. Methods .....	21
7.1. Sample.....	21
7.2. Measures .....	21
7.3. Interview .....	23
7.4. Analysis .....	23
8. Inova Fruit: Junami, Rubens and Wellant .....	24
8.1 Junami .....	26
8.1.1. Cooperative brand management.....	26
8.1.2. Brand equity .....	27
8.2 Rubens .....	27
8.2.1. Cooperative brand management.....	27
8.2.2. Brand equity .....	28
8.3 Wellant.....	29
8.3.1 Cooperative brand management.....	29
8.3.2 Brand equity.....	29
9. GKE: Kanzi and Greenstar .....	30
9.1. Kanzi.....	31
9.1.1. Cooperative brand management.....	31
9.1.2 Brand equity.....	32
9.2. Greenstar.....	33
9.2.1. Cooperative brand management.....	33
9.2.2. Brand equity .....	33
10. Analysis results.....	34
10.1. Differences between Inova Fruit and GKE NV.....	34
10.2. Clubs vs. regular companies with optimal branding and clubs vs. the horticulture sector.....	36
10.2.1. Organization structure of brand management and marketing.....	36
10.2.2. Brand management and marketing .....	36
12. Conclusion, discussion and recommendation .....	38
12.1. Conclusion.....	38
12.2. Discussion .....	41
12.2.1. Managerial implications .....	41
12.2.2 Limitation research and suggestions for future research .....	41
13. References .....	42
Appendix I.....	45

## 1. Introduction

More and more brands are appearing in the fresh agricultural food market, such as Chiquita bananas, Zespri kiwi's, Pink Lady apples, Dole pineapple and Tasty Tom tomatoes. These products were all once perceived as commodities. A commodity is a product so basic that it cannot be differentiated in the minds of consumers (Keller et al., 2008). But apparently it is possible to create a brand for a simple commodity product; nowadays even water is branded. 'The key to branding is that consumers perceive differences between brands in a product category' (Keller et al., 2008). So the success factor of the brands mentioned above is that consumers became convinced that products in the category were not the same and could vary substantially in quality. A good example of branding of a product that was once a commodity, is the tagline of Pink Lady: 'So much more than an apple' (Pink Lady, 2011).

The American Marketing Association defines a brand as 'a name, term, sign, symbol, or design, or a combination of them, intended to identify the goods or services of one seller or group of sellers and to differentiate them from those of competitors.' So a brand is a product or service that differs in some aspects from other products or services that satisfy the same need (Kotler and Keller, 2010).

The marketing of agricultural products is often organized by producer boards that are focusing on increasing production efficiency, price, competitiveness and product quality in order to develop a competitive advantage (Beverland, 2001). Beverland (2011) states that the development of brands could be the only way to remove an agricultural food product from commodity status and price competition. The homogeneous agricultural food market is splitting up and branding provides new opportunities for product differentiation and better profits for agricultural products.

Brand equity consists out of assets such as loyalty, awareness, perceived quality and brand associations. These assets provide value to the customer as well as to the firm. On the one hand, they improve the firm's performance by improving prices and margins. On the other hand, they help a customer to interpret and process information about the product and also affect the customer's confidence in the purchase decision (Fernández-Barcala and González-Díaz, 2006). One of the main advantages of creating brands for agricultural food products is the higher margin for farmers. Even though costs of growing and promotion will be higher for branded food products, they are also sold for a significantly higher price than the same unbranded products (Feenstra and Pons, 2010).

### 1.1. Problem statement

Building a brand in the agricultural food market is a big challenge, because of the relatively small companies in the chain. These small companies cannot supply the necessary quantities to cover a market segment. Also, the costs for a promotion campaign will be too high for a single agricultural company. Another complicating factor is the seasonality in the production of agricultural food. This can cause problems with constant delivery, constant quality and homogeneity of the fresh products (Padberg et al., 1997).

A solution for agricultural companies could be to work together with other companies to create a strong and successful brand. However, it probably won't be easy to work together with a lot of different companies. Every company has his own opinion and identity and in order to create a brand together, all companies need to agree on the value proposition and overall strategy of the brand.

The cooperation between companies when creating and sustaining a brand, could be less complicated and problematic with good organization. The branded club varieties in the Dutch apple market are good examples of cooperative branding of horticulture food. According to Sauvée (2000), organizational innovation is one of the determinant features of competitive position when branding cooperatively. So the key issue for cooperating companies and organizations within the chain is to create specific coordination mechanisms in order to create and sustain a strong brand. Therefore, the main objective of this paper is to get an overview of the organization of Dutch apple brands. To develop this overview, five cases in the Dutch apple market will be studied.

## 1.2. Research questions

Main research question:

*Is it possible to create and sustain brands in the Dutch horticulture sector?*

Sub-questions:

1. What are the criteria for organizations to create a strong brand?
2. How is marketing organized in the Dutch horticulture sector?
3. What are the most occurring dilemma's when branding fresh horticultural food?
4. How is the branding of Dutch apples organized in order to deal with these dilemma's?
5. How is brand management organized in the Dutch apple clubs?

## 1.3. Outline report

In the second chapter, the characteristics, the organization and the marketing of the Dutch horticulture are explained based on a literature study. The third chapter will discuss how to theoretically manage and build a strong brand. The fourth chapter deals with the branding of fresh food products, which includes the current shift from product focus towards consumer focus, the sensitivity of consumers for branding fresh food and dilemma's when branding horticultural food. The fifth chapter focuses on the solution in the apple market for the branding dilemma's stated in chapter four: clubs. In chapter six a theoretical framework will be presented. Chapter 7 will discuss the methods of research en chapter 8, 9 and 10 will outline and analyse the results of the research. The report will end with chapter 11 which will deal with the conclusion, discussion and recommendations of this research.

## 2. The Dutch vegetable and fruit sector

This research will focus on the horticulture sector because of its growth potential and its relatively strong international position. The production value of Dutch horticulture has increased with 1.8% a year on average between 1995 and 2005. In the same period, the production value of Dutch agriculture has decreased with 1.2% a year and the production value of cattle farming decreased with 1.1% a year (Zandvliet and Sijses, 2007). Also, almost all horticultural products are sold unprocessed, which makes it an interesting sector with multiple challenges when talking about branding.

In 2010, the Dutch horticulture recovered from the economic crisis; the production value of €7.9 billion, is the highest value ever. Food horticulture accounts for €2.7 billion of this value. Total horticulture accounts for 39% of the agricultural production (Productschap Tuinbouw, 2011). In 2011, the production value of fresh vegetables was €1.9 billion and the production value of fresh fruit was €440 million (Productschap Tuinbouw, 2012a).

Importing and exporting has become increasingly important for the Dutch food horticulture. The scope of the import and export has increased the last couple of years. Customers can choose products from different countries, depending on the season. Producers are exporting a large part of their harvest. Growers are profiting from the strong international trade position of The Netherlands (Noll, et al., 2010).

## 2.1. Organization of the vegetable and fruit sector

Before vegetables and fruit reaches the consumer, there are a lot of steps that need to be taken. These steps secure the delivery of the demanded quantity, at the right place, at the right time, in the right packaging and with the required quality and food safety. All the activities in the chain are realized without a central supervisor. There are around 800 companies that are active somewhere between production and end consumer. The chain that a horticulture product goes through differs per product (Noll, et al., 2010).

Figure 1 shows all the different kinds of companies and organizations in the chain for Dutch unprocessed vegetables and fruit and their mutual relationships. There are 3 levels that can be distinguished: production, middleman and wholesaler and retail (Noll, et al., 2010).

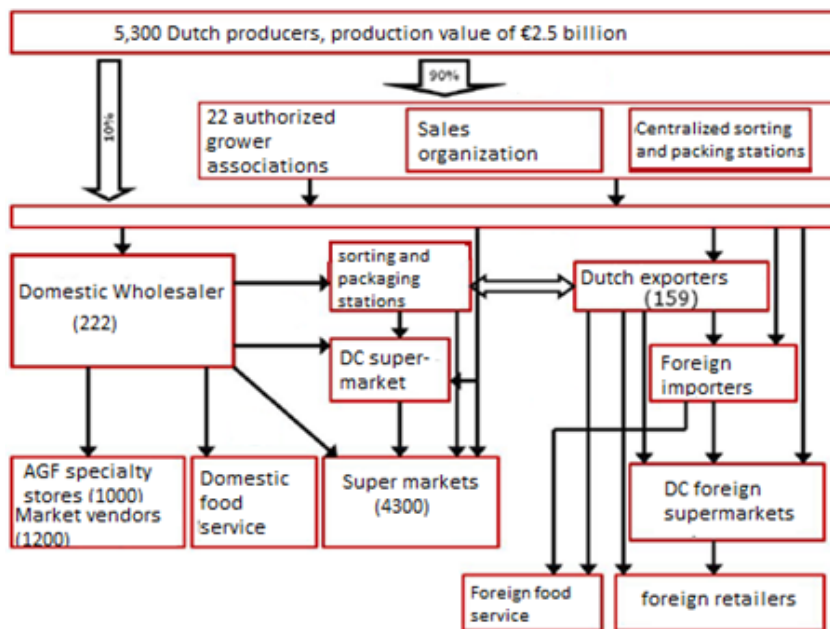


Figure 1: The Dutch vegetable and fruit chain (Noll, et al., 2010)



### 2.1.1. Producers

There are around 5000 cultivation companies in The Netherlands. Around 90% of the cultivation companies are organized in one of the 22 acknowledge horizontal grower associations. Growers that join a grower association, are legally obligatory to sell all there production through the grower association (Noll, et al., 2010).

