



# 03-05

## Annual Report / Årsberetning

MAPP – Centre for Consumer Research on Customer Relations in the Food Sector



Aarhus School  
of Business

MAPP

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MAPP's unique competences in Danish food science and the Danish food sector give a prominent position to fulfill the European fork to farm strategy

## Mod øget innovation i fødevarerektoren Supporting innovation in the food sector



Et overordnet mål for vores forskning er at bidrage til den danske og europæiske fødevarerektors evne til at fortsætte i den innovative bane. Innovation er nøglen til fremtidens konkurrencedygtighed, hvilket der er bred enighed om – og et af de store mål for forskningen er at skabe fundamentet for innovation i fødevarerekæden.

Fra starten i 1991 har MAPP drevet forskning til støtte for markedsbaseret innovation – forskning der giver en bedre forståelse af konkurrenter, kunder og forbrugere. Samtidig leverer MAPP værktøjerne til at udnytte denne forståelse i produktudviklingsprocessen. Denne markedsbaserede tilgang til innovation, i dag ofte kaldt brugerdrevet innovation, er et nødvendigt supplement til udviklingen af ny teknologi, som er den anden drivkraft for innovation i fødevarerektoren.

Da de to grundaspekter i innovation, nemlig marketing og teknologi, går hånd i hånd, har det været naturligt for MAPP at udvikle et stadigt tættere forhold til vores kolleger inden for naturvidenskaben og de teknologiske videnskaber. Dette er også grunden til, at MAPP har sluttet sig til Levnedsmiddelcentret (LMC) for at styrke båndene til den danske fødevarerforskning.

I 2005 blev de fleste forskningsgrupper under LMC, inklusive MAPP, evalueret af et internationalt panel (International Advisory Board, IAB). Dette resulterede i mange spændende forslag til vores fremtidige arbejde, og den ros, som vi, og mange andre forskningsgrupper i LMC, fik fra dette panel af top-videnskabsfolk, beviser, at vi er på rette spor med vores kombination af videnskabelig dybde og tværfagligt samarbejde.

A major aim for our research is to contribute to the continued innovativeness of the Danish and European food sectors. Innovation is the key to future competitiveness – and a major task for research is to provide the foundations for innovativeness in the food chain.

From its establishment in 1991, MAPP has carried out research that can support market-based innovation – research that allows a better understanding of competitors, customers, and consumers, and that also provides the tools for exploiting this understanding in the process of developing new products. This market-based approach to innovation, today often called user-driven innovation, is a necessary supplement to the development of new technology, which is the other main driver of innovation.

Since market- and technology-oriented aspects of innovation must go hand in hand, it has only been natural for MAPP to form ever closer relationships with our research colleagues in the natural and technological sciences. A major step in this process was achieved when MAPP joined the Centre for Advanced Food Studies (LMC), which now coordinates most of Danish food research.

In 2005, most research groups under LMC, including MAPP, were evaluated by LMC's International Advisory Board. This resulted in many valuable suggestions for our future work, and the many positive comments we and many other research groups under LMC got from this body of esteemed scientists, prove that our attempts to combine scientific depth with interdisciplinary cooperation has set us on the right track.

**Professor Klaus G. Grunert**  
Centerleder for MAPP / Director of MAPP

## International collaboration within Danish food science

Centre for Advanced Food Studies (LMC) coordinates the scientific activities and higher educations in Denmark within the food area and serves as a unique partner for the private and public food sector.

LMC was established in 1992 by The Royal Veterinary and Agricultural University, Denmark (KVL) and The Technical University of Denmark (DTU) highly encouraged by the private Danish food sector.

Since the summer of 2004 all major public, Danish food science institutions have collaborated within the frame of LMC. Later MAPP and the governmental food-related research institutes in Denmark also signed collaboration agreements with LMC, KVL and DTU.

LMC addresses important issues such as health, safety, quality, wellbeing, and consumer aspects by conducting innovative research across the food chain from fork to farm, integrating the most advanced analytical “omics” techniques and nano science as well as economics and sociology. LMC hosts the national graduate school FOOD. A combination of a strong record of investment in state-of-the-art research facilities and the constellation of these facilities and the interdisciplinary capabilities within LMC makes the centre unique.

Owing to the national priority Danish food science has reached a high scientific level within a number of disciplines.

The international advisory board reported in mid summer 2005 that “LMC has again taken a significant step forwards to become one of the prominent centres of research and academic education in food science and nutrition.” On MAPP it was noted: “They are certainly the premier European institution at this time in terms of consumer behaviour related to food quality and lifestyle...”

MAPP's unique competences in Danish food science and the Danish food sector give a prominent position to fulfill the European fork to farm strategy.

**Director Lisbeth Munksgaard,**  
Centre for Advanced Food Studies

## Fisk er sundt, men også dyrt!



I dag opfatter de fleste forbrugere fisk som et sundt og nærende måltid, og mange er fuldt bevidste om fiskens forskellige sundhedsmæssige egenskaber. På trods heraf har forbruget af fisk i de senere år været faldende eller stagnerende i mange europæiske lande.

Samtidig oplever vi en stigning i antallet af livsstilssygdomme som f.eks. hjerte/karsygdomme, sukkersyge og fedme. Særligt fedme har været sat under lup, og en decideret fedme-epidemi frygtes at opstå i de kommende år. En særlig indsats med et budskab om, at gode madvaner og fysisk aktivitet gavner, er nødvendig for at vende udviklingen.

Forskellige undersøgelser tyder på, at indtagelsen af fisk spiller en vigtig rolle i bekæmpelsen af hjerte/karsygdomme og overvægt. Det er derfor sandsynligt, at et øget forbrug af fisk ville kunne forbedre europæernes sundhedstilstand.

En forbedring af europæernes sundhedstilstand via et øget forbrug af fisk er netop det primære strategiske mål i EU-projektet SEAFOODplus, der involverer mere end 100 forskere. SEAFOODplus er et meget stort projekt og er derfor delt op i seks forskellige hovedområder. MAPP koordinerer det område, der beskæftiger sig specifikt med forbrugerholdninger og -adfærd.

