

VIVERA AND THE GERMAN MARKET



Source: (VIVERA, 2016).

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EXECUTIVE SUMMARY

Vivera is a Dutch Company located in Holten, Overijssel. They are operating since 1990. In the beginning, one could find Vivera products in various Dutch supermarkets, but now the products are available in more than 20,000 supermarkets in 20 different European countries. The mission of Vivera is that they want to provide affordable, vegetable products for everyone in the most sustainable way possible. The product range of Vivera includes vegetarian-, lupine-, 100% vegetable-, and organic products.

The focus of this research refers to the increase of market share on the German vegetarian product market. The problem is that there is little insight on the German vegetarian product market. Vivera does not have a lot of knowledge about their German customers and they do not know what their customers want and need. As a result, a central question was formulated: *'How can Vivera increase its market share on the German vegetarian product market?* Marketing tools and models are integrated in order to formulate a recommendation. Furthermore, academic articles, websites and case studies were consulted to highlight relevant studies and the profile of Vivera. Quantitative and qualitative research was integrated to monitor consumer buying behaviour of German inhabitants and to take a look at the field of market trends on the vegetarian product market in Germany.

As stated in the market description, Vivera serves specific target groups, namely vegetarians, vegans, flexitarians and lacto-ovo vegetarians. They do not sell products for pescatarians and meat eaters. A questionnaire was conducted among 367 respondents in the age group of 18-64 years old. According to results from this questionnaire, the majority of these respondents are female (90.77%) and in the 18-24 age category (68.52%). In addition, most of the respondents are single (45.09%). Their residence is very diverse; they come from all over Germany.

Like every company, Vivera has its strengths and weaknesses. These are described in the internal analysis. The strengths of Vivera include, for instance, transparency through social media and interaction with customers and good value for money. However, Vivera also has its weaknesses: low brand awareness through private labels and no online web shop. Moreover, the external analysis of this report shows that the German vegetarian product market is characterised by a high level of competition and an increasing number of vegetarian and vegan people in Germany.

In conclusion, successfully increasing market share on the German vegetarian product market is possible. However, what to do and how to do that should be considered carefully by Vivera. This report also makes recommendations with regard to future perspectives for Vivera on the German vegetarian product market. The first recommendation is that Vivera should focus on introducing products like vegan cheese, sweet products (chocolate, vegan gummy bears, cake, ice cream etc.) and ready-to-eat vegetarian and frozen meals. Furthermore, they should produce products without dairy but substitutes that taste similar to dairy, for instance, sour cream and whipped cream. And finally, Vivera should add fish and shellfish substitute products to their product range, to satisfy the needs of pescatarians and vegetarians who would like to eat fish more. The second recommendation is to create an online web shop. The advantage of an online web shop is that an online web shop is open 24 hours a day, 7 days a week and 365 days a year and customers can order anytime online. Besides, international customers could be attracted if they can order Vivera products online. Another advantage of this is that Vivera could increase its brand awareness if they start selling products online with their own brand name on it. The final recommendation concerns the assumption that vegetarian and vegan products might be trend sensitive. It is recommended to stay innovative and keep an eye on vegetarian food trends in the future, to stay ahead of the competition. In addition, it is very important to stay in touch with customers via Facebook and other social media channels like Instagram or Twitter. This is important because customers can help thinking of new products and share their wants and needs.

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1. INTRODUCTION

This report will answer the question how the company Vivera can increase its market share on the German vegetarian product market. The problem is that there is little insight on the German vegetarian product market. Vivera does not have a lot of knowledge about their German customers and they do not know what their customers want and need. Vivera wants to know how they can increase their market share so they can grow bigger on the German vegetarian product market.

This report therefore sets out to try and answer the following research question: *How can Vivera increase its market share on the German vegetarian product market?*

In order to be able to answer the research question, the following six sub questions will be researched:

1. How can we describe the company Vivera?
2. Who are the current German consumers of Vivera products?
3. Which Vivera products do German consumers need or want?
4. Who are the main competitors in Germany?
5. What are the market trends if we look at vegetarian products in Germany?
6. What are Vivera's strengths and weaknesses?

1.1 OUTLINE OF THE REPORT

This report consists of a logical research structure that will finally lead to the answer of the central question. In this introduction the central question and the sub questions have been defined. The next chapter of this report contains the methodology. After this section, the theoretical framework section follows. The fourth chapter contains a company description, such as the history, mission, corporate social responsibility, a product range description, the channels and the Business Life Cycle. The aim of this chapter is to provide a clear overview of the activities of Vivera. The fifth chapter focuses mainly on market description and gives an answer on the following two questions: *'Who are the current German consumers of Vivera products?'* and *'Which Vivera products do German consumers need or want?'* After the fifth chapter, the internal analysis is being discussed. The seventh chapter will address the external analysis of Vivera, including the DESTEP model, the five forces of Porter, a competitor analysis, market trends and opportunities and threats. The eighth chapter will show the confrontation matrix, including the SWOT analysis. The following chapter will look at the research findings and shows the results of the interview and the questionnaire. Finally, the conclusion and recommendations will be given.

2. METHODOLOGY

In order to provide a detailed recommendation for Vivera, several relevant research methods are used. All methods are explained below.

2.1 DESK RESEARCH

All results retrieved via desk research are classified as secondary data. The Internet is used to outline the German vegetarian product market. Furthermore, case studies and academic articles are used to construct the theoretical framework that provides an outline of previous studies. It can be concluded that the research findings retrieved via desk research are objective as they contain mere facts about the German vegetarian product market.

2.2 MODELS USED

Several market and export tools have been designed to gain insight into certain business aspects and whether it is feasible for a specific company to enter a foreign market. These tools will be further explained in the Theoretical Framework.

- Business Life Cycle
- Abell Business Model
- DESTEP model
- Porter's five forces model
- Competitor Analysis
- SWOT analysis
- Confrontation matrix

These tools will be further explained in the Theoretical Framework section.

2.3 FIELD RESEARCH

All results retrieved via field research are primary data. The two types of field research are quantitative methods and qualitative methods. Both types of field research are included in the report. The difference between these two types of field research is demonstrated below.

2.3.1 QUANTITATIVE METHODS

A total of 367 out of approximately nine million German vegetarians and vegans were surveyed. A number of 384 was intentionally chosen as it indicates an error rate of 5%, but the amount of respondents was unfortunately not enough. Moreover, an error rate of 5% results in a reliability percentage of 95%, according to Alles over Marktonderzoek (a

Dutch web site that gives access to information about market research) (Alles over Marktonderzoek, 2016).

A questionnaire was distributed among German inhabitants by using the online tool www.thesistools.com. In addition, Vivera placed a promoted post on their Facebook page, which is only possible for Facebook pages with more than 400 likes, with a link to the questionnaire used in this research report (see appendix 11.1). Vivera did this to increase the amount of respondents. Furthermore, Vivera promoted this message to people with the following interests on Facebook: veganism, vegetarianism, food and beverages and fitness and wellbeing. The Facebook post was running from Friday 9th of December to Wednesday 21th of December.

Questions in the questionnaire are in German to prevent a language barrier. The questionnaire comprises 14 questions: the first five questions relate to demographics and the remaining questions relate to the buying behaviour of German inhabitants concerning vegetarian and vegan products (see appendix 11.2). First of all, the questionnaire starts with a brief introduction and a reference to the length of the questionnaire. The introduction ends with a privacy statement, which guarantees that all results will be treated confidentially. Furthermore, demographic factors (questions 1 to 5) are of great importance to design the profile of the German inhabitants who participated in this research. All consumer groups are relevant to this research report. Moreover, questions related to buying behaviour (questions 6 to 14) are of great importance as well since they monitor the buying behaviour of German inhabitants in terms of what they buy, where they buy, how often they buy, why they buy, which products they would like to see more, why they do not buy, what they think of vegetarian and vegan products in the future and if they have any recommendations. Also, all questions are multiple-choice questions so processing the answers of the respondents is more effective within the limited time. There was also an 'Other' box added to some questions, so respondents could answer the question more specifically if they wish to. Finally, the questionnaire ends with a brief end section that thanks respondents for their support and their time.

2.3.2 QUALITATIVE METHODS

An expert in the field of market trends on the vegetarian product market in Germany was interviewed. Transcripts of the interviews are in the appendix (see appendix 11.3). The interview adds value to the research report as it contributes to a clear understanding of the trends in the future that may affect the German vegetarian product market.

- Interview with a press office employee from VEBU (Vegetarierbund Deutschland). This interview focuses on the trends on the German vegetarian product market. It is a structured interview with Wiebke Unger, which was conducted via e-mail.

The VEBU (founded in 1892) is a German non-governmental organisation that is committed to the interests of vegetarian and vegan people. The aim of the association is to represent the interests of their members and establish a vegetarian-vegan way of life through education and actions that create awareness (VEBU, 2016).

2.4 LIMITATIONS

All findings are important to provide a microscopic insight into the profile and buying behaviour of German inhabitants concerning vegetarian and vegan products. Although this research paper was carefully prepared, there were still limitations and shortcomings. First of all, it is important to point out that broader generalisations are drawn as only 367 respondents used the questionnaire. In addition, 90.77% of the respondents stated to be female while 8.44% of the respondents stated to be male, so it is likely that the wants and needs of male German consumers have not been represented clearly. Secondly, it was very hard to find an expert in the field of market trends on the German vegetarian product market. To provide enough credible information about these specific market trends, the interview should have involved more experts in the field of market trends on the German vegetarian product market. Furthermore, it would be better if a face-to-face interview was conducted instead of an interview via e-mail, to enable discussion and pursue in-depth information about this topic.

3. THEORETICAL FRAMEWORK

In this report several theories, models and concepts are implemented to answer the central question. These theories, models and concepts can be found below.

3.1 THE VEGETARIAN PRODUCT MARKET

It is important to understand what the vegetarian product market is, since it is a key concept in this research report. The market for vegetarian and vegan food is booming in Germany. According to an industry report released by the Institute for Trade Research (IFH) Cologne, 2015 saw an enormous growth in the vegetarian and vegan food market with a total sale of €454 million. The report suggests that more and more consumers are opting for vegetarian and vegan food (International Supermarket News, 2016). It is important to understand that there are various levels of vegetarianism. These various levels will be explained in short below:

3.1.1 VEGETARIAN

People who call themselves vegetarian do not eat meat, fish and/or poultry at all. However, they do consume dairy products and eggs, and often inedible animal-based products, such as fur, leather, wool and silk. Many vegetarians also do not eat products that contain gelatine or other animal-based products (Diffen, 2016).

3.1.2 VEGAN

Vegan people endeavour not to use or consume animal products of any kind. They do not consume meat, milk, honey or any food that is derived from animals. In addition, they do not use any animal derived products such as leather, medicines, wool and fur. Fruits, vegetables, grains and nuts are staples of both the vegan and vegetarian diets. Sometimes tofu is used as a replacement for meat-based products (Diffen, 2016).

