



# UNIVERSIDAD DE ALMERÍA

Vicasol, the improvement of a brand process  
and its relevance and positioning in the  
European market.

Author: German Fernandez Hidalgo  
Advisor: Jose Manuel Ortega Egea

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## **1. Introduction**

Which is the definition of a brand? A brand is the set of expectations, memories, stories and relationships that, taken together, account for a consumer's decision to choose one product or service over another. If the consumer (whether it's a business, a buyer, a voter or a donor) doesn't pay a premium, make a selection or spread the word, then no brand value exists for that consumer.

A brand's value is merely the sum total of how much extra people will pay, or how often they choose, the expectations, memories, stories and relationships of one brand over the alternatives.

A brand used to be something else. It used to be a logo or a design or a wrapper. Today, that's a shadow of the brand, something that might mark the brand's existence.

As the brand that defines the organization that will deliver and stand behind the offering, the corporate brand is defined primarily by organizational associations (David A. Aaker, 2005).

According to Aaker (2005), the brand building process is a complicated one which is not always a priority for business, particularly in their early years when funding may be limited.

After all what is a strong brand? According to Mary J. Kay (2005) reasoning about brand management is largely shaped by paradigmatic examples. Branding is not rooted in theory, in the strict sense. Instead, paradigmatic examples or strong brand cases illustrate what "happens" to a brand and how it is formed. In fact the evidence for the strength or power of the brand is made by the success story of the brand.

Yet the brand is not the same as a story or narrative; and the brand is not the same as the corporation that created it. Instead, the story is used to explain how brand hold power or strength by creating associated meanings in the minds of consumers. Strong brands have come to define the field of branding. Management principles to managing brands in the marketing literature are primarily based on analogies to strong brands.( Kay, 2005).

According to Kay (2005) powerful brands are culturally significant; they require analysis with a different type of logic, a logic that considers varying social and cultural contexts and the formation of "deep" or "rich" meanings. Analyses of brand meaning in this cultural sense can be drawn from sources such as semiotics, literary criticism, sociology, popular culture, and cultural studies. Holt (2004) goes so far to propose that these strong brands are akin to myths, powerfully interacting with identity formation.

Management practices in relation to this view of powerful brands have also changed. Since brands are part of the popular imagination, they need to be cultivated in movies, music, and within other popular cultural products. Product placement within cultural products has certainly become an important strategy in managing certain brands – product placement is much more than an alternative to traditional media advertising. The goal is to keep consumers actively engaged with the brand and to cultivate meaning.( Holt, 2004).

The branding process, in effect, the brand's "strength," is built on a definite "logic"for each brand. In this sense, branding appears to have rules, but the branding literature provides elusive advice to managers.

A successful branding program is based on singularity. It creates a consumer perception that there is no product or service on the market quite like yours. Greg Stine opines that there are nine branding principles. In his studies he has identified nine fundamental qualities of a good branding program. There are:

1. Keep It Simple: one big idea is best.
2. Mass-produced word of mouth (PR) builds brands.
3. Focused brands are more powerful than diffused brands.
4. Somehow, some way, you have to be different.
5. The first brand in a category has a huge advantage.
6. Avoid sub-brands at all cost.
7. Quality is important, but not as important as the perception of quality.
8. Be consistent and patient. Building a strong brand takes time.
9. Put your brand definition in writing, otherwise you'll get off course.

One of the most important questions for entrepreneurs is: How to build a strong brand? Then according to Aaker (1990), building a strong brand is a management priority, then how is this best accomplished? Developing the strength of a brand is not deemed to be easy. The branding literature suggests that more advertising does not always or necessarily strengthen a brand, particularly brands that are badly positioned, associated with inferior products and services, or in cases where behaviors associated with products and services are thought to be in a state of change. Branding requires extensive analysis of market positioning, yet both the methods of analysis and the rules to follow in making branding decisions can be daunting tasks for managers.

Branding and brand positioning are one of the most important strategies that a company can manage. In order to have good results, horticultural companies that tried to survive in our saturated market, need special methods to differentiate its products .

Keller tells us that good brands are no accidents. They are a result of thoughtful and imaginative planning. Anyone building or managing a brand must carefully develop and implement creative brand strategies. To aid in that planning, three tools or models are helpful. These are:

1. Brand positioning model describes how to establish competitive advantages in the minds of customers in the marketplace;

2. Brand resonance model describes how to create intense, activity loyalty relationships with customers;

3. Brand value chain model describes how to trace the value creation process to better understand the financial impact of marketing expenditures and investments.

Collectively, these three models help marketers devise branding strategies and tactics to maximize profits and long-term brand equity and track their progress along the way.

Positioning is the act of designing the company's offering and image to occupy a distinctive place in the minds of the target market.

There are four key components to a superior competitive positioning:

- 1) A competitive frame of reference in terms of the target market and nature of competition;
- 2) The points-of-difference in terms of strong, favorable, and unique brand associations;
- 3) The points-of-parity in terms of brand associations that negate any existing or potential points-of-difference by competitors;
- 4) A brand mantra that summarizes the essence of the brand and key points-of-difference in 3-5 words.

Keller and Lehman think that brand positioning "is the act of designing the company 's offering and image that occupy a distinctive place in the mind of the target market. The end result of positioning is the successful creation of a customer focused on value position, a cogent reason why the market should buy the product."

By "positioning," we mean quite simply the message a company wants to imprint in the minds of customers and prospects about its product or service—its brand—and how it differs from and offers something better than competitors. In an advertising context, positioning denotes a motivating, persuasively communicated message that gives targeted prospects a reason why they should think of, act, and remember the advertised product as exclusively able to deliver meaningful benefits. (Kevin J. Clancy, 2001).

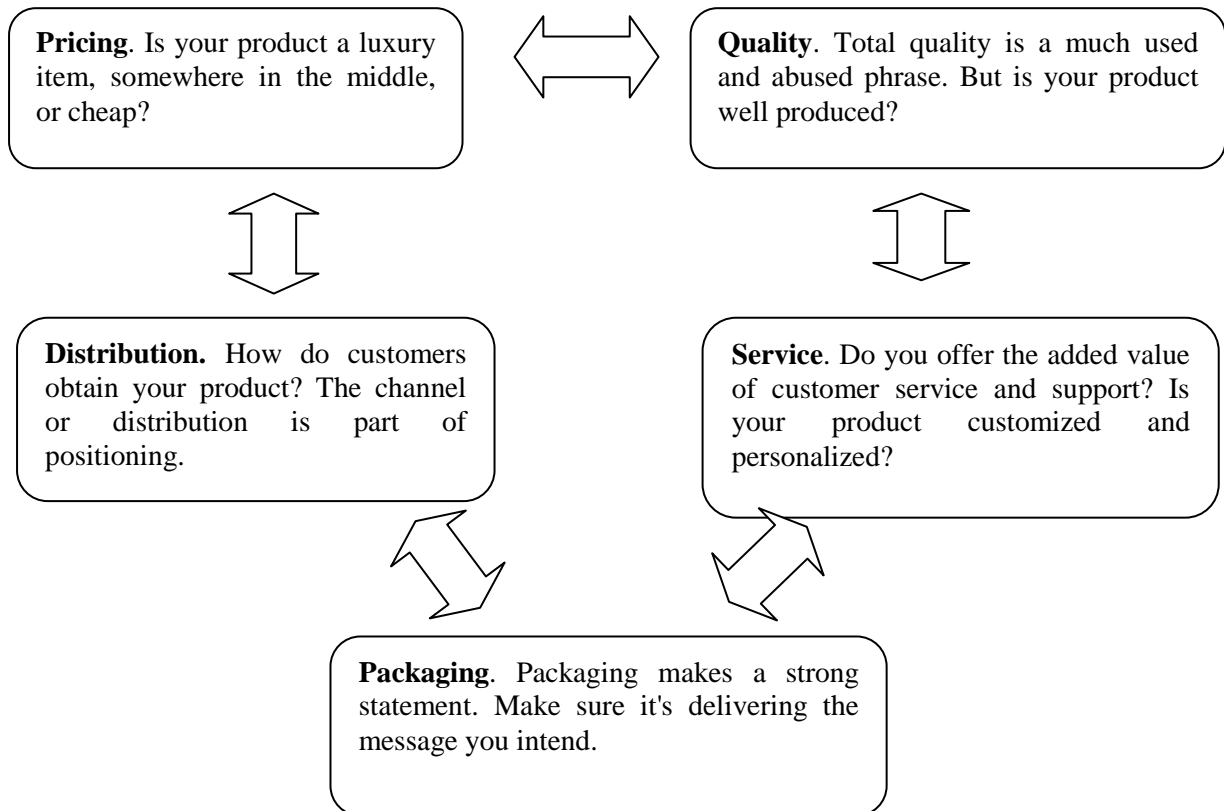
We try to improve and shape the preferences of our customers by using the brand positioning in order to create a higher loyalty and willingness to our brand than before. That's why they say that the branding is really important because it can help us to build a relationship, based on trust, respect and consistency with our customers.

There are three different types of brand positioning:

- 1) Intended positioning is the process of how we try to have our brand perceived by the target consumers and the way we are doing it.
- 2) Actual positioning is the part when we use different marketing communication tools in order to advertise and promote the aim of creation a brand position in the market.
- 3) Perceived Positioning is when our company was able to finish our brand, and when we realized to make our customers to see the company brand as we expected to see it. (Bhat and Reddy, 2002).