Området om forbrugerholdninger og -adfærd ser nærmere på, hvorfor europæerne ikke spiser mere fisk, selv om de udmærket ved, at fisk er sundt. Hvilke motiver og i særdeleshed hvilke barrierer ligger der bag europæernes forbrug

af fisk? Vi vil samtidig undersøge forbrugernes krav til information samt påvirkningen og effekten af budskaber om sundhed, sikkerhed og etik i relation til fisk.

I maj 2004 blev der gennemført en række fokusgruppediskussioner i en række europæiske lande. Resultaterne viser, at forbrugere i Europa i stor udstrækning spiser fisk ud fra de samme motiver. Generelt spiser forbrugerne fisk, fordi det er sundt, og fordi det smager godt.

*Forbrugerne mener, at fisk er sundt, fordi*

- fisk har et lavt indhold af fedt og kolesterol
- fisk er let fordøjeligt
- fisk anbefales af læger

Der er dog samtidig en række grunde til, at forbrugerne ikke spiser så meget fisk, som de burde. Her er det især prisen, der er problemet. Fisk opfattes som en meget dyr spise sammenlignet med eksempelvis kød, og det bliver ikke bedre af, at mange synes, at fisk ikke mætter så meget. Lugten af fisk samt det faktum, at børn generelt ikke kan lide fisk, lægger yderligere en dæmper på forbruget af fisk.

Lige nu foretages en omfattende forbrugerundersøgelse, der vil sætte endnu mere fokus på, hvorfor nogle europæere spiser fisk og andre ikke gør.

## Fish is healthy, but too expensive

Fisk opfattes som en meget dyr spise sammenlignet med eksempelvis kød  
Fish is considered very expensive compared to for example meat

Nowadays most consumers perceive fish as a healthy and nutritious meal and many are fully aware of the various nutritious values of fish. In spite of this, the consumption of fish has diminished or stagnated in many European countries in recent years.

At the same time we see an increase in diseases caused by the lifestyles of consumers such as cardiovascular diseases, diabetes and obesity. Especially obesity has been subject to close scrutiny and it is feared that obesity will turn into an epidemic in the years to come. The growing unhealthy lifestyle with unwholesome food habits and too little physical activity among Europeans requires new efforts to address the problem.

Various studies indicate that the consumption of fish plays an important role in the battle against cardiovascular diseases and obesity. It is therefore likely that a larger consumption of fish will improve the health of the European consumer.

Improving general health in Europe via increased consumption of fish is the primary strategic purpose of the EU project SEAFOODplus involving more than 100 researchers. SEAFOODplus is a large research project and therefore divided into six different areas. MAPP coordinates the consumer area, specifically dealing with studies on consumer attitudes and decision-making.

The consumer part of the project takes a closer look at why Europeans do not eat more fish now that they

know fish is good for you. What are the motives and especially the barriers for European consumers' consumption of fish? We will also look at consumers' demand for information as well as the influence and effect of messages about health, safety and ethics with regard to fish.

A number of focus group discussions in various European countries were carried out in May 2004. The results show that European consumers generally eat fish for a number of reasons. They eat fish because they think fish is healthy but also because they like it.

*Consumers find fish healthy because*

- fish has a low fat and cholesterol content
- fish is easily digested
- fish is recommended by doctors

However, there are a number of reasons why consumers do not eat as much fish as they ought to. The main problem is price. Fish is considered very expensive compared to for example meat, and it does not help either that fish is not a very filling food. The smell of fish and also the fact that children often dislike fish also dampens European fish consumption.

Currently a large-scale European consumer study is on the way, which will throw more light on why some European consumers choose to eat fish and others do not.

## Detailhandlens mærkevarearkitektur og forbrugeropfattelser



**Hvilket produktudvalg og hvilken service skal detailhandlen tilbyde forbrugerne? Hvilke fødevarer kan de slette fra deres sortiment, og hvilke mærkevarer er de nødt til at have på hylderne for at imødekomme forbrugernes ønsker? Det er et par af de spørgsmål, detailhandlen løbende stræber efter at besvare, så de kan sammensætte et produktudvalg og tilbyde et serviceniveau, der imødekommer forbrugernes ønsker.**

Detailhandlens udvalg af fødevarer byder typisk på en kombination af producentmærker (såkaldte mærkevarer), detailhandlens egne mærker samt generiske fødevarer uden et mærke. Kombinationen udgør samlet set detailhandlens mærkearkitektur.

I de seneste tre år har MAPP forsket intenst i netop mærkearkitektur. Det første skridt har været en sammenligning af mærkearkitekturen i Danmark, Frankrig, Tyskland, Storbritannien og Sverige. Sammenligningen viste, at der er meget vigtige forskelle, men også slående ligheder i detailhandlens mærkearkitektur, både i og mellem de enkelte lande. På den ene side stræber detailhandlen efter at ligne konkurrenterne på nogle områder, men på den anden side gør de et stort stykke arbejde for at være anderledes og have deres egen profil.

Detailkæder som Auchan (F), Fakta (DK), ICA (S) og Tesco (UK) har udviklet deres egne "branded house strategier". Det betyder, at detailkædens navn kan findes på flere af kædens egne mærker. Andre detailkæder håndterer sagen anderledes, og detailkæder som Aldi (D, DK og UK), Føtex (DK) eller Intermarché (F) sælger deres egne produkter under forskellige eksklusive mærker eller under egne mærker, hvor relationen til detailkæden ikke er særlig tydelig. Det kaldes for "house of brands strategy".

Vores resultater viser, at detailhandlens mærkearkitektur kan beskrives ud fra to dimensioner. Den første dimension handler om synlighed af detailhandlens egne mærker, hvilket refererer til, i hvilken grad forbrugerne kan forbinde kædens egne mærker med kædens navn. Den anden

dimension er kvaliteten af kædens egne mærker. Denne dimension fanger, at detailkædens egne mærker er forskellige i kvalitet, og at nogle kæder sælger egne mærker af meget forskellig kvalitet.

Men oplever forbrugerne så forskelle inden for de to dimensioner af mærkearkitektur? Og har det indflydelse på forbrugernes opfattelse og evaluering af de forskellige detailkæder? For at få et mere klart billede af netop dette gik vi i gang med at undersøge forbrugernes opfattelse af fem detailkæder i Danmark (Aldi, Fakta, Føtex, Kvickly og Netto). De udvalgte kæder er nemlig forskellige i forhold til mærkearkitektur.

