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Consumer acceptance of novel fruits and fruit products

Including:

- **D1.3.7 Report on case studies of fruit innovations**
- **D1.3.9 List of characteristics for future fruit innovations**

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CO	Confidential, only for members of the consortium (including the Commission Services)	

Description of deliverable

The present work was carried out within the Project 'Isafruit'. The strategic objective of this project is to increase fruit consumption and thereby improve the health and well-being of Europeans and their environment, by taking a total chain approach, identifying the bottlenecks and addressing them by consumer-driven preferences. The report is a deliverable of Workpackage 1.3 (INNOFRUIT) of Pillar 1, which focuses on the area of 'Consumer driven and responsive supply chain'. The aim of Workpackage 1.3 is to understand the determinants of the adoption of innovations by consumers, thus yielding insight into consumer behaviour with respect to new or modified fruit products and identifying opportunities for fruit innovation. As such, it will provide guidance for the development of future fruit product innovations. This deliverable (which combines the contents of the originally planned deliverables D1.3.7 and D1.3.9) describes the results of an international case study the success or failure of recent fruit innovations, the objective of which was to validate the factors underlying success and failure as identified in a consumer survey on consumer innovativeness and product characteristics underlying novel fruit product acceptance (D1.3.5/D1.3.8) and a choice experiment on the effect of several marketing claims on novel fruit product acceptance (D1.3.6).

Connection of deliverable with project goals:
This deliverable contributes to the overall strategic objective of ISAFRUIT, namely, "…to increase fruit consumption, searching the improvement of health and well-being of Europeans and their environment, by taking a total chain approach, identifying the bottlenecks and addressing them by consumer driven preferences." in the following way. By putting the results from D1.3.5/D1.3.8 and D1.3.6 to a test in the context of recent fruit innovations better insight is obtained in the validity and generalizability of the factors that contribute to the success of novel fruit products. As such, this deliverable qualifies the input from WP1.3 to "the development of consumer-driven, efficient, responsive, and innovative supply chains for the growth of fruit consumption in Europe and for a competitive and sustainable fruit industry," which is the main goal of Pillar 1.

This deliverable was made in cooperation between the partners 38 (WAU), 10 (WUR-LEI), 24 (UPM), and 29 (AUA).

Wageningen, June 23rd, 2010

Ivo A. van der Lans
Scientific coordinator of Pillar 1
10 (WUR-LEI)

Case Studies of Fruit Innovations

Authors:
Tom Bakker[1]
Jan Benninga[1]
Joanna Rakowska[2]
Jos Bartels[1]

With the cooperation of:
Ivo van der Lans[1]
Mieczysław Adamowicz[2]
Panagiotis Lazaridis[3]
Georgia Papoutsi[3]
Julian Briz[4]
Teresa Briz[4]

[1] Wageningen UR-Agricultural Economics Research Institute, the Netherlands
[2] Warsaw University of Life Sciences – SGGW, Poland
[3] Agricultural University of Athens, Greece
[4] Universidad Politécnica de Madrid, Spain

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The present work was carried out within the Project 'ISAFRUIT '. The strategic objective of this project is to find ways to increase fruit consumption and thereby improve the health and well-being of Europeans and their environment, by taking a total chain approach, identifying the bottlenecks and addressing them by consumer-driven preferences. The present report is a deliverable of Pillar 1, which focuses on the area of 'Consumer driven and responsive supply chain'.

The authors want to thank the European Union for financing the ISAfruit project (www.isafruit.org). In this way they support the cooperation of research with the fruit industry to gather and integrate insights in a whole lot of different aspects from farm-to-fork. These insights will help the fruit industry playing into consumer demands and needs, and improve in the price, quality, safety, availability and sustainable production of fruit and fruit based products.

More information: www.ISAfruit.org

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Agricultural Economics Research Institute (LEI B.V.)
Of Wageningen University and Research centre

Address	:	Alexanderveld 5, P.O. box 29703, The Hague, 2502 LS, The Netherlands
	:	
Tel.	:	+31 70 3358330
Fax	:	+31 70 3615624
E-mail	:	info.lei@wur.nl
Internet	:	www.lei.wur.nl

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Summary

D1.3.7 Report on case studies of fruit innovations

D1.3.9 List of characteristics for future fruit innovations

The task of the Deliverable 1.3.7 *Report on case studies of fruit innovations* is to provide information on consumers' acceptance of innovative fruit and fruit products selected for case studies in Deliverable 1.3.2 *List of selected fruit innovations,* and to validate findings from previous stages of WP 1.3 research.

The task of the Deliverable 1.3.9 *List of characteristics for future fruit innovations* is to provide a list of product characteristics and recommendations that can increase the success of fruit innovations in the future.

This report presents results of case studies carried out in February and March, 2010, in four European countries: Greece, the Netherlands, Poland and Spain within WP 1.3 of ISAFRUIT Project (D1.3.7). It also presents product characteristics accepted by consumers and recommendations for development of future innovative fresh fruits and fruit products, as well as recommended strategies and policies (D1.3.9), which were formulated on the basis of findings of case study and previous stages of WP1.3 research and their validation.

Authors:

Tom Bakker[1],
Jan Benninga[1],
Joanna Rakowska[2],
Jos Bartels[1]

[1] Wageningen UR-Agricultural Economics Research Institute, the Netherlands
[2] Warsaw University of Life Sciences – SGGW, Poland

1 Introduction

There is general consensus that considerable improvement of human health and well-being can be achieved by increasing fruit consumption. An increased intake of fruit and vegetables prevents from certain diseases and contributes significantly to human good physical and mental condition (Pomerleau *et al* 2003; WHO 2002; WHO 2003; EURODIET 2000).

Herein presented research and its results are a part of the European ISAFRUIT project, of which the long-term mission is to improve the health and well-being of Europeans and their environment by increasing consumption of fruit, produced in a sustainable way. An increased consumption, according to ISAFRUIT assumptions, results from a better fruit quality and availability of wider range of fruit and of processed fruit products, more competitive and safer production systems and improved consciousness of consumers.

Increasing fruit consumption, however, comes across certain critical bottlenecks, hypothesised in ISAFRUIT Deliverable 1.2.3 (Annex I, 2006) as:

- insufficient quality and safety of fruit and fruit products at the point of consumption;
- limited availability of certain fruit and fruit products;
- lack of sufficient consciousness of consumers about the health benefits of regular fruit consumption;
- high price of fruit and fruit products compared to competing products, i.e. snacks and soft drinks.

Fruit and fruit product innovations may play a significant role in the process of eliminating the above listed bottlenecks as well as in encouraging and enabling consumers to buy and consume more fruit, both fresh and processed. From that perspective, it is crucial to determine the factors underlying consumer acceptance of fruit and fruit product innovations. The objective of Work Package 1.3 (INNOFRUIT) is to understand the determinants of adoption and dissemination of innovations by consumers and individual chain members (see ISAfruit Annex I, p. 8). Research results aim to yield insight into consumer behaviour with respect to new or modified products and to identify opportunities for fruit innovation.

WP 1.3 deals with two tasks. The first, *Task 1.3.1 Consumer acceptance and choice of fruit innovations*, resulted in the following deliverables:

- Deliverable 1.3.1 *Theoretical framework on consumer innovativeness for fruit*
- Deliverable 1.3.3 *Report on consumer focus group discussion*
- Deliverable 1.3.4 *Development of a questionnaire for a survey into consumer innovativeness in the context of novel fruits and fruit products*
- Deliverable 1.3.5 *Consumers acceptance of novel fruits and fruit products*
- Deliverable 1.3.6 *Consumer choice experiment*

The second task, *Tasks 1.3.2 Fruit product innovations*, resulted in Deliverable 1.3.2 *List of selected fruit innovations*, and herein presented Deliverable 1.3.6 *Report on case studies of fruit innovations* as well as Deliverable 1.3.9 *List of characteristics for future fruit innovations. Finally, this task will conclude with Deliverable 1.3.10,* *which contains a synthesis of the conclusions from the deliverables of task one and two.*

The objective of Task 1.3.2 is to investigate recent fruit and fruit product innovations, to select innovations for case studies and to investigate and explain their success or failure from consumers' perspective, using results of the consumer studies under Task 1.3.1. The current analysis of fruit and fruit product innovations will provide information on consumers' acceptance of innovative fruit and fruit products selected for case studies in Deliverable 1.3.2 List of selected fruit innovations, which will validate findings from the focus-group discussions (D1.3.3), findings of research on consumer acceptance of novel fruit and fruit products (D1.3.5) and findings of consumer choice experiment (D1.3.6). All the findings are used to investigate consumers' innovativeness with respect to particular categories of innovations and to define determinants of consumers' attitudes. They enable to indicate innovations with high potential for success, i.e. for increasing fruits and fruit product consumption.

The next section presents a brief literature review on the measurement of success of innovations. Furthermore, Chapter 2 will elaborate on the method used for this study. Chapter 3 will describe the general results and present findings of the main issues as well as conclusions based on the findings for each investigated country. In Chapter 4 overall conclusions will be presented, followed by recommendations in Chapter 5. Next to recommendations, Chapter 5 contains a list of characteristics for future fruit innovations.

1.1 Literature review on measurement of the success of innovations

Measuring the success of an innovation is a topic on which many researchers in the fields of business and economics have endeavoured over the years (e.g. Mallick and Schroeder, 2005; OECD, 2005; Asschoff and Sofka, 2009). Looking at the current state of the literature however, it becomes clear that no definition or indicator of innovation success is dominant (Huang et al, 2004). There are several factors that complicate the identification of innovation success, such as the type of innovation (process, product, marketing or organization), level of aggregation (economy, sector, company) and focus (profitability, productivity, market success or employee satisfaction). Below, the literature on innovation success is summarized and indicators identified that could be applied in the current study.

The goal of the current research project is to identify factors that influence the success or failure of innovative fruit products from a consumer perspective. Therefore, this section on measuring innovation focuses on product innovation – other types of innovation are outside the scope of the current research. In table 1, a list of indicators of new product success is included, that researchers have identified in recent studies. From the table, it becomes clear that certain indicators are used more often, such as financial performance (e.g. Cooper and Kleinschmidt, 1987; March and Stock, 2003; Mallick and Schroeder, 2005) and market share (e.g. Sivadas and Dwyer, 2000; Mallick and Schroeder 2005).

Griffin and Page (1993), found an alternative indicator for innovation success: consumer acceptance. Consumer acceptance is often measured through calculating the number of days or months a product is on the market place. The longer a product is available on the market, the higher the consumer acceptance. One advantage of taking consumer acceptance as an indicator, is that the information is relatively easy to collect and not as 'sensitive' as alternative indicators, e.g. financial performance. Alternative indicators often involve confidential data for businesses and are consequently difficult to obtain. *For this reason, the current research takes consumer acceptance as its main indicator for innovative product performance.*

Table 1: Indicators of new product success

Author	**Indicators**
Cooper and Kleinschmidt (1987)	(1) Financial performance
	(2) Market impact
	(3) Opportunity window
Griffin and Page (1993)	(1) Customer acceptance
	(2) Financial performance
	(3) Product-level measures
Sivadas and Dwyer (2000)	(1) Quality
	(2) Time taken in development
	(3) Market share
	(4) Speed to market
	(5) Meeting of target costs
March and Stock (2003)	(1) Profitability
	(2) Revenues
	(3) Market share
Mallick and Schroeder (2005)	(1) Market share
	(2) Profitability (ROI)

The main objective of the current study, is to validate factors that influence the success or failure of an innovative fruit product. In marketing theory, several factors were identified that affect the success of a product. The first four factors belong to the marketing mix, a crucial set of marketing tools that companies apply to reach their objectives in the market (Kotler, 1988). The factors will be discussed briefly below:

1. Product: the factor product is the most basic marketing tool and describes what the company offers to the target group, including product features and packaging.
2. Price: a very important aspect of the product is the price, or what consumers have to pay for the product. Price can be measured in several ways, such as cost price, wholesale price or retailer price.
3. Place: the factor place refers to how the product is accessible for the consumer. This includes both the availability of the product on the market (e.g. available everywhere vs. exclusivity) and the position within the shop and/or shelf.
4. Promotion: concerns the activities that the company undertakes to communicate the product to its target group. Promotions range from price actions, to media campaigns, features and/or displays in shop and sampling.