3.1.3 LACTO-OVO VEGETARIAN

Lacto-ovo vegetarians do not eat meat, fish and poultry but do eat eggs and dairy products. 'Lacto' comes from the Latin for milk, and 'ovo' for egg (Hackett, 2016).

3.1.4 PESCATARIAN

Pescatarians eat no meat and poultry, but their diet does include fish. Although the word is not commonly used, more and more people are adopting this kind of diet, usually for health reasons or as a stepping-stone to a fully vegetarian diet (Hackett, 2016).

3.1.5. FLEXITARIAN

Flexitarians are not like vegetarians but are concerned with healthy eating. They have several meatless meals per week.

In addition, it is important to highlight that vegetarians are less price-sensitive than the general population. According to Colleen Holland, associate publisher of VegNews magazine, 'They are willing to spend more for products that are of importance to them and companies that they support' (Formichelli, 2009).

3.2 CORPORATE SOCIAL RESPONSIBILITY (CSR)

According to the website of the European Commission, the EU's executive body that represents the interests of the European as a whole, Corporate Social Responsibility refers to companies taking responsibility for their impact on society. CSR is important for the sustainability, competitiveness and innovation of EU enterprises and the EU economy (European Commission, 2016). The CSR in the section company description and is used to describe the company Vivera and its impact on society. Also, the CSR of Vivera shows us what the company wants to achieve and strives for in the future.

3.3 THE BUSINESS LIFE CYCLE MODEL

The Business Life Cycle Model is also used in the company description section. The life cycle of a business consists of the following four stages: establishment, growth, maturity and post-maturity. Each stage has its own special features and challenges. All successful businesses will go through these stages more than once (Toughnickel, 2016). This model is used to give a clear overview in which stage Vivera currently is and if the forecasts are positive or not.

3.4 THE ABELL BUSINESS MODEL

By using the Abell Business Model, Vivera gets a good overview of their customers' needs and what technologies should be used to serve these customers (Vliet V. V., 2014). Besides, it can be used to tune Vivera's future strategic policy to changes in the market. This model is relevant to section five of this report: market description of Vivera.

3.5 THE DESTEP ANALYSIS

The DESTEP analysis is a tool that helps Vivera to get an overview of the external environment in Germany, especially the demographic, economic, social, technological, environmental and political aspects of Germany. The DESTEP analysis is used in section seven: the external analysis of Vivera. Each organisation is faced with factors they cannot influence. These factors may directly or indirectly influence the operations of an organisation. With this analysis, Vivera can adjust their strategy to gain a positive effect or gain more market share (Veldman, 2016). Not all of the factors were relevant to this research report. The demographic aspect, the economic aspect and the social aspect

were more relevant to use in this research report than the technological aspect, the environmental aspect and the political aspect. These aspects are also more comprehensive described and researched. This is because it is important to this research report to have knowledge about the amount of vegetarians and vegans in Germany, lifestyle trends and economic data and forecasts. Technological data, environmental data and politics are of less importance to this research report.

3.6 PORTER'S FIVE FORCES MODEL

This model is also used in section seven of this research report to understand where power lies in the business situation of Vivera. It is also used to display Vivera's external environment. Porter's Five Forces Model helps to look into the strengths of a market position, based on the five key forces: supplier power, buyer power, competitive rivalry, threat of substitution and the threat of new entry.

3.7 COMPETITOR ANALYSIS

A competitor analysis is used in section seven: the external analysis. The competitor analysis was used to analyse the competitors – both the current competitors and potential competitors – and understand the strengths and weaknesses of the competitors (Inc., 2016). This is important to know for Vivera, because it is a chance to look closely at Vivera's market and Vivera's competition, to learn what others in this market are doing and why, and most important: to be in advantage of this competition.

3.8 MARKET TRENDS

The market trends can also be found in section seven: the external analysis. It is important to look at the market trends because the Vegetarian food market is quite trend-sensitive. However, the amount of vegetarians in Germany is increasing and it is very important to respond to this fact to gain more market share on the German vegetarian product market.

3.9 THE SWOT ANALYSIS

The SWOT analysis describes the strengths, weaknesses, opportunities and threats of a company and it helps to determine the strategy of an organisation. Specifically, SWOT is a basic, analytical framework that assesses what an organisation can and cannot do, and this is why this model is used in this research report. In addition, Vivera can also improve its market position if it is aware of its strengths, weaknesses, threats and opportunities. The SWOT analysis is used in section eight: the confrontation matrix.

3.10 CONFRONTATION MATRIX

By using a Confrontation Matrix, the output of a SWOT analysis can be further analysed in section eight: the confrontation matrix. Each different combination of strength, weakness, opportunity and threat is being analysed to identify the most important strategic issues Vivera is facing (EPM, 2011). This matrix is relevant to this research report because it shows how to increase the chance for success as the possible drawbacks are already examined.

4. COMPANY DESCRIPTION

4.1 VIVERA B.V.

Vivera is a Dutch Company located in Holten, Overijssel. They are operating since 1990. In the very beginning the products could only be found in various Dutch supermarkets but now the products can also be found in the hospitality industry, healthcare institutions and at caterers (VIVERA, 2016). At the moment the products are available in more than 20,000 supermarkets in 20 different European countries and this year, the products are being sold for the first time in Poland (Carrefour), Slovenia (McDonalds) and in France (Intermarché and E. Leclerc). The products are available in the Netherlands at: Albert Heijn, Jumbo Supermarkten, Plus, Dirk van den Broek, Coop, Emté, DEEN, Hoogvliet, Dekamarkt, Spar, Jan Linders, Poiesz, MCD, Attent, Boni, Boon's Markt, Nettorama and Vomar Voordeelmarkt. Currently (December 2016), there are working 220 permanent employees and three interns at Vivera.

4.2 MISSION

The mission of the company is that they want to provide affordable, vegetable products for everyone in the most sustainable way possible.

4.3 CORPORATE SOCIAL RESPONSIBILITY

For over 25 years, Vivera has been producing vegetarian and vegan products. An increasingly large part of their ingredients comes from their own soil – for example the lupine fields in Holten. Every Vivera product is grown and processed in the most sustainable way possible.

The CSR policy of Vivera is based on use of the three P's: People, Planet and Profit. This means that every step is taken while always keeping people and the environment in mind. The following four universal core values are outlining this policy:

4.3.1 TRANSPARENT

Through transparent, open communication using social media, Vivera manages to connect to a growing group of conscious consumers and engage in an active dialogue with them. By now, December 2016, Vivera's Facebook fan base has reached over 32,000 followers. They are also active on Twitter and Instagram.

4.3.2 SUSTAINABLE

Vivera takes their responsibilities, even outside the organisation. The sustainability policy is based on the following four focus areas:

- Optimising production processes;
- Participating in sustainable chains: major national initiatives to improve innovation and the sharing of knowledge;
- Producing healthy food;
- Investing in their people.

Besides, Vivera states that they ensure several universal basic conditions for their corporate processes, including the use of sustainable grown, GMO-free raw materials, the humane treatment of workers and a ban on child labour. Another point is that Vivera develops lighter packing materials and this means that they can achieve considerable savings on raw materials.

4.3.3 INNOVATIVE

To produce in a sustainable and innovative manner and to meet their CSR objectives, Vivera is continuously streamlining its production processes to achieve greater efficiency. There are three focus areas:

- Environmental management system: this helps them to control and reduce environmental effects;
- Efficient production: by reducing losses, Vivera saves on raw materials and energy;
- Waste water: Vivera's water purification system turns waste into a raw material for the production of biogas.

4.3.4 LOCAL

As mentioned before, an increasingly large part of their ingredients comes from their own soil – for example the lupine fields in Holten. In addition, Vivera has its own production area to support the growing of sustainable rapeseed and to introduce rapeseed press cake to others (rapeseed press cake is a source of protein for human consumption). Besides the local production of ingredients, Vivera states that they are also investing in growth opportunities for their own employees. They are also focusing on recruiting young talent in their own immediate environment: 'Local entrepreneurship means bringing n local people'.

The primary CSR-objectives for the coming years are:

- After the certification of their environment policy (ISO 14001)* and transport (Lean and Green)**, the certification of their CSR policy (ISO 26000) is next and the management says that they are willing to continue striving for better performance;
- Vivera keeps producing and consuming their own energy every year and they are increasingly making use of renewable energy;
- Choosing the right materials and processes helps Vivera to further reduce the amount of waste produced both by the company and their consumers' homes;
- Raw materials grown using increasingly sustainable processes and a move from vegetarian to vegan. (VIVERA, 2015)

*= The ISO certification is a tool which calls for a proper structure in order to safeguard the environmental process and continuously revise and improve it. It is based on the principle of 'doing what you say and saying what you do'.

**= Vivera only works with Lean and Green transporters in order to keep CO2 emission levels per product as low as possible. In 2016, Vivera started a cooperation with Muller Fresh Food Logistics, a local transporter. Muller Logistics is also a member of the Lean and Green programme and has demonstrated in the past that sustainability is a key issue to them. (VIVERA, 2015)

4.4 PRODUCT RANGE DESCRIPTION

As mentioned before, Vivera is active in the industry of vegetarian products and meat substitutes. Vivera has divided their range into the following product categories:

- Vegetarian
- Lupine
- 100% Vegetable
- Organic

Most of the vegetarian products are based on soya beans. They also have products that are made of lupine, chickpeas, vegetarian cheese, fresh vegetables, rice and beans (VIVERA, 2016). All of the products are completely GMO-free.

4.5 CHANNELS

- Supermarkets (95%)

Supermarkets are Vivera's most successful distribution channels. At the moment the products are available in more than 20,000 (national and international) supermarkets.

- Food service (5%)

Another distribution channel utilised by Vivera is food service. Examples of food service distribution channels are McDonald's, the hospitality industry (hotels, pubs and restaurants), healthcare institutions and Deli XL (Deli XL is a Dutch online wholesaler and supplier in the food service market).

- Industry

Vivera also utilises industry as a distribution channel. This implies especially meal producers and caterers.