A growers association can outsource its sales activities to a trading company. Growers will have their own 'sales organization' when the trading company is integrated in the grower association. An example of an integrated combination is growers association Cooperation Coforta and sales organization The Greenery B.V. The Greenery is the marketing and sales organization and Coforta is the only shareholder of The Greenery B.V. As seen in the chain diagram, the sales organization of a grower association can directly deliver to customers in The Netherlands and in foreign countries. They sell to wholesalers, exporters, retailers and distribution centres in The Netherlands, and sometimes through trading organizations to foreign retailers or foreign wholesalers. The chain activities like sorting, packaging and transporting from grower to sales organization can be done by the grower or by the sales organization (Noll, et al., 2010).

### 2.1.2. Wholesaler and middle man

In 2010 there were about 222 Dutch wholesalers, 159 exporters and 47 importers. The chain diagram also shows sorting and packaging companies and foreign importers. These companies will also be put under 'wholesaler and middle man.'

The main tasks of the wholesaler and middle man are:

- Act as intermediary between producers and customers. Growers and retailers can then save the trouble of finding the right partner and they also save time and effort of drawing up contracts.
- Offer logistic services, so that producers and customers can save on their costs for logistics.
- Securing quality and food safety. This can reduce recalls and reputation damage for producers.
- Manage fluctuations in demand, supply and quality. When there is a shortage, the wholesaler will take care of replenishing the shortage. So the grower won't need to bear the risk and customers don't need to search for another supplier (Noll, et al., 2010).

When the costs of time and effort are not that important, producer (the sales organization of the growers association) and customer can choose to directly work together. In that case, they will skip the wholesaler and middle man. This will be done when there are very little insecurities known so that the transaction costs will be relatively low. For example, when delivering Dutch apples and pears to a Dutch supermarket, the sales organization and retailer can build a long term relationship, in which the sales organization delivers directly to the distribution centre of the supermarket.

### **2.1.3. Retail/customer**

The Dutch retail in vegetables and fruit is concentrated, since it is mainly sold in supermarkets, vegetable and fruit specialty stores and at markets. The majority is sold in supermarkets. The retail of vegetable and fruit in the rest of Europe is also concentrated. The retailer has a relatively strong negotiation position, because of this concentration. However, retailers do build long term relationships with producers and wholesalers (Noll, et al., 2010).

### **2.1.4. Product Board**

The Product Board represents all the companies in the horticulture chain: gardeners, retailers, wholesalers, importers, exporters, producers, auctions, sales organizations, growers and unions. Their goal is to strengthen the Dutch horticulture. The product board is an organization by public law, which means that all companies in the horticulture sector are obligated to financially contribute to common activities. And all agreements made by the product board have force of law for everybody in the chain (Productschap Tuinbouw, 2012).

The product board of horticulture is currently renewing its organization, due to criticism from both the companies in the horticulture sector, as the political parties. The idea is to create a limited set of core tasks directed by the companies, substantially decreased levies, a smaller, democratic board and a smaller work organization.

The product board connects the horticulture sector with society. They are doing this by investing money and regulations in specific programs. In this way, the product board contributes to strengthening the competitive position of the Dutch horticulture sector and to a healthy life of consumers (Productschap Tuinbouw, 2011).

## 2.2. Marketing in the fruit and vegetable sector

### 2.2.1. Product board

Till the end of 2012, the product board of horticulture is investing in promotion of the vegetable and fruit sector through their own marketing promotion organization: the GroentenFruitBureau. Their goal is to strengthen the Dutch vegetable and fruit market and to stimulate sales, by designing consumer campaigns. They want to create general consumer awareness for vegetables and fruit. The Product Board is responsible for the financing and supervising of the promotion activities (Productschap Tuinbouw, 2012b).

As mentioned before, the Product Board of horticulture is currently renewing its organization and will decrease the amount of responsibilities. That's why they, after 2012, will stop investing in market activities like product promotion, market research, logistic and sector specific projects (Productschap Tuinbouw, 2012b).

### 2.2.2. Branding or labelling

Many products come onto the market packed and labelled. A label can be a simple (descriptive) name, which is put on the packaging. Labels have different functions: they identify the product and, if required, they can give them a certain gradation. They describe the product by, where it comes from, by who it is produced and how it should be used. The main characteristic of a label is that the claim is (legally) embedded. Controlled quality is therefore an important pillar for labels, other pillars can be tracking and tracing and sustainability. The main difference with a brand is that a label is based on hard, substantiate and transparent processes. It is often supported by a certificate and controlled by an accreditation organization (Riezebos and Zimmermann, 2005). Some labels are very well known by consumers, such as 'Scharrelei'. But there are also a lot of labels that are not fully recognized and acknowledged by consumers. It is also not the main goal of a label to influence the meaning and the perception of the consumer (Riezebos and Zimmermann, 2005).

A brand distinguishes itself primarily from a label by its legal protection for unique brand elements. A label does not have this legal protection, and can therefore also be used by competitors. A meaningful brand makes a product recognizable for the consumer and retailer, protects unique product characteristics, commits customers (which gives an competitive advantage) and has a positive influence on the image of the company. A brand has advantages for trade and for the suppliers: it makes it easier to sell the product, to identify suppliers, to build warranty of quality, and to establish consumer preference. Brands are important for the consumer or end user to be able to identify and compare products, since a brand is often known for its consistent quality and price. Branded products have a predictable using experience on which the customer can trust. This is hard to establish for fresh horticulture products, since the quality can fluctuate due to external factors. The quality of the end product in the retail stores is therefore hard to control (Riezebos and Zimmermann, 2005).

Another complicating factor for branding is the seasonality in the production of agricultural food. This can cause problems with constant delivery, constant quality and homogeneity of the fresh horticulture products (Padberg et al., 1997)

Companies in the horticulture sector can choose between branding or labelling. Labelling has a legally embedded claim, but is not unique. Labels mainly contain positive information for other organizations in the chain, consumers often don't obtain a lot of useful information from it. Branding mainly focuses on consumers and is hard to copy for competitors, but it requires higher investments, passion and highly developed entrepreneurship (Riezebos and Zimmermann, 2005).

### 3. Strong brands

'The power of a brand lies in what resides in the minds of the customer. The challenge for marketers in building a strong brand is ensuring that customers have the right type of experiences with products and services and their accompanying marketing campaigns so that the desired thoughts, feelings, images, beliefs, perceptions and opinions become linked to the brand.' (Keller et al., 2008).

Customer-based brand equity is the differential effect that brand knowledge has on customer response to the marketing of that brand. If a product has a positive customer-based brand equity, customers will react more favourably to it. So the power of a brand lies in the minds of consumers or customers and what they have experienced and learned about the brand over time (Keller et al., 2008).

When determining the strength of a brand, the brand equity should be measured. According to Aaker (1996) the measures of brand equity are divided into five categories

1. **Brand name awareness.** This reflects the presence of the brand in the mind of customers and can be measured by factors like recognition and recall.
2. **Brand loyalty.** This is the core of brand equity and can be measured by the price consumers are willing to pay and the satisfaction of consumers.
3. **Perceived quality and leadership.** This contains, the perceived quality compared with other brands and the popularity/leadership status compared with other brands.
4. **Brand associations.** This can be measured by the associations customers have towards the perceived value of the brand, the personality of the brand, and the organization of the brand. With these three measures it becomes clear how the brand can be differentiated from its competitors.
5. **Market behaviour.** This includes the performance of the brand measured by market share and the relative market price at which the brand is being sold.

#### 3.1. Managing a strong brand

##### 3.1.1. Brand manager system

'Someone, or some group, needs to be in charge of designing the brand identity and position in today's market; of seeing to it that identity/position implementation is effective and efficient; of ensuring that the identity/position is not compromised; and of designing crisis management plans to handle possible disasters' (Aaker, 1996).

The 'brand manager system' is the dominant organizational format in consumer-goods companies. This is the type of organizational structure in which brands or products are allocated to managers who are responsible for the performance of the brand. 'Brand managers are central coordinators of all marketing activities for their brand and are responsible for developing and implementing the marketing plan' (Low and Fullerton, 1994). A problem with brand managers could be that they are focusing too much on short-term tactical decisions. The company could therefore also appoint a brand equity

manager or put the CEO in charge of the brand, so that all decisions that put the brand at risk need to be approved at the top (Aaker, 1996).

### 3.1.2. Marketing agency

According to Aaker (1996), the marketing agency is often the best candidate for being the brand strategist. He states that a brand strategy needs a single architect, someone who will implement and coordinate a cohesive brand strategy across multiple media and markets.