In addition to the four factors described, two additional factors influencing product success were added: competition and consumer. The degree of competition can significantly influence the success of a product (Porter, 1990). For example, in the case of high barriers for entering the market or offering substitutes, a product remains unique and could remain successful. Hence, competition is one of the additional factors. Furthermore, information with regard to the target group can also provide an indication for the causes of product success – e.g. is the group buying the product similar to the target group of the company? What are the trends among the consumer target group?

This research also looks into the influence of such factors as freshness, healthiness, naturalness, taste, convenience and safety, on consumers' acceptance of fruit and fruit product innovations. These factors (namely product characteristics) and their impact on consumers' choices were discussed in consumer focus groups (D1.3.3) and surveyed in research on Consumers acceptance of novel fruits and fruit products (D1.3.5). Thus, the objective of the presented research is, among others, to validate findings of those earlier stages.

As a result, the research will analyse the success and failure of innovative product according to the following six factors: product, price, place, promotion, competition and consumer.

The next chapter, about the research methodology, describes the research process in more detail.

2 Methodology

This chapter consists of two parts: in the first part, the process of case study selection is described. The second part will discuss the methodology of the case study analysis in more detail (Eisenhardt, 1989).

2.1 Case selection process

The study was carried out in four EU-countries: Greece, Spain, the Netherlands and Poland. The goal of the case selection process was to identify four products for every country, of which two are successful and two are non-successful. This means that in total sixteen products were to be selected for the countries included in this research. The selection process was based on the inventory of fruit (product) innovations identified by Zajac and Kraszewska (2007), who identified that there are the main categories of innovations recognizable by consumers: product and marketing innovations. These categories were used to distinguish among products in the selection process. The process consisted of three steps, each step discussed in more detail below.

During the first step of the selection process, a list was constructed for every country, consisting of about 15 innovative fruit products that were recently introduced on the market. In addition, information was collected about the number of months the innovative fruit product has been on the market. As the main *measure of product success*, the number of months was applied as an indicator whether the product was a success or failure. Products that have been on the market for more than two years are considered to be a success, products that are not available any more after two years are considered to be a failure. The information about availability of the product was collected from the producer of the fruit product during short phone interviews, using a structured form (see Appendix 1).

In addition to Step 1, for every product it was determined which *innovation category* it belongs to (e.g. convenience, in/out home or quality). Obviously, an innovative fruit product can be in several categories. A form was developed to register the category for every fruit product (see Appendix 1).

After the preceding steps, a selection among the collected products was made: *two successful and two non-successful products for every country*. The products were selected on the basis of the following two additional criteria:

1. Fruit product vs. fresh fruit: a distinction was made between products that were processed (fruit products) and fresh fruit.
2. Innovation category: in order to obtain a good spread among cases, products were differentiated according to the innovation category they fell in (see section 3.1 for the results of the case selection procedure).

2.2 Case Study analysis

Once the successful and non-successful fruit products were identified for every country, semi-structured interviews with retailers were performed to obtain information about factors underlying the success or failure of an innovative fruit product. It was decided to interview retailers as they have a comprehensive overview of market performance and can be expected to be more objective than producers. For every product, three interviews were conducted with different retailers to collect information about what influences a product's success or failure. In each of the four countries involved in the study, researchers interviewed retailers using an interview protocol (see Appendix 2).

The interview protocol consists of 21 questions and is based on the factors described in het literature review (see section 1.1). Below, additional information is provided about the operationalizaton of the factors. For information about which questions in the protocol correspond with the factors explaining innovation success, see Appendix 3.

1. **Product**: contains the following questions:
    a. Description product category
    b. Other products in product category
    c. Innovative characteristics of product: described in terms like: Taste, Price, Convenient to consume, Healthy, Novel, Easily available in a store nearby, Attractive, Safe, Natural, Better than regular, Exclusive, etc.
    d. Consumer intention: to what degree the innovative characteristics of the product influenced the consumer.
    e. Obtaining innovative products: how the retailer obtains innovative products; e.g. contact with fruit producers, etc.
    f. Assortment: why the retailer decided to include the product in the assortment.
    g. Success/failure: the analysis of the retailer, of why the product became a success or failure.
2. **Price strategy**: contains an open question about a description of the price strategy of the product.
3. **Place**: this factor is divided into the following two questions:
    a. Place on the shelf: what the position of the product is on the shelf (prominent vs. less prominent) and in the shop.
    b. Availability: whether the product is available in all shops of the retail chain, or only in a number of stores. Alternatively, it could be possible that the product is only available in a specific formula of the retailer (e.g. the online shop).
4. **Promotion**: contains the following questions:
    a. Type of promotions: information about which promotions have been conducted to support the sales of the product (e.g. price, display or feature promotions). Furthermore, whether these promotions are initiated by the manufacturer, or only by the retail chain.
    b. Effect: a question about the effect of the promotion on the sales of the product.
    c. Introduction: a description about the introduction strategy of the product at the retailer (e.g. scale of release, try-outs, promotions), when the product was introduced on the market.
5. **Performance**: contains the following questions:
    a. Introduction: when the product was introduced on the market.
    b. Months available: how long the product has been on the market.

    c. Revenue share: what the revenue share of the product category is, as a percentage of total sales of the retailer.
    d. Volume: how many products have been sold during a year.
    e. Market share: what the maximum market share was that the product achieved, and when this was realized.
    f. Information collection: how data is collected with regard to market share - for example through a scanning system.
6. **Competition**: contains the following questions:
    a. Competing products: researchers are asked to collect information about which brands are competing with the product and what the differences are among the products in terms of product characteristics.
    b. Substitutes: information is collected about which product is substituting the product in question, and what the differences are among the products in terms of product characteristics
7. **Consumer**: contains the following questions:
    a. Target group category: an open question about a description of the consumers of the product category.
    b. Target group product: an open question about a description of the consumers of the innovative fruit product.

The interview protocol was completed in English by the partners involved in the research and submitted to the researchers in the Netherlands (LEI Wageningen UR). Subsequently, the researchers in the Netherlands performed the single-case and cross-case analysis.

The *single case analysis* consists of comparing the six factors influencing product success, described above, with the interview outcomes of one of the innovative fruit products. For every factor, information was collected in the four countries included in this study. Once the outcomes of the single cases were grouped in factors, it was possible to compare outcomes of cases in a *cross case analysis*. For each factor, outcomes were compared across cases (the innovative fruit products). Consequently, similarities and differences were identified among: product types (fresh fruit/fruit products), countries (the four countries included in the study) and success vs. failure.

The results of the case study selection and the analysis are discussed in the next chapter.

3 Results

This chapter first presents the results of the first two phases of the case selection process. Secondly, it presents findings of the single-case and cross-case analysis.

3.1 Stage I Results of selection of innovative fruit products for case studies

To validate the factors underlying the success and failure of fruit (product) innovations, we aimed at a comparison of two successful and two non-successful innovative fruit products in each of four different countries, i.e. Greece, the Netherlands, Spain and Poland. It was however not always possible to find sufficient non-successful products – for a number of reasons: because rotation of employees, or unwillingness to cooperate or share sensitive data giving the retailers competitive advantage. Furthermore, the fact that retailers simply do not remember things that happened two or more years ago, or in case of chains data is not available in the system any more (historical data is deleted).

The following innovative fruit products were selected as a case study, see Table 3.1 below:

Table 3.1 Overview of selected cases per country.

Country	**Product 1**	**Product 2**	**Product 3**	**Product 4**
Greece	Cut fruit salad (successful)	Amita Motion (successful)	Knorr Vie Classic (successful)	Knorr Vie Kidz (successful)
Netherlands	Wellant apple (successful)	Fresh cut fruit (successful)	Fruit2Day (successful)	Apple chips (non-successful)
Poland	Guanabana (non-successful)	Czeko-dżemi (non-successful)	Cranberry juice (successful)	Aktinidia[1] (successful)
Spain	Dried fruits (successful)	Fresh cut fruit (successful)	Fruit/milk mix (successful)	Seedless water melon (successful)

3.2 Stage II Case study findings single-case and cross-case analysis

In this paragraph the results of the second stage are discussed, containing information on innovative fruit products in Greece, the Netherlands, Poland and Spain.

3.2.1 Analysis of innovations between countries

This paragraph handles about the entire findings of the respondents from the interviews. See appendix 4 for an overview of the main results.

[1] Although Aktinidia was selected as a successful innovative product, due to a lack of information the product has not been included in the case studies.

3.2.1.1 Case study findings for Greece

*Table 3.2 Overview of product characteristics of products surveyed in Greec*e

Characteristics	PRODUCT:			
General	Fresh-cut fruit salad	Amita Motion	Knorr Vie Classic	Knorr Vie Kidz
Number of interviews	2	2	2	3
Product category	Salads	Juices	Juices (smoothy)	Juices
Time on market (months)	40 – 60	N.a.	24 – 44	12 – 44
Successful	Yes	Yes	Yes	Yes
Availability	Urban area's	Everywhere	N.a.	Everywhere
Market share product category	M.i.	M.i.	M.i.	M.i.
Competitive products	None	Vitamin juices	Other juices	Other juices
Substitutes	Fresh fruit Sandwiches	Fresh fruit	Fresh fruit	Fresh fruit
Target group	Not particular	Families	People who care about health	Children

'N.a.' means that the product is not available for research
'M.i.'means missing information

Fresh-cut fruit salad

1. *Product*: according to the two retailers interviewed about the fresh cut salad, the product is especially popular with consumers because of the high quality of fruit and the healthy characteristics. The product is "super fresh" and "ready to eat without conservatives". Because of the freshness, the product can only be on the shelf for one day and is prepared in store every day. The product characteristics make it very popular with consumers, who appreciate convenience and healthiness of fresh cut fruit.
2. *Price*: the retailers indicate that the pricing strategy is focussed on keeping the price as low as possible, so the product becomes affordable for as many consumers as possible. The ingredients of the product (e.g. orange, apple, melon, etc.) are bought daily and make up a large part of the cost price.
3. *Place*: in the retailers' opinion, fresh cut salad has a prominent position in the shop and on the shelf – it is placed in an open cooled shelf. The product is only available in cities because, as one retailer put it, "the product confirms the way of living". In urban centres people tend to live quicker and use less time to prepare their food, whereas consumers in the country prefer to prepare the salad by themselves.
4. *Promotion*: different strategies were applied by the retailers in this study to promote the fresh cut salad. Whereas one retailer did not perform any promotion to support the sales of the product, the other offered an incidentally price promotion (-20%) when the salad was bought in combination with a meal. This promotion also resulted in a sales increase of 25%. In addition, the

product was introduced in specific shops near office centres, “close to the target group”.

5. *Performance*: the retailers were not able to provide additional information with regard to the performance of the product – other than the fact that the fruit salad has been available for more than two years.
6. *Competition*: the retailers indicate that the fresh cut salad is “a unique product” and has no competitors at the moment. Several substitutes were mentioned, including sandwiches, ready meals and/or fresh vegetables.
7. *Customer*: in general, the consumers of this fruit product are characterized as young people (e.g. singles, students), who look for a quick snack in their lunch time during work. Furthermore, these consumers care about healthy and fresh products. One retailer added that in his shop usually young females buy the product that “care about their diet”. As such, the product is very suitable for people following a healthy lifestyle.

