

A Work Project, presented as part of the requirements for the Award of a
Masters degree in Management from the NOVA – School of Business and Economics.

FRUTA COM CHEIRO:
THE IMPLEMENTATION OF A NEW BRAND OF FRUIT IN THE PORTUGUESE
MARKET

SOFIA PINTO DE OLIVEIRA

STUDENT NUMBER: 1634

A Project carried out on the Management course, under the supervision of:

Victor Centeno

Lisbon, 7th of January 2014

ABSTARCT

“Fruta com Cheiro” is an idea for a new brand of fruit that would be introduced in the Portuguese market that would differentiate itself from the brands already in the market and from other non-branded fruit producers.

In order to prove that the idea was valid and would have a place in the market, two methods of exploratory research were used – in-depth interviews and focus groups – to understand attitudes and behaviors regarding fruit selection and purchase and also people’s perceptions to “Fruta com Cheiro”.

After these two steps, several considerations were made in relation to preliminary marketing aspects such as brand creation and positioning.

There was also a final remark on the fact that this thesis is not a business plan and its purpose was to show how viable would the project be.

Keywords: fruit, exploratory research, marketing, implementation

EXECUTIVE SUMMARY

“Fruta com Cheiro” is a concept for a new brand of fruit that would distinguish itself from the ones already in the market by providing fruit that have its original smell. This brand would be able to fill in the market gap generated by the mass production of fruit that follows beauty requirements and does not deliver in terms of smell and other characteristics. This project will also capitalize the opportunity of the fact that in Portugal there is not a brand of fresh fruit available to consumers.

This project would work as a cooperative with the goal of enhancing the original smell of fruit, restoring its intrinsic characteristics. In order to succeed, “Fruta com Cheiro”, needs to establish partnerships with several farmers around the country to ensure certain levels of production.

In order to prove if this project is viable, the first step is to do an exploratory research – by performing in-depth interviews and focus groups to gain insights about behaviors and attitudes towards fruit in general and specifically towards “Fruta com Cheiro” – to test how this concept is accepted by consumers and to retrieve conclusions on how they would value such a product. After this, there would be a section to explain the segmentation and positioning of this product and the Marketing Mix accordingly to the conclusions of both research methods.