Vi fandt ud af, at forbrugerne synes, at det er meget svært at skelne mellem kædernes egne mærkevarer og producentmærker på produktniveau. De mener ikke, at forskellen er speciel vigtig, og det er selvfølgelig en dårlig nyhed til producenterne af mærkevarer. Forbrugerne lægger på den anden side mærke til forskellen i kædernes mærkearkitektur på et mere generelt plan.

Det blev desuden konkluderet, at synligheden af detailkædens egne mærker og den opfattede kvalitet af disse fødevarer har en positiv indflydelse på kundernes tilfredshed og loyalitet.

Vores resultater viser, at detailkæder belønnes, hvis de arbejder med synligheden og kvaliteten af deres egne mærker. De detailkæder, der følger en "branded house strategy", lader til at være på rette vej. Omvendt står mærkevarerproducenterne over for en stor opgave, fordi forbrugerne har svært ved at skelne mellem producentmærker og detailkædens egne mærker.

## Retailer brand architecture and consumer perceptions

**Which assortment of products and services should retailers offer consumers? Which foods can be deleted from the present assortment? Which brands do retailers have to have in their assortment to satisfy consumer demands? These are a few of the questions food retailers continuously strive to answer in order to put together a variety of products and services that will appeal to consumers.**

The assortments of products that food retailers offer typically include a combination of manufacturer brands, retailer brands and generic or unbranded products. This combination constitutes the brand architecture of food retailers.

Over the last three years MAPP has studied retailer brand architecture intensively. The first step was to compare brand architecture in Denmark, France, Germany, Great Britain and Sweden. Results show that there are important differences but also striking similarities in the brand architectures of food retailers both within and across countries. This reflects that food retailers simultaneously strive to be similar to their competitors in some respects (e.g., by shelving certain brands) but different in others in order to differentiate themselves.

Retailers such as Auchan (F), Fakta (DK), ICA (S) and Tesco (UK) have developed their own "branded house strategies". This means that the name of the retailer also can be found on their retailer branded products. Other retailers do it differently. Retailers like Aldi (D, DK, UK), Føtex (DK) or Intermarché (F) sell their own products under a variety of exclusive brands or own brands and the relation to the retailer is not as obvious. This is called a "house of brands strategy".

Our results provide strong support for characterising retailer brand architecture in terms of two dimensions. The first dimension is labelled visibility of retailer brands and refers to the extent to or the ease with which consumers can associate retailer brands with the name of the retailer. The other dimension is quality of retailer brands. This

dimension captures that retailer brands differ in quality and that some retailers offer retailer brands with different quality levels.

But do consumers perceive the differences between the two dimensions? And does it influence consumers' perceptions and evaluations of different retail chains? In order to get a clearer picture of this we have studied consumer perceptions of five Danish food retailers (Aldi, Fakta, Føtex, Kvickly and Netto), because these chains differ with regard to brand architectures.

We found that consumers find it very difficult to distinguish between retailer brands and manufacturer brands at the product level. The distinction is simply not important to consumers and this is of course bad news to manufacturers. On the other hand consumers do notice the difference in retail brand architectures between food retailers at a more general level.

Furthermore, we found that the visibility of retailer brands and perceived quality of retailer brands has a positive impact on overall satisfaction and consumer loyalty.

Our findings indicate that retailers will be rewarded if they work to increase the visibility and quality of their retailer brands. Retailers that follow a branded house strategy appear to be on the right track. On the other hand, brand manufacturers have their work cut out for them, as consumers have difficulty distinguishing between manufacturer brands and retailer brands.

## Kan øget forarbejdning og økologi gå hånd i hånd?



**Økologi er oppe i tiden. Trods det er afsætningen af økologiske fødevarer på de fleste europæiske markeder begrænset til basisfødevarer som mælk, gryn og frugt og grønt.**

Undersøgelser har vist, at forbrugerne generelt opfatter økologiske fødevarer som mere naturlige end konventionelt fremstillede fødevarer, mens industrielt forarbejdede fødevarer som helhed ses som mindre naturlige. Generelt forventer forbrugerne, at de fødevarer, de køber, er velsmagende og sunde. Samtidig bliver convenience vigtigere. Det stiller krav om øget forarbejdning af råvarerne i fødevarerektoren og stiller dermed også krav til den økologiske fødevarerproduktion, hvis der skal fornyet vækst i sektoren. Spørgsmålet er derfor, om øget forarbejdningsgrad og økologisk produktion overhovedet er forenelige størrelser i forbrugernes hoveder.

MAPP har deltaget i et treårigt europæisk forskningsprojekt, hvor netop dette spørgsmål er centralt. Hovedformålet med projektet er at nå til en bedre forståelse af, hvordan forbrugerne danner købsbeslutninger i relation til økologiske fødevarer.

Der gennemføres forbrugerundersøgelser i otte europæiske lande, og der er fokus på at forstå beslutningsprocesserne for såvel friske som forarbejdede økologiske fødevarer. Samtidig lægges der vægt på at undersøge, hvordan holdninger, værdier, følelser og moralske overvejelser indgår i beslutningsprocessen i forskellige forbrugersegmenter.

MAPP har haft ansvaret for en undersøgelse om forbrugernes subjektive vidensstrukturer, særligt med hensyn til forarbejdede økologiske fødevarer. I den forbindelse har vi gennemført ladderinginterviews med forbrugere i fire lande. I hvert land er der gennemført interviews med forbrugere inden for segmenter, der udviser en grundlæggende interesse for økologiske fødevarer.

Resultaterne viser betydelige forskelle blandt segmenterne, både hvad angår de egenskaber og selv-relevante konsekvenser, der forbindes med økologien og købet af økologiske fødevarer. Undersøgelsen viser, at både individualistiske og kollektive værdier har indflydelse på, hvorfor nogle forbrugere vælger at købe økologiske fødevarer, mens andre ikke gør. Det blev også slået fast, at forbrugere, der har erfaring med økologiske fødevarer, generelt har en bredere palet af associationer til økologi.

Projektet støttes økonomisk af Den Europæiske Kommission og gennemføres i samarbejde med universiteter og forskningsinstitutioner i England, Finland, Grækenland, Italien, Spanien, Sverige og Tyskland. Interesseorganisationer og industrien deltager på sidelinien.