The main advantages of an agency are:

- No negative influence of possible changing brand managers within the company
- Agencies often succeed in providing a strong link between strategy and execution
- Agencies keep up-to-date with trends in communication
- Agencies have employees who are interested in brand strategy

For these reasons, it would be a good choice for companies to work together with marketing agencies in order benefit from their experience.

## 3.2. Building a strong brand

In their book Strategic brand management (2008), Keller et al. are defining strategic brand management as 'a process that involves the design and implementation of marketing activities to build, measure and manage brand equity'. There are four main steps in the strategic brand management process, which are shown in figure 3.

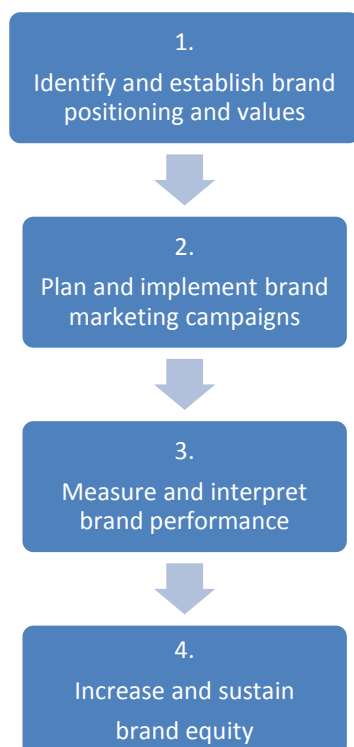


Figure 2: Strategic brand management process (Keller, et al., 2008)

### **3.2.1. Identify and establish brand positioning and values**

First the company needs to have a clear understanding of what the brand represents and how it should be positioned with regard to competitors. Positioning of a brand with respect to competitors is about creating brand superiority in the minds of consumers. The consumer has to be convinced of the advantages of the brand in comparison with the competitor, so the points of differences should be defined (Keller et al., 2008).

### **3.2.2. Planning and implementing brand management campaigns**

In order to create awareness for a brand, companies should choose the right brand elements for their product. Then they need to build marketing activities and a supporting marketing campaign in which the brand is integrated. And third, they could create secondary brand associations. The brand is then identified with another entity, even though this entity may not directly relate to the product or service performance, consumers may infer that the brand shares associations with that entity, so producing indirect or secondary associations.

### **3.2.3. Measuring and interpreting brand performance**

To determine or evaluate the positioning of a brand it can be helpful to extensively analyse the health of the brand. By analysing the brand, the company could find its sources of equity and recommend ways to improve and exploit the equity. In order to understand the effect of the brand marketing campaigns, it is important to measure and interpret brand performance.

So for profitable brand management it is important to keep evaluating and measuring brand performance. This will provide the company with precise and actionable information so that they can make the best possible tactical decisions in the short run and the best strategic decisions in the long run (Keller et al., 2008).

### **3.2.4. Increase and sustain brand equity**

'Managing brand equity involves managing brands within the context of other brands, as well as managing brands over many categories, over time and across market segments' (Keller et al., 2008). In order to increase and sustain brand equity, companies should define their corporate branding strategy (Keller et al., 2008).

## **4. Branding of fresh food products**

Brands are an essential part of modern markets, they provide companies with strong returns, awareness among consumers and trade buyers, and provide firms with assets that are difficult to imitate. Therefore, brands are the opposite of commodities, which are products that have little differentiation and whose value is most of the time determined by supply and demand. Agricultural companies have often been slow in creating brands, they preferred to seek government protections, improve their efficiency, or reduce buyer power through collective supply and marketing agreements such as co-operatives and producer boards (Beverland, 2007).

### **4.1. Shift from product focus to market focus**

Traditionally most producers of fresh horticulture products have seen their responsibility end when their product left the farm (Beverland, 2007). Since most companies in the fresh food sector are product oriented companies, (the quality of) the product is their main concern. But since the horticulture sector is dominated by international competition, Dutch producers are forced to constantly focus on (decreasing) the cost price, to act demand or consumer focused and to develop new products with a high added value (Zandvliet and Sijjes, 2007). The horticulture companies should realize that quality is a matter of perception; the suggestion of quality is more important than the factual quality. The Dutch horticulture sector should therefore be more focused on the market, which includes the use of brands (Riezebos and Zimmermann, 2005).

### **4.2. Brand sensitivity for fresh food products**

In 1994 and 2002 Riezebos and Zimmerman (2005) did research to brand sensitivity of products in twelve product categories. In the first test he let 40 marketers order the product categories on brand sensitivity. According to the marketers, eggs were the least brand sensitive. After this test, he did a second test with female consumers. The result of his research with the female consumers (from lowest till highest product sensitivity) was as followed: Coffee machine, shoes, washing machine, watches, pans, lady magazines, sweeteners, eggs, cars, milk, cigarettes and lipstick. Eggs, according to marketers the least brand sensitive, came on place eight in the consumer research. And milk was even on place ten. So of the twelve tested product categories, fresh food products appeared to be very brand sensitive.



### **4.3. Dilemma's when branding fresh food products**

Mainly because of the complicated sector and the characteristics of fresh horticultural food, there are some dilemma's that companies need to face when creating a brand.

#### **4.3.1. Individual company branding or branding of chains and/or networks**

Increased competition has resulted in more brands in the horticulture sector, but only a couple of them can make it. To promote a brand nationally, the supplier needs to make a large investment in marketing communication. The main problem is that a lot of horticulture companies are small sized firms. The costs for the development of a brand and the promotion campaign will be too high for a single agricultural company. Also, small companies cannot supply necessary quantities to cover a total market segment (Padberg et al., 1997). Cooperation in marketing within the chain, could therefore benefit the development of brands. Also other companies in the chain, such as the cultivation companies, could initiate and lead the introduction and positioning of a brand (Riezebos and Zimmermann, 2005).

#### **4.3.2. Characteristics of fresh food products**

Fresh food products have some complicating characteristics, which could have an influence on the branding strategy. Branded products normally have a predictable using experience on which the customer can trust. This is hard to establish for fresh products, since the quality can fluctuate due to external factors (Riezebos and Zimmermann, 2005). Another complicating factor for branding is the seasonality in the production of horticultural food. This can cause problems with constant delivery, constant quality and homogeneity of the fresh products (Padberg et al., 1997). Especially when cooperating within the chain with different growers, there should be a specific focus on quality control, since a branded product needs to be consistent in its quality.

#### **4.3.3. Horizontal branding or vertical branding**

When deciding to cooperate within to chain in order to realize a strong brand, the question is whether to horizontally or vertically cooperate. With horizontal branding, a group of companies from the same level in the chain will establish a branding strategy with each other. An example of this is Tasty Tom tomatoes. Vertical branding is a branding strategy where more levels in the chain are working together, an example of vertical branding is Max Havelaar.

Establishing and maintaining a brand is valuable. Producers should work together horizontally to gain an increased scale. This is necessary to have enough volume when the demand of the branded product will increase. Vertical cooperation in the horticulture is rare, because it's very complex. The strategical choice for vertical branding is often a result of an already existing cooperation and basis of trust (Riezebos and Zimmermann, 2005).

## 5. Branding in the apple market

A dynamic marketplace for apples is created by introducing new branded cultivars to the world apple market. Some of the cultivars did not succeed, but others such as Granny Smith, Fuji and Pink Lady have become important world varieties. One of the main reasons why new branded cultivars fail on the market is because of the price drop when production increases. In an attempt to keep the price of new varieties high, the “club” was developed.

### 5.1. Club varieties

For the development of new fruit varieties, producers are more and more focusing on taste profiles and taste preferences of the modern consumer (Feenstra and Pons, 2010). These new fruit varieties are often developed through cross breeding existing varieties. This is done by professional cultivars, who get a patent for the variety they developed in order to make money out of it and to guarantee the quality of the variety. These patent keepers often create a club system for their new variety. A ‘club’ is an organization that determines how the fruit is marketed. It determines the promotional activities, the sales price, how much can be grown, and how it is grown. The grower needs to become a member of the ‘club’ through signing a contract in order to be able to grow the variety (Robinson, 2011).

The main difference compared with free varieties is that the growers only produce a pre-determined volume of fruit, because the production of club varieties is demand driven. Since production will be limited, the price can be kept high. Also, the growers will receive the same middle price for their apples. This is different for ‘free’ varieties, the price for the grower will then differ depending on the sales organization they are selling to. In clubs, growers will each contribute money to promote and market the variety (Robinson, 2011).

To secure the quality of the club apple, only the first quality is sold under the club variety name. There are of course differences among growers in the production of first and less quality. It is therefore important that the club creates a system to control quality. Only if they control quality, the club can offer a consistent product of high-quality to the consumers (Feenstra and Pons, 2010).

The promotion of the club varieties is often focused on specific target groups. The market conditions for club varieties are expected to stay good in the next couple of years, also because consumers are very interested in apples of high quality (Feenstra and Pons, 2012).

The first successful club marketed the Pink Lady apple from Australia. It is common for a variety to have a different patent name and trademark name. Some varieties are even marketed under several different names depending on the region in which they are grown (Robinson, 2011). The Dutch acreage of new apple cultivations is still small, but growing. In 2010 about 15% of the apple acreage contained club varieties. The club varieties are gaining popularity with Dutch growers due to higher revenues than normal varieties. Also, growing club varieties can be a way for the individual grower to strengthen its position in the chain (Feenstra and Pons, 2010).