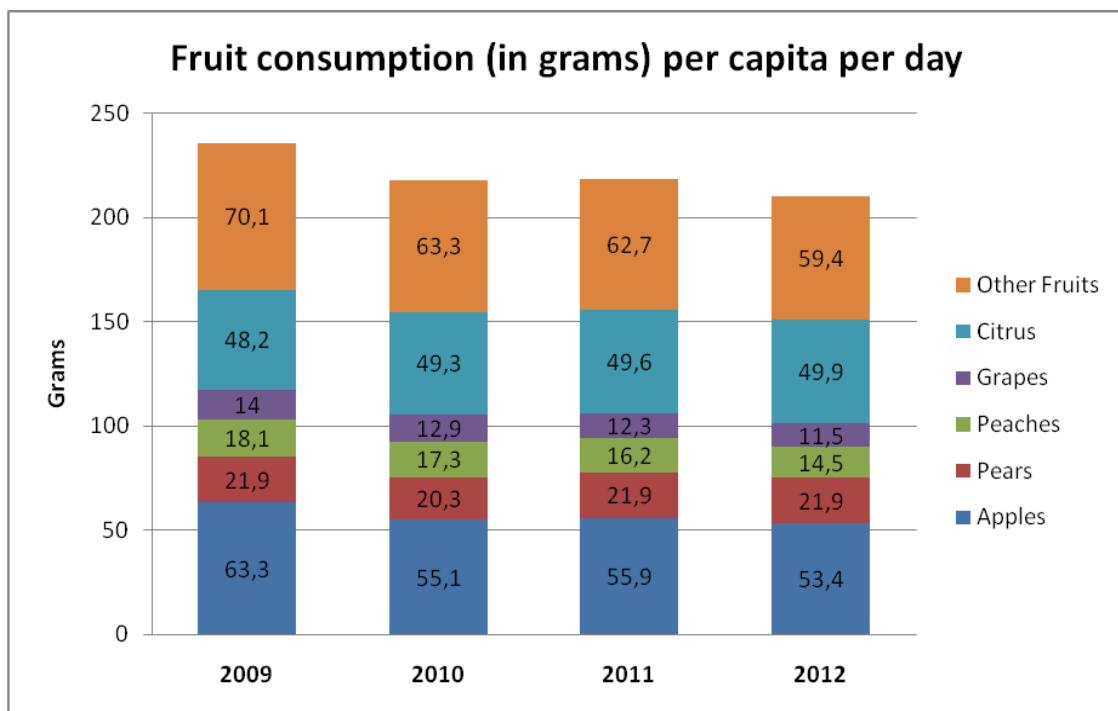
FRUIT CONSUMPTION IN PORTUGAL

In this section, there will be an analysis of the fruit market in Portugal that comprises the most consumed fruits in Portugal and also fruit consumption in by

income level. These sections will be helpful to understand how the internal market is performing and to also to gather some data regarding fruit in Portuguese households. For this purpose, data from Instituto Nacional de Estatística (INE) was used, namely “Inquérito às Despesas das Famílias 2010/2011”, “Estatísticas Agrícolas 2013” and “Balança Alimentar Portuguesa (2008-2012)”.

Fruit Consumption

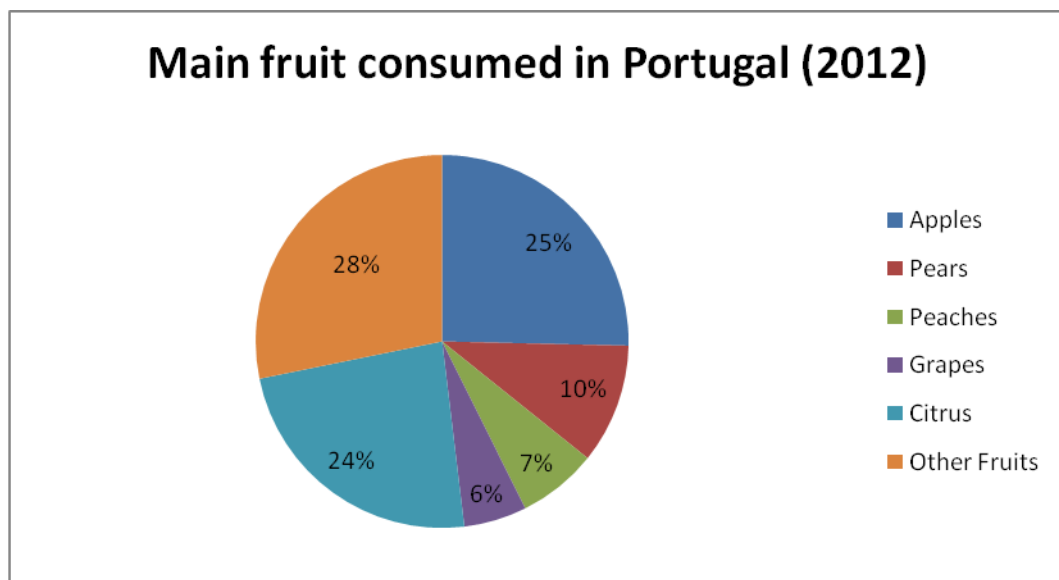
In order to see the most consumed fruits in Portugal, data from “Balança Alimentar Portuguesa 2008-2012” from INE was used. This is the most recent data on the subject and provides us some relevant information for the analysis about consumers’ preferences when it comes to fruit and allows also to make an analysis on how consumers have been behaving across time.



Graph 1: Fruit consumption (in grams) per capita per day (2009 to 2012)

As one can see by the graph, there is a slightly decrease (-10,6%) in fruit consumption per capita during the considered period (2009-2012). This overall decrease was a consequence of the decrease in the consumption of apples (-15,6%), peaches (-19,9%), and grapes (-17,9%). The consumption of citrus was the only one that felt an increase (3,5%) and pears remained relatively stable. (To further information about values, see annex 1).