Amita Motion

1. *Product*: the retailers participating in this study both included Amita Motion in the product category “juice with added vitamins”. Other products belonging to this product category are other fruit juices offering a high nutritional value. The main innovative aspect of the product is that it combines nine different kinds of fruit, which makes it cover 40% of the daily needs of several vitamins. According to one retailer: “these characteristics convince consumers that they consume a natural and fresh product”.
2. *Price*: the retailers were not able to provide information with regard to the price strategy of the product.
3. *Place*: Amita Motion has a prominent place on the shelf together with other fruit juices. Consumers looking for a fruit juice will therefore easily spot the drink. The product is mass-distributed throughout Greece and is available at retailers across the country: “one could find Amita Motion almost everywhere in Greece”, according to a retailer.
4. *Promotion*: the product is promoted through advertisements in general media, for example in magazines, TV and radio. These advertisements were conducted to support the sales of Amita Motion and were initiated by the manufacturers. In addition, Amita Motion uses sponsoring of sport games to promote the product. One respondent added that promotions had “no specific effect on the sales”.
5. *Performance*: the retailers did not have any specific information with regard to the performance of Amita Motion, other than the fact that the product is on the market longer than for two years.
6. *Competition*: retailers identified several competing products for Amita Motion. The closest competitor also combines many different kinds of fruit (ten in total) and contains many vitamins. Other competing products combine less different kinds of fruit and contain fresh juice. One retailer also sees fresh fruit as a substitute of the fruit juice, as “it is the only product that can offer the same benefits as Amita Motion offers”.
7. *Customer*: the target group of Amita Motion consists of adults and kids that desire products with added vitamins – in line with their healthy lifestyle. One retailer stated that these consumers are “positive towards functional foods and trust in the power of good nutrition”.

Knorr Vie Classic

1. *Product*: retailers indicate that Knorr Vie Classic (KVC) is a successful product, because of several innovative characteristics. Although it belongs to the fruit juice product category, which contains many competing products, KVC has several novel aspects that make it different from competitors. The packaging is innovative, because it is small of size, which makes it portable. Furthermore, the package opens easily, which adds to convenience. As a retailer stated it: "because of the small-portable size consumers can carry it everywhere". With regard to health, KVC is "rich in vitamins" which convinces consumers that drinking the juice "does something good for their health".
2. *Price*: not all retailers that cooperated with this study were aware of the price strategy of KVC. One retailer characterized the strategy as "premium price strategy" – indicating that the product is in the higher price ranges of the product category.
3. *Place*: in the shops included in this study, KVC had a relatively prominent position on the shelf. It was placed near the competing fruit juices.
4. *Promotion*: different promotion strategies have been applied in the promotion of KVC. One retailer did not apply promotions and therefore experienced "steady sales since the introduction of the product". Another retailer did offer several types of promotions: a) coupons with money offer, b) sample offer and c) extra product offer (e.g. 2+1). These promotions had a positive effect on sales: the retailer experienced an increase of "approximately 6%". The product introduction was accompanied by a media campaign by the producer, through advertising "especially for a woman". In addition, product samples were offered.
5. *Performance*: the retailers were not able to provide additional information with regard to the performance of the product, other than that the product has been available for more than 2 years.
6. *Competition*: according to the retailers, there are several competing kinds of fruit juice available on the market, which also offer added vitamins. All retailers identify the fact that KVC also contains vegetable ingredients as a novel, distinctive aspect of KVC. Furthermore, fresh fruit is identified as the main substitute of the product, because of comparable healthy features and their freshness.
7. *Customer*: health is a central aspect of KVC, according to the retailers in this study. Through its nutritional value, the product is in line with a healthy lifestyle of consumers. Consumers of KVC "actively care about their health and well-being".

Knorr Vie Kidz

1. *Product*: the retailers characterize Knorr Vie Kidz (KVK) as a unique fruit product within the juice product category, because of several innovative features. One retailer named three novel aspects: first, a new target group, namely children. Second, the high nutritional value. "The main innovative characteristic of this product is its synthesis from vegetables as well as fruit". Each bottle contains 100g of fruit and 100g of vegetables. Third, the package

is described as “small, portable and easy to open”. These are important advantages of KVK and “are the unique features of this product and the key in influencing consumer decision to buy the product”. A second retailer emphasises the positive effect on the parents of children: “parents buy this product for their children, so they can consume a healthy and tasty product. In addition, because of its size children are convinced to carry it with them to school”.

2. *Price*: all of the retailers indicate that KVK has a premium price strategy in comparison to the competing products in the product category.
3. *Place*: in the shops included in this research, KVK was placed in the juices fridge, on the same shelf as other fruit juices. At one retailer’s, the product obtained a “prominent” position in the shop. Therefore, it was easily for consumers to spot the product.
4. *Promotion*: the product is heavily promoted by the producer, according to the retailers interviewed – with mixed effects. Some retailers state that the promotions have no effect on sales: “sales are steady since the product was introduced in the market”. In contrast, another retailer states that “there is a direct and strong relationship between airing of the product’s advertisement and sales”. According to this retailer, the reason for this effect is that the product is on the market only for a few months and not a regular purchase yet.
5. *Performance*: retailers could not provide additional information with regard to the performance of the product.
6. *Competition*: according to the retailers, KVK is a unique product that “doesn’t really have a direct competitor in the market”. Retailers state that the vegetable ingredient makes it different from competing fruit juices. Furthermore, KVK provides half the minimum daily intake of fruit and vegetables recommended by the World Health Organization (WHO).
7. *Customer*: the product is mainly targeted at parents, who “care for their kids’ health and well-being”. In addition, the consumers are characterized by retailers as people who are “positive towards functional foods”. The unique features of KVK suit the preferences of these consumers very well.

Synthesis of case study findings for Greece

The successful products in Greece (all studied products) contain characteristics (health, convenience, taste) that are in line with current consumer trends, reference to D1.1.6. The four studied successful products more or less distinguish themselves from competing products on the basis of the characteristics mentioned. Other important factors to create a competitive advantage are an effective promotional strategy e.g. Knorr vie Classic, including price setting and the right price and a prominent the position on the shelf e.g. fresh cut salad.

Table 3.3 Summary

FACTOR	*SUMMARY OF CONTRIBUTION TO SUCCESS*
Product	Successful products have the following characteristics: good quality, fresh (in less extent applicable for KVC and KVK, healthy, convenience, new packaging and good taste. In addition, some products are targeted at specific consumer segments (e.g. children). The products are popular at consumers because the mentioned innovative aspects are in line with current trends of a healthy lifestyle and convenience.
Price	In general the fruit products follow a premium pricing strategy, by offering consumers added value through innovative product characteristics, e.g. convenience and health.
Place	All four products have a prominent position in the shop and on the shelf
Promotion	In general, the successful products have a positive relationship between promotions (both price and media) and sales increases. However, this effect is not quantified.
Performance	These successful products have been on the market longer than for 2 years and therefore survived the first selection process among consumers. (in addition it was not possible to collect further information)
Competition	A number of successful products (KVC, KVK) are distinguishing themselves with their competitors, e.g. by adding new ingredients and/or flavours. Other products are more similar to competing products.
Customer	The successful studied products were all targeted at consumers with an interest in healthy products. In addition, some products were directed at specific segments of this consumer group, e.g. children (and their parents).

3.2.1.2 Case study findings for The Netherlands

Table 3.4 Overview of product characteristics of products surveyed in The Netherlands

Characteristics	PRODUCT:			
General	Wellant apple	Fresh cut fruit	Fruit2Day	Apple chips
Number of interviews	3	3	3	2
Product category	Fruit	Fruit	(Fruit) juices	Snacks/fruit
Time on market (months)	24 – 60	3 - >60	60	< 3
Successful	Yes	Yes	Yes	No
Availability	Dec. – Apr. Specialty shops	Year round Every where	Every where	Not anymore retailers
Market share product category (%)	0.1 – 24	< 1	< 0.1	< 0.1
Competitive products	Other apple varieties	Fresh fruit	Other juices, inclusive smoothies	Regular chips
Substitutes	Other fruit	N.a.	None	N.a.
Target group	Diverse	Diverse	Diverse	Young people

'N.a.' means that the product is not available for research
'M.i.'means missing information

Wellant apples

In contrast with other products in the case of Wellant one interviewed respondent is a wholesaler and one respondent called supplier, sells a product concept in the form of a shelf at supermarkets (with Wellant in it).

1. *Product*: there are different opinions regarding the characteristics of the Wellant apple. Although most of the retailers interviewed agree that the apple is juicy, there is no consensus about the taste: some perceive it as sweet, while others perceive the taste to be sour. Also the shelf life of the product, the time a product can be consumed before its out of date, is a discussion point. Opinions are divided between "long" and "average" shelf life compared to other apple varieties. These views also impact the perception about the consumers of Wellant. The wholesaler states that the apple is mostly popular with enthusiasts of apples, others say consumers in general like the colour and taste of the apple.
2. *Price*: according to the interviewed retailers, the price of the apple is relatively high and fixed for the entire year, with incidental discounts. As the interviewed respondent of the specialty shop states, this is "to increase familiarity with the apple among consumers".
3. *Place*: the Wellant apple has a prominent position on the shelf, according to the interviewed specialty shop and wholesalers – although the position depends on the success of the product. "When the product sells good, it

will get a prominent shelf position from the time of introduction". Wellant apples are mostly available at specialty shops.

4. *Promotion*: promotions were performed both by the producer (Innova) and the retailers. The promotions by the producer were done through the business literature, targeted at specialty shops. Retailers promoted Wellant apples in the shop through: price promotions, features near the shelf, posters, bags and samples, made available by Inova. Most of the retailers noticed a positive effect on the sales of the apples after the promotion, although the effect could not be quantified. The wholesaler had a different opinion on the influence of promotions though and qualified the effect as "not high".
5. *Performance*: of the total sales of apples, Wellant apples occupy a small market position, around 0.5% of apples according to the wholesaler. For specialty shops however, the market share is much higher: sometimes around 40%.
6. *Competition*: Wellant apples mainly compete with other kinds of apples, such as Rubens, Pink Lady and Breaburn.
7. *Customer*: opinions differ among the interviewed parties, about who the target group is of the apple. The opinion of the wholesaler is that the apples are mainly popular with people of more than 55 years of age. In contrast, the specialty shop states that the apple is bought by everybody. Finally, the supplier claims that the apple is targeted at two types of consumers: "a) the conscious consumer that prefers sustainable and organic food and b) the quality eater, who prefers a high-quality apple".

Fresh cut fruit:

1. *Product*: there is debate among the retailers to which degree the product is innovative. One retailer states that the product is innovative because "it's convenient, easy to prepare and because of the quality of the fruit". The convenience is especially relevant in the case of specific types of fruit that are difficult to clean, e.g. pine apple or mango. One other retailer claims that, although he agrees on the aspect of convenience, the product is not that innovative: "not many new developments since the product was introduced", although it was in the first introduction time. Furthermore, it is a difficult product for retailers as the fresh cut fruit degrades quite quickly. Overall though, convenience does play a large role in the success of the product. As one retailer mentioned, "it matches the preferences of the target group". In addition: "fresh cut fruit is the nicest product in our fruit assortment, based on the combination of different fruits, the positive impact on our image and it's an impulse product. Consumers often buy it when they see it."
2. *Price*: the fresh cut fruit follows a premium pricing strategy. It is relatively expensive compared to fresh fruit. Some supermarkets though are offering the product at competitive prices, to make the product more attractive for consumers and gain a competitive advantage on competing supermarkets. To quote one retailer: "we focus less on margins, but apply psychological prices. Its important what our competitors do".
3. *Place*: the fresh cut fruit has a prominent position in the shops, according to the supermarkets interviewed. In certain shops it is placed in front of the

fruit table, so that all consumers walk past it. “Fruit is one of the most important categories of the shop”. Fresh cut fruit is available all over the country.