4.6 BUSINESS LIFE CYCLE

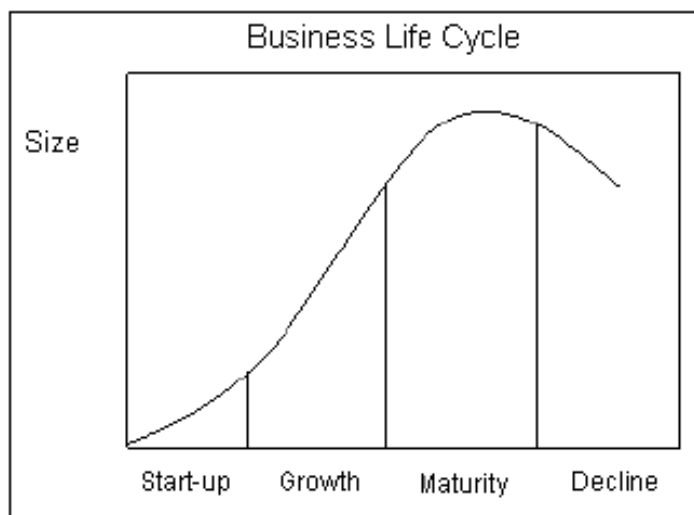


Figure 1, *Business Life Cycle*. Source: (Chen, 2016).

The company Vivera is in the growth stage. It has reached the stage where the business expands and spreads its roots into new markets and distribution channels. Because of the increasing demand for vegetarian and vegan products, the forecasts are positive (Chen, 2016).

4.7 CONCLUSION OF COMPANY DESCRIPTION

Vivera is a Dutch Company located in Holten, Overijssel. They are operating since 1990. In the beginning, one could find Vivera products in various Dutch supermarkets, but now the products are available in more than 20,000 supermarkets in 20 different European

countries. The mission of Vivera is that they want to provide affordable, vegetable products for everyone in the most sustainable way possible. Vivera's Corporate Social Responsibility policy is based on use of the three P's: people, planet and profits with the following four universal core values: transparent, sustainable, innovative and local. Furthermore, the product range of Vivera includes vegetarian-, lupine-, 100% vegetable-, and organic products. Moreover, the distribution channels Vivera utilises are supermarkets (95%), food service (5%) and industry. Last of all, Vivera is in the growth stage with positive forecasts.

5. MARKET DESCRIPTION

5.1 WHO ARE THE CURRENT GERMAN CONSUMERS OF VIVERA PRODUCTS?

By using the Abell Business Model, Vivera gets a good overview of their customers and their needs and what technologies should be used to serve these customers.

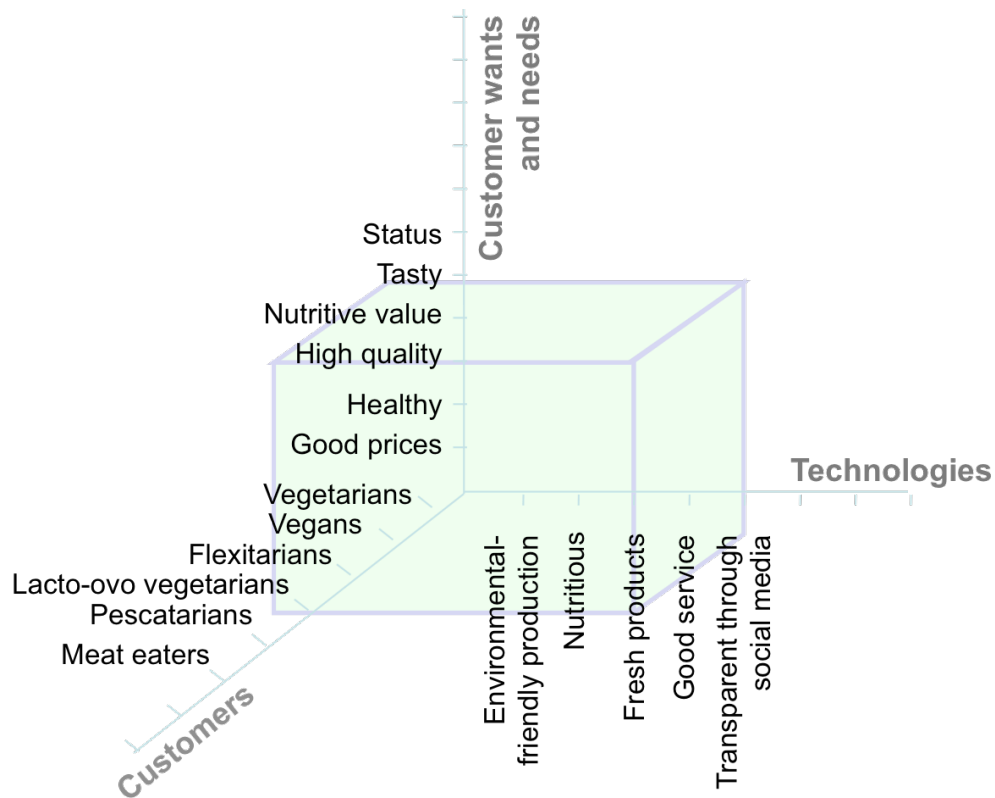


Figure 2, Abell Business Model of Vivera.

As demonstrated in figure 2, the target group of Vivera is specific. Vivera sells products for vegetarians, vegans, flexitarians and lacto-ovo vegetarians. Vivera does not sell products for pescatarians and meat eaters. Furthermore, nearly all consumer wants and needs are met by the products. Besides, Vivera uses several technologies to satisfy the needs of customers, for example transparency through social media and environmentally friendly production. To sum up, the Abell Business Model shows the current positioning of Vivera on the German market: it serves specific target groups and the products cover most wants and needs of its customers.

5.1.1 DEMOGRAPHICS

If one takes a look at results from the questionnaire, which was conducted among 367 respondents in the age group of 18-64 years old, 90.77% of the 367 respondents are female and 8.44% is male. Besides, most of the respondents (68.52%) are in the 18-24-age category, followed by the 25-34-age category (20.9%). Furthermore, most of the respondents are single (45.09%). Another remarkable fact is that a vast majority of the respondents stated that they are living in a household with two persons (32.45%) or are living alone (21.54%). The residence of the respondents is very diverse; they come from all over Germany.

5.2 WHICH VIVERA PRODUCTS DO GERMAN CONSUMERS NEED OR WANT?

By answering this question it is important to show which vegetarian and vegan products are at the moment the most popular. In Germany, the five most popular Vivera products are the same as in The Netherlands, namely (groente) balletjes, kruimgehakt, wokreepjes, tofu and groenteschijf.

If one takes a look at results from the questionnaire, in figure 3 can be seen which products respondents preferred buying:

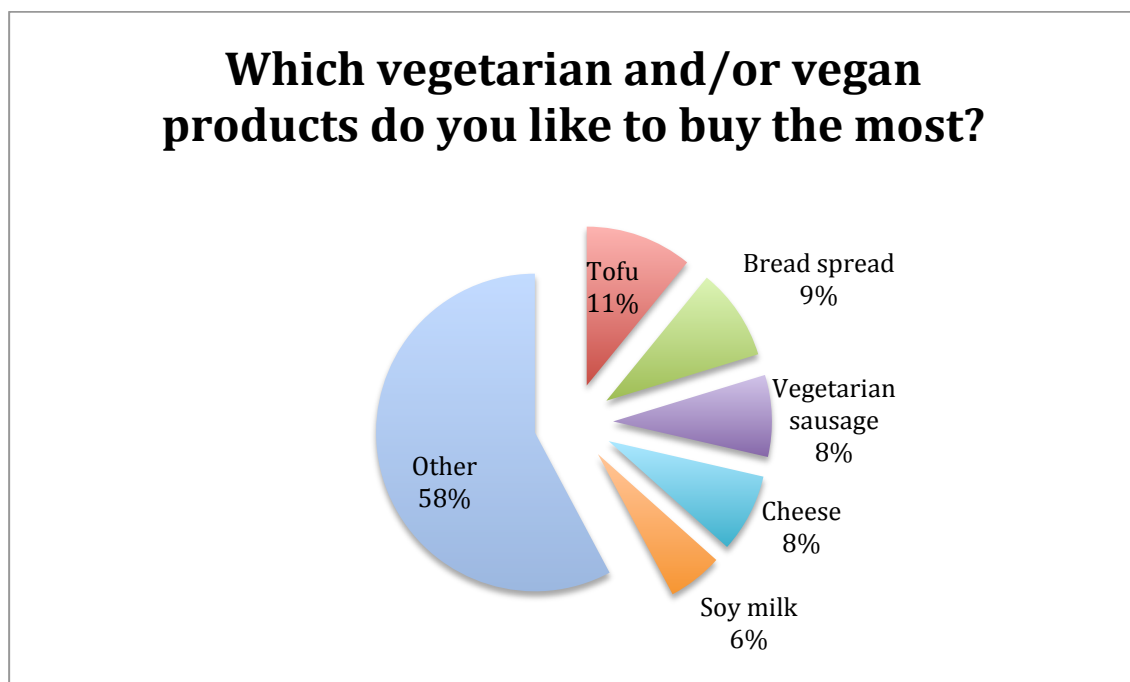


Figure 3, 'Which vegetarian and/or vegan products do you like to buy the most?' explains which vegetarian and/or vegan products people like to buy the most.

The reasons why they are buying these products can be found below in figure 4:

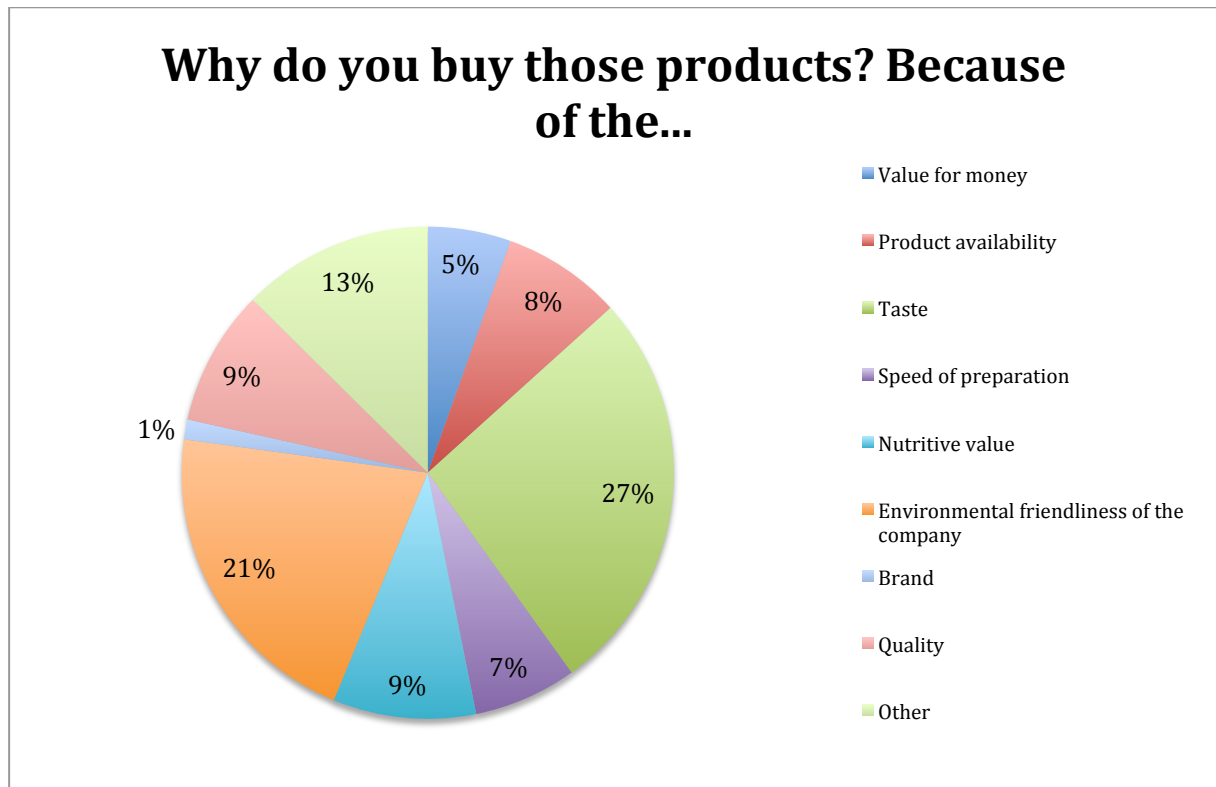


Figure 4, 'Why do you buy those products? Because of the...', explains why people buy vegetarian and vegan products.