## Can increased food processing and organic products go hand in hand?

**Økologi er oppe i tiden**  
Ecology is popular these days

**Ecology is popular these days but in spite of this the sale of organic foods is limited to basic foods as milk, grains, fruit and vegetables.**

Studies have shown that consumers in general perceive organic foods as more natural than conventionally manufactured foods, while foods manufactured industrially as a whole are seen as less natural. In general consumers expect the products they buy to be tasty and nutritious. At the same time convenience gets more important. Therefore there is an increased demand for processing raw material within the food sector including organic food production if renewed growth is to be developed in this specific sector. The question is therefore whether increased processing and organic food production are compatible in the minds of consumers.

MAPP participates in a three-year European research project where this question is very central. The main purpose of the project is to get a better understanding of consumers' decision-making as regards buying organic foods.

Consumer studies are carried out in eight European countries and the focus lies on the understanding of the decision-making processes for fresh as well as manufactured organic foods. The study also focuses on questions such as how attitudes, values, feelings and moral considerations influence the decision-making process in different consumer segments.

MAPP is responsible for the study regarding consumers' subjective knowledge structures, especially with regard to processed organic foods. In this connection we have carried out laddering interviews with consumers in four countries. In each country the interviews were carried out with the consumer segments that normally show an interest in organic foods.

The results show considerable differences between the consumer segments with regard to attributes and self-relevant consequences connected to ecology and the purchase of organic foods. The study also showed that both individual and collective values have impact on why some consumers buy organic foods and others choose not to. It was also found that consumers that are familiar with organic foods have more and also broader associations to ecology in general.

The project is funded by The European Commission and is carried out in cooperation with universities and research institutions in England, Finland, Greece, Italy, Spain, Sweden and Germany. Organisations and industry participate collaterally.

## Børn har meget at skulle have sagt, når familien er på indkøb efter frugt og grøntsager



**Danske børn spiser meget usund mad som slik og kager, og forbruget af sunde fødevarer såsom frugt og grønt er lavt hos for mange danske børnefamilier. Denne kombination af fødevarer kan betyde, at mange danske børn bliver overvægtige og udvikler livsstilsrelaterede sygdomme i en alt for tidlig alder.**

Børn har i stigende omfang indflydelse på familiens indkøb af forskellige produkter, såvel *indirekte* som *direkte*.

*- Den indirekte indflydelse sker ved, at forældrene i deres bevidsthed er klar over, hvad deres børn ønsker, de skal købe med hjem og herefter køber ind til børnenes livretter.*

*- Den direkte indflydelse finder sted, når børnene aktivt forsøger at påvirke deres forældre til at købe bestemte fødevarer og for eksempel beder om specifikke produkter.*

Danske børn spiller en vigtig rolle ved indkøb af fødevarer. Sammenlignet med tidligere, inddrages børnene i langt højere grad i familiens beslutningsprocesser, og de tager direkte del i diskussioner om køb af produkter.

Projektet "Børns indflydelse på familiens beslutninger vedrørende valg af fødevarer med fokus på frugt, grønt og sundere spisevaner", som MAPP er en del af, gennemføres i samarbejde med Statens Institut for Folkesundhed og Gasa Nord Grønt A/S. Målet er netop at undersøge, hvordan vi kan få danske børn til at spise mere sund mad, specielt frugt og grønt, ved at overbevise deres familier om, at de skal købe flere sunde fødevarer.

Mere præcist undersøges det, hvor stor indflydelse børn har på familiens køb af forskellige fødevarer samt deres indflydelse på forskellige beslutningsområder i familiens købsbeslutningsproces. MAPP undersøger sammenhængen mellem børns forbrugerkompetence og deres indfly-

delse på familiens indkøb af fødevarer. Vi undersøger også, om der er en sammenhæng mellem familiens fødevarerrelaterede livsstil og børnenes indflydelse. Herudover undersøger vi, hvilke motiver og barrierer der ligger bag børns valg og fravalg af frugt og grønt.

MAPP har gennemført en spørgeskemaundersøgelse med både børn og forældre som respondenter. Resultaterne viser, at børn ofte forsøger at påvirke deres forældres indkøbsadfærd. De kommer med idéer til indkøb af specifikke fødevarer, især frugt og grøntsager, og forældrene køber ofte det, børnene gerne vil have. Børn har størst indflydelse på lette måltider som morgenmad og mellemmåltider, mens deres indflydelse på aftensmaden er begrænset. Det samme gælder for specifikke fødevarer. Fødevarer, der kræver mindre tilberedning som slik, pålæg og frugt, har børn størst indflydelse på, mens det omvendte gælder for fødevarer, der kræver større tilberedning som kød, fisk og grøntsager.

Der arbejdes fortsat på analyserne af de indkomne data fra spørgeskemaundersøgelsen. Det næste skridt bliver at præsentere resultaterne for de familier, der deltog i den indledende kvalitative undersøgelse med henblik på at opnå uddybninger af resultaterne.

## Children have a say when the family goes shopping for food, especially for fruit and vegetables

**Many Danish children eat too much unhealthy food such as sweets and cakes, and the consumption of fruit and vegetables is too low in many Danish families with young children. Eating much unhealthy food can cause obesity and lifestyle-related illnesses at an early age.**

Earlier studies show that children's influence, *indirect* as well as *direct*, on what the family buys, including food, is on the increase.

*- Children's indirect influence is exerted when parents are fully aware of what their children want; they shop accordingly and buy their children's favourite dishes.*

*- The direct influence is exerted when children actively try to persuade their parents to buy specific products.*

Danish children play a significant role in the purchase of foods. They often take part in the family's decision-making process as well as in family discussions about shopping. Today parents consult their children a lot more compared to earlier when parents made almost all buying decisions.

MAPP is part of the project "Children's influence on the family's decision regarding foods with special focus on fruit, vegetables and healthier eating habits", which is carried out in collaboration with the National Institute of Public Health and Gasa Nord Grønt A/S. The aim is to study how you get Danish children to eat more healthy food, especially fruit and vegetables, by convincing their families that they should buy healthier products.