4. *Promotion*: as the fresh cut fruit is sold under a private-label brand (name of supermarket), all of the promotions are performed by the supermarket – with a positive effect. Lift factors between five and ten were recorded in the case of a price discount. Information about the height of the price discount was not available. As one retailer mentioned: “the effect of a price-off is very high. Two factors play a role: nice weather and the relatively high price of cut fruit”.
5. *Performance*: overall, fresh cut fruit has a niche position in the supermarket sales, less than 1% of the sales of all products. Sales depend to a large degree on the weather: on a sunny day sales increase sometimes with a factor 10.
6. *Competition*: fresh fruit and canned fruit are mentioned as the most important competitors of the cut fruit. “Fresh fruit, is an impulse product. When outside temperatures are high the sales are relative high. Consumers are not yet regular buyers”. One other supermarket analysed the criteria through which consumers make a buying decision: “consumers select according to three criteria: visual quality, taste and price-quality relationship”.
7. *Customer*: mostly young people (until 25 years old) and older people (55+). “The former because of convenience and trendy image, the latter because of convenience and spending power”. Another supermarket adds however: “Price plays an important role. Potentially, everybody could become a buyer of this product”.

Fruit2Day

1. *Product*: the retailers involved in this research agreed about the innovative aspects of the product, namely that the combination between juice and big parts of fruit make it a substitute for fresh fruit. As one retailer said: “when you consumed this product, you finished your fruit for the entire day”. Next to being a healthy product, it also is convenient, as you save time drinking one bottle of juice instead of eating different pieces of fruit. One retailer added: “the product is a good concept, and nicely in line with government policy to increase healthy consumption”. Although retailers defined the product as a success during the six years it has been on the market, the sales have declined lately. There are different opinions among retailers about the reasons for the sales decline. One retailer explained the decline by focussing on consumer perceptions: “because of the large pieces of fruit, consumers perceive it as not easy to drink”. Another supermarket had a different explanation: “the hype surrounding the product is over, new products are introduced, so sales are declining”. Overall though, retailers agree that the explicit focus on health distinguishes Fruit2Day from its competitors and create an added value for consumers.
2. *Price*: retailers indicate that the producer applies a premium pricing strategy for Fruit2Day, which means that the price is relatively high compared to other fruit juices in the product category. There are different

explanations among the retailers. The first retailer motivated the premium price by the high cost price of the product, so the price is in high extent based on the cost price. Another retailer commented that premium pricing is acceptable for the consumer: “although the price is high, the consumer is willing to pay for it, because of convenience”. Finally, one retailer legitimized premium pricing by emphasizing that the product is unique and that therefore a higher price is possible.

3. *Place*: retailers made different choices with regard to the position of the product on the shelf, depending on several factors. Two retailers made the decision about where to place the product, based on the sales of the product. When the sales are good, the product receives a more prominent position on the shelf. One retailer made the decision based on commercial grounds: producers pay for the position on the shelf – “the more prominent the position, the higher the price”. However a relation between successfulness and place on the shelf was only suggested.
4. *Promotion*: Fruit2Day is extensively promoted by both the producer and the retailer. The producer is focussed on above-the-line. This means marketing promotions in general media, such as TV, radio and magazines. Retailers mostly perform promotions in features, sampling and price-promotions. These activities are often in line with the media campaigns from the producer. According to one retailer, the promotional activities by retailers are “agreed with the producer beforehand, and performed four times per year”. Another retailer added: “the promotions are meant to decrease barriers for consumers, to buy the product”. These promotional campaigns have a considerable effect on the sales of Fruit2Day: the retailers estimate a lift factor of between three and six. One retailer mentioned that the lift factor is quite high, “considering that the core sales of the product are already high”. The lift factor is an indicator for price elasticity, but it doesn’t say anything about the success of a product.
5. *Performance*: according to the retailers, the product currently operates in a niche position, with a market share of around 2.5% of the product category (cooled fresh juices). As mentioned before, sales of Fruit2Day are currently declining though. One retailer predicted “a difficult future” for the product, as the product is already on the market for several years and new products are introduced.
6. *Competition*: the product has competition from other fruit juices, including juices from the same brand. Although Fruit2Day was one of the first that focussed on health, more juices have been introduced with similar characteristics since.
7. *Customer*: there is no consensus among retailers about who the consumer for this product is. One retailer stated that the product is for everybody, “from families to young people”, while other retailers identified more specific segments. The latter ones conclude that the product is mainly popular with consumers that focus on a healthy lifestyle. One of these retailers added that the consumers are often young people, which makes the success of the product difficult to understand: “on the one hand side the product attracts consumers who really think about health and therefore want to drink fruit. On the other hand, it mostly appeals to younger consumers, who care less about health”.

Apple chips

1. *Product*: retailers mentioned several innovative aspects about the Apple chips. One retailer stated that: “the product has a combination of good taste, with a health claim”. The other retailer added that “convenience” is also an important characteristic, of being able to quickly eat a healthy product. All of the retailers indicated however that these innovative aspects did not seduce consumers to buy the product. As one said: “consumers did not trust the combination of health and chips”. The evaluation of the retailer was: “the product was a failure because of a bad design of the entire case, including price, taste, positioning and package”. Remarkable is also the difference in defining the product category between the retailers: at one supermarket the product belonged to the snack category, whereas with the other supermarket the product was part of the fruit products.
2. *Price*: two of the interviewed retailers were not able to provide information about the price strategy of the product. One retailer stated however, that apple chips were in the premium price category and he perceived the remark to be “too expensive”.
3. *Place*: the product was only available in selected stores (big retailers). Yet it is not available anymore. Furthermore, the shelf space available for the product was also very limited. As one retailer stated: “the product was positioned near the snacks, but had no shelf space. The producer provided their own material to present the product”.
4. *Promotion*: according to the retailers, promotion for apple chips was limited, because it concerned a relatively small product. One retailer did perform some promotions however, including features and price promotions, but it did not have effect on the sales of the product.
5. *Performance*: according to the information provided by the retailers, the product performed very badly. Sales were minimal and were not increasing. Promotions did not have any positive effect. Therefore, supermarkets deleted apple chips from their assortment after around three months.
6. *Competition*: the product competed both with snacks and with regular apples. Retailers were not certain about the added value of apple chips to these substitutes. According to one retailer, “the added value of apple chips is nearly zero”.
7. *Customer*: the retailers state that the product was targeted at young people and families, looking for a healthy alternative for regular chips. In the end, these consumers did not seem to be attracted by the product.

Synthesis of case study findings for the Netherlands

The innovative new products, successful and non successful, in The Netherlands can be characterized by the following aspects: health, convenience, taste/quality. Successful products have a clear relationship between the aspects mentioned and the product themselves. Non-successful products appeared unable to establish this relationship. E.g. in case of apple chips beforehand health was an important selling point argument, afterwards one considered that health in relation to chips was not a good argument. All products studied tend to obtain a niche position in the fruit product category. This niche position was caused by both the aspects mentioned above and the premium pricing strategy. In addition, certain products are very sensitive to price promotions. In other words, they are highly price elastic. Finally, it seems that most innovative products are targeted at a young consumer group, who prefer convenience and health, combined with a good taste.

Table 3.5 Summary

FACTOR	*SUMMARY OF CONTRIBUTION TO SUCCESS*
Product	Successful products contain several characteristics, most importantly health, convenience and taste. Non-successful products have an insufficient fit with these aspects and therefore cannot convince consumers to buy them.
Price	Overall, the products have a premium price setting in comparison to other products in the same category. The successful products distinguish themselves by offering a good combination between health, convenience and taste, in relation to the product and the price. The non-successful product also distinguished from other products but had a weak relationship to product and price.
Place	Mostly prominent place on the shelves. A direct relation between place in the shelf and successfulness of a product can not be determined.
Promotion	In general, promotions have a big influence on the sales of successful product. Although some products are more sensitive (elastic) to price promotions than others.
Performance	Overall, the innovative products occupy a niche position within the product category. Although these are considered to be niche products, the revenues are still quite large.
Competition	Successful products distinguish themselves from competing products or substitutes by innovative aspects. Innovative aspects are mainly convenience, health, new taste and quality.
Customer	Current innovative fruit products are mostly targeted at younger consumers (around 25) who are sensitive to health and convenience.

3.2.1.3 Case study findings for Poland

Table 3.6 Overview of product characteristics of products surveyed in Poland

Characteristics	PRODUCT:		
General	Guanabana	Czeko-dżemi	Cranberry juice
Number of interviews	2	2	3
Product category	Juices	Jams	Juices
Time on market (months)	< 12	Short time	6 – 36
Successful	No	No	Yes
Availability	Certain chain of shops	Limited number of shops	M.i.
Market share product category	N.a.	Very small	N.a.
Competitive products	Other juices	Do not exists	Other fruit juices
Substitutes	None	Chocolate creams	None
Target group	Young people	Whole population? Children?	Entire population

'N.a.' means that the product is not available for research
'M.i..' means missing information

Guanabana fruit juice

1. *Product*: it represents a line of exotic juices, by Fortuna, which are an example of processed fruit. They were unsuccessful in Poland and are not sold any more. Retailers stress that new, exotic tastes were the novel characteristic of these products. However, in their opinion the exotic taste was exactly the reason for rejecting the product by consumers: 'the taste was too different from what consumers were used to', 'it could seem too strange, people did not even know the fruit, so they could suspect that the juice was produced by flavouring and colouring'. In case of a big supermarket chain the information about new products is obtained by managers from a list/ data base elaborated by a special department – managers of individual supermarkets within the chain do not carry out any market research and do not have any direct contacts with the producer or sales representatives. Other retailers say that they find new products either at the wholesaler's or sales representatives of the producer contact them. They introduced this particular juice in their assortment because juices by Fortuna generally had been selling well.
2. *Price*: in one case the price was calculated on the basis of regular shop's margin and the price offered by the producer, other retailers said that the price did not differ from prices of other juices produced by this company, but they are not able to give any other detailed information.
3. *Place*: the position of this product on the shelf was different in different shops: in case of a huge supermarket chain the respondent said that 'the producer

usually buys the shelf for their product, so whether the product takes a more or less prominent position in the store largely depends on the producer', while in case of other interviewed retailers 'the juices were placed on the same shelf as other juices by Fortuna, so the position was neither better nor worse than that of other juices', so when he wants a prominent place he has to pay for it. Availability of this product across the country is not known, because retailers from small and medium-sized shops have information only about their local market, while managers of big chain supermarkets do not have any access to data concerning the whole chain.

4. *Promotion*: the retailers did not promote this product at all. They mostly relied on the promotion campaign carried out by the producer, on the main part of which consisted of a well-remembered TV commercial. Retailers comments on the promotion were: 'there was only producer's TV commercial campaign, the music track was very popular', or 'there was no special promotion – products by Fortuna are well-known and whenever there is a new product launched in the market, it has a kind of trust credit with customers, and I think that producer's promotion was good enough'. One of the retailers remarks 'the product is out of the market so obviously the promotion did not work'.
5. *Performance*: the retailers are not able to provide additional information with regard to the performance of the product. They only comment that the juice was available for quite a short time.
6. *Competition*: retailers point out at different juices, however those are not specifically exotic ones, only one retailer mentions another exotic 'cactus juice', so it seems that there was not any special competition for this product, just a wide range of juices in general. After *Guanabana juice* disappeared from the market, a new line of exotic juices - 'Fruit of the world' - was introduced and is still at sale.
7. *Consumer:* describing the target group, retailers mostly associate the product with a TV commercial campaign 'the TV commercial showed young skaters, so maybe the juice was meant for young people', others remark 'probably young people, but also other clients to a smaller degree'. When asked who bought these products when they were at sale, the retailers are not able to specify.