## 6. Framework of branding fresh food products through a club organization

Based on the literature study, a framework of branding fresh food products through a club organization has been designed. It is a graphical representation of the brand management process of club varieties and the factors that influence this process. The framework will be applied in the empirically part of this research. The framework contains three processes:

- A. The first row shows the process of building a strong brand in an optimal way with a high brand equity as a result. The process starts with the general organization of a company. This factor focuses on the amount of suppliers, the organization of departments, etc. The process continues at the organizational structure of brand management: who are responsible for building and sustaining the brand? The next step is the actual brand management. The strategic brand management process contains of four main steps according to Keller et al. (2008). If these steps are taken successfully, the company will be able to create and sustain a brand with a high brand equity.
- B. The third row represents the process of marketing in the Dutch vegetable and fruit sector. The first step is to study the organization and structure of the vegetable and fruit sector. The second step is to look how marketing of vegetables and fruit is organized within the sector, this is often done by Product Boards. Their main goal is to create general product awareness, by promoting commodities. Another way to market commodity products is to use labels. These activities will lead to increased general product awareness.
- C. The second row displays the process of the brand management of the club varieties in the Dutch apple sector. The process starts with the organization of the club. The organization will be influenced by the dilemma's occurring from the differences between companies in the horticulture sector and the characteristics of a general company. The next step in building a brand with a high brand equity is the organization structure of the brand management. This will be influenced by the structure of brand management in a general company with optimal branding and the organizational structure of the general marketing activities of the horticulture sector. If the structure of brand management is clear, the club can move on to the next step: the actual brand management. The strategic brand management process of Keller et al. (2008) is used to analyse how the brand is management in a club. The brand management will be influenced by the way a general company with optimal branding manages its brand and by the general marketing activities of the horticulture sector. If all the steps are taken successfully, the club will be able to create and sustain a brand with high brand equity.

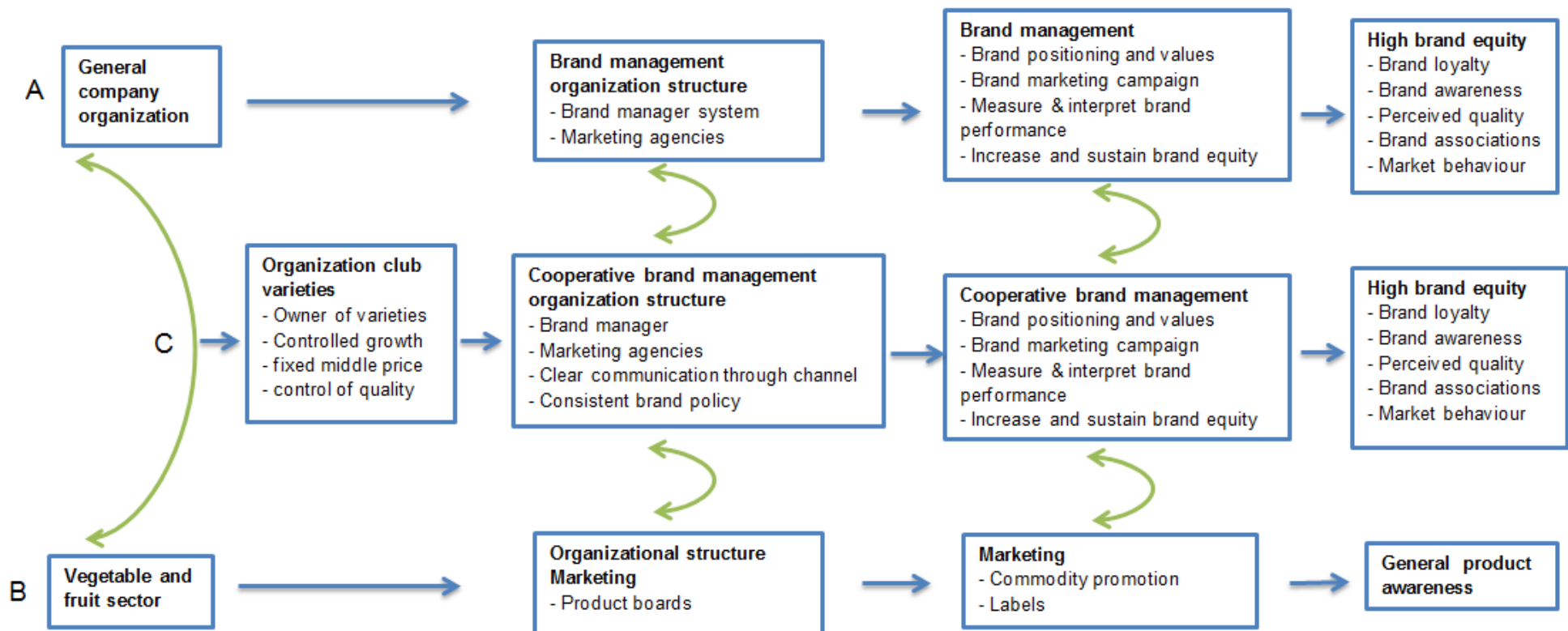


Figure 3: Framework of branding fresh food products through a club organization

## 7. Methods

### 7.1. Sample

For this paper, 2 club organizations with in total 5 apple brands are chosen to study. Inova Fruit with its brands Junami, Rubens and Wellant and GKE NV with its brands Kanzi and Greenstar. These cases are particularly selected, because their apples are grown in The Netherlands. Inova Fruit is located in The Netherlands and GKE NV in Belgium. To collect data, secondary data from literature and other sources will be used and an interview will be held with an expert in the Dutch horticulture sector.

### 7.2. Measures

#### 1. Club variety organization

When creating a club variety brand, many companies in the chain are involved, such as the growers and the sales organizations. The club variety organization, therefore covers all companies involved with the brand. The question is how the cooperation, between all these companies, is organized.

Club variety organization	
<b>Owner of varieties</b>	Who is the official owner of the variety?
<b>Controlled growth</b>	Is there controlled growth; does acreage growth of the varieties depend on market demand?
<b>Fixed middle price</b>	Is there a fixed middle price for the growers?
<b>Control of quality</b>	And is there a consistent quality control within the organization?

Table 1: Club variety organization measures

#### 2. Cooperative brand management organization structure

There will be researched how brand management is organized within Inova Fruit and GKE N.V.

Cooperative brand management organization structure	
<b>Brand manager</b>	Are there brand managers for every club variety?
<b>Marketing agencies</b>	Are the companies outsourcing (a part of) their marketing activities?
<b>Clear communication through channel</b>	How are decisions communicated within the club variety organization (for example to the growers)?
<b>Consistent brand policy</b>	Does the club have consistent brand policies? So are there strict rules for every brand?

Table 2: Cooperative brand management organization structure measures

### 3. Cooperative brand management

The measures of cooperative brand management are based on the strategic brand management process of Keller et al. (2008).

Cooperative brand management	
<b>Clear brand positioning and values</b>	<ul style="list-style-type: none"> <li>• Do the brands have clear points of differences and a consistent brand positioning?</li> <li>• Does each brand have a clear target group?</li> </ul>
<b>Consistent brand marketing campaign</b>	<ul style="list-style-type: none"> <li>• What are the main brand elements for the apple brands?</li> <li>• Is there consistency in the brand elements used?</li> <li>• Is the brand linked to secondary sources in order to create associations?</li> </ul>
<b>Clear measures and interpretation of brand performance</b>	<ul style="list-style-type: none"> <li>• Are the clubs performing comprehensive evaluations of a brand?</li> <li>• Are the clubs measuring and interpreting brand performance in order to understand the effects of the marketing campaigns?</li> <li>• Are the clubs collecting information from consumers over time in order to create a clear picture of the image that the brand has among customers?</li> </ul>
<b>Clear long term strategy to increase brand equity</b>	<ul style="list-style-type: none"> <li>• Do the clubs determine long term strategies for their brands?</li> <li>• Are there any plans for future brand expansion?</li> </ul>

Table 3: Cooperative brand management measures

### 4. Brand equity

The measures of brand equity are based on the categories designed by Aaker (1996).

Brand equity	
<b>Brand loyalty</b>	Are the consumers committed to the brand and do they prefer that apple above other apples?
<b>Loyalty awareness</b>	Are the consumers aware of the brand and do they have strong, favourable and unique associations with the brand?
<b>Perceived quality</b>	Are customers really experiencing a higher quality than other apple varieties?
<b>Brand associations</b>	Do the customers have the brand associations that the clubs want them to have?
<b>Market behaviour</b>	Are the growers of branded apples indeed receiving a higher price for their apples? And what about the profit margin, since cultivating a brand also has higher costs?

Table 4: Brand equity measures

### 7.3. Interview

One expert in the Dutch apple sector will be interviewed. The goal of the interview is to control information found in the literature and on the internet and to gather information that cannot be found in literature or on the internet. The expert is Leonard Kampschoër, director of the Royal Fruitmasters Groep. Fruitmasters is a partner of both Inova Fruit and GKE NV.