More specifically the project looks into the extent of children's influence on their family's purchases of various food products as well as into their influence in various decision areas in the family's decision processes. MAPP looks at the

connection between children's consumer competence and their influence on food shopping. Consumer competence is measured based on children's direct involvement as well as their commitment to grocery shopping. Furthermore we study the relationship between the family's food-related lifestyle and the children's influence. Moreover, we study children's motives and barriers with regard to choice and rejection of fruit and vegetables.

MAPP carried out a survey with both children and parents as respondents. Results show that children try to influence their parent's buying behaviour by supplying ideas for future shopping, especially with regard to fruit and vegetables, and that parents often respond positively to their children's requests. Again, children were found to have most influence on easily prepared meals, like breakfast and snacks, while children's influence on dinner is more limited. The same goes for specific food products that take time to prepare.

Work on the analyses of the collected data from the questionnaire is still in progress. The next step will be to introduce the families that took part in the initial qualitative study, to the results with a view to supplementing results.

## Kend din virksomhed – og dine omgivelser



**Hvordan opfatter en virksomhed sine omgivelser og sin egen rolle i disse? Hvad er det, der udgør en virksomheds identitet, og hvor stærk er denne identitet? Kommer den for eksempel klart til udtryk i virksomhedens handlinger, i dens strategier og produkter? Disse spørgsmål har professor Hans Skytte arbejdet med i et projekt, der er finansieret af Norma og Frode S. Jacobsens Fond.**

Projektet omfatter analyser af slagteriselskabet Tican a.m.b.a. samt to af slagteriselskabet Danish Crown's virksomheder, nemlig Svinekødsdivisionen og Tulip Food Company. Projektet omfatter endvidere analyser af detailkæder i Danmark, Sverige, England og Tyskland.

Resultaterne fra projektet viser, at de analyserede virksomheders identitet har gennemgået en større udvikling over de seneste 10 år – for eksempel er produktionsvirksomhederne blevet mere internationalt orienterede, og de har rettet mere opmærksomhed mod forbrugerne og detailkæderne. De fleste virksomheder har imidlertid ikke nogen særlig stærk identitet. Dette viser sig ved, at identiteten ikke slår særlig tydeligt igennem i den enkelte virksomheds begrebsdannelse, strategiudformning og adfærd. Udviklingen i identiteten slår tydeligst igennem i producenternes produktudvikling og detailkædernes sortimentsudvikling.

Et andet resultat er, at det ikke er i alle virksomheder, at der er lige stor bevidsthed og lige klar logik vedrørende afprøvning af formodninger og bevidst udvikling af tolkninger af den verden, man arbejder i. Som virksomhed kan man for eksempel have nogle formodninger om, hvad ens kunder efterspørger og forsøge at afprøve disse formodninger gennem sin markedsføring og produktudvikling. En klarere sammenhæng mellem afprøvning af formodninger og begrebsudvikling ville fremme den enkelte virksomheds udvikling.

Et tredje resultat er, at der ikke anvendes særligt mange oplysninger om de relevante aktører i omgivelserne, som eksempelvis er kunder, leverandører og offentlige myndigheder, i forbindelse med tilrettelæggelse af virksomhedens strategi, produktudvikling eller adfærd. Det vil med andre ord sige, at flere virksomheder er mere internt end eksternt orienterede.

## Know your company – and its environment

**Hvad er det, der udgør en virksomheds identitet, og hvor stærk er denne identitet? What constitutes a company's identity, and how strong is this identity?**

**How does a company perceive its environment and its role in its environment? What constitutes a company's identity, and how strong is this identity? Does it for instance manifest itself clearly in the company's actions, in its strategies and products? These are questions that Professor Hans Skytte asked in a project financed by the Norma and Frode Jacobsen Foundation.**

The project included analyses of Tican a.m.b.a. as well as two of Danish Crown's companies, viz. the Pork Division and Tulip Food Company. The project furthermore included analyses of retail chains in Denmark, Sweden, Great Britain and Germany.

The project results show that the identity of the companies analysed has undergone a major transformation over the past 10 years – e.g. the processing companies have become more internationally oriented, and they have shifted their attention towards consumers and retail chains. Most companies, however, do not have a particularly strong identity, which is demonstrated by the fact that the company's identity is not reflected to any strong degree in its conceptual work, strategy formation and behaviour. The development in identity manifests itself most clearly in the manufacturers' product development and in the retail chains' assortment work.

Another result shows that not all companies demonstrate the same awareness and the same clear-cut logic as regards the testing of assumptions and conscious development of interpretations of the world they work in. A company may for instance have certain assumptions about what customers demand and try to test these assumptions in its marketing and product development. A clearer link between testing assumptions about the environment and the company's interpretations would strengthen the company.

A third result shows that companies do not make use of information about relevant actors in its environment, e.g. customers, suppliers and public authorities, to any large degree when planning company strategy, product development or behaviour. In other words, a number of companies are internally rather than externally oriented.



## Brugerdrevet innovation - er de ældre et segment?

**Er gruppen af ældre i eget hjem et segment? Det mest nærliggende svar er nej. Ældre forbrugere er nemlig mindst lige så forskellige som andre, og forskelle i holdninger, spisevaner, madlavningsvaner, indkøbsadfærd, kort sagt fødevarerrelateret livsstil, er lige så udprægede for denne gruppe som for resten af befolkningen.**

Der kan alligevel være gode grunde til ikke at forkaste tanken om ældre som segment. Selv om der ikke er nogen grund til at antage, at forbrugere rent mentalt skulle blive mere ens med alderen og få en ensartet fødevarerrelateret livsstil, er der alligevel et par ting, der deles af mange ældre. Aldringsprocessen medfører nemlig nogle fysiologiske og sociale effekter, der kan ændre forholdet til mad og fødevarer og give nogle begrænsninger og problemer.

MAPP har i de sidste tre år deltaget i EU-projektet "Food in Later Life". Her har vi undersøgt ældres forhold til mad og fødevarer. Vi har desuden kortlagt, hvordan materielle, personlige og sociale ressourcer spiller sammen med personlige fødevarerrelaterede mål om at bestemme ældres tilfredshed med den del af ældres liv, der vedrører mad og fødevarer.