Giving this data, one can see that consumers tend to be relatively stable when it comes to the choice of fruit both in terms of the type of fruit and in terms of quantity.



Graph 2: Most consumed fruits (in percentage) in 2012

The most recent data on fruit consumption is from 2012 but taking into account the evolution of the most consumed fruits in previous years we can say that there will be only slightly changes overtime. This graph shows that apples (28%), citrus (24%) and peaches (10%) were the most consumed fruits. Other fruits that include fruits such as cherries, kiwis, pineapples or mango have an overall weight of 28%.

Fruit consumption by income level

	Up to 6300€	From 6300€ to 12.600€	From 12.600€ to 18.900€	From 18.900€ to 25.200€	From 25.200€ to 37.800€	More than 37.800€
Percentage of total population per income level	4,3%	23,2%	23,5%	17,3%	17,7%	14,1%
Fruit consumption in percentage of total income	1,4%	1,3%	1,2%	1,0%	1,0%	0,8%
Fruit consumption in absolute value	93 €	130 €	184 €	206 €	257 €	345 €

Table 1: Fruit consumption by income levels in Portugal (2010/2011)

In order to see how fruit consumption is split among the several social classes, data from "Inquérito às Despesas das Famílias 2010/2011" (report developed by INE) was used. The two most important tables for the subject were "Despesa total anual média por agregado (€) segundo a COICOP, por escalões de rendimento total do agregado, 2010/2011" and "Despesa total anual média por agregado (%) segundo a COICOP, por escalões de rendimento total do agregado, 2010/2011" and its most relevant data is summarized above. As said previously, this is the most recent data on the subject and therefore was the one chosen to be analyzed.

As one can see by the table, the percentage of income allocated to the purchase of fruit decreased as the income increases whereas the absolute value increases with income. One possible explanation is the fact that as disposable income increases, people tend to decrease their attention to promotions and discounts and move into the purchase

of high quality fruit. This goes accordingly to what is expected from consumers: as their disposable income increases, they will shift their consumption towards more expensive and higher quality products.

Another relevant insight is the fact that over 70 % of the population spends more than 180€ per year in fruit which yields a minimum of 15€ per month. By these numbers we can see the economic and monetary base for the project, taking into account the current trend of having a healthier and balanced diet.

As a conclusion, one can say that fruit is present in Portuguese houses, representing a considerable share of the economy even during a recession period.

EXPLORATORY RESEARCH

“Fruta com Cheiro” is an idea for a new brand and therefore it needs to be tested prior to its entry in the market. The first step to test a new idea such as this is to make an exploratory research. In this specific case, the two methods used were in-depth interviews because this process allows the researcher to gather inputs from interviews to better direct its research and were followed by a focus group to better understand people’s motivations, test “Fruta com Cheiro” concept among the potential consumers to design the Marketing Mix accordingly.

The main working hypothesis under this research was to understand if there was a segment of consumers that value fruit for its intrinsic and characteristic smell, like it was erstwhile, and therefore are willing to pay more for it. In-depth interviews were used to see if this working hypothesis was valid or not and therefore used as a base for a further research.

In-depth interviews

The in-depth interviews were conducted in a calm environment and took, in average, thirty minutes and followed the interview guide designed for the effect (see annex 2). One important remark of this process is that the respondents are the ones selecting and buying the fruit for themselves and/or for the household. This process allows the formulation of hypothesis related to the introduction of ‘‘Fruta com Cheiro’’ to be further tested such as how consumers value certain characteristics and their purchasing behavior.

In the case of ‘‘ Fruta com Cheiro’’, were conducted 40 in-depth interviews (38 women and 2 men) that generated several insights in terms of consumers’ attitudes and beliefs towards fruits, key decision factors and the several determinants when choosing fruit that will be further explained. The analysis was made by topic – the ones presented in the interview guide – and this allowed the creation of two main groups/consumers’ profiles: ‘‘Young Consumers’’ and ‘‘Mature Consumers’’.