Since the interview is meant as a complement on information previously gathered, the interview will be a structured interview. It is very clear which information is still needed and there is a logical order in the questioning. In order to communicate easily, the interview is done in Dutch (Appendix I).

### 7.4. Analysis

First, each case will be described on the measures mentioned above. After that, the cases will be compared with each other on these factors to discover the differences. Furthermore, there will be a comparison between the club variety brands of the cases and the general marketing process in the vegetable and fruit sector.

<b>Club variety organization</b>	<ul style="list-style-type: none"><li>• What are the differences in organization between GKE NV and Inova fruit?</li></ul>
<b>Brand management organization structure</b>	<ul style="list-style-type: none"><li>• What are the differences in the organization of brand management between GKE NV and Inova Fruit?</li><li>• What are the differences with brand management in a general large company and with the product board horticulture?</li></ul>
<b>Cooperative brand management</b>	<ul style="list-style-type: none"><li>• What are the differences in brand management of GKE NV and Inova Fruit?</li><li>• In what way does the branding of the club varieties differ from the promotion and labelling of free varieties?</li></ul>
<b>Brand equity</b>	<ul style="list-style-type: none"><li>• Which club brands seems to be having the highest brand equity?</li></ul>

## 8. Inova Fruit: Junami, Rubens and Wellant

### Club variety organization

Inova Fruit is established in 2001 by sales organizations Fruitmasters (29%), The Greenery (26%), Auction Haspengouw (18%), the Dutch fruit cultivation organization (NFO) (16%), auction Zuid-Limburg (7%) and Auction Zaltbommel (4%). The goal of Inova Fruit is to develop apple and pear varieties that are completely based on consumer preferences. Inova Fruit also develops unique branding concepts and supervises the market launch of these concepts (Inova Fruit, 2012). Till 2011, Inova Fruit is selling 3 apple varieties: Junami, Rubens and Wellant (Inova Fruit, 2012). The Italian variety owner of Rubens chose Inova Fruit as the variety and brand manager of Rubens in the Benelux and the marketing coordinator of Europe. Inova fruit manages the process from plant development till the market introduction and has the final responsibility for the marketing and communication of Rubens (Rubens Apples, 2012). But Inova Fruit is not the variety owner of Rubens; they are just one of the several organizations in Europe that sell Rubens (Kampschoër, 2012). The same counts for Junami and Wellant. Inova Fruit is chosen by the Swiss variety owner of Junami and the Dutch variety owner of Wellant, as the European variety manager and brand manager (Inova Fruit 2012a; Inova Fruit 2012b), that means that Inova Fruit is not their official owner.

In order to centralize sales of the Inova Fruit club varieties 'Inova Fruit Verkoop BV' was established in 2011 (Oever, van den; 2007). The Verkoop-BV is in fact an extra level in the chain, it will buy the total harvest of Rubens, Junami and Wellant from the growers (Verheul, 2011). The sales organizations can buy their fruit back for their own customers. The goal of the Verkoop BV is to create one organization who has control on the whole chain of Rubens, Junami and Wellant (Verheul, 2011).

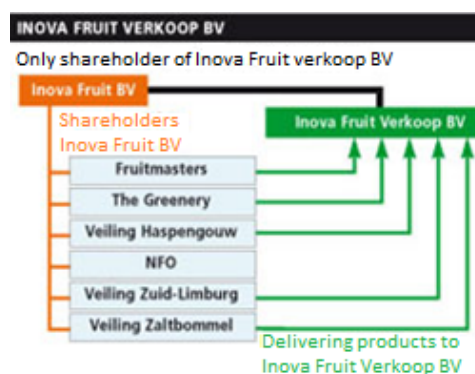


Figure 4: Organization of Inova Fruit Verkoop BV

The Verkoop BV is also allowed to deliver to existing customers of the sales organization, but it doesn't seem logical that sales organizations will lose customers through this model. Supermarkets want to have a wide assortment in fruit and vegetables and the Verkoop BV doesn't have that. With the establishment of Fruit Verkoop BV, the quality control, promotion, sales and marketing, will be managed by one organization (Verheul, 2011).



Growers who are not a member of a sales organization can also buy trees from Inova Fruit varieties, because The Dutch Fruit growers organization (NFO) is a shareholder of Inova Fruit. Those growers need to sign a contract that the products will be sold through one of the shareholders (Oever, van den, 2007).

There is no estimated middle price for growers of Inova Fruit varieties. The price they receive depends on their sales organization. Inova Fruit did not expand its amount of apple trees based on market demand. They have planted new trees, without being sure whether it would be sold or not.

The Verkoop BV and the grower associations are arguing that there should come one middle price for all growers, but this is hard to realize because every sales organization has planted a different amount of Rubens, Wellant and Junami trees. For example, some sales organizations have planted more Rubens trees than the market demands. So they are having a hard time selling all their apples, which leads to the fact that their growers will receive a relative low price for their Rubens, Wellant and Junami apples. But there are also sales organizations who were more discrete in planting new trees and paid more attention to market demand. These sales organizations are still able to pay their growers a good price. These sales organizations will not agree on establishing a common middle price, because it will probably harm their growers (Kampschoër, 2012).

#### **Brand management organization structure**

Inova Fruit has the final responsibility for the marketing of their varieties to assure a consistent marketing campaign and brand look (Rubens Apples, 2012). However, in an attempt to increase sale, Inova Fruit also gave some branding responsibilities to retailers and growers. An example is the sales of Junami at Albert Heijn, Inova Fruit has given Albert Heijn approval to put their own sticker on the Junami apples. As a result, Junami apples are now being sold in large discount packages at Albert Heijn (Kampschoër, 2012).

There is one marketing manager at Inova Fruit who is responsible for all marketing activities at Inova Fruit. Besides this manager, every product has his own product manager who is responsible for the whole strategy of that particularly product (Inova Fruit, 2012).

The names of the varieties, logos, corporate image and instruments used for promotional campaigns are developed by agencies with much experience in the fast moving consumer business (Inova Fruit, 2012). One of the conditions of the Verkoop BV, is that growers will be involved in decision making around the brand. According to Leonard Kampschoër, Inova Fruit does not involve the sales organizations in marketing decision making and also the communication towards sales organizations about marketing decisions sometimes lacks (Kampschoër, 2012).

## 8.1 Junami

### 8.1.1. Cooperative brand management

#### **Brand positioning and values**

The Junami is a hard apple with a white pulp and a long shelf life. The apple is positioned as a special and honest apple. 'Special because of its crispy and fruity character and honest because it is a real thirst quencher with an invigorating aftertaste' (Junami, 2012). Junami guarantees a high quality. The apples are grown in North-Western Europe under strict and highly controlled conditions with continuous quality monitoring. Inova Fruit is striving to create the following core brand associations of Junami: young, fresh, open, adventures, energetic, sportive, healthy, active, fit, vital, power (Inova Fruit, 2010).

Taste tests have proven that the Junami is a good apple for young people and families, because of its fresh tangy taste and crispy bite. The target group of Junami is the European consumer with 'youth as a state of mind' in the age range of 18 till 35 year. He or she wants to be modern, youthful, sporty and fit and values the taste and the look of an apple (Inova Fruit, 2010).

#### **Brand marketing campaign**

Inova fruit is creating favourable and unique brand associations for Junami by communicating to the consumer that the Junami apple is the perfect snack, whether you are sporting, working, on a party or watching a movie. Eating a Junami will quench the consumers thirst and the consumer will feel very fresh afterwards. The tag line of Junami is: 'Have a Junami break!'. Typical icons for the Junami campaign are happy apple smileys, focusing on a break during sporting, working, partying, etc. The slogan and apple smileys are the main brand elements for Junami which are used in every marketing activity. Junami is the main sponsor of the TV program 'Help, my child is overweight' on RTL 4. With this sponsorship, Junami uses secondary associations in order to build brand equity. People could, for example, think that their child will lose weight if they eat Junami apples (Inova Fruit, 2010).

#### **Measure and interpret brand performance**

Inova Fruit is measuring the effects of the Junami marketing campaigns. The sponsorship of the TV program in 2011 resulted in an increased brand awareness to 35% and an increased campaign awareness to 16%. Of all the times consumers buy apples, they will, on average, regularly buy Junami 34% of the time. This was only 4% before the TV promotion in 2011. (Inova Fruit, 2011).

#### **Increase and sustain brand equity**

The goal for Junami is to create a top 3 preference position within their target group (Inova Fruit, 2012a). However, a long term vision for Junami could not be found. It also looks like Inova Fruit does not have a clear and consistent long-term vision in general (Kampschoër, 2012).

### 8.1.2. Brand equity

Inova Fruit does not seem to have a very consistent way of measuring brand equity. However, it looks like Junami has a pretty decent brand equity, with a brand awareness of 35% in 2011 (Inova Fruit, 2011). According to Leonard Kampschoër, Junami is the apple with the highest brand equity of Inova Fruit, with on average a good price for the grower (Kampschoër, 2012).

## 8.2 Rubens

### 8.2.1. Cooperative brand management

#### **Brand positioning and values**

Inova fruit positions Rubens as the nicest apple, because of its crispiness, freshness and sweetness. The core brand associations that Inova Fruit wants to create for Rubens are: Social, fun, happy, harmony, friendship, enjoy, sweet, fresh from the tree, sunny, sharing, season/tradition, nicest taste (Inova Fruit, 2008).