Positioning is a powerful tool that allows you to create an image. And image is the outward representation of being who you want to be, doing what you want to do, and having what you want to have. Positioning yourself can lead to personal fulfillment. Being positioned by someone else restricts your choices and limits your opportunities.

That's why it's so important for entrepreneurs to transform their passion into a market position. If you don't define your product or service, a competitor will do it for you. Your position in the market place evolves from the defining characteristics of your product. The primary elements of positioning are:



## 2. Brand Resonance

As we said before the corporate brand (or, more generally, an organization brand) can be dialed up to play a more prominent role in the brand portfolio. The corporate brand defines the firm that will deliver and stand behind the offering that the customer will buy and use. The brand has access to organizational as well as product associations and the flexibility to play several roles within the brand portfolio. Of most significance is its potential in some contexts to be a master brand with a significant driver role. (Aaker, 2004).

Building a strong brand can be thought of in terms of a sequence of steps, in which each step is contingent on successfully achieving the previous step.

- 1). Who are you? (brand identity)
- 2) What are you? (brand meaning)
- 3) What about you? What do I think or feel about you? (brand responses)
- 4) What about you and me? What kind of association and how much of a connection would I like to have with you? (brand relationships)

Performing the four steps to create the right brand identity, brand meaning, brand responses, and brand relationship is a complicated and difficult process. To provide some structure, it is useful to think of sequentially establishing six “brand building blocks” with customers. To connote the sequencing involved, these brand building blocks can be assembled in terms of a brand pyramid.

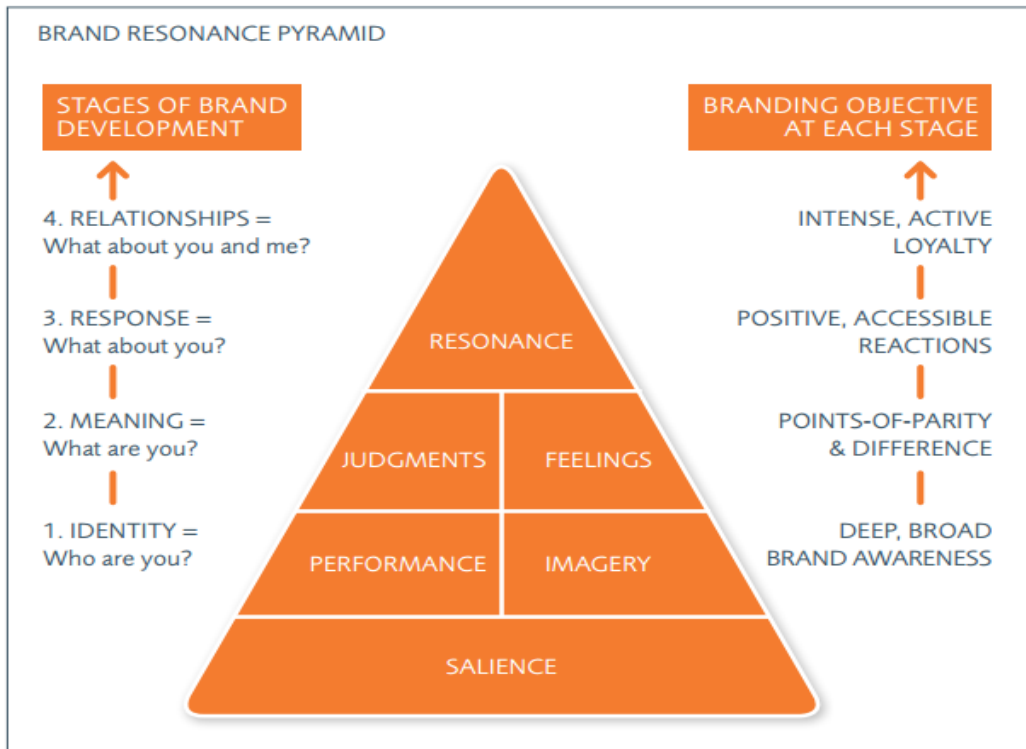


figure 1

Source: Brand Resonance Pyramid (elaborated by Kevin Lane Keller, "Brand Planning", published by "Shoulder of Giants", June 2009).

According to Keller (2009), if we want to have a successful brand identity we need to have into consideration:

**Brand salience** relates to aspects of the awareness of the brand, for example, how often and easily the brand is evoked under various situations or circumstances.

**Brand meaning** is made up of two major categories of brand associations that exist in customers' minds related to performance and imagery, with a set of specific subcategories within each.

These brand associations can be formed directly (from a customer's own experiences and contact with the brand) or indirectly (through the depiction of the brand in advertising or by some other source of information, such as word of mouth). These associations serve as the basis for the positioning of the brand and its points-of-parity and points-of-difference. Creating strong, favorable, and unique



associations and the desired points-of-parity and points-of difference can be difficult for marketers, but essential in terms of building brand resonance.

Keller opines that strong brands typically have firmly established favorable and unique brand associations with consumers.

**Brand responses** refers to how customers respond to the brand and all its marketing activity and other sources of information—that is, what customers think or feel about the brand. He thinks that brand responses can be distinguished according to brand judgments and brand feelings, that is, in terms of whether they arise from the “head” or from the “heart.”

**Brand judgments** focus on customers’ personal opinions and evaluations with regard to the brand. Brand judgments involve how customers put together all the different performance and imagery associations of the brand to form different kinds of opinions.

**Brand feelings** are customers’ emotional responses and reactions with respect to the brand. Brand feelings also relate to the feelings that are evoked by the marketing program for the brand or by other means?

**Brand resonance** refers to the nature of this relationship and the extent to which customers feel that they connect with a brand and feel “in sync” with it. With true brand resonance, customers have a high degree of loyalty marked by a close relationship with the brand such that customers actively seek means to interact with the brand and share their experiences with others.

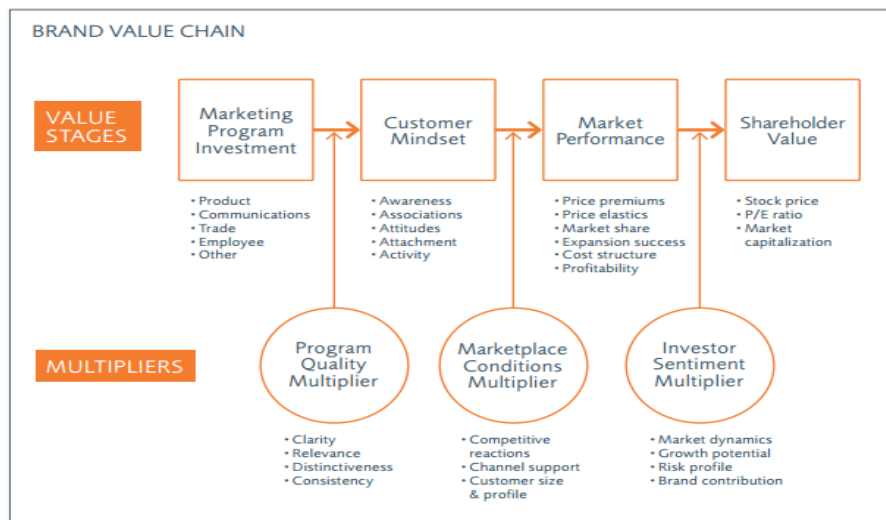


figure 2

Source: Brand Chain Value ((elaborated by Kevin Lane Keller, "Brand Planning", published by "Shoulder of Giants", June 2009).

### 3. Brand Positioning Strategies

Your brand positioning is the “space” that your services and solutions occupy in the minds of your target audience. The right positioning incorporates strong values and differentiators that are important to your customers. Brand positioning is important in deciding where you want to position your brand within its category and relative to the competition. Brand Positioning permeates virtually everything we do. It is the foundation to all communications and brand strategy. It is the disciplined thinking that guides the basis for building relationships between brands and customers.

Once you determine the way in which you can reach your market, the next thing to look at is how you are going to lure your customer to try your brand.

Here is a list of nine positioning types you can think of before deciding on which one you will attach to your brand:

## **1. Quality positioning**

Perception of quality is probably one of the most important elements for a brand to have and can be combined with any of the other prompts below.

Quality, or the perception of quality, lies in the mind of the buyer. Build a powerful perception of quality, and you will succeed in creating a powerful brand. Al Reis and Laura Reis, authors of "The 22 Immutable Laws of Branding" say the best way to increase perception of quality is to narrow the company's focus. When you narrow a product's focus, they explain, you become a specialist rather than a generalist, and a specialist is perceived to know more, or be of "higher quality" than a generalist.

Another way to build the perception of high quality is to simply attach a higher price tag to your brand. Most people think that they know a high quality product from another, but in reality, things are not always as they seem.

Believe it or not, high price is a benefit to some customers. It allows the affluent consumer to obtain psychological satisfaction from the public purchase and consumption of a high end product. Of course, the product or service does need to have some perk or difference to justify the higher price.