Czeko-dżemi

1. *Product*: Czeko-dżemi represents an unsuccessful product, not accepted by the consumers, categorised as processed fruit product. It was a mixture of jam and chocolate, and there were no similar products in the market. Other products mentioned by the retailers were either jams or chocolates and they have been accepted by the consumers (still at sale). 'A new taste and a totally new combination of fruit and chocolate' were the novel characteristics of the product, in retailers' opinion they were also the reason why it failed: 'the taste was not accepted', 'the idea of mixing jam and chocolate was not good', 'maybe it was not so good as chocolate creams, e.g. Nutella, or clients are more used to fruit jams', 'consumers prefer either cream chocolates or pure jams'. Retailers mentioned similar sources of information about new products: 'I observe the wholesalers offer and the offer of products sold by huge supermarkets and my competitors, sales representative of smaller producers also contact me', 'we are informed about a new product by the producer's

sales representative or managers and employees of the shop observe the market and find the products that are not sold by our shop yet'. Manager of a big chain supermarket comments: 'our chain does not look for new products, producers or sales representatives apply to us and they negotiate with the management of the whole chain. But sometimes the producers are too small, too 'local' and they cannot meet our requirements'. Retailers say that they included this product in their offer because they generally try to make the offer interesting to consumers.

2. *Price*: the price was 'adjusted to producer's price' and 'not too high because of severe competition in the market'.
3. *Place*: the position of these products on the shelf was different in different shops: in case of a huge supermarket chain the respondent says that 'the stores of the chain are designed in detail, so e.g. jams are always placed according to this design', while in case of other shops the place for this product differed: 'if the product is new, it is displayed on a separate, special – usually top shelf' or 'this is a small shop so all products are grouped: juices together, jams together.' It is not proved that the placement in the shelf led to the failure. Availability of this product across the country is not known.
4. *Promotion*: the retailers promoted this product in different ways: 'as usual in such situation, consumers are offered samples to taste and producer's representatives give away leaflets informing about the product' or 'when I have a new product I ask my clients if they know it, if they have heard about it, if they want to buy it – a kind of attracting attention to a new product". The results of Czeko-dżemi promotions are estimated negatively: 'at the beginning a small increase, then decrease' and 'customers did not buy it regularly'.
5. *Performance*: the retailers are not able to provide any detailed information with regard to the performance of the product. However, they all agreed that the product was sold for a relatively short time and in small amount.
6. *Competition*: retailers point out that there were no products similar to Czeko-dżemi, there were either jams or so-called chocolate creams.
7. *Consumer:* describing the target group, retailers mention either 'the whole population, irrespective of age and other characteristics' or 'maybe children and people who are not afraid of calories'.

Cranberry juice

1. *Product*: this juice represents successful product innovations, categorised as processed fruit. It was introduced in 2009, it is still available and the sales are increasing. There are at least three other cranberry juices available in the market. Retailers stress that this product is innovative because 'it is healthy, natural, attractive and it refers to traditional home-made products' and, it has a good taste, it contains only natural ingredients'. They also comment that this juice is bought by consumers who care about their health. Retailers obtain information about innovative products 'by contacts with sales representatives of companies and by checking the offer of wholesalers offering healthy products' as well as 'information on new products appearing at fruit and food fairs and available on the Internet'. Retailers included this product into their offer because of different reasons: 'first I bought it as a consumer and it was so good that I looked for it at the wholesalers', 'there has been a big demand for cranberry products and the reason that the shop had been selling other

products by this company for a long time, so cranberry juice was almost automatically introduced into the offer as soon as it had been launched by the company'. Polish retailers remark that cranberry and raspberry juices have always been popular with Polish consumers, but they also stress that this product is tasty, natural (without preservatives) and it has 'its own customers', which are the main success factors.

2. *Price*: all retailers agree that the producer sets up the price and the retailers only add their margin. However, comparison with prices of other cranberry juices shows that this one is the most expensive.
3. *Place*: retailers have two main strategies of placing this product: either on the shelf with other products by Polska Roza company or on the shelf with other juices.
4. *Promotion*: the retailers seem to operate in the same way: there has been no promotion of this product. However, it is often offered when consumers ask about cranberry products or juices in general.
5. *Performance*: depending on the retailer, the juice has been available from 6 up to 16 months. Retailers are not able to precisely define the revenue share of this category (juices), however they estimate it as 'approximately 30% if we take into consideration only cranberry juices' or 'very small'.
6. *Competition*: retailers explain that there are several competitive products. They differ 'in price and contents of the natural juice or concentrate', but 'they are similar in colour in taste'. Cranberry juice by Herbapol is the strongest competition, as the company is the best known in the 'health' market, it supplies chemists, and it is strongly associated with 'natural medicine'. Although this juice is made of concentrate, consumers focus mainly on the name of the company.
7. *Consumer:* retailers agree that all consumers (despite the age, gender, profession, etc.) can be a target group, especially those interested in healthy life style. However the relatively high price may play a significant role in consumers' choices.

Synthesis of case study findings for Poland

Successful products are not distinguished by promotion, price strategies or place in shop, but by product characteristics. Especially taste is an important factor in the success of a product. Crucial is not the uniqueness of taste, but the appreciation by the consumer. It seems that other product characteristics, such as health and naturalness, have limited influence – which is smaller than the influence of taste.

Table 3.7 Summary

VARIABLE	*SUMMARY*
Product	Taste is the most important product characteristic. However, it can have both a positive and negative effect on sales. Successful products are perceived by consumers as having a good taste. A unique taste (innovative) is not a guarantee for success. Researching consumer preferences for the taste is therefore highly recommended. In addition, successful products seem to have more innovative characteristics (health, convenience, food safety, etc.).
Price	Prices for all products are cost-price driven. The final price in the shop consists of the producer price, added by a margin.
Place	o the Guanabana was placed near similar products and nation-wide available. o the place of the product differed among shops. The availability was partly unknown. o placed near comparable products and/or products from the same company. Availability is unknown.
Promotion	Products were hardly supported by promotions in the store. In some cases producers made TV commercials. The effect of promotions is not measurable.
Performance	Performance is not registered by retailers, so information was not available. A lack of performance cannot be linked to the other variables. Concrete this means that the variables price, place, promotion not have a demonstrable relation with the fact whether a product is successful or unsuccessful. Perhaps lack of promotion, but a causal relationship cannot be demonstrated. But, it have been product characteristics which have a decisive meaning
Competition	With or without competition from similar products, a product can become a success in the market and vice versa. The uniqueness of a product is not a guarantee for success.
Customer	Retailers are not aware of the target segment that the producer has in mind. In addition, customers are not informed and supported by the producer.

3.2.1.4 Case study findings for Spain

Table 3.8 Overview of product characteristics of products surveyed in Spain

Characteristics	PRODUCT:			
General	Dried fruits	Fresh cut fruit	Fruit/milk mix	Seedless water melon
Product category	Snacks	Fresh fruit	Juices	Fresh fruit
Time on market (months)	24 – 72	M.i.	48 - 72	48
Successful	Yes	Yes	Yes	Yes
Availability	M.i.	M.i.	Nationwide	Nationwide
Market share product category	M.i.	M.i.	M.i.	M.i.
Competitive products	Other snacks	Other salads	Other fruit drinks	Regular melon varieties
Substitutes	M.i.	Fresh fruit salads	M.i.	Fresh fruit; deserts
Target group	Young people	Working people	Entire population	Entire population

'N.a.' means that the product is not available for research
'M.i.' means missing information

Dried fruits

1. *Product*: Some remarks from the interviews are: "it's a healthy alternative to regular snacks. The price is affordable and it is easy to carry". These are the remarks of a retailer which correspond with the innovative characteristics of this product, although health is mentioned only in one of the three interviews. Shops and retailer came in contact with this product via supplier/whole sale. Their expectations about this product were positive: "It seemed it was a good product (a good snacks brand), and I thought people would like to get a single bag for an immediate consumption".
2. *Price*: It is remarked, that the price is lower than that of comparable products, although it has to be seen in relation to the size of the packing (which is small). One retailer answered: "it is a cheap, affordable product", while another added: "although it is rather expensive to be so small, it is perfectly affordable for anyone".
3. *Place*: The place on the shelf is between other snacks: "not very prominent. They are in the snack's shelves, but in an average place". In one of the shops the product is behind a counter however and consumers have to ask for it.
4. *Promotion*: the retailers indicate that no special promotion has been carried out for this product. As one mentioned: "We have not carried any special promotions, and I do not recall anything special from the brand. I think these products have a very small quota, and even if promotions were strong and sales increased, let's say, 20%, it would not be so relevant in our total revenue".
5. *Performance*: Performance is hardly monitored by the interviewed shops and retailer, so information about the degree of success is difficult to assess.

However, successful products do seem to have a relatively high share of the category sales

6. *Competition*: Other snacks like sunflower seeds, pumpkin seeds, popcorn were seen as competitive products, as well as salty and sweet snacks and dried fruits of other brands. Dried fruits distinguish themselves from the competing products by offering a healthy alternative, in a convenient package: "the advantage of these dried fruits is that they are easy to carry, they satisfy you temporarily until you reach your regular meal, they are full of energy and they are not expensive at all".
7. *Customer*: Young people were seen as the main buyer group of this product. One retailer remarked with the main target group of dried fruits: "I would say parents that want a healthy snack for their children, or young people that want a quick snack".

Fresh cut fruit

1. Product: characterized as an already prepared mixture of fresh fruit, ready to eat, with the size of a portion, healthy substitute for sandwiches, for a meal on the move. As one retailer indicated: "The product is convenient and the fruit is of very good quality. The convenience of the product comes from the fruit being cut and mixed". In short the distinguishing characteristics are health, convenience and quality (freshness). The introduction of the product took place via wholesalers.
2. *Price*: retailers were not able to provide detailed information with regard to the price strategy of the product. One retailer said the price of the fruit product was "based on the costs of the fruit used".
3. *Place*: in general, the shelf of the fresh cut fruit is placed in the neighborhood of fruits and salads. The exact position on the shelf of fresh cut fruit is different among retailers: one remarked "on the lower part of the shelf", while another retailer said "in the middle there is a shelf with fruits".
4. *Promotion*: retailers indicated that no special promotions have been carried out to enhance the sales of the fresh cut fruit.
5. *Performance*: retailers could not provide information about the performance of the product.
6. *Competition*: fresh fruit and other kinds of salads are seen as competitive products by retailers: "fresh cut fruit salads with a mixture of different fruits. There are fresh cut fruit (only pineapple, only papaya, etc) or fresh cut fruit but not mixed (kiwi, pineapple, papaya and melon)".
7. *Customer*: are characterized as "working people who want fruit ready to eat (convenience) and people in a hurry, eating on the move". Another quote in this context is: "Workers in the offices nearby the store, retired people that do not want to cut fruit". So, it is clear that convenience is seen as the main distinguishing characteristic.

Juice with milk

1. *Product*: the product was categorised by retailers as 'juices', 'juices and beverages' and 'fruit juices'. Other products belonging to the same category are 'functional juices and functional products with vitamins or fibres added' and 'other juices and mixtures of juices'. Retailers said that this product is

innovative because of many characteristics, such as ‘easy to drink, easy to carry, no need to keep it cold, refreshing, of different taste’. In retailers’ opinion the tropical flavour and two formats of the drink may influence consumers’ intention to buy it. Retailers obtained this product from the wholesalers and because it was offered by producers. They included it in their assortment because of their positive expectations towards good sales and because they tasted and accepted it. Among the success factors retailers mention the fact that there was ‘nothing similar before, the product is convenient and it is a good combination of milk and fruit’, as well as ‘good taste, price and convenience’.