The respondents also indicated by ticking the 'other' box that they are buying vegan and vegetarian products because of ethical grounds, because they are vegan or vegetarian and because they do not want to harm animals.

The respondents also had to answer the question: 'Which vegetarian and/or vegan products would you like to see more?' The most frequent answers given are listed below in a top 5:

1. *Vegan cheese (23.49%)*
2. *More sweet products like chocolate, vegan ice, vegan gummy bears and cake (15.21%)*
3. *Ready-to-eat vegan and vegetarian frozen meals and vegan frozen pizzas (12.21%)*
4. *More products without dairy but substitutes that taste similar to dairy, for instance, sour cream, whipped cream and cottage cheese (7.48%)*

5. More fish and shellfish substitute products (3.99%)

Besides, many respondents said that they would love to see more products without additives like salt, e-numbers and sugar. Moreover, they also indicated that they would like to see more vegan products without any food that is derived from animals (like eggs, gelatine and dairy).

5.3 CONCLUSION OF MARKET DESCRIPTION

The Abell Business Model shows the current positioning of Vivera on the German market. It serves specific target groups, namely vegetarians, vegans, flexitarians and lacto-ovo vegetarians. The products cover most wants and needs of its customers. In addition, if Vivera wants to gain more market share in Germany, they should focus on introducing vegan cheese, sweet products like chocolate, gummy bears etc. and more ready-to-eat vegetarian and vegan frozen meals. Furthermore, they should produce products without dairy but substitutes that taste similar to dairy, for instance, sour cream and whipped cream. Finally, Vivera should add more fish and shellfish substitute products to their product range.

6. INTERNAL ANALYSIS

6.1 STRENGTHS OF VIVERA

- S1: Transparency through social media and interaction with customers

Vivera is very transparent through social media. They have a Facebook page with 32,420 likes and customers can rate the company's service and products on this Facebook page. The rate is currently a 4.9 on a scale of 5, so this is quite positive. Besides, they are very active on the field of keeping in contact with their customers. Vivera often posts industry-related articles, images and videos, which allows customers to give feedback and share their opinion. Vivera is less active on Instagram (8,964 followers) and Twitter (7,512 followers). On these two channels, most of the posts are related to recipes and useful tips.

- S2: Good value for money

Vivera wants to provide affordable, tasteful products from a good quality to their customers. The products are nutritious, fresh and not more expensive than other products on the vegetarian product market. So it can be concluded that Vivera offers good value for money.

- S3: Operating national + international

Operating internationally is important because the global economy has become more competitive as many companies seek to expand beyond domestic borders. It is also important to look abroad for new customers and markets so the company will gain more market share and increased brand awareness. At the moment the products from Vivera are available in more than 20,000 supermarkets in 20 European countries, so this is very good already.

- S4: Sustainable, green company

Vivera is on the way to become the greenest factory in Europe. This is because they are working with a sustainable approach in each component on the production chain, for example the dishes on the shelves: they are lighter and thus Vivera saves 23% on plastic (VIVERA, 2016). Besides, Vivera is continuously streamlining its production process to achieve greater efficiency. This is relevant for the German vegetarian product market, because the environment is very important to Germany and they appreciate it if a company works on their sustainability and environmentally friendly production.

- S5: Long-term customers

Vivera has built up a close network of long-term customers, for example supermarkets like Intermarché (France), Carrefour (Poland) and Albert Heijn (The Netherlands). These long-term relationships ensure that Vivera has a stable position on the vegetarian food market.

- S6: Innovative

Innovation is very important if Vivera wants to keep its customers satisfied in this continually changing world. They do this by launching new products and listening to questions and recommendations from people on social media. Innovation is also important to keep ahead of the multinationals that also have discovered the vegetarian product market.

6.2 WEAKNESSES OF VIVERA

- W1: Low brand awareness through private labels

Regarding the fact that Vivera produces for private labels from supermarkets, it is very clear that many people have little knowledge about the brand Vivera. People are eating Vivera products but they think that their supermarket has produced those products.

- W2: No online web shop

A second weakness of Vivera is that the company has no online web shop. Vivera sells all of its products in supermarkets or through other distribution channels like food service and industry. In addition, because they do not have an online web shop, Vivera cannot reach those customers who prefer to shop online. However, competitors such as Viana and Alnatura are having a web shop already. So this is a weakness for Vivera.

6.3 CONCLUSION OF INTERNAL ANALYSIS

Each company has its strengths and weaknesses. The strengths of Vivera include transparency through social media and interaction with customers, good value for money, they are operating national and international, they are a sustainable and green company, they have long-term customers and they are innovative. These aspects contribute to a strong brand. However, Vivera also has its weaknesses: low brand awareness through private labels and no online web shop. Low brand awareness through private labels does not contribute to a strong brand image for Vivera. The lack of an online web shop does

not increase the market share of Vivera in Germany. The company could therefore use its strengths to eliminate these weaknesses.

7. EXTERNAL ANALYSIS

7.1 DESTEP MODEL

First, the DESTEP-model will be shown. By using the DESTEP-model, the external environment is analysed, especially the demographic, economic, social, technological, environmental and political aspects of Germany.

7.1.1 DEMOGRAPHIC ASPECT

Germany, officially the Federal Republic of Germany, has the largest population of any country in Western Europe and also the largest economy (the 4th largest economy in the world). Germany consists of 16 states covering 357,021 square kilometres. The major cities are Berlin, Hamburg, Munich and Cologne. Besides, the country is a founding member of the European Union and the Eurozone (PESTLE, 2015).

According to Index Mundi, a data portal that gathers facts and statistics from multiple reliable sources, in July 2016 the population of Germany numbered 80,7 million inhabitants. The largest age group was aged between 25 and 54 years old (40.96%) followed by the group aged 65 years and older (21.76%). The median age is 46.8 years old (IndexMundi, 2016).

According to the European Vegetarian Union, a non-profit-, non-governmental organisation for vegetarian societies and groups in Europe, nearly 10 per cent of the German population is vegetarian. Germany has the highest rate of vegetarianism compared to its European neighbours. The number of vegans in Germany is also increasing with nearly 1 million people (Schuster, 2016). Therefore, increasing market share on the German vegetarian product market is very important due to many vegetarian and vegan consumers.

7.1.2 ECONOMIC ASPECT

According to GTAI (Germany Trade and Invest), the economic development agency of the Federal Republic of Germany, Germany is seen as Europe's food and beverage market leader. National and international companies, operating in almost every sub segment of the German food and beverage market, make more than 170,000 different food products available to German customers. Increasing health awareness, an aging population and the demand for health and wellness products have helped a number of market actors to

become significant industry players. Germany stands at the forefront of food and beverage market development and tries to meet the international challenge of increased demand for safe and healthy foodstuffs. Today, Germany is both the third largest exporter and importer of agricultural and food products worldwide (Germany Trade and Invest, 2016/2017).

Germany's food and beverage industry is the third largest industry sector in Germany. The total food retailing revenue grew by 2.3 per cent, reaching 191 billion euros in 2015. Other important distribution channels include food service sales (73.6 billion euros) and exports of processed foods (55.3 billion euros). The largest industry segments by production value are meat and sausage products (24 per cent), dairy products (14 per cent), baked goods (10 per cent) and confectionery (9 per cent).

In addition, the forecasts are positive: industry analysts expect a positive market development for 2016 and beyond. Customers are tending to buy less and less often, but demanding higher quality including organic, fair trade and health & wellness food products (Germany Trade and Invest, 2016/2017).

7.1.3 SOCIAL ASPECT

Germany is a cosmopolitan country shaped by a pluralism of lifestyles and ethno-cultural diversity. There is great social openness and acceptance as regards alternative ways of life and different sexual orientations. Approximately 16.4 million people in Germany have a migratory background and Germany is the most popular immigration country after the USA (Facts About Germany, 2016). Because of Germany's diverse population, the country's cuisine is in a process of constant transformation and culinary traditions differ from region to region.

People these days are also experimenting at home with new dishes containing fruits, vegetables and plant-based meat substitutes, and almost every restaurant has vegetarian options on the menu. Repeated media reports of rotten meat scandals over the last few years have led to the fact that many Germans eat less meat as a health precaution. Other reasons for the increase of vegetarians in Germany is the importance of animal welfare and the fact that meat production does serious damage to the environment and is ineffective and expensive compared to the production of vegetarian items.

7.1.4 TECHNOLOGICAL ASPECT

More producers are shifting to organic production to meet fast-growing consumer demand. The on going trends towards vegetarian and vegan foods has prompted some meat processors to also introduce meat-free product variations including

vegetarian/vegan sausages and cold cuts. The manufacture of meat products in accordance with halal requirements becomes also more important in Germany (Germany Trade and Invest, 2016/2017).

Research, development and innovation spending in the German food and beverage industry are projected to reach 3.9 billion euros in 2016, a plus of 13.7 per cent over 2015. This money is spent to develop new products, enhance nutrition and improve general food safety. Besides, the on-going digitalisation of the food industry allows manufacturers to continuously improve the quality of products and processes as well as enhancing planning accuracy, traceability of products and customer communication (Germany Trade and Invest, 2016/2017).

According to the report from Germany Trade and Invest (GTAI), Germany's strong food industry landscape is supported by world-renowned public institutes such as the Federal Research Centre for Cultivated Plants, the Federal Research Institute of Nutrition and Food and several institutions of the Leibniz Association. Main research areas include nutrition science, food technology, plant and animal production and aquaculture. The German federal government also supports technical and non-technical innovation in nutrition, agriculture and consumer protection with an annual budget of 26 million euros (Germany Trade and Invest, 2016/2017).