‘‘Young Consumers’’ - that represent 15 out of the 40 in-depth interviews made – can be define as being mostly women, aged between 22 and 33 years old that are one of the responsible person for buying the fruit for the entire household (3 out of 15) but mostly in charge of buying fruit for themselves (12 out of 15).

‘‘Mature Consumers’’ represent the majority of the sample – 25 out of 40 – and are mostly women (only 1 men was interviewed) and are the responsible for purchasing fruit for themselves and for the household. This group is aged between 35 and 55 years old.

These two groups have in common the fact that all respondents live in urban areas and all have an occupation (study and/or a job).

The first topic to be analyzed was how the selection and the choice of fruit are made by the consumers. By this, the goal was to understand the conscious and unconscious patterns consumers have when they purchase fruit.

- For “Young Consumers”, the process starts by looking at fruit and then pick up the ones that are better looking. After this, the final selection is done firstly by touch and then by the smell but only in certain types of fruits such as melons, watermelons, mango, strawberries, pineapples and oranges. Another important aspect relevant that popped up in the analysis is the fact that aspect is relevant and critical when this group of consumers is choosing fruit that was produced by intensive agriculture however when “Young Consumers” are choosing fruit from organic sources, aspect loses importance towards the health benefits and flavor.
- For “Mature Consumers”, the process follows a systematic and structured approach that comes from years of experience. They start by picking up one piece of fruit and then inspect it to see whether it delivers certain patterns in terms of aspect, then consumers smell the fruit and, like “Young Consumers”, they feel the need to touch the fruit to make the final choice. The main difference of these two processes is that “Mature Consumers” tend to be much more selective and each phase of the evaluation process has its own cut-off factors. This group of consumers will reject any piece of fruit that will not deliver in terms of aspect, smell and the touch.

The second topic analyzed was the key decision factors that consumers use to make the decision of purchase. This topic is more related to how consumers rank certain aspects that related to the purchase such as quality of the fruit, its price, promotion and other advertising campaigns and discounts.

- “Young Consumers” stated that the quality of fruit comes first but they are price sensitive. The general idea transmitted by these consumers is that they consider always the trade-off between quality and price: when facing the choice between buying premium products at a higher price or a standard quality piece of fruit priced accordingly, they stated they will, in the majority of the times, chose the standard quality and standard priced product. Some respondents stated that this choice is a consequence of their current financial situation because they just moved out of their parents’ houses.
- “Mature Consumers” behave differently when it comes to this subject. For this group, quality appears in first place and price always comes secondly. Unlike “Young Consumers”, they do not face the quality vs price trade-off and they prefer to pay more for higher quality fruit because they consider fruit to be an essential item for their health and for their eating habits. As mentioned before, this group is mostly constituted by women who consider family as their top priority and, therefore, act accordingly. In this line of thought, respondents stated that when buying food, they prefer to invest on quality rather than saving money.

There are other insights regarding this topic that are worth being mentioned such as the fact that none of the respondents of both groups mentioned discounts or

promotional campaigns during the interviews. Another relevant fact is that people from both referred the importance of fruit for their well-being and health.

The third topic relevant for the analysis is whether people perceive any changes in fruit quality and how they manifest themselves. Under this topic, the goal was to understand if people notice any change – if there is any, in their opinion – in terms of aspect, smell, size, taste or other relevant aspects when it comes to their evaluation criteria of fruit. This will help to understand what people are looking for and miss in fruits.

- “Young Consumers” have, among the group, different positions. The majority (12 out of 15) stated that fruit today looks much more artificial than before whereas the remaining 3 did not mention anything regarding this topic. Some of the comments related to the changes in fruit besides being more artificial were that fruit does not taste or smell like before and that, in terms of aspect, all the fruit looks the same.
- “Mature Consumers” were more specific in relation to this matter and took more time exploring it than “Young Consumers” as a result of their longer experience and wider knowledge of the subject. The common opinion was that today there is much variety of fruit however quality and what they consider to be essential (aspect, smell, taste and touch) is being lost due to standardized production procedures. In this sense, they refer that fruit today lost their intrinsic characteristics becoming less appealing and that the relationship quality to price has been decreasing. These consumers find it more difficult to meet their criteria for the price they were used to pay.