The main target group of Rubens is the European consumer in the age range of 35-55 years old, with an uncomplicated taste and who value seasonal products.

#### **Brand marketing campaign**

Each year, Inova Fruit formulates a promotion and communication plan for Rubens. This must lead to higher brand awareness and preference for Rubens. Inova Fruit is creating favourable and unique brand associations for Rubens by communicating to the consumer that Rubens is the nicest apple because of its crunchy, fresh sweet apple with a full taste (Inova Fruit, 2008). The pack shot of a Rubens apple with logo is centrally positioned on PR and advertisement material with a white and light blue background. The tag line of Rubens is: 'Rubens. Can you share it?'. The packaging material of Rubens is always recognizable by using the same colours and the logo (Inova Fruit, 2008).

There are different promotion campaigns for Rubens on the television, radio, at fairs and in stores. An example of a campaign is 'The best home-grown apple' ('Het beste van eigen bodem') campaign. By promoting Rubens as an apple grown in The Netherlands, they are using a secondary source to create favourable brand associations.

#### **Measure and interpret brand performance**

Inova Fruit evaluates its promotion campaigns every year. All the television, radio and in-store promotional activities have resulted in an increase in awareness for the Rubens apple campaigns. After the promotion campaign in 2010, Rubens captured the first place in promotion awareness of the customer, above the 5 big apple varieties Elstar, Jonagold, Goudreinette, Golden Delicious, Granny Smith. Also, the customer's intention to buy Rubens apples has increased from 7% to 24%. Because brand awareness is already present, new marketing campaigns should focus on increasing brand preference and increasing the visibility in the store (Inova Fruit, 2011).

### **Increase and sustain brand equity**

The goal for Rubens is to create a top 3 preference position within their target group (Inova Fruit, 2008). However, a long term vision for Rubens could not be found. It even seems like Inova Fruit does not have a clear and consistent long-term vision in general (Kampschoër, 2012).

#### **8.2.2. Brand equity**

As mentioned before, Inova Fruit has grown more Rubens apples than the market demanded. This is why growers are since a couple of years dissatisfied about the price they receive for their Rubens apples (Kampschoër, 2012), especially the growers from the sales organizations that planted a large amount of Rubens trees (boerderij.nl, 2010). Even though the Rubens apple does seem to have a pretty high awareness, sales are lacking (Kampschoër, 2012). Based on this information it can be stated that the Rubens apple does not have a very high brand equity.

## 8.3 Wellant

### 8.3.1 Cooperative brand management

#### **Brand positioning and values**

Wellant is positioned as the ultimate apple, the best that nature has to offer. It exceeds all the other apples on taste, smell and appearance. Quality is more important than quantity and the Wellant apple is grown traditionally and with craftsmanship. The result is an outstanding apple with a pronounced flavour and a robust size. The intense flavour and fruity aroma distinguishes Wellant from all the other apples. The core brand associations that Inova Fruit wants to create for Wellant are self-confidence, knowledge, expertise, premium, prestige, status, high quality, luxurious, careful and demanding (Kernwaarden Wellant, 2012).

The target group of Wellant are consumers who value the good things in life. The 'real connoisseurs' who love an intense taste. Someone who is classic and conservative but really enjoys life (Inova Fruit, 2009).

#### **Brand marketing campaign**

The main brand element used in the marketing campaign is Wellant as a petit four with the tagline 'Allow yourself a Wellant' ('Gun uzelf wellant'). Some of their marketing activities are in store promotion materials, expanding of assortment, advertisements and public relations, website banners and the Willem and Drees concept (Inova Fruit, 2009). The focus of the marketing campaign in 2011-2012 is on taste and treat and on Wellants crunchy, juicy and intense taste. There will be cooperated with specialty stores, Wellant growers with farms shops and the Willem & Drees concept (Wellant apple, 2011). However, what could be found is that Inova Fruit also allowed growers to sell Wellant themselves. This can make it harder for Inova Fruit to keep one consistent brand marketing campaign, since they can't control the growers home sale.

#### **Measure and interpret brand performance**

Inova Fruit does measure the influence of marketing campaigns and the brand performance. However, there is not much known about the results of those measurements for Wellant.

#### **Increase and sustain brand equity**

The goal for Wellant is to create a top 3 preference position within their target group (Inova Fruit, 2012b). However, a long term vision for Wellant could not be found. It also looks like Inova Fruit does not have a clear and consistent long-term vision in general (Kampschoër, 2012).

### 8.3.2 Brand equity

Inova Fruit does not seem to have a very consistent way of measuring brand equity. As mentioned before, there are no brand performance measurements of Wellant known, so it cannot be stated whether Wellant has a high brand equity or not.

## 9. GKE: Kanzi and Greenstar

### **Club variety organization**

The developer of the new varieties Nicoter (Kanzi) and Nicogreen (Greenstar) is Better3Fruit. The worldwide licences of both apples, are bought by the European Fruit Co-operation (EFC), which makes them owner of the varieties (Kampschoër, 2012). EFC is a cooperative venture between sales organizations Veiling Haspengouw in Belgium, Fruitmasters in The Netherlands and WOG Raiffeisen in Germany. EFC is founded in 2002 in order to provide an adequate answer to the increasing internationalisation of the fruit trade (EFC, 2012).

Greenstar Kanzi Europe N.V. (GKE NV), a subsidiary of EFC organizes the production and marketing of the Nicoter and Nicogreen varieties worldwide. The top quality fruit of these varieties is marketed under the trademark names Kanzi and Greenstar. The goal of GKE NV is to organise the production and marketing of the two apple varieties in such a manner that (financial) added value is created for all parties, from grower to consumer.

GKE NV is working closely with all their licensing partners around the world to guarantee superior quality of their apples (GKE, 2012). In all countries licensing partners are responsible for production and sales of the varieties. The apples are starting as a domestic product in each country, to create a high consumer acceptance. Later on this can shift towards import. All the licensing partners together function as a club. They keep an eye on the balance between demand and supply, so the production will grow as market demand grows. In this way they will prevent overproduction (Kampschoër, 2012).

The club varieties are offered in a closed system; growers who want to plant these cultivars need to get a contract with one of the licence keepers. The grower has to pay a licence fee on the trees and he might have to contribute to the marketing of the fruit. When growing Kanzi and Greenstar, the grower commits himself to take care of the cultivation and to deliver a product of good quality. Every grower receives the same price for the same size and quality (EFC, 2012a).

### **Brand management organization structure**

The marketing strategy is first determined on an European level and then implemented on a local level. GKE NV coordinates the marketing activities, they have a marketing team for both varieties and they cooperate with different marketing agencies. However, all license partners are involved in the decisions about marketing programs. Their marketing departments cooperate intensively on the marketing strategy of Greenstar and kanzi (Kampschoër, 2012). There are uniform packaging and quality standards, so the local licence keeper need to follow the rules of the Kanzi concept. Since it is important to pay attention to a country's culture, marketing techniques can be adjusted on a local level, as long as it stays within the rules of the concept (Kampschoër, 2012; Kanzi, 2010).

## 9.1. Kanzi

### 9.1.1. Cooperative brand management

#### **Brand positioning and values**

Kanzi is positioned as a fresh red apple with a unique sweet-sour taste and a tempting colour. Kanzi distinguishes itself from competitors with its high guaranteed quality, high productivity, uniform and robust pulp, attractive size and shape, perfect taste, tempting colour and long shelf life (Kanzi, 2010). The core brand associations that GKE wants to create for Kanzi are juicy and crunchy, sensual sweet and seductive. Consumer research showed that Kanzi, with its sweet and sour taste and red appearance, is suited for a wide target group (Kanzi, 2010).

#### **Brand marketing campaign**

GKE is creating favourable and unique brand associations for Kanzi by communicating to the consumer that Kanzi is an exotic quality apple, with a nice sweet-sour flavour. It looks like the apple is coming from a far and mysterious destination. The consumer recognizes this in the brand elements in Kanzi's promotions: exotic colours, African inspired design and international photography. The main tag line of Kanzi is 'Apples from Kanzi'. Kanzi creates brand associations by using these African inspired brand elements as secondary sources.

All the campaign materials are consistent in their message, from packaging and displays till posters and flyers. Temptation and indulgence are central themes in the marketing and promotion material (Fruitmasters, 2012a).

#### **Measure and interpret brand performance**

GKE had multiple agencies who measure brand performance for Kanzi. After a period of TV commercials, the specific TV channel will measure the results of the campaign for them. That will help GKE to get to know their customers and to measure their brand awareness. GKE also works with social media to measure brand performance. On average, there is a large sales increase after promotion activities, so demand from the retailer is also a good measure of brand performance (Kampschoër, 2012).