7.1.5 ENVIRONMENTAL ASPECT

Environmental awareness among European citizens has increased in the past years and like the rest of the world, Germany faces the consequences of global warming. Internationally, Germany leads the way in climate protection and is a pioneer in the development of renewable energy sources, according to Facts about Germany (2016). With the Energy Reform, Germany is leaving the age of fossil and nuclear energy behind and is heading fast for a future that hinges on sustainable energy sources. This involves an exit from nuclear power by 2022. Furthermore, by 2020 Germany plans to have reduced its emission of carbon dioxide by 40 per cent in comparison to 1990, and is even striving for at least 80 per cent by 2050 (Facts About Germany, 2016). The fact that the environment is very important to Germany is relevant for Vivera, since Vivera is striving to become the greenest factory in Europe. For example the dishes on the shelves, which their products are in, are lighter and thus they save 23% on plastic (VIVERA, 2016).

7.1.6 POLITICAL ASPECT

Germany is a parliamentary democracy. Its constitutional bodies are the Bundestag, the Bundesrat, the Federal President, the Federal Government and the Federal Constitutional

Court. The system of personalised proportional representation is decisive with regard to the character of the parliament. This way smaller parties are also represented in the Bundestag in proportion to their election results (Facts About Germany, 2016).

The Federal Republic of Germany is a value-based, cosmopolitan, vibrant democracy with a diverse political landscape. According to Facts about Germany, a website that offers basic knowledge and guidance about Germany, the democratic parties compete against each other but they also have mutual respect for each other and form coalitions at various political levels. Since the elections for the 18th German Bundestag in 2013, Germany has been governed by a Grand Coalition of CDU/CSU and SPD, an alliance of the two major forces in the German party system. Federal Chancellor Dr. Angela Merkel (CDU), the first female head of a German government, has been in power since 2005 and is now in her third term of office (Facts About Germany, 2016).

7.1.7 CONCLUSION DESTEP:

The aspects of the DESTEP model described above are all relevant to Vivera improving its market position on the German market. It is, however, important to point out that some aspects are more important to take into account than others. The demographic aspect, the economic aspect and the social aspect were more relevant to use in this research report than the technological aspect, the environmental aspect and the political aspect. Firstly, the demographic and the social aspect were of great importance to this research report, since it is important to have knowledge about the fact that the amount of vegetarians and vegans is increasing in Germany. Besides, German people these days are experimenting more with plant-based meals and meat substitutes. Secondly, the economic aspect is important, because Germany stands at the forefront of food and beverage market development and has a stable economy. In addition, there is also a positive market development expected for the coming years. So it can be concluded that the German market is very attractive for Vivera.

7.2 FIVE FORCES OF PORTER ANALYSIS

Porter's five forces analysis is a framework, named after Michael E. Porter, that identifies and analyses five competitive forces that shape every industry and helps determine an industry's weaknesses and strengths (Investopedia, 2016). The five forces that are being discussed below are: intensity of rivalry, power of customers, threat of new entry, power of suppliers and threat of substitute products.



Figure 5, Porter's Five Forces Model. Source: (Reiser, 2015).

7.2.1 INTENSITY OF RIVALRY

The intensity of rivalry among competitors in an industry refers to the extent to which firms within an industry put pressure on one another and limit each other's profit potential (Wilkinson J. , Intensity of Rivalry (one of Porter's Five Forces), 2013). Vivera faces intense competition from Valess, Meica, Wiesenhof, Rügenwalder Mühle, Taifun, Viana, Alnatura and Alberts Tofuhaus. Generally, the degree of competitive rivalry in this market is strong. There are not many sellers but they are all selling the same kind of products in Germany.

7.2.2 POWER OF CUSTOMERS

Porter's bargaining power of customers refers to the pressure customers can exert on businesses to get them to provide higher quality products, better customer service and lower prices (Wilkinson j. , 2013). Vivera's customers are the people who buy their products in supermarkets. The bargaining power of customers is low because there are not many substitute products available on the market. In addition, there are many buyers but few sellers.

7.2.3 THREAT OF NEW ENTRY

In Porter's five forces, the threat of new entrants refers to the threat new competitors pose to existing competitors in an industry (Wilkinson J. , Threat of New Entrants (one of Porter's Five Forces) , 2013). Vivera operates in an open market. This means that new arrivals can enter easily and that the competition will arise since vegetarian products and

meat substitutes are a rising trend. However, Vivera and other companies like Meica and Rügenwalder Mühle have already built up a close network of distributors so they are ensured of a stable position. This makes it harder for new competitors to gain success on this particular market.

7.2.4 POWER OF SUPPLIERS

In Porter's five forces, supplier power refers to the pressure suppliers can exert on businesses by raising prices, lowering quality or reducing availability of their products (Wilkinson J. , Supplier Power (one of Porter's Five Forces) , 2013). Vivera's suppliers are for example companies who deliver raw materials, spices, soy, cheese, vegetables, bowls, foil and boxes. The power of suppliers is not very strong since there are many companies that deliver such products. In addition, if suppliers would decide to stop a contract, this would not affect sales in short term.

7.2.5 THREAT OF SUBSTITUTE PRODUCTS

Porter's threat of substitute products is the availability of a product that the consumer can purchase instead of the industry's product. A substitute product is a product from another industry that offers similar benefits to the consumer as the product produced by the firms within the industry (Wilkinson J. , Threat of Substitutes (one of Porter's Five Forces), 2013). As already mentioned before in this report, vegetarian products and meat substitutes are becoming more popular and a rising trend in Germany so Vivera does not have to worry about its position. In addition, there are not many substitute products available on the market.

7.2.6 CONCLUSION FIVE FORCES OF PORTER

The intensity of rivalry is strong in this particular market. There are not many sellers, but they are selling the same kind of products. The power of customers is low because there are not many substitute products on the vegetarian food market. The following aspect is the threat of new entry. New arrivals can enter the vegetarian food market easily due to the open market, but the existing companies in this market have already built up a close network with their distributors. That makes it hard for new entry to gain success on the vegetarian food market. The power of suppliers is low because many companies deliver products such as spices, packaging materials, vegetables etc. The last aspect is the threat of substitute products. There are not many substitute products on the vegetarian food market so Vivera does not have to worry about its position.

7.3 COMPETITOR ANALYSIS

According to an article called 'Fleischersatz', the pioneer among the vegetarian food manufacturers in Germany was Rügenwalder Mühle in 2014. This company already generated 20% of its sales of meatless products in 2015. Other companies like Meica and Wiesenhof were following (Test.de, 2016). The most important competitors will be discussed below. Note: the + is for strengths, the – is for weaknesses.

7.3.1 COMPETITOR VALESS

Valess started with an idea from a Dutch food technician named Adriaan Cornelis Kweldam. He was a former sous-chef in the Amstelhotel and he created new products made from milk, which he presented as a business idea to FrieslandCampina. The company was very excited about his products and in 2005, Valess was introduced. FrieslandCampina decided to market the product as an alternative to fish and meat instead of a meat substitute. In 2007, Valess was launched in Belgium and in 2009, Valess was launched in Germany (FrieslandCampina, n.d.).

Strengths and weaknesses Valess:

- + Sold in The Netherlands, Belgium, Germany and Switzerland
- + Strong mother company: FrieslandCampina
- + A big variety of products: 12 products
- + Approximately 12,000 likes on Facebook
- Not suitable for vegans since it contains dairy and eggs
- No possibility to order products online on their web site

7.3.2 COMPETITOR MEICA

The company Meica was founded in 1908 by the farmer and butcher Fritz Meinen in Edewecht (Germany's Northern Ammerland region). Meica is a medium-sized meat processing company in family ownership. The company also produces organic and vegetarian products under the name Bio-Krusenhof (Meica, n.d.)

Strengths and weaknesses Meica:

- + Serves 30 countries worldwide
- + Sustainable

- + 60% of their staff has been with the company for 20 years
- + Meica offers young people training positions
- They do not have many vegetarian products, especially focused on meat and sausages
- Not very active on social media, only 56 likes on Facebook
- No possibility to order products online on their web site

7.3.3 COMPETITOR WIESENHOF

In the mid 1960's, a collaboration between Paul Wesjohann and Heinz Lohmann began and the development of the poultry brand Wiesenhof started. Wiesenhof is one of the famous brands of the PHW Group (Wiesenhof, n.d.). According to the website of the Spiegel newspaper, one of the most widely read German-language news websites, PHW is the market leader in Germany with more than €2 billion in annual sales and 40 subsidiaries (Klawitter, 2011). At the moment Wiesenhof produces 9 vegetarian products.

Strengths and weaknesses Wiesenhof:

- + Values quality, safety and sustainability
- + Leading poultry producer in Germany
- + All stages of production are in Germany and mainly in their own company
- Mainly focused on poultry
- Not a big variety of products: 9 products
- Not very active on social media
- No possibility to order products online on their web site

7.3.4 COMPETITOR RÜGENWALDER MÜHLE

Rügenwalder Mühle is a family company that produces sausages, ham and meat substitute products in Bad Zwischenahn, Lower Saxony. The company was founded in 1834 by Carl Müller and is one of the best-known food brands in Germany.

Strengths and weaknesses Rügenwalder Mühle:

- + All vegetarian products are marked with the European V label
- + Innovative cooperation with VEBU (German Vegetarian Association)

- + A big variety of vegetarian products: 21 products
- + Strong on social media: approximately 247,000 likes on Facebook
- Only in Germany
- No possibility to order products online on their web site

7.3.5 COMPETITOR TAIFUN

Taifun GmbH (a company with limited liability) was founded by Klaus Kempff and Wolfgang Heck in 1990. Taifun uses only organically grown soybeans that are GM-free. According to their web site, they are producing approximately around 100 tons of tofu per week and 2 million packages of various tofu specialities are exported to 14 European countries in 2016 (Taifun, n.d.).

Strengths and weaknesses Taifun:

- + High-quality products
- + Young company
- + Growing company
- Only tofu products
- Not very active on social media, only 1,929 likes on Facebook
- No possibility to order products online on their web site

7.3.6 COMPETITOR VIANA

Viana was founded in 1988 in Cologne and was a traditional brand of the company Tofutown.com GmbH. Viana produces 100% vegetarian organic GMO free products (meat alternatives, tofu products, soy and rice drinks and soy creams) (Viana, 2016).

Strengths and weaknesses Viana:

- + A wide range of products
- + Products can be found throughout Europe, Kingdom of Bahrain and North America
- + Possibility to order products online on their web site (www.vianastore.de)
- Viana does not have a clear website
- The company is not strong on social media. Their Facebook page has only 3,218 likes.