## **2. Value Positioning**

Although at one time, items that were considered to be a good "value" meant that they were inexpensive, that stigma has fallen by the wayside. Today, brands that are considered a value are rising in popularity amongst consumers. Southwest Airlines is probably the best example of how a company has been able to offer discount prices and still keep a strong brand identity. In fact, most of the other major airlines have followed Southwest's lead by rolling out value-priced flights under new, co-branded names.

## **3. Feature- Driven Positioning**

More marketers rely on product/service features to differentiate their brands than any other method. The advantage is that the message is clear, and the positioning will be credible if you stick to the facts about the product. Unfortunately, feature-orientated stances are often rendered useless if the competition comes out with a faster or more advanced model.

## **4. Relational Positioning**

One of the most effective ways to create interest in a brand is to send out a positioning prompt that resonates well with potential buyers. For instance, Sketchers equates sneakers with cool and that

characteristic passes to all who wear them. Apple computer, which was down on its luck in the overall computer marketplace, started asking computer users to liberate themselves from the PC camp and” Think Different.” These brands have achieved positioning based on who buys what they sell, not solely by what they sell.

### **5. Aspiration Positioning**

These are positioning prompts that offer prospects a place they might like to go, or a person they might like to be, or a state of mind they might like to achieve.

### **6. Problem/solution positioning**

As the name implies, problem/solution prompts show the consumer how a sticky situation can be relieved quickly and easily with the brand or service. What problem/solution campaigns lack in imagination, they usually make up for in directness and credibility. For example, frozen meals cut meal preparation time to minutes. Detergents and cleansers also make good use of these prompts.

### **7. Rivalry -based positioning**

By definition, positioning deals with how one brand is thought of compared to its obvious competitors. Therefore, the idea of a rivalry-based position might seem redundant but many campaigns take this approach. Laundry detergents, for one, are constantly going head-to-head to prove which one has the most power to lift stains.

### **8. Warm and fuzzy Positioning**

Underneath our capitalist driven needs to consume, we are still docile and emotional animals. As such, many marketers play on our feelings. In the book, *Building Brand Identity: A Strategy for Success in a Hostile Marketplace*, author Lynn Upshaw writes, “How people feel about a brand is oftentimes need- or desire based, which means that emotional or psychological approaches can oftentimes be very effective as positioning prompts.”

### **9. Benefit -Driven Positioning**

Other brands base their entire positioning on the fact that they give back to the consumer. Discover credit card, for instance tells customers that “It Pays to Discover.” Use the card and get money back. Discover was among the first major credit cards companies to provide its users with a financial incentive for using their card.

#### **4. Vicasol, the growing company.**

Vicasol is an agricultural cooperative located in Vicar council in the he province of Almería. The company's goal is to plan and organize the member grows productions demanded by the European market and the consumers. Vicasol aims to sell the products and achieve the maximum economic performance.

Vicasol was founded in 1979 thank to the willingness to the group of growers in Vicar in order to sell their horticultural products outside the local market.

Initially Vicasol was created as an agriculture transformation society. Afterwards constituted as andalusian cooperative society.

Right from the start this company had one clear philosophy: a job well done putting the trust on quality and growing the products demanded by their customers.

Since Spain entry into the European Economic Community a face of great growth begins for the cooperative.

In 1999 there was a generational change that allows the entry of new members. Then Vicasol was able to exceed 500 ha cultivated.

The merge with Almerisol cooperative in 2003 and the continuous cooperation of new growers had transformed the company in one of the most important companies in Almeria.

After a history, force and work and cooperation the company today still maintain the same spirit as the founders.

#### **4.1 Products and Brands**

Vicasol is a company that is always putting attention on its clients preferences. They pay attention to their products once harvested, and for this during processing and standardization they meet all European and International regulation on fresh produce (size, colour, maturity, labeling).

In VICASOL they rely on high level mechanization and the latest technologies for their product treatment in the vegetable sector. With an efficient use of productive resources, all their technology

Likewise, Vicasol achieve consideration with hygiene-sanitary norms, maximum quality products and greater competitiveness to their offer.

Vicasol is present in the European markets with brand names that enjoy great prestige, such as: VICASOL, ALMERISOL, VyP, VI-GREEN and PUEBLASOL.

We can differentiate these brands in two groups:

Premium:



Best quality of the product, color, taste, smell, weight and size fits perfect for the most demanding market. These kinds of products are delivering to wholesalers and big chains of supermarket such as Tesco or Sainsbury in UK.

Standard:

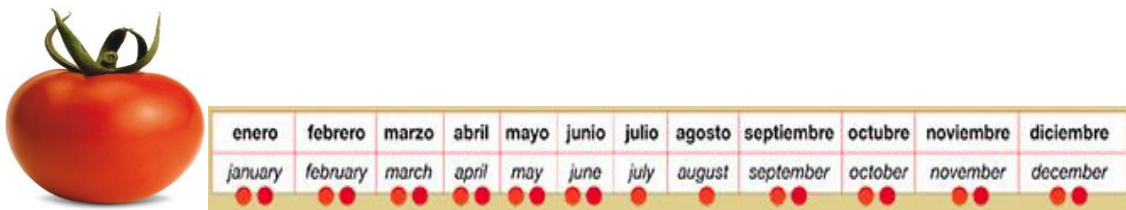


High quality of the product, but with some differences in packaging, presentation, not for demanding markets, these brands are orientated to deliver for hard-discount chains, such as Lidl and Aldi.

### 4.1.1 Tomato

Tomato is a very low caloric fruit with high water and mineral content such as potassium, magnesium and iron. They contain lycopene, one of the most powerful natural antioxidants. It is an important source of vitamins B1, B6, E, C, also a source of niacin and folic acid. It may be eaten raw or cooked it must have smooth skin.

When raw it has soft texture to taste, firm and with no granules. Its flavor is a balance between slightly acid and sweet.



Source: Vicasol, Monthly Tomato Productivity

### Plum tomato

Has the general characteristics of loose tomato but longer shelf life and more sugar content. Generally known to be more tasteful.



## Vine Tomato

Has the general characteristics of loose tomato but more sugar content than others. It's very gentle to palate.



### 4.1.2 Pepper

Pepper varieties are rich in C vitamin. Peppers contain flavonoids and carotenoids.

Peppers flavour may vary from one variety to another, they can be mild to hot, but never bitter. They have a crispy texture when raw and soft when cooked.



Hot peppers are rich in capsaicin, a compound which gives de characteristic flavour and with beneficial health effects.

enero	febrero	marzo	abril	mayo	junio	julio	agosto	septiembre	octubre	noviembre	diciembre
january	february	march	april	may	june	july	august	september	october	november	december

Source: Vicasol , Monthly Pepper Productivity



### 4.1.3 Melon

The melon is a high water, low calorie fruit. It contains B vitamin and is also a good source of vitamin C. This fruit has a characteristic sweetness and smell.



enero	febrero	marzo	abril	mayo	junio	julio	agosto	septiembre	octubre	noviembre	diciembre
january	february	march	april	may	june	july	august	september	october	november	december

Source: Vicasol, Monthly Melon Productivity

Melons have a pleasing flavour due to the sugar and water content. They are also very refreshing.

### 4.1.4 Aubergine

Aubergines have high water content and low carbohydrates, proteins and fats. Rich in B and K vitamins. They have high potassium content and small amounts of calcium, magnesium and phosphorus.



enero	febrero	marzo	abril	mayo	junio	julio	agosto	septiembre	octubre	noviembre	diciembre
january	february	march	april	may	june	july	august	september	october	november	december

Source: Vicasol, Monthly Aubergine Productivity

They must be tender and firm, smooth and shiny skin and uniformly colored. It is recommended to sprinkle salt when cooking them to eliminate bitterness and to obtain a denser flesh.

#### 4.1.5 Cucumber

Cucumbers have a characteristic delicate smell, especially when sliced. They have a mild fresh flavour and crunchy texture. This fruit has very high water content, 90% of its composition.



enero	febrero	marzo	abril	mayo	junio	julio	agosto	septiembre	octubre	noviembre	diciembre
january	february	march	april	may	june	july	august	september	october	november	december

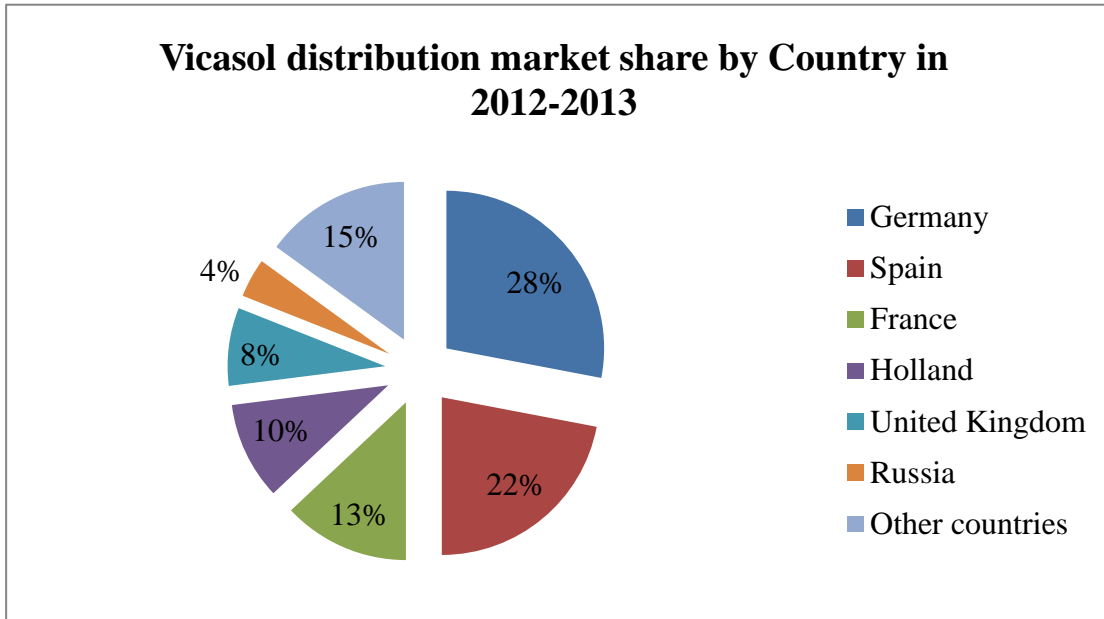
Source: Vicasol, Monthly Cucumber Productivity

Regarding vitamin content, it is high in A vitamin. Have beneficial effects on skin.