Mere konkret har MAPP interviewet og observeret ældre forbrugere over 65 år i otte forskellige europæiske lande - dels mens de ældre købte ind i diverse fødevarerbutikker og dels i deres eget hjem. Det er der kommet en lang række spændende resultater ud af, og vi har fået indblik i nogle af de generelle problemer, som ældre ofte har i forbindelse med indkøb og brug af fødevarer. En viden som i den grad kan bruges som et godt udgangspunkt for kommende produktudvikling.

**Vores resultater giver anledning til at fremhæve fødevarerbranchens muligheder for produktudviklingen inden for tre områder**

*- Udvikling af fødevarer med mere fokus på smag og aroma.*  
Mange ældre har nedsat smags- og lugtesans og lægger derfor stor vægt på, at maden smager af noget. I produktud-

viklingen af f.eks. grøntsager, konserves og færdigretter vil et større fokus på at opnå en kraftigere smag derfor lønne sig for virksomhederne, og gruppen af ældre vil opleve en langt større nydelse af maden.

*- Udvikling af fødevareremballage, der tager højde for svagere fysik og behov for mindre portioner.*

Den svagere fysik hos mange ældre gør det vanskeligt at åbne diverse fødevareremballager. Ældre efterlyser derfor emballager, der er nemme at åbne. Der er samtidig mange, der ønsker sig mindre pakningsstørrelser. En del ældre har mindre appetit, og mange bor desuden alene. Et dårligt syn er endvidere dagligdag for mange ældre, og de har svært ved at læse informationen på mange emballager. Både skriftstørrelser og -farver kan gøre det meget svært for ældre at læse sig til produktets indhold og pris.

*- Udvikling af sundhedsfremmende fødevarer, der er skræddersyede til at imødegå aldringens fysiologiske virkninger.*

Der er et stort potentiale i at udvikle sundhedsfremmende fødevarer til ældre. Det kunne være funktionelle fødevarer, der kan gøre det lettere for ældre at få en kost, som indeholder netop de biologisk aktive stoffer, der kan give den enkelte et bedre fysisk og psykisk velbefindende. Sundhedsmotivet er nemlig et særdeles vigtigt fødevarerelateret mål for denne gruppe, som blandt andet også giver sig udslag i et stort forbrug af kosttilskud.

Nydelsen er imidlertid altafgørende for ældre. Det er ikke nok, at produkter er sunde. De skal også smage godt - og det skal fødevarerproducenter holde sig for øje, når de produktudvikler til ældre forbrugere.

Virksomheder, der forstår at bruge denne forbrugerviden til udvikling af innovative produkter, der skaber værdi for forbrugerne, kan opbygge en kompetence, der er både kompleks og svær at kopiere, og som ikke mindst kan give en langvarig konkurrencefordel.

## User-driven innovation - do seniors constitute a segment?

**Is the group of elderly living in their own home to be considered a segment? The most obvious answer is no. Elderly consumers are every bit as different as others, and differences in attitudes, eating habits, cooking practices, shopping behaviour - in short food-related lifestyle - are just as distinct for this group as for the rest of the population.**

It may, however, make sense not to reject the idea of seniors constituting a particular segment. Although there is no reason to assume that consumers develop a uniform outlook as well as food-related lifestyle as they grow older, there are nonetheless a couple of features that many seniors share. The aging process has a number of physiological and social consequences that can alter their approach to food and food products, which may entail certain limitations and problems.

For the past three years MAPP has participated in the EU project "Food in Later Life" in which we have studied senior citizens' outlook on food and food products. Furthermore we have analysed how material, personal and social resources interact with personal food-related goals to determine the satisfaction of seniors as regards the part of their lives that concerns food and food products.

Specifically MAPP has interviewed and monitored consumers aged 65+ in eight European countries - partly during seniors' shopping in various food stores and partly in their own home. This has yielded a pool of interesting results and we gained insight into some of the general problems that seniors experience in connection with shopping and cooking. This is valuable knowledge for future product development.

**The results enable us to highlight the food sector's product development options in three areas**

*- The development of food focusing on taste and flavour.*  
Many elderly suffer from an impaired sense of taste and smell and therefore they attach importance to food having taste. In the product development of e.g. vegetables,

tinned food and ready-made dishes, an increased focus on enhanced taste will be worthwhile for the companies, and the elderly will get more pleasure out of their food.

*- The development of food packaging that takes into account the weaker physique of the elderly as well as their need for smaller portions.*

Weak physique often makes it difficult for seniors to open food packages. Seniors therefore look for packaging that is easy to open. Also there is a demand for smaller packages. Quite a number of elderly have a small appetite and furthermore many live alone. Impaired vision is also a general problem and many find it difficult to read the labels. Both printing type and colour prove to be obstacles when seniors try to read product price and content.

*- The development of health-promoting products tailor-made to counter the physiological effects of aging.*

Health-promoting products for the elderly are bound to constitute a vast potential. These products might include functional foods that make it easier for seniors to eat a diet that contains the biologically active substances that can improve their mental and physical wellbeing. The health aspect is a very important food-related goal for this group, which, among other things, manifests itself in a large intake of dietary supplements.

The pleasure of eating is important to seniors. It is not enough that food products are wholesome. They have to be tasty - and manufacturers must keep that in mind when they develop food products for seniors.

Companies that recognize the value of exploiting this knowledge in their development of innovative products, which create value for consumers will be able to establish a competence that will be both complex and difficult to imitate, and which will offer long-term competitive advantages.

## Nedbrydning af barrierer for en sundere kost



**Mad, som ser indbydende ud, smager godt og fremmer mæthedfølelsen, kan være en ny mulighed for at modvirke den stigende forekomst af overvægt og livsstilssygdomme.**

Mange almindelige fødevaringredienser, såsom bioaktive stoffer, kan have en indvirkning på sammensætningen af en persons energibalance, og endvidere kan visse ingredienser øge energiforbruget og mindske appetitten. Anvendelsen af bioaktive fødevaringredienser er i stor udstrækning accepteret i samfundet, fordi disse organismer forekommer naturligt, de er velkendte og ofte uskadelige. Ved at tilføje disse ingredienser til almindelige fødevarer kan varenes gastronomiske kvalitet forbedres.

I december 2005 fik MAPP bevilget midler til et forskningsprojekt om dette emne. Projektet har titlen "Nedbrydning af barrierer for en sundere kost via forbrugerdrevet produktudvikling".