7.3.7 COMPETITOR ALNATURA

Alnatura Produktions- und Handels GmbH is a bio-food industry company based in Bickenbach. The company was founded in 1984 and sells food and textiles produced according to ecological criteria. Alnatura offers a great assortment for vegetarians and vegans (approximately 370 products) (Alnatura, 2016).

Strengths and weaknesses Alnatura:

- + Is increasingly seeking to win flexitarians as customers
- + A big variety of products: approximately 370 products
- + Strong on Facebook: 298,729 likes
- + Won the title of Germany's most sustainable company in 2011
- + Possibility to order products online on their web site (alnatura-shop.de)
- Only in Germany
- Critical media attention for paying low wages to employees in 2010

7.3.8 COMPETITOR ALBERTS TOFUHAUS

Alberts is a manufacturer of pure plant foods from controlled organic cultivation. They state that their customers are 'Happytarier'. Their purpose is to preserve the natural basis of life of plants, animals and humans. Besides, their products are purely vegetable and contain no raw materials of animal origin (lactose free) (Alberts-tofuhaus, 2016).

Strengths and weaknesses Alberts Tofuhaus:

- + Innovative with long term research and development
- + High-quality
- + Received a bio certificate
- + All products are purely vegetable and contain no raw materials of animal origin
- Does not use social media
- Website is hard to find
- No possibility to order products online on their web site

And finally, we will discuss Vivera with a close link to the SWOT analysis:

7.3.9 VIVERA

- + Transparent and active on social media: 32,420 likes on Facebook
- + Good value for money
- + Operating national + international
- + Sustainable
- + Long-term customers
- + Innovative
- Low brand awareness through private labels
- No possibility to order products online on their web site

Based on the information above, a ranking table has been made. The competitors are analysed on several aspects: wide product range, operating international, sustainable/innovative, active on social media, brand awareness and if they have an online web shop. Table 1 provides a clear overview of each competitor.

	Wide product range	Operating international	Sustainable/Innovative	Active on social media	Brand awareness	Online web shop
Vivera	++	++	++	+	-	-
Valess	+	+	-	+	+	-
Meica	-	++	++	-	++	-
Wiesenhof	+	-	++	-	++	-
Rügenwalder Mühle	++	-	++	++	++	-
Taifun	-	++	+	-	-	-
Viana	++	++	-	-	+	++
Alnatura	++	-	++	++	+	++
Alberts Tofuhaus	-	-	++	-	-	-

Table 1, Ranking table competitor analysis.

7.3.10 CONCLUSION COMPETITOR ANALYSIS

In conclusion, we can say that Vivera has currently a leading position, together with Rügenwalder Mühle, Alnatura and Viana. Vivera needs to improve on the fields of social media and brand awareness to become stronger than their competitors. Besides, they should create an online web shop so they will attract more (international) customers as well.

7.4 MARKET TRENDS VEGETARIAN PRODUCTS IN GERMANY

According to an article published on the VEBU website (Vegetarierbund Deutschland: a German non-governmental organisation that is committed to the interests of vegetarian and vegan people), there is an increasing number of vegetarian-vegan people in Germany. 7.8 Million people are vegetarian and around 900,000 people are vegan, this is almost ten per cent of the population (for comparison: 30 years ago this was just 0,6 per cent). Every day, there are about 2,000 vegetarians and 200 vegans added to the list. Besides, just a few years ago plant alternatives were only found in selective food stores but today they are part of the product range in ever supermarket. So today it is very easy to buy vegetarian and vegan products and to lead a plant-based lifestyle. If one takes a look at the amount of vegetarian/vegan restaurants, the vegan trend has also arrived in this sector. In Berlin alone, the number of vegan restaurants rose from 12 in 2011 to 28 in 2014. Currently, there are almost 50 vegan restaurants in Berlin (Christoffer & Unger).

According to the website from The Vegetarian Resource (a non-profit organisation dedicated to educating the public on vegetarianism and veganism), in 2015, the three main categories – meat alternatives, plant milk and breakfast products (cereals, muesli and spreads) – had a revenue of €454 million with an annual increase of 17% on average since 2010, when the revenue was only €208 million. The Institute for market research in Cologne found out that not only the demand for the most common vegetarian and vegan products has increased but also the popularity of cruelty-free alternatives for products that are often wrongfully perceived to be vegan by nature (wines, juices, chips, shampoo and porcelain) (Huckmann, 2016).

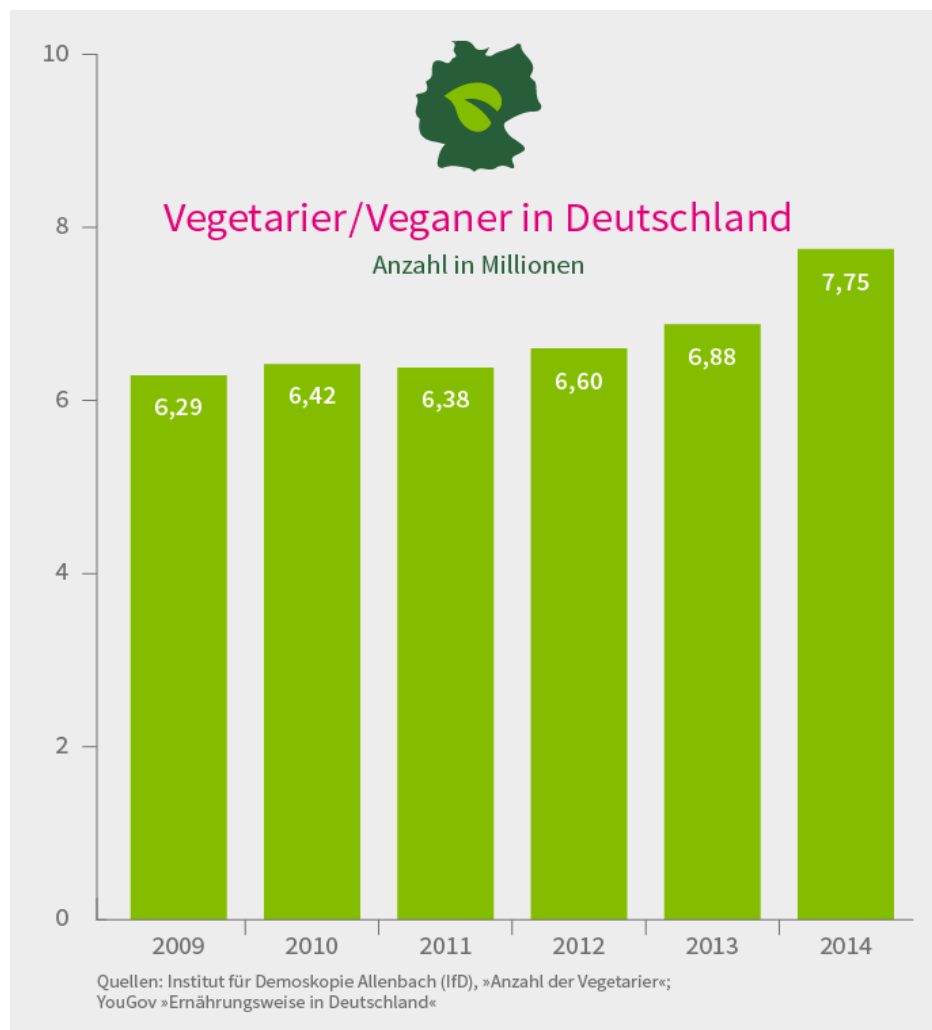


Figure 6, *Vegetarier/Veganer in Deutschland*. This bar chart shows the amount of vegetarian/vegan people in Germany from 2009 to 2014. From 2009, the amount of vegetarian/vegan people in Germany has been gradually growing. Source: VEBU.

According to Mrs Unger, press office employee from the VEBU, the market of vegetarian and vegan products is not yet saturated. In the interview conducted for this report she states the following: “The number of vegan- and vegetarian-living people is increasing and they want an adequate range of veggie-products. Especially meat alternatives are quite new. Producers are trying new resources for the products. Besides soya, they use protein based on lupine or peas to produce healthy and tasty meat alternatives. More and more caterers, big canteens and system-gastronomies are reacting to the veggie-trend and integrate vegan meals into their product-range” (Unger, 2016).

Mrs Unger also states that in the future, there is still a lot of development possible: “The availability of vegetarian and vegan food is already very good. But there is still a lot of development possible. For example many school canteens in Germany are not yet

offering vegetarian and vegan meals. The VEBU campaign Aktion Pflanzen-Power is working to improve the availability of vegetarian and vegan options in schools and kindergartens” (Unger, 2016). She also mentions the fashion- and cosmetics sector, and thinks that the vegan lifestyle will expand as well on these sectors. “There is still a lot to come and we are excited for new developments”, she says (Unger, 2016).

In addition, 90% of the respondents of the questionnaire answered that they think that vegetarian and vegan products will become more popular in the future. 9% said that the demand for vegetarian and vegan products will remain the same as now (see figure 7).

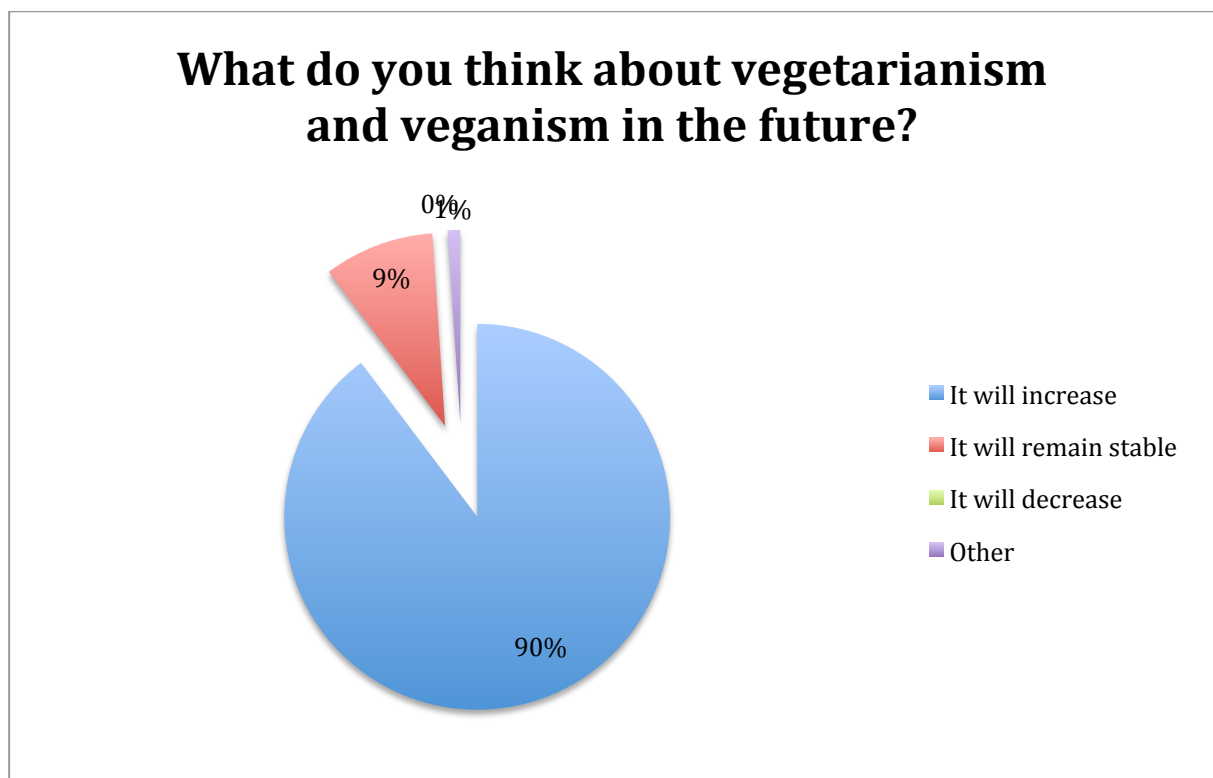


Figure 7, ‘What do you think about vegetarianism and veganism in the future?’, shows how people think about vegetarianism and veganism in the future.