#### **Increase and sustain brand equity**

The Kanzi apples are expanding to countries outside Europe, it's becoming a world player in the apple market. The Kanzi apple is already available in the U.S., Australia, Chile and other parts of the Southern Hemisphere (Snoei, 2011). The long term strategy of Kanzi is to build a year round concept within 10 years. A year round concept means that Kanzi is not influenced by seasonality anymore, the apple can be offered the whole year, through import and export from different countries. To realize this goal, it is important to expand to the Southern Hemisphere, to countries such as South Africa and New Zealand (Kampschoër, 2012).

### 9.1.2 Brand equity

Urs Luder, director of GKE NV, noticed in 2011 that the volume of Kanzi increased each year since its start in 2005. From 2010 to 2011, there was a volume increase on European level of 30%. This increase is due to both an increase in acreage and an increase in volume per tree. Urs Luder stated that they have noticed that consumers value the brand Kanzi and that the Kanzi apple has found his place. Consumers are currently in a phase where they specifically ask for the Kanzi apple brand (Snoei, 2011). The Kanzi apple thereby provides a good price for the grower, which is in fact the main driver of club success, since the club concept is started as a response on the low revenues of free varieties for growers (Kampschoër, 2012). Based on all factors mentioned above, it can be concluded that Kanzi has a high brand equity.



## 9.2. Greenstar

### 9.2.1. Cooperative brand management

#### **Brand positioning and values**

GKE has not yet found an optimal way to position the Greenstar apple as an apple with high added value compared with its competition (Kampschoër, 2012). The apple does have potential, since it has a high vitamin C level and since the pulp will keep his white colour after cutting it (Fruitmasters, 2012 ; Kampschoër, 2012). However, Leonard Kampschoër noticed that the concept of Greenstar is not strong enough, an example is that the apple is called Greenstar but the peel becomes yellow. As a result, GKE is not really focusing on Greenstar at the moment, an option could be to restyle the concept somewhere in the future.

#### **Brand marketing campaign**

The tagline of Greenstar is: 'Nature's ultimate refreshment'. The Greenstar is presented as a fresh and juicy apple. The central theme of Greenstar's promotion is the refreshing power of the green apple. The focus of the promotion is on the fresh look of the apple, the thirst quenching qualities, the high level of vitamin C and the fact that the pulp will keep his colour after cutting it (Fruitmasters, 2012). However, there are not much marketing campaigns for Greenstar since GKE is currently not focusing on Greenstar (Kampschoër, 2012).

#### **Measure and interpret brand performance**

Since there are currently no marketing campaigns for Greenstar, they are also not measuring brand performance (Kampschoër, 2012).

#### **Increase and sustain brand equity**

The popularity for Greenstar on the market for fresh fruit preparation, the fruit service and the restaurants is increasing (AGF.nl, 2012). However, the development of the Greenstar apple is too expensive to only focus on such a niche market. So they will not specifically start focusing on this niche market (Kampschoër, 2012). As mentioned before, GKE does not have a clear long-term strategy for Greenstar. An option is to restyle the concept in the future, but it is not sure whether this is going to happen.

### 9.2.2. Brand equity

Greenstar does not have a high brand equity currently. Since GKE is not focusing its activities on Greenstar, they also do not expect Greenstar to have a high brand equity.

## 10. Analysis results

### 10.1. Differences between Inova Fruit and GKE NV

Underneath there are tables displayed which are summarizing the results and which give a good representation of the differences between Inova Fruit and GKE NV.

Organization club varieties	Inova Fruit	GKE NV
Owner of varieties	No	Yes
Controlled growth	No	Yes
Fixed middle price	No	Yes
Control of quality	Yes	Yes

Table 5: Results organization club varieties

After analysing the table above, it can be stated that Inova Fruit lacks in some crucial factors in order to be a good working club. They are not the owner of one of their varieties and they did not let the amount of trees grow according to market demand. Which results in overproduction and a lower price for growers. There are thereby no agreements between sales organizations about prices for growers. GKE does succeed on these factors. Inova Fruit and GKE NV both say they have a central control of quality, however it's not sure how extensive these controls are.

Brand management organization structure	Inova Fruit	GKE NV
Brand manager	Yes	Yes
Marketing agencies	Yes	Yes
Clear communication through channel	No	Yes
Consistent brand policy	No	Yes

Table 6: Results brand management organization structure

Both companies work with brand managers and marketing agencies. However clear communication through the channel about brand management decisions seems to lack at Inova Fruit, as well as a consistent brand policy since they also allow retailers to put their name on the brands of Inova Fruit. GKE NV is clearly communicating brand decisions through the channel and they do have a consistent brand policy, since everything is decided by the club.

Cooperative brand management	Inova Fruit Junami	Inova Fruit Rubens	Inova Fruit Wellant	GKE NV Kanzi	GKE NV Greenstar
Clear brand positioning and values	Yes	Yes	Yes	Yes	No
Consistent brand marketing activities	Yes / No	Yes	Yes / No	Yes	Yes
Clear measures and interpretation of brand performance	Yes	Yes	?	Yes	No
Clear long term strategy to increase brand equity	No	No	No	Yes	No

Table 7: Results cooperative brand management

As seen above in table 7, both clubs are pretty successful in brand management. They both have formulated a clear brand positioning for their brands and they designed a consistent brand marketing campaign. The only inconsistencies of Inova Fruit is that they allow retailers to put their logo on the Junami packaging and that they allow home sale of Wellant. This could have a negative effect on the consistency of their marketing activities. Greenstar is the only brand that is not succeeding in brand management at the moment, but GKE NV acknowledges that and they are currently focusing on Kanzi instead of Greenstar. So they also don't expect Greenstar to perform well. All brands from Inova Fruit seem to lack a long term strategy, it looks like there is no clear vision for the future. Kanzi is the only brand with a clear strategy for the future.

Strong brand	Junami	Rubens	Wellant	Kanzi	Greenstar
High perceived brand equity	Yes	No	?	Yes	No

Table 8: Results strong brand

Since there was not enough information available about all the specific brand equity factors, the brands are analysed by perceived brand equity in general. Junami and Kanzi seem to have a pretty high brand equity, since they have a high awareness, high sales and a good price for the growers. Rubens has a low brand equity since there is overproduction of Rubens apples and the price for growers is low. There is not enough information available about Wellant, so it cannot be stated whether they have a high brand equity.

## 10.2. Clubs vs. regular companies with optimal branding and clubs vs. the horticulture sector

Underneath, important differences between the clubs and an general company and the club and the horticulture sector are described.

### 10.2.1. Organization structure of brand management and marketing

#### **Differences with a regular company with optimal branding**

Both clubs and regular companies often work with brand managers and external marketing agencies. However, it is even more important for clubs to clearly communicate decisions involving the brand through the chain, since different sales organizations need to cooperate with each other and because different growers are the producers of the product. It is thus important to involve club members in the decision making of the brand and to keep them up-to-date.

Also since different sales organizations are selling the club apples to different retailers, it is more important for clubs to have and communicate a consistent brand policy with clear rules about the brand. This is different in a regular company, since they are often the only ones selling the brand. It is of course still important to have a consistent brand policy, but it's less likely to go wrong since everything is more centrally organized within a general company.

#### **Differences between the club and the product board horticulture.**

The main difference between the clubs and the product board horticulture is that growers and sales organizations can choose whether to get involved in a club. Since the Product Board is an organization by public law, everybody in the horticulture sector is obligated to pay for it, even if you're not interested. Another difference is that the Product Board makes promotion for the total sector, not only for certain products. The club specifically focuses on their brand(s).

### 10.2.2. Brand management and marketing

#### **Differences with a regular company with optimal branding**

There are not much differences in brand management between clubs and a regular company with optimal branding. They are both formulating a brand positioning and their values and they are both designing consistent marketing campaigns. One club (Inova Fruit) seems to lack in measuring brand performance and formulating a long term brand strategy compared with a regular company with optimal branding.

Another difference can be found in the measures of brand equity. Next to the general measures such as loyalty and awareness, there is one other important measure for clubs: the price which growers receive for their apples.

### **Differences between the club and the horticulture sector**

The marketing in the horticulture sector is completely different from the branding in clubs. The marketing organised by the Product Board is only focusing on general product promotion, so it could promote the apple in general, but not a specific variety. By branding in a club, a specific variety is promoted, in order to stimulate sales of that specific variety. So the goal of promotion from the Product Board is to create general product and sector awareness and the goal of clubs is to increase brand equity.

Another way of marketing in the horticulture sector is the use of labelling. In chapter 2.2.2. all the important differences between labels and brands are described. The most important difference is that it is not the main goal of a label to influence the meaning and the perception of the consumer, their main goal is to inform consumers and other parties in the chain. This is contradictory to a brand since the goal of a brand is to influence the meaning and the perception of the consumer, in order to create high brand equity. Also a brand is unique and a label is not, since it can be used by other parties in the chain as well.

## 12. Conclusion, discussion and recommendation

Before drawing conclusions on the research questions, the main research question and the sub-questions will be repeated:

*Is it possible to create and sustain brands in the Dutch horticulture sector?*

1. What are the criteria for organizations to create a strong brand?
2. How is marketing organized in the Dutch horticulture sector?
3. What are the most occurring dilemma's when branding fresh horticultural food?
4. How is the branding of Dutch apples organized in order to deal with these dilemma's?
5. How is brand management organized in the Dutch apple clubs?