2. *Price*: retailers said that the price strategy for this product does not differ from strategies for other products and it is mostly based on ‘a very good relation between the price and quality’.
3. *Place*: the position of the product on the shelf was quite different in different shops, mostly prominent, but in some cases similar to other beverages, just on the higher shelf. All retailers agreed that the product is available nationwide.
4. *Promotion*: retailers took two different attitudes to promotion, passive one when they did not do anything in this matter and the other, based only on price promotion or by price promotion joint with new packaging and new flavour.
5. *Performance*: depending on the retailer, the product has been at sales for 4 or even 8 years. Retailers are not able to define the market share and the maximum market share. The volume of the product category sold differs significantly from 4-5 litres per day up to 96 litres per day, depending on the retailer.
6. *Competition*: among products competitive to this juice with milk, retailers list ‘soft drinks and sodas’, ‘other fruit juices and a mixture of soy milk and juice produced by the same company’ and ‘fruit juices and dairy products, which need to be refrigerated’. Retailers do not find any substitutes for this product.
7. *Consumer:* most retailers agree that entire population is a target group for this product, however one of them pointed out at ‘young people with healthy life style’. Retailers disagree about consumers who buy this product. They mention ‘young people’, ‘entire population’ and ‘young people with average income, but not whole families’.

Seedless watermelon

1. *Product*: seedless watermelons are part of the fresh fruit category, just like other fruit: melon, pineapple, apple, oranges. The lack of seeds is the innovative feature and it increases sales because seedless watermelon can be safely eaten by children (they do not choke with seeds) or by elderly people who look for convenience. Retailers obtain this kind of products observing the demand, observing offers of wholesalers and getting offers from suppliers. They included seedless watermelon in their assortment because ‘the clients were asking for it’ or because ‘the sales department of the chain decided to include it’. According to the retailers, the main success factors were ‘convenience, good quality and a good colour of the pulp’, ‘very good taste and refreshing qualities’.
2. *Price*: retailers said that ‘it is a product with a very good relation between the price and quality’, ‘the price depends on the season: 1.20 Euro per kg at the beginning and at the end of the season, and 68 cents at the high season’.

3. *Place*: the position of this product on the shelf was very different in different shops: 'I sell more regular watermelons so they are visible. When clients want seedless kind they have to ask about it' or the opposite situation 'very prominent position. We bought a special stand for fresh-cut seedless watermelon – the sales increased when we started cutting the fruit'. The fruit is available all over Spain.
4. *Promotion*: the retailers promote this product in three main ways: attracting consumers' attention, reducing the price and informing about the fruit. They comment: 'I cut it and offer people small samples, but watermelon – seedless or not – does not really need any promotion', 'price promotions, especially in the peak of the season, producers sometimes give posters or flyers with information about the product, there are also stickers on the fruit with the brand name and other information' and 'when the season starts I place a big banner announcing summer fruit and watermelon is among them and I also like to shape watermelon like sculptures which attracts consumers attention'. Retailers are not able to answer the question about the effects of promotion. One says there was no increase'. Another retailer claims there was a small increase. Another estimated the increase by 50%. Retailers are not able to specify how the product was introduced in the market, they remark generally: 'just offered in shop, but other seedless varieties were available before it' and 'cautious introduction, only after consumer demanded it'.
5. *Performance*: the retailers estimate the time of introduction as about 4-5 years ago. The revenue share is estimated as 'small' in one case and 'around 30% of all watermelon sales'. Retailers define the volume of the category as '1800 watermelons', 'if 100 kg a day in the peak season, then 30-40 kg of seedless watermelons' and 'during peak months 150 kg per day'. They are not able to give any information about the market share.
6. *Competition*: when asked about competitive products retailers pointed out at other varieties of watermelon that are cheaper, 'regular' varieties with seeds as well as other fruit e.g. plums, while the substitutes may be other fresh fruit or when melon is eaten as a dessert then ice-cream or cakes.
7. *Consumer:* all retailers agree that the entire population is a target group for this product, but especially families with young children. Retailers say that consumers who buy this product are 'people in a hurry, eating on the move' and 'working people, who want the convenient fruit ready to eat'.

Synthesis of case study findings for Spain

Successful products have four main characteristics: convenience, health, taste and quality. Convenience consists of two dimensions: consumption convenience (e.g. packaging) and handling (portions). These innovative aspects create higher value for the consumer, which justifies the higher price of the products. Overall, the products have prominent positions in shop and shelf, except for the specialty stores. Here, consumers sometimes even have to ask for the products. Promotion is mostly performed by supermarkets. Perhaps this is because specialty stores can profit from the promotion of supermarkets. Finally, successful products distinguish themselves from competing products by connecting to the target groups.

Table 3.9 Summary

VARIABLE	*SUMMARY*
Product	Successful products combine convenience with a good taste and present themselves as a healthy alternative to snacks.
Price	Successful products offer high value to consumers that justify the high price. Value consists of convenience and quality (freshness and diversity).
Place	Successful products have a prominent place in the shop, for example near the entrance and/or on eyelevel in the shelf. Furthermore, they are located at a logical place, namely near competing products - e.g. near snacks, sandwiches. Specialty shops however are cautious with providing new products a prominent position in the shop. Sometimes, consumers even have to ask for the products. The motivation is the unfamiliarity with the product and to avoid risks.
Promotion	Successful products cannot be distinguished by promotional activities. For example, fruit products are often not promoted in the specialty shops, but can still become a success. Supermarkets on the other hand, do perform promotions (e.g. price promotions, banners, sampling and flyers) and profit from higher sales.
Performance	Performance is hardly monitored by retailers, so information about the degree of success is difficult to assess. However, successful products do seem to have a relatively high share of the category sales.
Competition	Successful products distinguish themselves from competing products or substitutes by innovative aspects. Innovative aspects are mainly convenience, health, new taste and quality.
Customer	Successful products are able to reach their target group that suits their innovative characteristics. For example, fruit salad with busy people and seedless watermelon with children and elderly people

3.2.2 Case study findings: cross-case analysis

In this paragraph, the results of the previous sections are analysed. Three types of analyses are performed: first cross-case analysis between countries, second analysis between fresh fruit and fruit products and finally between successful and non-successful products.

3.2.2.1 Cross-case analysis of innovations between countries

In all of the countries studied, three product characteristics played a crucial role in the success of innovative fruit products: health, convenience and taste. In the Southern European countries, the freshness of a fruit product is also important to convince consumers. Also the price strategy appeared to be more or less similar across the countries. Premium pricing was the most applied strategy, justified by creating added value for the consumer, through the innovative product aspects. For many of the selected products, the prices were cost-price driven. Poland is an exception with regard to promotions in the store. Whereas retailers in other countries apply several types of promotions to boost sales of fruit products, retailers in Poland hardly used promotions to enhance revenues.

In general, successful products obtained a premium position in the shop and on the shelf – in all countries but a relation with sales can not be proved. Specialty shops in Spain were very cautious however with placing innovative products in the shop. Sometimes consumers even had to ask for the product. Entrepreneurs motivated this behaviour with unfamiliarity with the product and risk-aversion. Most products in the countries studied were targeted at young people, as the innovative aspects could be synthesized with a healthy lifestyle and preference for convenience. Similarities and differences between countries are summarized in the table below.

Table 3.10 Summary Cross-case analysis between countries

VARIABLE	*SUMMARY*
Product	It depends on the product, but health, convenience and taste are important characteristics for new products in all researched countries, although having these characteristics is not a guarantee for success. The unsuccessful products included in the study also contained these characteristics, but the products did not catch on with consumers because the combination with the product was not logical apple chips and Guanabana. Health and convenience correspond with current trends of healthy food and easy to take food.
Price	The price is for an important part cost-price driven. This often results in a premium price. In case of successful products the price is attractive enough because of its value regarding to convenience, health and taste.
Place	In most cases the successful products were placed near or between products of the same category. The more successful the product is the more prominent the place on the shelf is. In one case the producer pays for a prominent place on the shelf. Some specialty shops are cautious to place new products on a prominent place in the shelf. A relation with the sales has not been proved.
Promotion	Promotion is separated in price actions and media actions. The shops and retailers which apply price actions, experience high result. This is an indication for a high price elasticity. The result of price actions depends also from timing of price actions, regarding to the weather. Impact from media campaigns was not quantified.
Performance	In some countries this aspect is not measured. In other countries successful products appeared to be niche market products. Niche market products in the categories fresh fruit and fruit product still generate a high revenue.
Competition	The distinguishing characteristics of new products are not a guarantee for success but in the same time helpful to be so in the competition with products of the same product category. E.g. when the product is convenient, very healthy, with a distinguishing taste, the taste has to be linked up with the wishes of consumers.
Customer	Some new products are connected with young people, especially when convenience plays a role. Other products are consumed by all parts of the society. Another market segment recognized consists of consumers that have a health aware health style.

3.2.2.2 Cross-case analysis between fresh fruit and fruit products

From a product perspective, no differences were identified in the success factors of fresh fruit and fruit products. Three examples of a clearly failed market introduction are examined. These are the products apple chips in the Netherlands and Guanabana and Czeko-dzemin from Poland. Apple chips is an example of a fruit product with very good perspectives before the introduction, according to the respondents which have tried to introduce this product. This failure is not due to the lack of distinguishing characteristics but to the combination of these characteristics added to the product chips. Regarding to fresh food, fruit products have the image of being more artificial, as respondents in some countries remarked. Convenience as important product characteristic contains the whole spectrum of 'easy to eat', including size of portions. Health is strongly connected with vitamins.

Table 3.11 Summary cross-case analysis between fresh fruit and fruit products

VARIABLE	*Fresh fruit*	*Fruit product*
Products	Fresh cut fruit (2x), Wellant (kind of apple), seedless watermelon,	Fruit drinks (6x), Smoothies (2x), Apple chips, dried fruit
Product	Most fruit product are drinks, which mean that the rate of innovativeness is not so high; There is no difference between fresh fruit and fruit product in the scoring characteristics, health, convenience and taste. The main difference between the two groups is the product presentation (packing), but this has no demonstrable effect of the rate of success. Quality is especially important for fresh fruit in relation to freshness.	
Price	The price is mainly established by the cost price, which results in premium prices. This counts for both fresh fruit and fruit products. Most of the products have a high price elasticity. Exceptions are kinds of fruit like the apple Wellant and the seedless water melon.	
Place	Most products are placed near or between the products of the product category they belong to. An effect on sales has not been proved.	
Promotion	Price actions were applied for products with high and relative low price elasticity. That is why the effect differs. There is no difference between fresh fruit and fruit products. The effect of promotion via media is also high. However, there is a difference in the type of promotions conducted for fresh fruit and fruit products. Whereas fruit products are promoted both by the producer and the retailer, fresh fruit are only promoted by retailers – with the exception of Wellant apples. The effect of promotions appears to be not measurable except the effect of price promotion.	
Performance	Some products are still growing in revenue, others have become in the stadium of market satisfaction (Product life cycle), which mean that maximum market potential has been reached.	
Competition	Competition on both the market for fresh fruit and fruit products is hard. That is why new products often become successful when they distinguish their self from others by e.g. convenience, health and taste. The degree of competition depends on the extent to which the innovative aspects can be imitated by competitors, without being in conflict with intellectual property (IP). This is relevant for both fresh fruit and fruit products.	
Customer	There is some difference between both groups, in general fruit products are more directed to young people, although some fresh fruit products are also directed to younger people. To summarize, fresh fruit products have a more focused target group in comparison to fruit products.	