Projektet vil – som noget helt nyt – samle tre forskningsområder, som ikke tidligere er blevet kombineret i denne sammenhæng. For det første kommer projektet til at bygge på eksisterende forskning i, hvad der er bestemmende for forbrugernes valg af fødevarer og for en sund livsstil. For det andet kombinerer projektet denne viden med ernærings- og sundhedsfaglig viden om, hvad der gør en fødevarer sund. For det tredje kæder projektet disse to områder sammen med ekspertise inden for forbrugerdrevet

produktudvikling, hvilket her vil sige udvikling af produkter baseret på en dybere forståelse af forbrugeradfærd.

Øvrige deltagere i projektet er: Den Kongelige Veterinær- og Landbohøjskole, Kræftens Bekæmpelse, Hjerteforeningen, Mandag Morgen og en række danske fødevarer virksomheder.

*Projektets overordnede mål er*

*1) at indsamle viden om påvirkelige faktorer, der enten modvirker eller bevirker, at forbrugerne køber og anvender sundere fødevarer,*

*2) og på baggrund af denne viden at komme med nye produktidéer, som vil resultere i et sundere valg af fødevarer.*

Udgangspunktet for projektet er det faktum, at sundere fødevarer vil forbedre den generelle sundhedstilstand, dog kun når forbrugerne faktisk også køber og anvender produkterne. Udviklingen af sundere fødevarer, som forbrugerne vil synes om, forudsætter et grundigt kendskab til hvordan forbrugerne danner præferencer for produkterne, og målet med dette projekt er derfor at analysere præferencer for sundere fødevarer.

## Breaking down barriers for healthier eating

**Sundere fødevarer vil forbedre den generelle sundhedstilstand**  
Healthier food products will improve public health

**Food which is appealing, tasty and promotes satiety could be a novel concept in preventing the escalating prevalence of obesity and lifestyle diseases.**

Several harmless food ingredients, such as bioactive ones, may influence a person's energy balance and these ingredients can potentially enhance energy expenditure and suppress appetite. The use of bioactive food ingredients is largely accepted by the general public because these agents are naturally occurring, well-known and often harmless; by adding these compounds, the gastronomic quality of well-known food products may be improved.

In December 2005, MAPP received a grant for a research project with the title: "Breaking down barriers for healthier eating by consumer-led product development".

The project will tie together three areas of knowledge that have not previously been brought together. Firstly, it will build on existing research on determinants of consumer food choice and of health-related behaviour. Secondly, it will combine this knowledge with nutritional and health-related expertise on what makes a food product healthy. Thirdly, it will relate these two knowledge areas to expertise in consumer-led product development, i.e., the development of products based on a thorough understanding of consumer behaviour.

Other participants in the project are: The Royal Veterinary and Agricultural University, The Danish Cancer Society, The Danish Heart Foundation, the magazine Monday Morning and a number of Danish food companies.

*The project has two general aims*

*1) to generate knowledge on actionable factors that prevent and factors that facilitate the purchase and consumption of healthier food products*

*2) building on this knowledge, to generate new product concepts that will induce healthier food choices*

Point of departure is the notion that healthier food products will improve public health only when consumers actually buy and consume them, and the development of healthier food products, which consumers will prefer, requires a thorough understanding of how consumers form such preferences. This project therefore has the aim of analyzing these preferences for healthy food products.

## Dissemination

In the period 2003-2005 MAPP published 36 articles in refereed international journals and another 12 articles are in press. MAPP wrote 33 articles for trade magazines or as input to press releases

**In the period 2003-2005 MAPP published 36 articles in refereed international journals and another 12 articles are in press. MAPP wrote 33 articles for trade magazines or as input to press releases. MAPP researchers participated in 44 international conferences and gave 190 practically oriented presentations at conferences, companies, government administration, trade organizations, ministries etc.**

*MAPP participated in the following projects in 2003-2005:*

- A consumer-oriented analysis of barriers and possibilities for sale of food products via the Internet
- Acceptance of biotechnological applications in the food chain: Attitudinal and economic factors in the interplay between manufacturer and consumers
- Adapting the Danish food-related lifestyle consumer model (FRL) for market segmentation and predicting consumer trends on markets for prepared consumer foods from Ireland
- An analysis of the potential sale of food products via the Internet in Denmark and the UK
- Aspects of inter-project learning in product development
- Brand strength and brand loyalty in the interplay between producer and retailer
- Children's influence on family decisions regarding foods, especially fruit, vegetables and healthier eating habits
- Children's influence on the family consumption of fish
- Choosing foods, eating meals: Sustaining independence and quality of life in old age
- Communicating about food allergies – Information for consumers, regulators and industry
- Communication flow and information strategies for food with probiotic properties

- Company level determinants of degree of market-orientation of value chains in agribusiness and fisheries
- Concerted action to develop a European framework for probabilistic risk assessment of the environmental impact of pesticides
- Consumer complaints: tendencies and behaviour
- Consumer decision-making on organic products
- Consumer preferences and meal preparation skills in relation to healthy food products such as fish and shellfish with a view to develop/adapt products, communication strategies and recipes to Danes
- Consumers' formation and change in their attitude structure regarding the use of biotechnology in the development and production of foods
- Cross-cultural consumer investigations and communication: validity and application possibilities
- Development of deepfrozen baby food based on Danish organic vegetables
- Development of frozen food for children
- Development of plant sink organs: Novel genes for science, agronomy and industrial use
- Different organisational changes due to different sensemaking
- European network on safety assessment of genetically modified crops
- Families' use of simple heuristics in the evaluation and choice of food and beverages
- Fish oil for consumption
- Food quality and food safety
- Foods enriched with fish oil: Stability, nutrition and consumer acceptance
- Green accounts: information to consumers about environmental effects caused by production of specific foods
- Health promoting, safe seafood of high eating quality in a consumer-driven fork-to-farm concept
- Information and new product development decision-making