7.4.1 CONCLUSION MARKET TRENDS

There is an increasing number of vegetarian and vegan people in Germany. 7.8 Million people are vegetarian and around 900,000 people are vegan. Today it is easier to buy vegetarian and vegan products and to lead a plant-based lifestyle compared to a few years ago. More and more caterers, big canteens and system-gastronomies are reacting to the veggie-trend and integrate vegetarian and vegan meals into their product range. However, there is still a lot of development possible, for instance, vegetarian and vegan

meals on school canteens and kindergartens. The vegan lifestyle will also expand to the fashion- and cosmetics sector in the future.

7.5 OPPORTUNITIES AND THREATS

7.5.1 OPPORTUNITIES OF VIVERA

- O1: Increasing customer demand for vegetarian and vegan products

As mentioned before, the number of vegetarians and vegans in Germany is increasing. Every day, there are about 2,000 vegetarians and 200 vegans added to the list. This means that there is an increasing customer demand for vegetarian and vegan products and this customer demand will keep increasing. So this means that Vivera needs to anticipate on this fact if they want to gain more success on the German vegetarian product market in the future.

- O2: Create an online web shop

Vivera does not have an online web shop but sells all of its products in supermarkets or through other distribution channels like food service and industry. To create an online web shop would be a good idea, because an online web shop is open 24 hours a day, 7 days a week and 365 days a year and customers can order anytime online. Besides, international customers could be attracted if they can order Vivera products online. Another advantage of this is that Vivera could increase its brand awareness if they start selling products online with their own brand name on it.

- O3: A growing demand for ready-to-eat and frozen meals

According to the questionnaire, ready-to-eat meals and frozen meals turned out to be a great need on the German vegetarian product market. A reason for this is that life has become more stressful and hasty in Germany and people tend to eat fast food more easily (The Local DE, 2013).

- O4: Positive development German economy, sustainability and environmentally friendly technology are becoming more important.

The fact that there has been a positive development in the German economy, concepts like economy, sustainability and environmentally friendly technology are booming in Germany. Vivera wants to become the greenest factory in Europe and keeps working on its sustainability and environmentally friendly technology, so there are laying many opportunities in Germany on this particular subject.

- O5: Globalisation

To explain this opportunity, the concept of globalisation needs to be explained. According to The Financial Times, globalisation is the integration of economies, industries, markets and policy-making around the world (The Financial Times, 2016). Globalisation made sure that companies now are more interested in exploring foreign markets. Exploring foreign markets, like Germany, can lead for example to a larger market for a company's goods and products and a longer product life for some products. And this is exactly what Vivera is trying to do: increase its market share in Germany.

7.5.2 THREATS OF VIVERA

- T1: Important competitors like Meica, Valess, Wiesenhof, Rügenwalder Mühle, Taifun, Viana, Alnatura and Alberts Tofuhaus.

As stated in section 7.2, the competitive rivalry in the industry for vegetarian and vegan foods in Germany can be classified as high. There are not many sellers, but they are selling the same kind of products. The many firms already operating in this segment as well as the potential entrants could pose a threat for Vivera.

- T2: Vegetarian and vegan products might be trend sensitive.

As mentioned before, the amount of vegetarians and vegans in Germany is increasing. Currently, almost ten per cent of the population is vegetarian or vegan and this is almost ten per cent of the population while 30 years ago, this was just 0,6 per cent. The forecasts are also positive, but it could be dangerous if a number of scandals about this particular industry will appear. Also future research might show us that a vegetarian or vegan lifestyle is not healthy at all.

7.5.3 CONCLUSION OPPORTUNITIES AND THREATS

Opportunities to Vivera include: an increasing demand for vegetarian and vegan products, to create an online web shop, the growing demand for ready-to-eat and frozen meals, a positive development of the German economy and globalisation. Threats to Vivera include: important competitors on this particular market and the assumption that vegetarian and vegan products might be trend sensitive.

8. CONFRONTATION MATRIX

8.1 SWOT ANALYSIS

Combining the internal analysis (strengths and weaknesses) with the external analysis (opportunities and threats) of Vivera results in a SWOT analysis. The SWOT analysis can be found below and is based on information in this research report.

Strengths	Weaknesses
S1: Transparency through social media and interaction with customers	W1: Low brand awareness through private labels
S2: Good value for money	W2: No online web shop
S3: Operating national + international	
S4: Sustainable, green company	
S5: Long-term customers	
S6: Innovative	

Opportunities	Threats
O1: Increasing customer demand for vegetarian and vegan products	T1: Important competitors like Meica, Valess, Wiesenhof, Rügenwalder Mühle, Taifun, Viana, Alnatura and Alberts Tofuhaus.
O2: Create an online web shop	T2: Vegetarian and vegan products might be trend sensitive
O3: A growing demand for ready-to-eat and frozen meals	
O4: Positive development German economy: sustainability and environmentally friendly technology are becoming more important	
O5: Globalisation	

8.2 CONFRONTATION MATRIX

The confrontation matrix shows strategic options Vivera could implement when entering the German market (see figure 8). In addition, the confrontation matrix will aim to eliminate possible drawbacks and increase the chance for success.

	Strengths	Weaknesses
Opportunities	In Germany, there is a continuous demand for quality. Especially on the field of sustainability and environmentally friendly technology. Vivera aims to produce in a sustainable and innovative manner and offers good value for money. So Vivera is, according to German standards, a positive company to work with. The opportunity to create an online web shop could attract more (national and international) customers because an online web shop is open 24 hours a day.	The opportunity to create an online web shop could eliminate the weakness that Vivera has no online web shop. In addition, creating an online web shop could increase Vivera's brand awareness.
Threats	There is a chance that vegetarian and vegan products might be 'trend sensitive'. A solution for this threat is to stay innovative and keep an eye on the food trends in the future. In addition, transparency through social media and interaction with customers will help to eliminate this threat because Vivera listens to its customers and fulfils their needs and wants. Furthermore, if Vivera stays innovative and keeps in contact with their customers, the important competitors might not play a big role anymore.	The weakness that Vivera has no online web shop makes sure that competitors that do have an online web shop are ahead of Vivera. Online shopping gets more and more important so Vivera needs to eliminate this weakness. Besides, an online web shop might certainly increase brand awareness.

Figure 8 Confrontation Matrix.

8.3.CONCLUSION CONFRONTATION MATRIX

The SWOT analysis gives an overview of the internal and external environment of Vivera. In addition, the SWOT analysis is used to design a confrontation matrix that helps to define future strategic options for Vivera. Combining the strengths and opportunities of Vivera result mainly in positive outcomes. Therefore, Vivera should focus on these options instead of focussing on weaknesses and threats. An example of a strategic option is to create an online web shop that is likely to increase Vivera's brand awareness and market share as well. Furthermore, it is important to stay in touch with customers through social media and keep anticipating on their wants and needs.

9. CONCLUSION AND RECOMMENDATION

9.1 CONCLUSION

The aim of this research is to provide a detailed and coherent recommendation to Vivera, and to provide information on how the company Vivera can increase its market share on the German vegetarian product market. In order to formulate an answer, a central research questions was designed: ***'How can Vivera increase its market share on the German vegetarian product market?'***

By drafting sub questions and integrating several business models, the central question was answered and a detailed recommendation was made. Answers to the sub questions are given in the following subsections.

9.1.1 HOW CAN WE DESCRIBE THE COMPANY VIVERA?

Vivera is a Dutch Company located in Holten, Overijssel. They are operating since 1990. In the beginning, one could find Vivera products in various Dutch supermarkets, but now the products are available in more than 20,000 supermarkets in 20 different European countries. The mission of Vivera is that they want to provide affordable, vegetable products for everyone in the most sustainable way possible. Vivera's Corporate Social Responsibility policy is based on use of the three P's: people, planet and profits with the following four universal core values: transparent, sustainable, innovative and local. Furthermore, the product range of Vivera includes vegetarian-, lupine-, 100% vegetable-, and organic products. Moreover, the distribution channels Vivera utilises are supermarkets (95%), food service (5%) and industry. Last of all, Vivera is in the growth stage with positive forecasts.

9.1.2 WHO ARE THE CURRENT GERMAN CONSUMERS OF VIVERA PRODUCTS?

Vivera serves specific target groups, namely vegetarians, vegans, flexitarians and lacto-ovo vegetarians. They do not sell products for pescatarians and meat eaters. A questionnaire was conducted among 367 respondents in the age group of 18-64 years old. According to results from this questionnaire, the majority of the respondents are female (90.77%) and in the 18-24 age category (68.52%). In addition, most of the respondents are single (45.09%). Their residence is very diverse; they come from all over Germany.

9.1.3 WHICH VIVERA PRODUCTS DO GERMAN CONSUMERS NEED OR WANT?

If Vivera wants to gain more market share in Germany, they should focus on introducing vegan cheese, sweet products like chocolate, gummy bears etc., more ready-to-eat

vegetarian and vegan frozen meals. Furthermore, they should produce products without dairy but substitutes that taste like dairy, like sour cream and whipped cream. And finally, Vivera should add more fish and shellfish substitute products to their product range.

9.1.4 WHO ARE THE MAIN COMPETITORS IN GERMANY?

The competitors on the German vegetarian product market are: Valess, Meica, Wiesenhof, Rügenwalder Mühle, Taifun, Viana, Alnatura and Alberts Tofuhaus. A ranking table was made, and the competitors were analysed on several aspects: wide product range, operating international, sustainable/innovative, active on social media, brand awareness and if they have an online web shop. The following main competitors came out: Rügenwalder Mühle, Meica and Alnatura. Vivera needs to improve on the fields of social media, brand awareness and the creation of an online web shop to become stronger than these main competitors.