There were also three other topics to be explored under this exploratory research, the origin of the fruit products bought by consumers and if it influences the purchase decision, if consumers take into account the seasonality of fruit products to understand if this was relevant in terms of quality evaluation and finally the where the purchase of fruit occurs and if has a specific meaning to consumers. These topics were only explored and developed by consumers when they were interpolated to do so however they are worth to be further detailed.

The purchase location – if the purchase occurred in a supermarket, local grocery store or other – was asked to understand where consumers make their decision and if there is a relationship between quality and where they make their buy their products.

Both “Young Consumers” and “Mature Consumers” mentioned that they buy their fruit in supermarkets and only go to local groceries store if they only need to buy a few items. The justification to do so was that related to their available time to shop, the perception that fruits’ quality is equal in both places and variety offered by supermarkets.

The seasonality of fruit was mentioned by 5 of the 40 respondents spontaneously and they sated that it is not relevant for their purchase decision because seasonality is surpassed by the constant availability of fruit products all year long even though they recognize that fruit tastes better when it is its time. When people were directed to this topic the common answer was that it was not relevant for their decision.

The last topic analyzed in this exploratory research was if the origin of fruit products was relevant for consumers when making the decision and consequent purchase. This topic had common statements among “Young Consumers” and

“Mature Consumers” which stated that the origin of fruit is only relevant for certain fruit such as bananas, oranges and grapes. The respondents stated that when buying bananas they make a distinction between the ones from Madeira, oranges from Algarve and grapes from Flor-da-Rosa and the remaining locations. To justify their distinction, they often declared that those products differentiate themselves from the others because of their superior quality (in terms of aspect, flavor and smell).

Taking into account the result of the in-depth interviews, one can clearly see that “Mature Consumers”, due to their attitudes and behaviors tend to be more favorable to such a concept because they value quality above price.

The first part of the exploratory research yield interesting insights for the second phase of research – focus group – that was performed. As one can see, there is clearly a segment of consumers willing to pay more for quality fruit and also for fruit that presents its intrinsic and original smell which confirms the working hypothesis presented as relevant and valid as a work base to the second phase of the exploratory research.

Focus Groups

The focus group approach was performed not only to understand and confirm the motivations underlying the choice of fruit and how the process is carried out but mostly to access how people would respond to the concept of “Fruta com Cheiro” to access the viability of the concept.

In order to do so, people were asked to talk freely about their attitudes and behaviors when buying fruit; secondly they were presented to the words “Fruta com

Cheiro” and were asked to say whatever came to their minds regarding them. This was done to understand what people associated with the sentence and therefore their perception of smell, its importance and relevance.

This exploratory research was done in a quiet place, with 3 groups of seven people. The first step was to explore topics related with the selection and purchase process and the second major topic of analysis was people’s manifestations towards the concept. The concept was introduced by only saying people the name of the project – “Fruta com Cheiro” – and asking them what they thought about it and how it would influence their choice and purchase

The results of the analysis of the focus groups will be presented by group and then there will be overall conclusions on the most important topics covered.

Focus Group 1

This focus group comprised 7 women between 35 and 56 years old. When it comes to attitudes and behaviors towards fruit, this group fitted the profile of “Mature Consumers”, explained previously. Making the selection of fruit is a very structured process with high standards: they start by looking at the fruit, then they touch it and finally they smell it. They are very concerned with the quality of the fruit and, for them, price is not the first concern.

When “Fruta com Cheiro” sentence was introduced people were surprised and they took some time to react but it yield some interesting comments. People’s reaction can be divided into two: their opinion on the importance of the smell and the strength of the concept. They began by saying that smell was important and is missing from the

fruit that is currently offered. The second part is related with the concept itself and it took some effort to make people speak about it and they were asked to related smell and its relevance with their selection and purchase methods.