- Interdisciplinary approaches to innovation in the food sector with special emphasis on the concept "care"
- Investigation of consumers' price knowledge before, during and after the purchase
- Knowledge sharing in international product development teams
- Low-wage work in Denmark
- Market-oriented flexible production of farmed fish
- Market-oriented product development with a Means-End Chain approach
- Measuring willingness to pay: A price information processing perspective
- Novel cross-linking enzymes and their consumer acceptance for structure engineering
- Product-oriented efforts in the agricultural sector
- Quantitative risk assessment strategies for novel foods
- Retailer buying as meaningful action: A study of how and why German food retailers buy fresh pork
- Safe and high quality food supply chains and networks: Establishing an international research knowledge network on cross-border food supply chains and networks
- Seafood: Consumer behaviour and wellbeing
- Sustainability in the production of pork with improved nutritional and eating quality using strategic feeding in outdoor production
- The prevalence, costs and basis of food allergy across Europe
- The social construction of success - a discourse psychological study of SAP R/3 implementation
- The validity of the Means-End Chain model of consumer behaviour
- Traceability of food chains: Implications for differentiation-based competitive advantage

*MAPP continuously provides up-to-date information on its research via [www.mapp.asb.dk](http://www.mapp.asb.dk).*

*There were three MAPP conferences in 2003-2005:*

- 2003** – MAPP conference 2003 with the themes: Do companies' sales strategies match retailers' buying strategies? New marketing possibilities for freerange pork, Retailers' own brands vs. branded goods: The influence on European retailers' ranges of products, Internet food shopping: Why not?
- 2004** – Consumer orientation in the food chain: How are today's consumers served?
- 2005** – User driven innovation of foods: New products for special target groups.

*MAPP also organizes an international workshop on food marketing and consumer behavior once a year. The themes have been:*

- 2003** – Consumer perceptions of healthiness of food and consumer acceptance of new functional food
- 2004** – Consumers, food and convenience
- 2005** – Consumer reactions to food branding and labelling

## Publications and other dissemination 2003-2005

## 1 / ARTICLES IN JOURNALS WITH REFEREE SYSTEM

**Bech-Larsen, T. & Grunert, K. G. (2003).** The perceived healthiness of functional foods: A conjoint study of Danish, Finnish and American consumers' perception of functional foods. *Appetite*, 40(1), 9-14.

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**Brunso, K., Scholderer, J. & Grunert, K. G. (2004).** Closing the gap between values and behaviour: A means-end theory of lifestyle. *Journal of Business Research*, 57, 665-670.

**Brunso, K., Scholderer, J. & Grunert, K. G. (2004).** Testing relationships between values and food-related lifestyle: Results from two European countries. *Appetite*, 43(2), 195-205.

**Dransfield, E., Ngapo, T. M., Nielsen, N. A., Bredahl, L., Sjöden, P. O., Magnusson, M., Campo, M. M. & Nute, G. R. (2005).** Consumer choice and suggested price for pork as influenced by its appearance, taste and information concerning country of origin and organic pig production. *Meat Science*, 69, 61-70.

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**Grunert, K. G., Bech-Larsen, T., Lähteenmäki, L., Ueland, Ø. & Åström, A. (2004).** Attitudes towards the use of GMOs in food production and their impact on buying intention: The role of positive sensory experience. *Agribusiness*, 20(1), 95-107.

**Grunert, K. G., Bredahl, L. & Brunso, K.**

**(2004).** Consumer perception of meat quality and implications for product development in the meat sector: A review. *Meat Science*, 66(2), 259-272.

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**Grunert, K. G. & Hildebrandt, L. (2004).** Success factors, competitive advantage and competence development. *Journal of Business Research*, 57, 459-461.

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**Bech-Larsen, T. & Esbjerg, L.** – The garden of the self-services store: A study of customer perceptions of the fruit and vegetable department's influence on store image. *Journal of Food Products Marketing*. In press.

**de Ferran, F. & Grunert, K. G.** – French fair trade coffee buyers' purchasing motives: An exploratory study using means-end chains analysis. *Food Quality and Preference*. In press.

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**Stacey, J.** – Arrangør af MAPP-konference 2005, Brugerdriven innovation af fødevarer: Nye produkter til særlige målgrupper, Middelfart, 8.-9. november, 2005.

**Søndergaard, H. A.** – Novel cross-linking enzymes and their consumer acceptance, LMC-besøg på Handelshøjskolen i Århus, Århus, November 13, 2003.

**Søndergaard, H. A.** – Consumer attitudes to novel enzymatic technologies, Food Congress: Lifestyle – Challenges to Food Science and

## Publications and other dissemination 2003-2005

Technology, DTU, Lyngby, March 17-18, 2004.

**Søndergaard, H. A.** – Markedsorienteret produktudvikling. Skal vi bare spørge forbrugerne, hvad de vil ha' eller skal vi også tænke selv? VIFU Udviklingsforum, NOVEM, Hølstebro, 21. oktober, 2004.

**Søndergaard, H. A.** – Afskrækkes forbrugere af nye teknologier? Hvad sker der, når forbrugerne lærer om enzymer? Resultater fra en europæisk undersøgelse, MAPP-konference 2004, Middelfart, 27. oktober, 2004.

**Søndergaard, H. A.** – Consumer attitudes to novel enzymatic technologies, IFROS Conference, Lille, France, October 27-29, 2004.

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**Thøgersen, J.** – Sustainability in everyday life: Food choice, mode of transportation and waste disposal, Karlsruhe Nutrition Congress, Federal Research Centre for Nutrition, Karlsruhe, Germany, October 10-12, 2004.

**Thøgersen, J.** – Trends in organic food research, Workshop on Consumer Research on Food, European Commission Research Directorate-General, Directorate E: Biotechnology, agriculture and food, Brussels, October 5, 2005.

**Thøgersen, J.** – What predicts consumer choices of organic food? CONDOR Dissemination Event, London, November 18, 2005.

**Thøgersen, J.** – Forbrugernes forventninger og reaktioner, Levnedsmiddelskabets møde om bæredygtighed i fødevarerindustrien, Ingeniørhuset, København, 24. november, 2005.

### RESEARCHERS AND ADMINISTRATIVE STAFF 2003-2005

**Bech-Larsen, Tino,**  
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**Costa, Ana,**  
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**Esbjerg, Lars,**  
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**Grunert, Klaus G,**  
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**Pasgaard, Pernille,**  
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MAPP has carried out research that can support market-based innovation – research that allows a better understanding of competitors, customers, and consumers, and that also provides the tools for exploiting this understanding in the process of developing new products