## 4.2 EU Markets captured by Vicasol

### 4.2.1 Market Analysis

Vicasol is working with different EU markets. We took in consideration the ones that we think are the most important as: Germany, United Kingdom, France and Holland.



Source: Vicasol own elaboration.

Agricultural Market and especially vegetables sector is characterized as one of the most demanding one because of its highly competitive and changing environment. In this sense we can say that Vicasol has competed against the obstacles that have arisen throughout history.

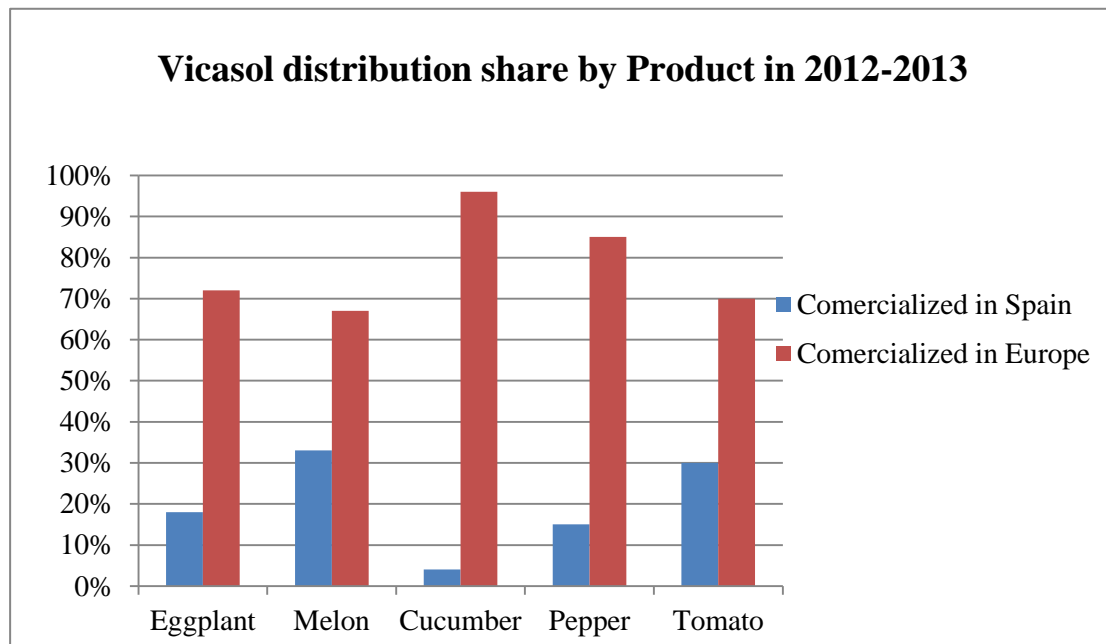
As we can see in the chart above, Vicasol focuses its exports to the European market, these values being higher than 70% beyond the Spanish borders. Clearly indicating the inclination towards an international market, positioning the brand, Vicasol, in mostly all the countries of the European continent. However, we can see how the market receives more than 20% of its fruit and vegetable production.

We must emphasize the importance of Germany as Vicasol products importer, as it is the country that product gets around 28%. This highlights the great work done by the sales and marketing department, which spends most of its budget to the promotion and customer loyalty, reaching in this way to

achieve objectives in the medium and long term, ensuring the continuity of the company in this market.

We also find other less important markets such as the UK, Holland and France, which are a third of the production company. Markets which have a deep presence as exporters in the European market, import many vegetables, emphasizing the great strength of the brand Vicasol in the international market.

Finally signal the presence of Russia as a new emerging market for distribution of vegetables from Almeria, reaching as large importer of horticultural products, as seen on the chart, in the past year and has sold 4% Vicasol product to Russian lands, mainly Moscow and St. Petersburg, the result of a promotion work carried out in previous years.

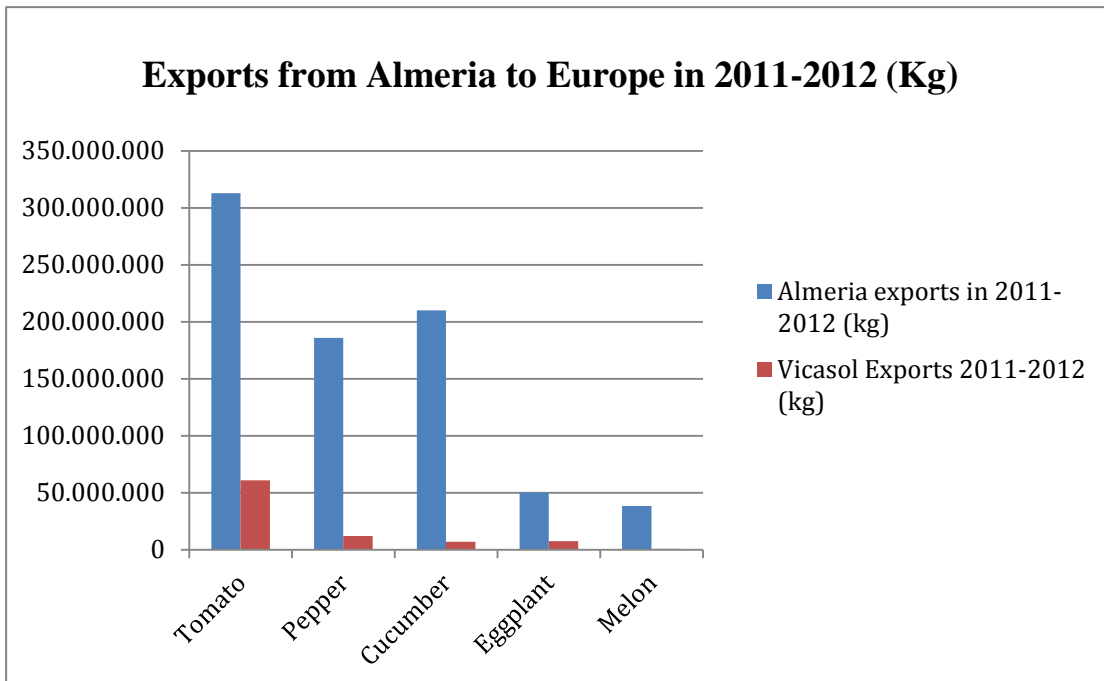


Source: Vicasol own elaboration.

The distribution share of the respective products Vicasol markets both locally and internationally is very significant, especially if we stop to analyze the data shown in the chart above, you can see how only 20% of marketed product remains in Spain, largely thanks to the tomato, the company's flagship product and main banner Vicasol seal off borders.

A highly emerges from these data is the case of cucumber, which is marketed almost entirely outside, like peppers, reaching over 80% share.

According to these data, the company has reached its highest peak export in its history, around 70% of their product has gone to European countries, while the growth forecast is that in the 2013-2014 campaign is reached 80%, with a predicted increase in the volume of kilos of up to 20%.



Source: Coexpfal anual exports chart.

Vicasol is a great reference exporter of vegetables, both nationally and internationally. As can be seen in chart number 3, thanks to the commitment made by the company to improve and increase production each year, Vicasol has covered 20% of exports of tomatoes that have been made in Almeria total field to the rest of Europe. Standing at the head of cooperatives increased market share abroad if we compared with the competitors.

#### 4.2.2 The German Market

Germany is the first European country in terms of population and GDP, and the second largest exporter . Apart from that geographical proximity and social status in the European Union make Germany a country whose importance to Almeria field is not necessary to point out .The Federal Republic of Germany is located in Central Europe . Its population is approximately 81.75 million people .

The German primary sector (agriculture, livestock and fisheries) occupies about 860,000 people, about 2% of the working population and generates about 1% of GDP. All of this, helps to make it one of the more valuable European markets for vegetable exports to Germany by the Almeria area and specifically for Vicasol .

As in the rest of the European Union , in Germany there has been a significant change in food consumption habits , with a growing inclination towards healthy products , including fruits and vegetables play an important German consumers attach great importance to the freshness and safety which has led to a growing interest in organic products .