9.1.5 WHAT ARE THE MARKET TRENDS IF WE LOOK AT VEGETARIAN PRODUCTS IN GERMANY?

There is an increasing number of vegetarian and vegan people in Germany. 7.8 Million people are vegetarian and around 900,000 people are vegan. Today it is easier to buy vegetarian and vegan products and to lead a plant-based lifestyle compared to a few years ago. More and more caterers, big canteens and system-gastronomies are reacting to the veggie-trend and integrate vegetarian and vegan meals into their product range. However, there is still a lot of development possible, for instance, vegetarian and vegan meals on school canteens and kindergartens. The vegan lifestyle will also expand to the fashion- and cosmetics sector in the future.

9.1.6 WHAT ARE VIVERA'S STRENGTHS AND WEAKNESSES?

Like every company, Vivera has its strengths and weaknesses. The strengths of Vivera include transparency through social media and interaction with customers, good value for money, they are operating national and international, they are a sustainable and green company, they have long-term customers and they are innovative. These aspects contribute to a strong brand. However, Vivera also has its weaknesses: low brand awareness through private labels and no online web shop. Low brand awareness through private labels does not contribute to a strong brand image for Vivera. The lack of an online web shop does not increase the market share of Vivera in Germany. Therefore, the company could use its strengths to eliminate these weaknesses.

9.2 RECOMMENDATION: HOW CAN VIVERA INCREASE ITS MARKET SHARE ON THE GERMAN VEGETARIAN PRODUCT MARKET?

Considering all the information processed in the previous subsections, a recommendation is written. Based on all the information in this report, increasing market share on the German vegetarian product market is possible for Vivera when carefully integrating the recommendations below.

9.2.1 RECOMMENDATION 1: PRODUCT

If Vivera wants to gain more market share in Germany, it is recommended that Vivera starts focussing on introducing vegan cheese, sweet products (chocolate, vegan gummy bears, cake, ice cream etc.) and ready-to-eat vegetarian and vegan frozen meals. Furthermore, they should produce products without dairy but substitutes that taste similar to dairy, for instance, sour cream and whipped cream. And finally, Vivera should add more fish and shellfish substitute products to their product range, to satisfy the needs of pescatarians and vegetarians who would like to eat fish more. However, the choice of products to be integrated into the Vivera product range should be carefully researched by Vivera, by conducting a second quantitative research.

9.2.2 RECOMMENDATION 2: PLACE

Another recommendation to gain more market share on the German vegetarian product market is to create an online web shop. The advantage of an online web shop is that an online web shop is open 24 hours a day, 7 days a week and 365 days a year and customers can order anytime online. Besides, international customers could be attracted if they can order Vivera products online. Another advantage of this is that Vivera could increase its brand awareness if they start selling products online with their own brand name on it. However, it is important to note that Germany is larger than the Netherlands. Therefore, Vivera should carefully decide whether this is feasible or not.

9.2.3 RECOMMENDATION 3: STAY INNOVATIVE

The final recommendation concerns the assumption that vegetarian and vegan products might be trend sensitive. It is recommended to stay innovative and keep an eye on vegetarian food trends in the future, to stay ahead of the competition. In addition, it is very important to stay in touch with customers via Facebook and other social media channels like Instagram or Twitter. This is important because customers can help thinking of new products and share their wishes and demands.

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11. APPENDICES

11.1 FACEBOOK POST VIVERA

Advertentievoorbeeld 1 van 1 advertentie < >

Nieuwsoverzicht op desktop 1 van 8 < >

Vivera
Gesponsord · €

Pagina leuk vinden

Vegetarier des Deutschlands aufgepasst!
Wenn auch euer Herz genau wie unseres bei vegetarischer oder veganer Küche und Erzeugnissen höher schlägt, dann unterstützt uns, das derzeitige Angebot zu verbessern!
Wir suchen das derzeit herrschende Meinungsbild zu den vegetarischen und veganen Produkten auf dem deutschen Markt. Zusammen haben wir die Chance, Ihre Wünsche Realität werden zu lassen.... [Meer weergeven](#)
[Vertaling bekijken](#)



Helfen Sie uns, die vegetarische und vegane Angebote zu verbessern und gewinnen!

-

11.2 QUESTIONNAIRE

Hallo, ich bin Amber Dommerholt und ich begleite die Marktanalyse von Vivera, einem niederländischem Produzent für vegetarische und vegane Produkte (fleischersatzprodukte). Ich möchte mehr über das Konsumverhalten, die Wünsche und die Bedürfnisse von deutschen Konsumenten erfahren. Dafür brauche ich nur in 3 Minuten Ihre Zeit. Beantworte mir einfach einige Fragen zu Ihren Erfahrungen zu vegetarischen und veganen Produkte. Ich werde Ihren Antworten natürlich anonym und vertraulich auswerten. Ich danke Ihnen für Ihre Unterstützung und für Ihre Zeit.

Q1. Welchen Geschlechts sind Sie?

- ☐ Weiblich
- ☐ Männlich
- ☐ Andere

Q2. Wie ist Ihre Postleitzahl?

Q3. Welcher Alterskategorie gehören Sie an?

- ☐ Unter 18
- ☐ 18-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65+

Q4. Wie ist Ihren Beziehungsstatus?

- ☐ Single
- ☐ Verheiratet
- ☐ Verwitwet
- ☐ Geschieden
- ☐ Andere

Q5. Wie viele Personen leben in Ihrem Haushalt?

- ☐ 1
- ☐ 2
- ☐ 3

- ☐ 4
- ☐ 5
- ☐ 6
- ☐ Mehr als 6

Q6. Wo gehen Sie für gewöhnlich Lebensmittel einkaufen?

- ☐ Bio-Märkte
- ☐ Discounter (Lidl, Netto, Aldi)
- ☐ Supermärkte (Kaisers, Real, Rewe, Edeka, Kaufland)
- ☐ Lokale Läden
- ☐ Andere

Q7. Warum gehen Sie dort einkaufen?

- ☐ Breites Angebot
- ☐ Kürzeste Distanz
- ☐ Gute Qualität, frische Erzeugnisse
- ☐ Attraktive Preise
- ☐ Guter Service
- ☐ Andere

Q8. Wie häufig verwenden Sie vegetarische oder vegane Produkte (im Durchschnitt)?

- ☐ Mindestens einmal in der Woche
- ☐ Einmal im Monat
- ☐ Weniger als einmal im Monat
- ☐ Nie

Q9. Welche vegetarischen oder veganen Produkte kaufen Sie am liebsten? Bitte nenne einige:

Q10. Warum kaufen Sie vegetarische oder vegane Produkte? Ich kaufe sie...

- ☐ Aufgrund des Preis-Leistungsverhältnisses
- ☐ Aufgrund der Verfügbarkeit
- ☐ Aufgrund des Geschmacks
- ☐ Aufgrund der Verarbeitbarkeit
- ☐ Aufgrund des Nährwertes
- ☐ Aufgrund der umweltfreundlichen Produktion

- Aufgrund der Marke
- Aufgrund der Qualität
- Anderer Grund:

Q11. Zu welchen vegetarischen oder veganen Produkte fehlen Sie ein Größeres Angebot? Ich wünsche mir...

Q12. Falls Ihr vegetarische oder vegane Erzeugnisse nicht wichtig sind, warum sind sie Sie nicht wichtig?

- Sie sind nicht so geschmackvoll
- Ungenügendes Angebot
- Mir genügen die konkurrierenden Erzeugnisse
- Mir sind sie zu teuer
- Ich kann nicht auf Fleischprodukte verzichten
- Jemand in meinem Haushalt bringt mir davon ab
- Andere

Q13. Wie schätzen Sie die Zukunft von vegetarischen oder veganen Erzeugnissen ein?

- Die Nachfrage wird künftig an Zuwachs gewinnen
- Die Nachfrage wird sich nicht sonderlich verändern und auf dem derzeitigen Niveau bleiben
- Die Nachfrage wird abnehmen
- Andere

Q14. Gibt es noch etwas, dass Sie mir gerne zu diesen Produkten mitteilen möchten?

THANK & CLOSE

Ich danke Ihnen für Ihre Unterstützung und für Ihre Zeit.

11.3 TRANSCRIPT INTERVIEW VEBU

This interview was conducted via e-mail.

Date: 17-10-2016

Person interviewed: Wiebke Unger

Good afternoon, thank you very much for your time.

My name is Amber Dommerholt, 21 years old and currently writing a dissertation for the Dutch vegetarian company Vivera. It's a market research and my report will answer the question how the company Vivera can increase its market share on the German vegetarian product market. The problem is that there is little insight on the German vegetarian product market. I wanted to ask you questions about how the vegetarian market was 10 years ago, which developments and trends we can find at the moment in Germany and the final question is about trends in the future.

*Let's start with question 1: **Amber:** If we go back in time and take a look at Germany's vegetarian food market 10 years ago, how was the situation back then?*

Wiebke: Vegan and vegetarian products are quite now on the market. If we go back 10 years, the supply and availability was much less than today. Today every supermarket offers a wide range of vegan and vegetarian products, like plant-based milk, vegetable spread and meat alternatives. Today it is very easy to buy veggie-products and lead a plant-based lifestyle. Also there are many vegetarian or vegan restaurants. Its number is increasing rapidly. For example, in 2011 there were only 12 vegan restaurants in Berlin. Today there are almost 50 vegan restaurants. There are also vegan and vegetarian hotels and guesthouses.

***Amber:** Which developments and trends can we find at the moment in the German vegetarian product market?*

Wiebke: The market of vegetarian and vegan products is not yet saturated. The number of vegan- and vegetarian-living people is increasing and they want an adequate range of veggie-products. Especially meat alternatives are quite new. Producers are trying new resources for the products. Besides soya, they use proteins based on lupine or peas to produce healthy and tasty meat alternatives. More and more caterers, big canteens and system-gastronomies are reacting to the veggie-trend and integrate vegan meals into their product-range. VEBU-Gastro offers workshops and guidance for them.

Amber: *Which trends do you expect to come in the future?*

Wiebke: The availability of vegetarian and vegan food is already very good. But there is still a lot of development possible. For example many school canteens are not yet offering vegan meals. The VEBU-campaign „Aktion Pflanzen-Power“ is working to improve the availability of vegan options in schools and kindergartens. Besides, the conditions for start-ups in the veggie-sector are very good. VEBU-start-up supports entrepreneurs in starting their own business. Besides the food-market, the vegan lifestyle will expand and cover many other areas as well, like vegan fashion and vegan cosmetics. There is still a lot to come and we are excited for these new developments.