### 12.1. Conclusion

The conclusion will be formulated by first answering the sub questions and in the end answering the main research question.

#### **1. What are the criteria for organizations to create a strong brand?**

A strong brand is based on brand equity which consists of the factors: brand name awareness, brand loyalty, perceived quality and leadership, brand associations and market behaviour.

The first criterion to gain a high brand equity is to successfully manage the brand, in a regular company this is mainly done by working with brand managers and external marketing agencies. The second criterion is to follow a strategic brand management process: identify and establish brand positioning and values, plan and implement brand marketing campaigns, measure and interpret brand performance and increase and sustain brand equity.

#### **2. How is marketing organized in the Dutch horticulture sector?**

Marketing in the Dutch horticulture sector is mainly based on general product promotion which is organized by the Product Board Horticulture. The product board is an organization by public law, which means that all companies in the horticulture sector are obligated to financially contribute to common activities. But, the Product Board horticulture is currently renewing its organization and will therefore stop investing in market activities such as product promotion after 2012.

Another way of marketing in the Dutch horticulture sector is by using labels. However, labels mainly contain positive information for other organizations in the chain, consumers often don't gather a lot of useful information from it. And it can thereby be used by competitors as well, it is not unique.

### **3. What are the most occurring dilemma's when branding fresh horticultural food?**

The main dilemma is that most horticulture companies are small sized firms. The costs for the development of a brand and the promotion campaign will be too high for a single agricultural company and small companies will thereby be unable to supply necessary quantities to cover a complete market segment.

When deciding to cooperate within the chain, a new dilemma is whether to horizontally or vertically cooperate. Horizontal cooperation is necessary to produce enough volume. Vertical cooperation is rare, but could be the result of an already existing cooperation and base of trust. A second dilemma when deciding to cooperate within the chain is the quality guarantee for consumers, which they expect from a branded product. These two dilemmas are part of the main dilemma when deciding to cooperate in order to develop a brand: how to organize this cooperation? This also includes whether to work with brand managers and marketing agencies, and how to involve all the companies in the brand decision making.

### **4. How is the branding of Dutch apples organized in order to deal with these dilemma's?**

To deal with the first dilemma, different companies within the horticultural chain are cooperating to create a brand. A specific focus in this research is on branding through clubs. The club is a vertical way of cooperation within the chain, with growers and different sales organizations. The club implements different measures to control difficulties such as a consistent quality. Examples of these measures are a controlled growth in order to keep the price high, a centralized quality control in order to assure consistent quality and a fixed middle price for growers. The organization consists of brand managers and marketing agencies, and includes clear communication about brand decision making to all members of the club. A club also creates a consistent brand policy for all members of the club and all other parties involved, such as retail.

### **5. How is brand management organized in the Dutch apple clubs?**

The two Dutch apple clubs studied in this research are Inova Fruit and GKE NV. Both Inova Fruit as GKE NV are working with brand managers and a marketing agency to manage their brands. Since multiple sales organizations are working together in clubs, it is important to involve them in decision making around the brand and to communicate decisions clearly through the channel. This is better organized at GKE NV than at Inova Fruit, since Inova Fruit is not involving the sales organizations in marketing decisions.

Each club follows the necessary steps of brand management; they have a clear positioning of their brands, a consistent marketing campaign and most of them measure brand performance to keep on track. GKE NV also has a consistent marketing policy, with strict rules for their brands. Inova Fruit is a little bit less strict in their marketing policy, especially towards retailers.

**Main research question:**

***Is it possible to create and sustain brands in the Dutch horticulture sector?***

By reviewing the five cases in this research and comparing them with each other, with the horticulture sector and with regular companies with an optimal way of branding, it can be stated that it is possible to create strong brands in the horticulture sector through clubs.

However, not all cases seem to succeed in sustaining their brand. A critical factor for clubs to sustain their brand seems to be the organization of their club. GKE NV appears to be a much stricter and better organized club as the official owner of their varieties, with a controlled growth, good communication to all parties involved with the brand, a fixed middle price for growers and a clear strategy for the long term for Kanzi. Inova Fruit is not the official owner of all their varieties, they didn't control growth, they seem to lack in clear communication through the channel and they don't have a fixed middle price for their growers. Since Inova Fruit didn't control growth, some sales organizations have planted too many new trees of some varieties, this resulted in overproduction. Since supply is higher than market demand; sales prices decrease, the price for the growers decreases and Inova Fruit doesn't offer an exclusive product to the customer anymore. This makes it hard to sustain a high brand equity for their brands.

Thus, club organizations are able to create apple brands in the Dutch horticulture sector, however, to sustain a club apple brand on the long term, ownership of the varieties and a strict organization seem to be crucial.



## 12.2. Discussion

### 12.2.1. Managerial implications

This research can be helpful for agricultural companies who are interested in branding their fresh products, since it gives a good overview of all the necessary steps that need to be taken.

It will especially be helpful for organizations who consider to enter or to start a club organization. The research makes clear that it is important for a club to own the brand and to have a very strict organization from the beginning. If not, it could be harder to sustain the brand on the long term.

### 12.2.2 Limitation research and suggestions for future research

Although this research has been conducted as complete as possible in order to answer the research questions, some points are up for discussion.

A first remark concerns the amount of literature about branding in horticulture. Since this is a new and recently upcoming trend, not much research has been done. As a result, this research had to deal with a lack of literature about branding in the horticulture sector and about the organization of clubs. Therefore, also non-scientific information is used such as industry papers and sector research. It would be interesting for researchers to further research the topic of branding horticultural products, since it is a trend that is still growing. There are thereby also other apple clubs in the world that were not taken into account in this research, it would be interesting to study these as well.

A second remark concerns the fact that only one person is interviewed, which is due to the limited time and resources available during this research. Leonard Kampschoër is definitely an expert with a lot of knowledge about the subject of this research, but he does have a strong preference for Kanzi. It could be that this has led to a distorted picture of the situation. However, the information derived from the interview is processed in the results with high cautiousness and objectivity. Also, since only one person is interviewed, some information lacked. As a result, some measurements were not completed.

The third remark concerns the measurement of brand equity. It has not been easy to determine the successfulness of the brands by measuring brand equity. Since no research with consumers has been done, this research mostly relied on secondary data and the opinion of one expert. It would be interesting to perform a market research, to research the real added value of branded apples and each brand for consumers. Since consumers are, together with the price for the growers, the most important aspects of brand equity for club apples.

The fourth remark concerns the fact that this research has particularly focused on cases of branding through clubs, while there are also other forms of cooperation within the chain which create brands, such as the horizontal cooperating growers of Tasty Tom. It could be interesting to look at the different organizational forms of cooperation to develop a brand within the horticulture chain. This could map all the advantages and disadvantages of the different organization structures of branding horticulture fresh food.

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## Appendix I

### I. Interview Leonard Kampschoër, Director Koninklijke Fruitmasters Groep

1. Zou u mij de gehele organisatie/keten rondom GKE NV willen uitleggen?

*Mijn idee over EFC NV: EFC (European Fruit Co-operation) betaalt Better3Fruit licence fees. EFC wordt dan min or meer eigenaar van de appels. GKE is verantwoordelijk voor de wereldwijde productie en marketing van Greenstar en Kanzi. GKE werkt samen met verschillende licentie partners. Zij betalen GKE een licence fee. Vervolgens kunnen de telers die de appels willen telen een contract afsluiten bij een van deze licentie partners.*

- a. Wie is er verantwoordelijk voor productie van de bomen, kwaliteitscontrole, promotie, marketing en verkoop?
  - b. Wie heeft de eind verantwoordelijkheid van het merk en wie is de eigenaar van het merk?
2. Hoe is het brand management binnen GKE NV georganiseerd?
    - a. Is er een brand manager per merk?
    - b. Hoe gaat de samenwerking met het externe marketing bureau? Voor welke activiteiten schakelen jullie hen in? Alleen voor bijvoorbeeld marketing campagnes of ook voor de positionering, brand elements etc. (outsourcing)
    - c. Worden alle besluiten rondom het merk gecommuniceerd binnen het bedrijf en naar andere belanghebbende in de keten (telers)?
  3. Wat is de huidige strategie voor Greenstar?
    - a. Wat is de doelgroep?
    - b. Wat zijn de kern merk associaties die GKE NV wil creëren voor Greenstar?
    - c. Is er een consistente marketing campagne?
  4. Hoe wordt de sterkte van de merken van GKE NV gemeten?
    - Naamsbekendheid
    - effect campagnes
    - consument informatie
    - associaties die personen met je merk hebben
  5. Wat is de lange termijn visie van elk merk?
    - a. Kanzi → Internationale speler
    - b. Greenstar → waarom geen supermarkt appel?

6. Waaruit blijkt voor jullie de waarde van jullie merken voor de organisatie?

Opties:

- Naamsbekendheid van het merk (awareness)
- De associaties, of het beeld, dat de consument van het merk heeft (associations)
- Merkgetrouwe consumenten, bereid een hogere prijs te betalen? (loyalty)
- Kwaliteit en marktleiderschap (Perceived quality)
- Marktgedrag: marktaandeel, prijs en marge (market behaviour)
- Anders, ....