According to research conducted in Germany in 1998 , in the basket of organic products in this market ( the second largest in the world after the United States) fruits and vegetables are the most demanded products by German consumers , who also are willing to pay up to 52 % more for these organic products. In the fruit and vegetable sections of supermarkets , customers value the presence of a wide assortment of items, a good presentation. The main aspects involved when making the decision to purchase are the taste , ease of use , the appearance, the price / quality and healthy characteristics of the product.

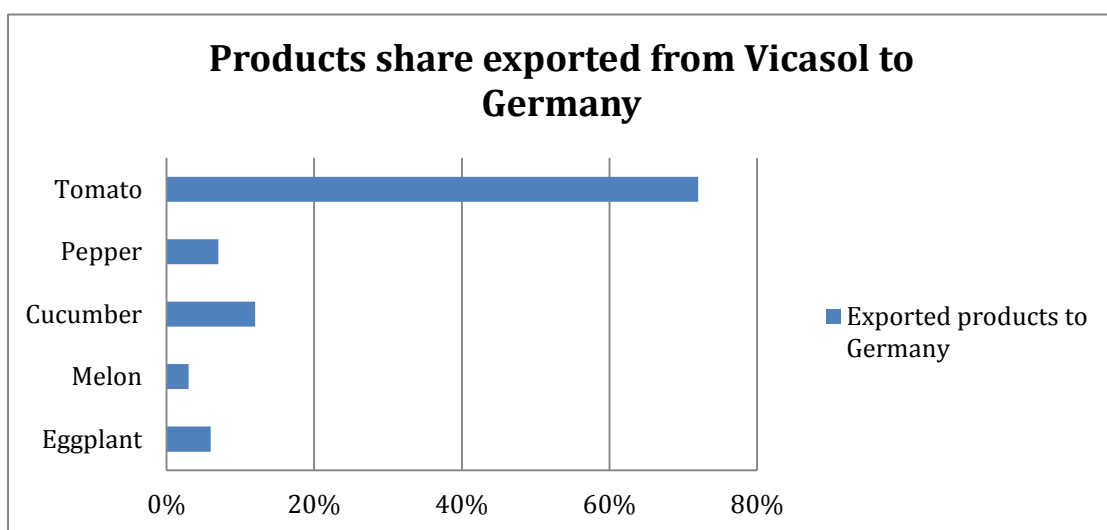
The distribution channels that Vicasol used to distribute their products in this market are differentiated into two main groups:

**Wholesalers:** hypermarkets , supermarkets and small businesses acquire certain products with the intermediation of wholesalers , although most of these have created their own shopping centers to ensure better provisioning and control costs.

**Agents and distributors:** the majority of imported products depend of import and distribution agents to access the German market. Agents place orders for goods and sign the documents exporters that represent , but do not usually take possession of the goods of their constituents .

These groups have their own substrings forming a pyramidal structure which includes stores in virtually all spectrum of channels ( hypermarkets , supermarkets , discounters , etc. . ) . Within this business philosophy fall hard-discount chains (Lidl , Aldi ) , DESOFT , discount ( Penny , Plus) , supermarket chains and hypermarkets (Metro , Tesco, Edeka) . That way if a producer seeking access to the German market through hypermarkets , the route will be through the central purchasing of large groups .

The main instruments of export promotion in Germany are the fairs. Germany is the leading country in world trade organization of events. The most important trade fair is taking place in Hannover , Frankfurt , Dusseldorf, Cologne, Munich , Berlin (Fruilogistica) and Nuremberg.



Source: Vicasol own elaboration.

#### 4.2.3 The English Market.

United Kingdom of Great Britain and Northern Ireland ( UK) was established under the called "Act of Union " ( 1800 ) and consists mainly of Islands British (except Ireland) . The largest of these islands is Great Britain , comprising the territories of England, Wales and Scotland. The other major island is Ireland , comprising Northern Ireland or Ulster (part of the Kingdom UK ) in the north, and south , the Republic of Ireland.

The UK is the third most populated country in the European Union (EU ) . The country has an estimated total population of 62 million people , which makes it the third most populous country in the

European Union. The British economy is the third largest in the EU after the German and French and sixth worldwide.

Agriculture represents only 0.7% of GDP. The UK is the third largest importer of fruit and vegetables worldwide and a major customer for Spain in this type of products. 14% of the Spanish exports of major horticultural products Murcia allocated to this market.

British consumption of vegetables remained stable since the late 80's around 38 kg per person per year, one of the lowest figures.

Europe, consumption being higher among women and among older people.

With respect to the main product horticulture in Almería highlights the consumption of tomatoes and, with a volume much lower, melon, cucumber and pepper. All except the cucumber, are products that the UK only produces, so accurate purchase beyond their borders, mainly in the area of Almería.

Spain is the leading supplier of vegetables in the UK exceeding 50% imports of tomatoes, zucchini, eggplant, cucumber and watermelon.

Fresh demand line has maintained a growth over the past years. As for the type of customer, we can say that the British consumer has traditionally been classified to be consuming quality and high prices, but this trend has changed a lot in recent years, since large surfaces have a great battle to gain share market and this reduces costs and margins. Consumers increasingly fixed in price. When it comes to quality, it does remain at a higher standard than other European countries, is considered a very demanding client in this aspect, it is a type of consumer looking for the most perfect features of each product and their health.

The British food retailing is characterized by being isolated with the rest of the continent, as evidenced by the fact that few foreign channels have been implemented in the country.

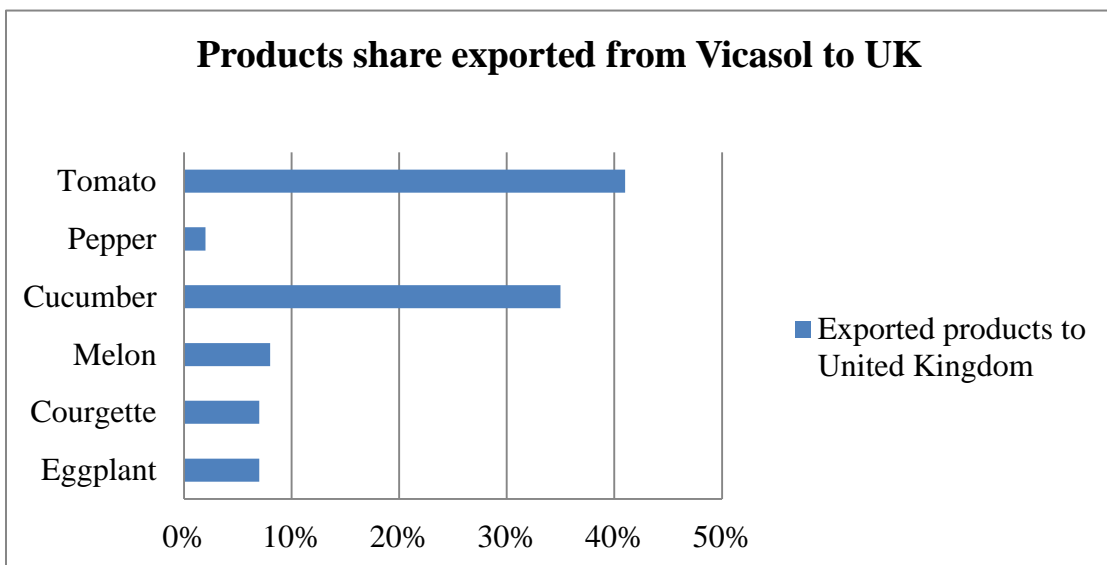
Vicasol, like in other markets, uses two different distribution channels:

- **Direct marketing retailer** through the large supermarket chains. 70-80% of market sales are the main distribution channel for the company. Only three large supermarket chains account for most of the height of the market, which Vicasol works with them throughout the year (Tesco, Sainsbury's and Morrisons), on the other hand, to a lesser extent also billed vegetables to other chains as Aldi, Netto and Lidl. Therefore, in general to work effectively in this market need a production structure with relatively large production units.



- **Marketing through wholesalers** of food products, including wholesalers of "catering". Supplying the independent retail sector (small chains, independent stores , flea markets and street vendors ) , basically a less demanding market sector as above, but equally or more economically profitable .

According to promotional activity, UK we must emphasize the absence of agriculture fairs since they are really important and have a great international impact, especially at the European level. As promotional resources and attracting new customers more used to be carried out in the company are through trade meetings destination and origin in order to reach long-term commercial agreement or seasonal, moreover campaigns through magazines and specialized websites.



Source: Vicasol own elaboration.

#### **4.2.4 The French Market.**

France is the largest country in Western Europe. The population of the metropolitan area is about 65 million inhabitants.

The economic situation of France is the characteristic of a developed country in which services account for almost three quarters of the total, about 2 % agriculture and construction industry and more than 20%.

The French market has specific features, has two key features to consider in the time to consider its penetration, it is a mature and organized.

We can highlight the following features of the French market:

- Quality requirement or resistance to accept safe payment terms for the seller
- The importance of the French language in communications possibility of complementarily or industrial and commercial.
- There is a good level of information on buyers
- Importance of transport logistics or facility to occupy market niches.

France is the third largest exporter, including the European market and the eighth if not included, but the export position of French agriculture is adversely affected by competition from emerging countries that are increasing their market share .

French domestic production of horticultural products represents the 70 % of total sales in this country, the remaining 30 % coming from imports from other countries. Which more than the 20 % of fruits and vegetables that are sold in the French market are from Spain.