3.2.2.3 Cross-case analysis between successful and non-successful products

Successful products have the following characteristics: health, convenience and (good) taste. The products are popular with consumers because these innovative aspects are in line with current trends of a healthy lifestyle and convenience. Non-successful products in general have an insufficient fit with the innovative aspects and are therefore less popular with consumers. Exception is apple chips in the Netherlands where the failure is due to the absence of a relation between the health aspect and the product category chips. Although taste is important, the influence on success can be both positive and negative. Successful products are perceived as having a good taste. A unique taste (innovative) is therefore not a guarantee for success. With regard to convenience, two dimensions can be distinguished: consumption convenience and handling. Consumption convenience is about innovative ways in which the fruit product can be consumed, e.g. cut fruit or the seedless watermelon. For example, the cut fruit product can be consumed more conveniently in comparison with separate types of fruit. Handling on the other hand, makes the fruit product easier to transport, e.g. in smaller portions. Hitching on the current lifestyle trend of health, many innovative fruit products are using this claim as an important product characteristic. Successful products, such as Fruit2Day, are able to link health to their products. However, health claims should have a logical link with the characteristics of the product and the consumers. Relevant examples are the apple chips and the chocolate/jam combination (Czeko Dzemi). Making this link clear and logical is therefore very important for product success.

Most of the products studied, compete from a niche position in their product category. Next to having innovative product characteristics, the niche position is caused by the price strategy. Almost all products follow a premium pricing strategy, which means that the prices are relatively high and often based on cost price. Successful products are able to follow this strategy because they offer added value to consumers, for example: better taste, being healthier or more convenient. Consequently, a specific group of consumers (segment) are willing to pay more for these fruit products.

When innovative fruit products proved to be successful, they gain a prominent place in the shop. This means that the product is placed in a good location in the shop (e.g. at the head of the fruit department) and on the shelf (at eyesight). Important is also that the product is positioned in a logical place in the shop. Especially with unsuccessful this appears not to be the case, so this might be one reason for their unsuccessfulness. Successful products are placed on the basis of the consumer needs, so functional drinks near the fruit drinks. Apple chips however, were not always placed near the snacks, but also at the fruit department. In that case consumers could there not be influenced by an impulse to buy a healthy alternative to regular snacks. Furthermore, the position of innovative fruit products seems to be different when comparing supermarkets with specialty shops. Specialty shops seem to be cautious to place innovative fruit products on their shelves. Because of unfamiliarity with the product and to avoid the risk of selling an unsuccessful product, they wait with selling a new product until it has proved a success. That is why market potential is not fully utilized

The effect of promotions on product success was difficult to establish. In general, successful products have a positive relationship between promotions and sales increases. Some products appeared to be more price elastic to promotions (price actions) than others. Fruit salads for example, had a high price elasticity, meaning that if the price goes down the sales go up rapidly. Although promotions seem to have a positive effect, some fruit products also became a success without any promotions. This was often the case in specialized vegetable and fruit shops, where innovative fruit products were hardly promoted. Perhaps some of these shops profited from promotions at supermarket chains. The question remains what the success of the innovative product would have been, when a promotional campaign would have been conducted. More data is needed though, to establish the difference in sales between the degree and types of promotions.

Finally, successful products have been able to reach the target group that suit the innovative aspects of the fruit product. Very often the innovative products were targeted at a specific consumer group, especially younger consumers that prefer healthy and convenient products. Almost none of the innovative fruit products studied focused on broader targets groups, e.g. families with children.

4 Conclusions

Introduction
The development of new fruit products implicates a broadening of the fruit product assortment and therefore it is a stimulus for fruit consumption. In the following part the overall conclusion of this case study about the introduction of new fruit products in Greece, Poland, Spain and the Netherlands will be presented. When products are successful, they form a stimulant for fruit consumption. In the following part the overall conclusions of this case study about the introduction of new kinds of fruits and fruit products, will be handled.

In the ISA Fruit program this case study forms the last study in the series of fruit consumption related work packages. In addition to obtaining new insights, it is meant to compare the results with the results of other fruit consumption related work packages. The findings regarding to introduction of new fruit products in this study has a strong relationships with the trend impact factors health and convenience of D1.1.6. The findings in this study about the process of innovation and introduction of new fruits and fruit products, fits well with the presented global product innovation model in D1.3.1. In this model consumer innovation adoption is the result of marketing communication and product characteristics, with consumer characteristics as modifying factors above. In D1.4.4 product innovation is one of the distinguished fruit product chain innovations. Taste and health are the mentioned characteristics.

General:
The case study findings confirm the ISAfruit project assumption that fruit product innovations may have some potential to increase fruit consumption. Most products examined in this research were successful, yet the findings make it clear that the introduction of new fruit products can still be improved. Although it is known from other research that the majority of innovations fail and one of the WP 1.3 objectives was to investigate the reasons for innovations failure, it was difficult and in some cases impossible to get any information about unsuccessful innovations from the retailers. The reasons for this are: rotation of employees, unwillingness to cooperate or share sensitive data giving the retailers competitive advantage, the fact that retailers simply do not remember things that happened two or more years ago or in case of chains data are not available in the system any more (historical data is deleted).

Product:
1. Among all analysed factors, product characteristics have the biggest impact on success according to presented case study findings.
2. Among product characteristics, health, convenience and taste play the most important role in influencing consumers’ choices. This conclusion confirms conclusions of consumer focus group discussion (D1.3.3) and of research on consumer acceptance of novel fruits and fruit products (D1.3.5), where especially health and taste were stressed as factors most strongly influencing consumers’ choices.
3. Innovative taste does not implicate automatically a success for the product. Appreciation of taste mainly depends on consumer’s perception. Therefore, taste can either have a positive or a negative influence on product success; taste is therefore a prerequisite for success.

4. The claims of the producer (e.g. health, convenience) should match the characteristics of the fruit product. For example, in the case of apple chips the product characteristics (chips) from consumer perception did not match the health claim of the producer.
5. When we compare fresh fruit and fruit products (processed fruit) innovations, the scope of product innovation is more limited for fresh fruit (natural product), because it is more difficult to obtain a unique product in this category.
6. Consequently, because fresh fruit products are relatively similar (excluding exceptions such as the seedless watermelon), competition in the fresh fruit market is fierce and focussed on price. Thus, distinguishing yourself as a producer with competitors, on the basis of the characteristics mentioned at point 2, is difficult.
7. However, competition is also fierce in the market of fruit products, as innovative aspects are quite easy to imitate.

Consumer

1. From the case study findings we can define two consumer groups:
    a. the group that appreciates only well-known, classical taste but accepts some innovative characteristics like for example increase in convenience or health – we call them non-innovative consumers;
    b. the group that appreciates and accepts improvements or novelties in different product characteristics – we call them innovative consumers.
2. The innovative group can influence the non-innovative group, thus starting a dynamic process of the shift between the two segments.
3. In some cases, even very innovative consumers (e.g. Polish consumers according to findings/conclusions of D1.3.3) reject new products, (e.g. Guanabana juice and Czeko-Dzemi, mixed fruit jam and chocolate) despite the fact that those products had the characteristics required by consumers, e.g. attractive or even exclusive packaging (D1.3.3). It confirms the conclusion that there are some limits to consumers' acceptance of novel fruit and fruit products, if these products differ too much from what consumers are used to, especially in the aspect of taste.
4. The above findings may play a significant role in development of the product, in selecting the target group, in creating the promotion and introduction strategies.

Market and price:

1. Retailers most often do not know what the target group is for an innovative product. Thus, promotions carried out by them may be ineffective as they are not directed to the right target group and this causes inefficient spending of limited financial resources.
2. From the producers is known, that most products are offered to specific consumer segments (younger people, people about 25 years old, people focusing on health/convenience, etc.), therefore they operate in a niche position, which means that the innovative products are offered not to the entire population but only to some specific segment of the population.
3. Two factors contribute to niche position:
    a. product characteristics, which make the product relatively unique and appealing to some consumers only, e.g. Fruit2Day;

   b. price: premium pricing strategy; only for people who can afford to buy.
4. In the carried out case study, the premium price was justified by offering consumers innovative products with added value such as convenience, better taste or added health, in comparison with competing and substitute products.
5. Premium price is caused by high cost price, which limits the potential consumer group. Because of high prices the market potential is not fully exploited.
6. Within the surveyed fresh fruit and fruit products there were little innovations for a broad target group, e.g. families. Therefore the impact of these innovative products on the total population of consumers remains limited. New products meant for bigger consumer groups have more market potential.

Promotions:
1. Fruit products were generally promoted either by the retailer (conventional retailers' methods) or by the producer through conventional mass media techniques (above-the-line).
2. Fresh fruit products were often promoted by retailer only.
3. Differences in price elasticity between products, implicates different effects of price promotions (lift factor[2]) on the sales.
4. Success of promotions based on reducing prices of premium price products indicates high elasticity of such products, which tells the producer that the potential market for this innovation can be much bigger (e.g. cut fruit);

Product introduction:
1. The introduction period of innovative product is crucial for the success of products. The first months are especially decisive. When the sales of the innovative fruit product are below expectations, retailers may quickly give up selling the product.
2. The study indicates that producer's strategy surrounding the product introduction is unknown to retailers. Therefore, it seems that the introduction is underexposed and not well documented. In fact introduction at retailers is carried out by the mother holding.

Place:
1. Successful products have a prominent position in the shop;
2. Retailers pay a lot of attention to the place in the shop and on the shelf of the fruit product, however the position of the product is usually determined by one of the following factors:
   a. the sales volume: the more of the product is sold, the better position is given to it,
   b. the spending power of the producer, who can or cannot afford to 'buy' a shelf for the product,
   c. the available space in a shop
   d. the shape of the product (ergonomics). For example big products are not placed on the higher shelves,
3. Specialty shops pay attention to positioning in a much lesser degree, which implicate that the success of products could have been much bigger as it is.

[2] The lift factor is the marketing jargon for the increase in sales caused by price actions.

5 Strategies, policies and product characteristics for future fruit innovations

Introduction

This chapter translates the conclusions of Chapter 4 into recommendations for strategies, policies and product characteristics of future fruit innovations. The recommendations are divided into suggestions for fruit producers, retailers and policymakers.

Recommendations for producers:

1. Producers should test if consumers accept the new characteristics of the offered innovative product, especially if it is a new taste, which seems to be the most crucial aspect deciding about consumers' acceptance of innovative product.
2. Producers should make sure that consumers can easily recognize and accept the link between product characteristics and producers' claims about those characteristics (e.g. healthiness, convenience) and that consumers find them logical and approvable.
3. Producers should take into consideration the possibility of 'double-targeting', i.e. taking advantage the fact that there are innovative and non-innovative consumers in each segment of the market, specified according to age, gender, and other standard criteria and that a new, innovative product can be targeted to a more precisely specified group of consumers.
4. Producers should identify their target group beforehand (before developing the product) and when introducing the product, they should inform the retailers who the target group are.
5. If producers apply a premium price strategy, they should make sure that the product has some added value from the point of view of the consumer.
6. If the price promotion signals that the potential market is much larger, then the producer's strategy may carefully aim at introducing another, cheaper version of the product, controlling however competition between the two version.
7. Producers and retailers should cooperate in carrying out promotions, and at least communicate about the target group and about general outlines and time of their promotions.
8. Producers and retailers should take into consideration the fact that they have to allocate sufficient financial resources to support the new innovative product within its first several months on the market, as this time can be a prevailing factor in some cases.
9. Performance of innovative products on the market over the first several months is crucial to the success or failure of the product, so more participants should cooperate in the introduction of new product to increase the chance of its success.
10. In case of longer chains consisting of producer-wholesaler-retailer, the producer should try and inform the wholesalers about the target group and the promotional campaign and try and make wholesaler transfer the information to the retailer. All levels of the chain should be to some degree involved in producer's campaign.