Spain continues to be the leading supplier of fruits and vegetables to France and has won a quality image among professionals industry for years, but Morocco continues to gain market share thanks to its low price , after it in recent years had been declining for Spanish imports . The offer from Morocco is mainly vegetables and high quality citrus .

Consumption of fruits and vegetables in French households has declined slightly in recent years , seeing more consumption of fruits affected the vegetable . The average fall vegetable consumption estimated at over the years was 4 % .

French are aware that most fruit and an important part of the vegetable and the distribution points are in Spain.

Spanish products were for several decades in the French market and have been slowly gaining an image of quality at competitive prices among professionals and consumers, while emerging producer countries such as Morocco, are making an effort in this direction and have increased quality in recent years.

Above all, there is a great influence when choosing a product where it came from, placing vegetables as the first option, followed by the product of the Spanish garden.

Unlike other markets, Vicasol focuses on a single distribution channel, retail trade, which covers almost the entire market share relating to vegetable market, displacing almost entirely to the wholesale trade.

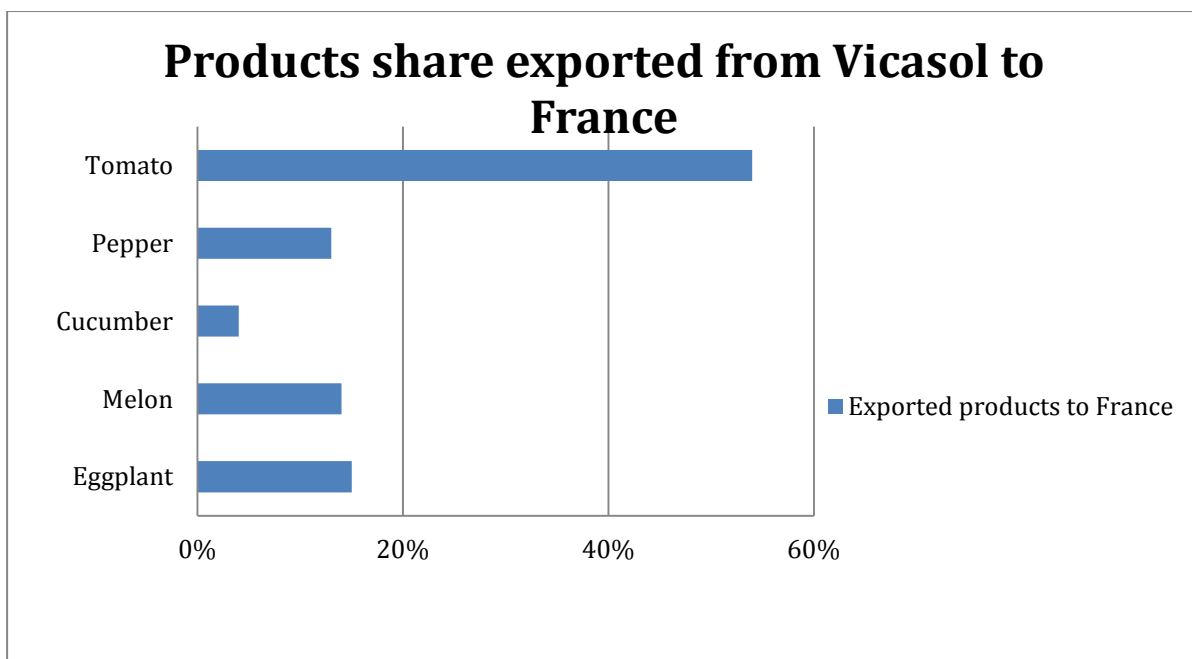
Within retail trade can highlight two distinct subgroups:

**The local trade**, which includes the small shops of all kinds, small supermarkets less than 120 m<sup>2</sup>, the so-called superettes (120 to 400 m<sup>2</sup>) and lower maxi discount

**Department stores**: supermarkets (between 400 and 2500 m<sup>2</sup>), hypermarkets (over 2,500 m<sup>2</sup>), the hard discount, stores popular, cash & carry and the different types of stores, and expertise (GMS).

Vicasol focuses mainly vegetable distribution through major retail groups and hard discount chains operating in the French market such as: Aldi, Lidl, Netto, Carrefour and Auchan.

According to the promotional activity in the French market, we can say that the main actions carried out are the end customer loyalty because it is a very settled and stabilized market in the business framework Almería, Vicasol especially because since its opening to foreign trade. The French market was the first to start selling vegetables from the company, which brings a great knowledge of this by the sales department and magnificent relations with professionals of French market.



Source: Vicasol own elaboration.

#### 4.2.5 The Dutch market

Netherlands is the official name of the sovereign state and correctly located in north of Belgium and west of Germany . The west and north of the country is below sea level , which is 26% of the total territory , protected by more than 2,000 km. levees.

The total population of the Netherlands amounted to 16.5 million, of which a third of the population are immigrants. The country enjoys a privileged location to meet the supply needs of the European Union . This geographical strategy , with three rivers flowing into the sea of world's busiest , with good infrastructure for maritime , land and air , has contributed to the Netherlands is one of the transportation hubs and distribution of goods in the world .

Dutch consumers tend to value quality greatly , and are willing to buy something when you consider the price is commensurate with the quality . Usually they don't prefer products over their foreign counterparts . What benefits selling vegetables in Almeria , as though the Netherlands is a world leader in the export and production of vegetables . The proceeds from the garden Almeria has a great reputation and acceptance by consumers.

Another aspect to take into account the Dutch consumers is its high sensitivity to advertising, so that a good advertising campaign will certainly contribute to increased sales.

Dutch consumers have much money to spend but do not spend it easily. By nature, they tend to resist change, which means they prefer the known to the new products. The recent rise in environmental campaigns has made the Dutch consumers prefer environmentally products, which also favors the Spanish product and special product that Vicasol exports, characterized by their quality and respect for the environment, as evidenced by the wide range of certificates in this regard.

Netherlands is a country dedicated to trade, and its openness to trade one of the highest in the world, surpassing usually 100%. Within the Europe stands out for its strong dealer. Re-exports of goods and services, including from third countries destined European Union, account for between 40% and 45% of its sales abroad.

Netherlands is one of the largest exporters of agricultural products. Agriculture and horticulture represent 10% of the Dutch economy after U.S. being the largest exporter of agricultural products in the world.

The agricultural sector, however small, it is still significant. Yields are high, and the exploitation of very intensive agricultural area with advanced farming techniques. Predominantly small farms, well-developed agricultural credit system. Almost 60% of production is exported, either directly or through the food industry. In this sense include bulbs, flowers, fruits (Netherlands is the third largest exporter of horticultural products).

In general it can be said that the retail distribution sector is well developed, and that its fundamental characteristic Netherlands is an extreme level of concentration. An estimated 80% of sales are generated through commercial channels.

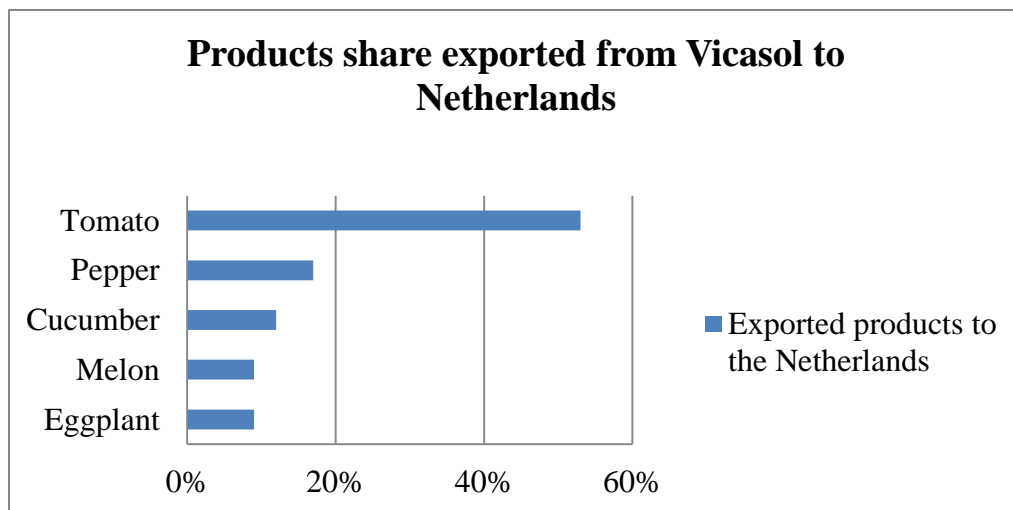
Due no doubt to the small geographical size of the country, the importers have been integrated in the wholesale distribution, and have become wholesale importers. On the other hand, and more recently, large chain stores and supermarkets in many cases negotiate directly with exporters, importing directly.

It can be stated that the concentration of buying power and the shortening of the supply chain is a constant in the evolution of the Dutch market. Increasingly, the big chains just want to talk to the producer, or at most, with his representative. Believe not require the services of traditional importer which increases their costs for doing a job they think they can do themselves: product selection, transport, storage and distribution to their outlets. This represents a major difference with other

markets, such as the British market, which requires a ready-made product that goes directly originally prepared to put directly on the shelves of supermarkets.

Currently, the bulk of vegetables exported Vicasol Dutch market, it sells through wholesalers. This is because the Netherlands was the second country, after France, to which it began exporting vegetable of Almeria, which trade ties between the two are established for decades, ensuring that very high flow Almeria product and specifically of the cooperative Vicasol to the Dutch market.

Regarding promotional activities in the Dutch market, this bears some similarity to the French market. The market relations in the Netherlands are in good health, thus ensuring sustained annual sales, guaranteed, since the relationship between the two markets (Dutch and Almeria) has been caring for over several decades, so that the professional relationship between the two is very close and cordial. However Vicasol by not exercising stops advertising campaigns to reach those customers most stringent, mainly aimed at showing a quality product that respects the environment, cultivated with the use of biological and integrated control.



Source: Vicasol own elaboration.

#### 4.2.5 The Russian market (St Petersburg and Moscow)

Russia is the largest country in the world, occupies the whole of northern Asia and 40% of Europe, especially Eastern Europe, according to estimates, Russia has an estimated population of 142 million people, 73% which is in urban cores, the largest cities in Russia are Moscow and St.Petersburg, which focuses on all commercial activity of Vicasol in this country. The standard of living in Russia varies greatly depending on the area. In large cities there is a significant percentage of the population with purchasing power medium or medium-high to can acquire, and generally prefers, imported products, usually at prices much higher than those of Western European countries.

Russia is the world's largest importer of fresh and development potential of this sector is huge in a country whose major consumption centers (Moscow and St. Petersburg) are in latitudes where winter lasts nearly five months. Russia also produces only fruit and vegetable production is very limited and restricted to a short summer and spring shooting.

The fruit and vegetables in Russia has, like in other markets, a series of features that greatly complicate the task of operators due to the expiration of the products and the speed with which they must work the exporter and the importer sell the goods before they deteriorate over time.

We can distinguish between different market characteristics which we find when exporting products to the Russian market:

- Geographical remoteness: a truck (transport of fresh vegetables to Russia is mostly done by road) takes 8 days to get to Moscow and from there part of the goods to be transported further afield as Siberia (4-5 days of transport) or the Urals (2-3 days).
- Competition from other countries: Turkey, Egypt and Morocco are major suppliers of fresh produce to Russia. Especially Turkey has obvious logistical advantages due to geographical proximity and their campaigns coincide in time with the Spanish season (October to May).
- The prices of fruit and vegetables fluctuate too much too quickly and may that the selling price of a fruit change week to week.

In the Russian market there are three different distribution channels:

-**Supermarket chains:** suppliers to the chains are always Russian importers placed product from their stores in Moscow or St. Petersburg. An exporter can supply a supermarket chain but this must be set to a warehouse in Russia.

- **Importers-distributors:** this channel is controlled by Azerbaijani companies, who also directed the three wholesale markets of the city, mainly responsible for the distribution of fruit from Moscow, these companies distribute the product to the Russian regions (in these regions, which control the fresh sector are also national Azerbaijan), to food markets in the city and supermarket chains.

- **Major importers** of St. Petersburg: are companies located in the city and working almost exclusively with shipping. They usually work with large suppliers.

Vicasol is working with the first group, in their vegetables distributed through supermarket chains, which receive goods in warehouses in Moscow and later supply the supermarkets and shopping malls in this city, or send directly to St. Petersburg for distribution.

The Russian market shows a risk that must be taken very into account, since it is a very complex market because of its remoteness and unfamiliarity. Below we have listed a number of risk factors to consider when marketing the vegetables with the Russian market:

- Spanish exporter should care much their relationship with the importer and minimize the risk of claims.

- Keeping up the situation and rumors about the importers which send goods to a defaulter is very risky, and that alone can know Spanish company if you have an agent who has current and accurate information.

- Establish and maintain firmly reasonable credit limit customer Russia to prevent the formation of large debts.

- The 100% payment in advance is not a condition common in the industry, and the importer shall have a debt to your supplier for a longer or less dilated. For example Vicasol trade agreements with Russian companies, these initially pay half the value of the goods supplied before leaving home, and the remaining outstanding amount is payable on arrival of the goods at destination.

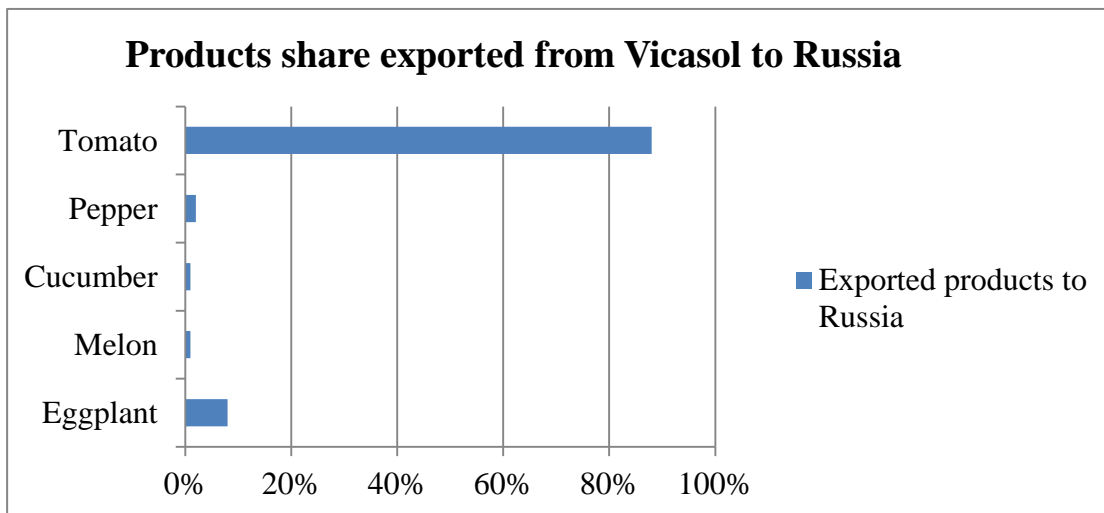
In short, the import of vegetables sector in Russia is quite small and very fast information flows. In this regard, a company that sends to Russia products with quality problems have many difficulties to find a new importer, as the former will surely rumors spread more or less justified. On the other hand, a defaulting dealer not loyal to his suppliers may be sidelined for the rest of importers.

Promotional activities in this market that are made by the company Vicasol have more personal and individual character in destination and preparing a series of business meetings consisting agreeing a schedule of meetings with potential business partners for two or three days. The number of interviews per day is 2-3 higher than usual so that the agenda is offered for two days, not three that is normal.



The dealers do not speak English, so it is mandatory to be accompanied by an interpreter. In this type of event is looking to reach a product supply agreement throughout the year and in large quantities. On the other hand it is trying to negotiate payment in advance, if possible, of all the goods, but never down 50% of this.

We have to mention also that other methods used to promote are fairs and congresses. There are two major fairs that are held in the Russian capital: ProdExpo, WorldFood Moscow and these are the most important in the country.



Source: Vicasolownelaboration.

### **4.3 S.W.O.T Analysis of Vicasol Company**

#### **4.3.1 Opportunities**

-Possibility of growth when incorporated into the habit of household consumption, by relating it to the health factor .

- Export orientation . The industry derives most of its revenue in the foreign markets , especially the European Union , and there are moves towards opening other EU markets .

- Association of fruits and vegetables to the Spanish Mediterranean diet , known in the world , as a way to enhance their development.

- Spanish fruits and vegetables have shown that achieve high levels of food security.

- It has achieved economic and social recognition by sector Spanish authorities and community .

- Horticultural activity is part of the culture and way of life of our country , is a major employer and also in times of economic crisis , is able to incorporate labor from other sectors.

- Domain greenhouse technology , which will develop a new model that incorporates greenhouse cogeneration or renewable energies .

- Strengthen market orientation in terms of profitability .

- Possibility of extending marketing calendars in foreign cultures , especially if diversified varieties , new crops are incorporated and prioritized fruit varietal conversion . This would improve the competitiveness against the competition .

- Improved position in the market sector , by:

Statement of economic areas regulated by the CMO ( Common Market Organization ) of fruits and vegetables .

Facilitate the implementation of agreements under the CMO both organizations and associations .

- The commitment products IV and V range and innovation in preserves, juices and ready meals , adds value to the production and one of the elements that increase competitiveness against the increasing

competition from third countries . Also, the increase in the final quality care , food security with consumer awareness of its

Public Employment Service Survey . The Horticultural Sector in Spain 2012 important boost purchasing our products.

- The sector of the fourth and fifth range begins to have greater presence, since is winning over consumers in the domestic market gradually with an attractive and easy to consume. For this reason right now some companies are positioning vegetable produced and sold in this segment of products that are gaining market year after year.

- In line with the above , also the increase in the occurrence of functional art , based on agricultural products intended for improving health, extra supply of nutrients, a cosmetic, pharmaceutical , is another route with high added value and profitability.

- Given the difficulty to compete in costs with third countries outside the EU , are tends to produce high value-added products that can provide a position competitive in the market . Such are the premium products , products organic , healthy products , ethnic , products aimed at a group of specific people.

- Investments in technology and advanced processes, although difficult to assume, are allowing eventual cost increase and the quality of the products. In some cases, you begin to use a machine that integrates the collection, grading and packaging, dispensing and storage phase, shortening time and increasing the ultimate freshness.