Recommendations for retailers/ specialty shops

1. Retailers should target innovative products at the same group as the producer does.
2. Consequently, retailers should make their promotion campaign compatible and complementary with producer's campaign to increase efficiency of financial resources allocated to the promotion.
3. Retailers should pay special attention and attract consumers attention to innovative products, over the several first month after introduction – the positioning of innovative products seems to be underestimated by small and medium-sized shops which should be changed and retailers should change that in order to expose products promoted by producers and big retailers and benefit from it.
4. Retailers may strengthen their market position attracting more customers thanks to a wide offer of standard products and regularly introducing innovative products at the same time.
5. Retailers should measure the performance of innovative products with and without price promotion to define whether the product has high or low price elasticity and this way get a basis for effective promotion decisions in the future.

Recommendations for policy makers:

1. Health seems to be an important success factor for innovative products, however these products are still niche and they reach only a limited segment of the total potential fruit consumers. Therefore to enhance fruit consumption policy makers should carry out more campaigns informing citizens about health benefits of consuming fruit, thus creating a bigger demand for the fruit products that are currently in a niche position.
2. Policy makers should focus their promotional campaigns on the demand side, increasing consumer needs for fruit products.
3. Because the whole market consists of different consumer segments, policy makers should target their campaigns promoting fruit products.
4. Policy makers should use information tools well-adjusted to the consumer segment that they want to reach.

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Appendix 1: Checklist Case Study Selection

Selection Criteria Case Studies

This section presents the selection criteria for selecting a successful and a non-successful example of a production innovation. The selection process follows a sequence: in two steps successful products will be separated from non-successful products.

STEP 1: CUSTOMER ACCEPTANCE

Background: the product mentioned in Deliverable 1.3.2 is successful when it is still available in shops to consumers. Please collect required information at the manufacturer of the fruit product (see below) and fill in the table.

Required information:

1. Collect data on market introduction of the 14 fruit products.
2. What was the introduction date of the product?
3. Is the product still available?
4. **If not**, how long on market? (fill in Exit column)
5. **Successful**: > currently available. **Non-successful**: not available

Product name	Introduction date	Still available?	Exit	Successful?
1 Juices enriched with vitamins and minerals	2002	√		Yes
2 ready-to eat fruit combinations	More than 10 years	√		Yes
3 The mixtures of milk derivatives and fruit are also important innovations in this field, "fruit to drink" different from the traditional juices.	2002	√		Yes
4 Ready-to-eat fruit dishes	2003	√		Yes
5 single servings are specially important for a certain population segment	More than 10 years	√		Yes
6 Fruit and vegetable snacks. Fruits and vegetables of small size to eat out, in a bag	More than 10 years	√		Yes
7 Fresh-cut fruit served with some cream or chocolate (in a separate compartment) to dip the pieces	In fruit fairs	X		----
8 Dried fruits with different flavours (orange and lemon)	In the USA	X		----

9 Frozen fruit prepared for cooking	1995	√		Yes
10 Fresh-cut fruit served with a fork/spoon and a serviette, to eat out.	In fruit fairs	X		-----
11 Ready-to-eat dishes with an easy aperture and an attractive design	In fruit fairs	X		----
12 Spot indicating when the product is ready to eat changing its colour UPM Pillar 1	In fruit fairs	X		----
13 Seedless fruit varieties (grapes or watermelon without seeds)	2002	√		Yes
14 Marmalades with new fruits (tropical fruits)	More than 3 years	√		Yes

STEP 2: INNOVATION CATEGORIES

Background: in order to make a selection among the successful and non-successful products in step 1, additional information about the innovative nature of the fruit products is required.

Please fill in the form below for <u>every</u> fruit product of step 1 and send the 14 forms + the information in table 1 to: marianne.groot@wur.nl

<table>
<tr><td>Name:

“Zumosol Fresh: naranja y lima con vitaminas ACE”</td><td>Institute acronym:
UPM</td></tr>
<tr><td colspan="2">Product (number and name):
1 Juices enriched with vitamins and minerals</td></tr>
<tr><td colspan="2">Product category (please mark below, one option possible)[3]:
Fresh fruit: ☐
Fruit product: ☐X</td></tr>
<tr><td colspan="2">Consumption pattern (please mark below, more than one possible)[4]:
Home: ☐X
Out-of-home: ☐X</td></tr>
<tr><td colspan="2">Motivation (describe in terms of category descriptions):

Orange and lime juice enriched with vitamins A, C and E. Price: 1,10 €/litre</td></tr>
<tr><td colspan="2"></td></tr>
</table>

[3] Fresh fruit = original fruit, not processed in a product (e.g. new apple or banana).
Fruit product = fruit processed in a product (e.g. smoothie or desert).
[4] Any innovation that enables the consumer to consume fruit or fruit products in home and/or out of home, e.g. at work, schools, sports facilities, on the go, at gas stations, cafés/bars, restaurants, hotels, institutions
(hospitals), airports, etc.

Appendix 2: Interview Protocol

Interview Protocol

Instruction for interviewer: the information in this section should be gathered for each product at 3 different retail stores (supermarkets or specialty stores, depending on the type of product). Please fill in this form for every interview separately.

1. When was this product introduced in this store and for how long is/was it available?
    a. Introduction….-…..-......
    b. months available:……

2. What is the product category this product belongs to?
    a. Product category:……………………

3. Which other products belong to the same product category?

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4. What is the target group of the **product category**?

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5. What is the revenue share of the **product category** in the total revenue of the retailer?

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6. What is the volume (nr. of products sold) of the **product category** last year?

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7. What is the maximum market share realized by this **product** in the category, and when was this accomplished?
    a. Maximum market share:……….%
    b. Date: ….-…..-......

8. How does the retailer collect the information of question 7?

Instruction for interviewer: ask the retailer about how data is collected with regard to market share. For example, do they have a scanning system? What does it register?

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9. Which promotions have been conducted to support the sales of the product (e.g. price, display or feature promotions)? Where these promotions initiated by manufacturer, or only by the retail chain?

Instruction for interviewer: collect information about which type of promotions have been conducted, and when they have taken place.

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10. What was the effect of these promotions on the sales of the product?

Instruction for interviewer: describe as detailed as possible, e.g. in terms of a % increase/decrease on sales, and the duration of the effect (e.g. a 5% increase in sales during a period of 1 month).

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11. Can you please describe the three main competitors of this product in the product category and what are the distinctive features of the products?

Instruction for interviewer: collect information about which brands are competing with the product and what the differences are among the products in terms of product characteristics.

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12. Can you please describe the main substitution of this product and what is the distinctive feature of the product?

Instruction for interviewer: collect information about which product is substituting the product in question, ask for brand names, and what the differences are among the products in terms of product characteristics.

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13. What is the position on the shelf of this product? (prominent or less prominent)?

Instruction for interviewer: please ask on until you also have a good idea about the place in the shop and the products in the neighbourhood

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14. How can the customers be characterized that buy this product?

Instruction for interviewer: apart from sociodemographics (gender, age, income), please also try to get a characterization in terms of lifestyle, etc.

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15. What are the innovative characteristics of this product?

Instruction for interviewer: please describe in terms like: Taste, Price, Convenient to consume, Healthy, Novel, Easily available in a store nearby, Attractive, Safe, Natural, Better than regular, Exclusive, etc. Don’t propose these terms to the respondent, just try to get him/her at that level of specificity

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16. In what way did these product characteristics (question 15) influence the consumers intention to buy the product?

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17. What is the nation-wide availability of this product for the consumer?

Instruction for interviewer: is the product for example available in all shops of the retail chain, or only in a number of stores? Alternatively, it could be possible that the product is only available in a specific formula of the retailer (e.g. the online shop).

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18. What is the price strategy of this product?

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19. How was the product introduced on the market?

Instruction for interviewer: please describe the introduction strategy of the product at the retailer (e.g. scale of release, try-outs, promotions), when the product was introduced on the market. For example, was the product widely released in all shops of the retail chain, or only in a limited number of shops? Were there any try-outs with consumers, who could test the product in the first weeks? Was the market introduction accompanied with promotions in the retail store, or

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20. How does the retailer obtain innovative products? (e.g. contact with fruit producers, etc.)

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20a. Why did the retailer include this product in his/her assortment?

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21. What are according to you the reasons for the success/failure of this product?

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Appendix 3: Linking factors to questions

	Question																				
Variable	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Product		X	X												X	X				X	X
Price																		X			
Place													X				X				
Promotion									X	X									X		
Performance	X				X	X	X	X													
Competition											X	X									
Customer							X							X							

Table: Linking Questions Interview Protocol to Variables

Appendix 4: Frequency table of the most essential findings from interviews

Interview question	Total	Answer category 1		Answer category 2		Answer category 3		Answer category 4	
What are the innovative characteristics of the products?		Health mentioned		Convenience mentioned		Taste mentioned		Quality/freshness mentioned	
		Fresh fruit	Fruit products	Fresh Fruit	Fruit products	Fresh fruit	Fruit products	Fresh fruit	Fruit products
	PL 7 NL 12 GR 9 SP 12	PL 0 NL 1 GR 2 SP 1	PL 2 NL 4 GR 7 SP 0	PL 0 NL 3 GR 1 SP 4	PL 0 NL 2 GR 4 SP 4	PL 0 NL 3 GR 0 SP 0	PL 4 NL 1 GR 2 SP 2	PL 0 NL 2 GR 1 SP 1	PL 0 NL 0 GR 2 SP 0
What is the price strategy of this product?		Cost price driven		Prices of other retailers/products		Premium price			
	PL 7 NL 12 GR 9 SP 12	PL 5 NL 1 GR 0 SP 1		PL 2 NL 0 GR 0 SP 0		PL 0 NL 6 GR 3 SP 0			
What is the position on the shelf of this product?		Prominent		Mean position		Inferior position			
	PL 7 NL 12 GR 9 SP 12	PL 1 NL 6 GR 5 SP 3		PL 4 NL 2 GR 4 SP 4		PL 1 NL 1 GR 0 SP 2			

Which promotions have been conducted to support the sales of the product?		Price actions	Media actions	Samples	Features
	PL 7 NL 12 GR 9 SP 12	PL 0 NL 7 GR 2 SP 3	PL 2 NL 8 GR 5 SP 0	PL 1 NL 2 GR 0 SP 2	PL 1 NL 6 GR 0 SP 1
		Price actions	Media actions	Samples	Features
Noticeable effect of the promotions on the sales of the product?	PL 7 NL 12 GR 9 SP 12	PL 0 NL 5 GR 2 SP 3	PL 0 NL 0 GR 0 SP 0	PL 0 NL 0 GR 0 SP 0	PL 0 NL 0 GR 0 SP 0
What are the reasons for the success/non success of the product?		Distinguishing characteristics		Does fit/ non fit with consumers expectations	
		Succesful product	Nonsuccessful product	Succesful product	Nonsuccessful product
	PL 7 NL 12 GR 9 SP 12	PL 0 NL 8 GR 5 SP 9	PL 0 NL 2 GR - SP-	PL 2 NL 8 GR 0 SP 2	PL 3 NL 2 GR - SP -
		Price		Suits to trends	
		Succesful product	Nonsuccessful product	Succesful product	Nonsuccessful product
		PL 0 NL 1 GR 0 SP 0	PL 0 NL 1 GR - SP-	PL 0 NL 0 GR 3 SP 0	PL 0 NL 0 GR - SP -