- The European Union membership makes it possible to keep fighting to get a change in trade policy of the European Commission regarding trade concessions, control of imports and the opening of new markets.

- Sensitization of all stakeholders in the sector to improve competitiveness and facilitates partnerships to reach agreements that promote such a fragmented industry in the primary production sector and so focused on the distribution and in industry.

### 4.3.2 Threats

- One of the major threats is that the production sector lacks concentration and production is highly fragmented .
- The increase in production costs , along with the cumulative inflation over the past five years , has very negative consequences on competitiveness, given the strength of the euro and import liberalization .
- The rise in VAT on flowers and plants , from the reduced rate ( 8% ) to normal ( 21 % ) , exacerbate the crisis in this sector farms .
- Strong growth in imports , which account for 26 % of consumption national .
- There is weakness and division budget using promoting and marketing tools .
- There is a lack of joint programming.
- Given the joint distribution , producers approach formulas the retail purchase offers .
- In recent times , is increasing the pressure of competition . Our production model, which is based on climatic and geographic advantages , is ceasing to be competitive with other producing countries.
- There producing countries that are more willing to use pesticides banned in the EU . Also, there are no import controls to verify compliance with community rules as for food safety, traceability , hygiene, etc. .
- Imports from third countries. Despite the breaches of the regulations , negotiating a quota increase of certain vegetables (tomato ) and the liberalization of shipments of fruits and vegetables to the EU. This implies the existence of strong competition from countries like Morocco, Turkey - especially in the production of tomato.
- Low production costs in some of these countries (very cheap labor) represent significant competition, primarily in tomatoes .
- Countries like Russia establish trade barriers , it leading to a slow growth of horticultural exports .
- The stabilization of prices adversely affects the capacity of the sector.

### **4.3.3 Strengths**

- Leading position in the market thanks to its business structure and expertise in the field of agriculture.
- Large production capacity and development of large-scale vegetable.
- Integrated control systems for biological control of the company culture.
- Vicasol has the ability to adapt to any type of customer and market thanks to custom packaging and labeling itself, which facilitates the distribution and marketing of their products to foreign markets.
- Vicasol boasts a skilled workforce and good industry experience which makes maintaining its competitiveness against other companies.
- Accreditation as certified brand quality by different centers and respect for the environment in turn has several titles won by their efficiency and sustainability.
- This company has a large capital investment in new technologies for more performance and eliminate unnecessary costs leading to cost savings and a reduction in fixed costs each campaign.
- Vicasol is characterized by its wide variety of horticultural products, bringing its flagship product as tomato and pepper. However we can find other varieties equally important as cucumbers, eggplants and melons among others, making it a point of differentiation with respect to other companies.
- This company is capable of supplying markets throughout the year, thanks to its production capacity planned by the various departments, ranking this as a major advantage in the market, avoiding a fall in its market share.

### **4.3.4 Weaknesses**

- As for the weaknesses Vicasol has difficulties conquer new markets, such as the American or Asian.
- One of the most important weaknesses we found in the field of company when it comes to transport their products is the lack of alternative to road transport.
- The location of the company often prevents more fluid trade with more distant markets where you could get great economic returns of these.
- The company finds difficulties in setting competitive prices because its production involves high costs, despite the use of saving methods and systems adapted to minimize production costs.

## **5. Conclusion**

After all the research we have done, we can say that Vicasol is one of the most important companies of this region, that is growing faster than the others.

As we seen trough this small research Vicasol is the image of a company that begun with a few growers and now it can be considered one of the most important Andalusian cooperative with more that 850ha cultivated and 400 growers.

According to all information that we have founded we can say that Vicasol built a strong brand and its positioning in the European markets is well situated, nevertheless they can improve by using the price strategy. As we already mentioned in our market research Vicasol count on , right from the start with an important philosophy: a job well done by putting the trust on quality and growing the products demanded by their customers.

For this well organized company is really important to have in consideration the customer's preferences but in the same time their goal is to plan and do the best for their members and growers. Vicasol helps their growers to improve the quality of the products and to achieve maximum economic performance. On the other side Vicasol's aim is to satisfy their captured markets and the consumers, that's why they always intend to improve the production system and allow the entry of new members and capture new markets as we told before like Asian and American one.

As we have already said Vicasol grows produce in protected modern installations, which allow the most advanced techniques in product growth and this is really important in order to compete with others companies.

For this company innovative agricultural systems and strict European and International standards, are followed in the use of fertilizers and phytosanitary products. Their efforts are focused in biological and integrated production advance and their professional technicians give the growers the necessary assessment for a quality production.

Vicasol leads quality production, optimizing the use of available resources and approaching updated protocols of good agricultural practice, environment respect and biodiversity. For Vicasol is important that the entire cultivation process meets strict sanitary demands, because they want to ensure vegetables maximum quality.

We also want to mention that the fact that Vicasol is a very well organized and planed society because of his qualified staff. We think is the most important factor in order to be successful and competitive in the market.

## 6. Annexes

5. Table1.Vicasol exports to European countries in 2011-2012 (kg)Source: Vicasolanual chart. 2011-2012

Products/Country	GERMANY	AUSTRIA	BELGIUM	BELARUS	CROATIA	DENMARK	ESTONIA	SLOVAKIA	SLOVENIA	SPAIN
<b>Eggplant</b>	1.558.969	95.938	73.906							1.658.969
<b>Courgette</b>										
<b>Melon</b>	89.606		6.918							66.169
<b>MelonCantaloup</b>	62.324		38.051							41.995
<b>Melon Galia</b>	526.238	26.359	236.835		8.385	51.970				402.513
<b>MelonCharentais</b>										1.181.198
<b>Cucumber</b>	2.896.029	282.156	248.282		34.119					307.336
<b>Pepper</b>	1.732.782	411.417	352.578							2.237.035
<b>Tomato</b>	18.021.582	3.470.670	2.293.244	507.761	20.337	40.046	40.384	12.345	120.435	25.640.208

Table 2.Vicasol exports to European countries in 2011-2012 (kg)Source: Vicasolanual chart. 2011-2012

PRODUCTOS/PAÍSES	FINLAND	FRANCE	U.K	GREECE	HOLLAND	HUNGARY	ICELAND	IRELAND	ITALY	LATVIA
<b>Eggplant</b>	30.216	2.942.673	339.004		601.884	56.575	130.994	2.611	735.197	8.372
<b>Courgette</b>										3.242
<b>Melon</b>	5.681	82.105	241.165		133.119				65.518	9.500
<b>MelonCantaloup</b>	14.464	589.720	293.183		150.786				932	
<b>Melón Galia</b>		88.566	488.205	40.761	432.573	1.924			2.984	
<b>MelonCharentais</b>		1.889	9.688						19.997	
<b>Cucumber</b>	4.545	688.311	752.398		787.603		828			35.031
<b>Pepper</b>	1.047	2.561.749	1.811.798		1.128.280	128.649	6.708	75.482	812.386	174.318
<b>Tomato</b>	70.538	12.142.316	2.174.646	20.415	4.034.042	260.375	134.983	80.891	2.223.387	100.401

Table 3. Vicasol exports to European countries in 2011-2012 (kg) Source: Vicaso annual chart. 2011-2012

<b>Product/Country</b>	<b>LITHUANIA</b>	<b>NORWAY</b>	<b>POLAND</b>	<b>PORTUGAL</b>	<b>CZECH REPUBLIC</b>	<b>ROMANIA</b>	<b>RUSSIA</b>	<b>SWEDEN</b>	<b>SWITZERLAND</b>	<b>UKRAINE</b>
<b>Eggplant</b>		16.140	199.615		64.510	16.550	360.629	120.520	125.492	35.219
<b>Courgette</b>			153.004			1.101				
<b>Melon</b>	10.304		51.711			1.061	5.151	27.349	1.473	
<b>MelonCantaloup</b>			1.689			2.814	42.954	22.034	39.502	
<b>Melon Galia</b>			68.794	33.208	7.112	7.069	56.711	142.451	256.307	
<b>MelonCharentais</b>										
<b>Cucumber</b>	13.094	150.754	181.356		154.481	7.557	31.208	506.823	265.555	
<b>Pepper</b>	15.657	532.328	1.025.943		428.015	8.551	68.878	438.850	314.475	
<b>Tomato</b>		635.796	4.247.153	514.005	4.110.784	211.685	4.132.255	797.052	407.679	15.656



Table 4. Exports comparison between Almeria and Vicasol S.C.A

<b>Product/Country</b>	<b>Almeriaexports in 2011-2012 (kg)</b>	<b>Almeriaexports in 2010-2011 (kg)</b>	<b>ExportsIncrease</b>	<b>Almeriaproductexport share</b>	<b>VicasolExports 2011-2012 (kg)</b>	<b>% of Vicasolexports</b>
<b>Tomato</b>	312.974.518	285.299.803	11%	39%	60.840.863	20%
<b>Pepper</b>	186.020.756	157.627.602	11%	23%	12.076.807	7%
<b>Cucumber</b>	210.067.569	162.049.905	12%	23%	7.040.130	3%
<b>Eggplant</b>	50.224.018	43.701.042	11%	9%	7.515.014	15%
<b>Melon</b>	38.497.669	37.968.968	10%	6%	824.285	5%

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