Under these topics this particular group has mixed feelings: 5 people stated that they consider smell to be important when buying however they do not consider it to be a crucial factor and do not considered it sufficient enough to justify an increase in fruits' prices but the remaining 2 people had a different opinion. These 2 people considered fruit to be a bundle of criteria, smell being one of them and therefore they were willing to pay a little more for such attribute. They also mentioned that smell was the characteristic that changed the most over the years stating that fruit, today, does not smell like it did during their childhood. One of these two females stated that buying fruit that has it intrinsic smell was very rare and whenever she finds it, she does not even look at the price.

Overall, this group considered smell to be important but only two people find it relevant enough and considered the possibility of paying more for it.

Focus Group 2

The second group comprised 7 females between the age of 22 and 32 years old. When it comes to first part of the analysis – attitudes and behaviors about the selection and purchase process – this group was very homogeneous and fitted the profile of “Young Consumers”: they base their decision on quality but also on price (the trade-off between quality and price is always present) and they use smell as secondary criteria basing their quality standards on the aspect and touch.

The reaction of this group to the concept was mild in the sense that they were not very expansive even when they were pushed to. When faced to the concept they stated that they do not use smell as cut-off factor and “Fruta com Cheiro” is regular in the sense that it already exists. Their opinion did not suffer relevant changes when they were asked about how they would change their purchase process, reinforcing the fact that smell does not play a relevant role and that they do not recognize the lack of smell in fruit currently sold. These reactions go accordingly to what was conclude previously under the “Young Consumer” profile, namely the fact that they are not as aware as “Mature Consumers” when it comes to changes in fruit characteristics.

Focus Group 3

This last group was composed by 7 women from 24 years old and 59 years old. In terms of the first part of the analysis – the attitudes and behaviors towards the selection and purchase of fruit – the group was divided regarding their opinions. As expected, there is a division between consumers that consider smell to be secondary and that they focus their method in the relationship between price and quality (women from 24 and mid 30’s – “Young Consumers”) and the ones that consider almost exclusively fruit quality (mid 30’s to 59 years old – “Mature Consumers”).

This group was the one that was more active in the discussion of the concept and there was not the need to help them exploring it – the only statement needed to start the discussion was “ what do you think about “Fruta com Cheiro”. The opinions were antagonistic with “Young Consumers” stating that is nice to have fruit that smells good but smell is secondary in their choice hierarchy while “Mature Consumers” stated that smell is important and they associated it with sensory words such as pleasure, delight

and richness. Between the 4 ‘‘Mature Consumers’’ included in this group, three people stated that they felt a little bit frustrated when buying fruit because ‘‘it is not like the old times’’ when the fruit was ‘‘perfumed and tasty’’.

This group was the one that present the more visible differences between ‘‘Young Consumers’’ and ‘‘Mature Consumers’’. As an overall conclusion, one can say these focus groups’ conclusions match the first exploratory research – in depth interviews – and yield several valuable insights when it comes to the concept’ acceptance which will be summarized below:

- Regarding the concept of ‘‘Fruta com Cheiro’’, 5 people among the 21 – ‘‘Mature Consumers’’ showed positive and strong reactions. They showed that smell is crucial, being considered as a characteristic relevant when dealing fruits’ quality and makes them remember the ‘‘old days’’.
- The remaining ‘‘Mature Consumer’’ consider smell to be relevant but not crucial however they consider that having fruit with an intense smell is much attractive rather than fruit we are able to find today.
- ‘‘Young Consumers’’ tend to react to smell as being indifferent when they are dealing with fruit and as consequence they do not value this particular concept. For this group, ‘‘Fruta com Cheiro’’ is not viable and are quite indifferent to it.

MARKETING PLAN

One important remark to be done is the fact that this project’s goal is to prove the viability of the ‘‘Fruta com Cheiro’’ concept and explore some marketing mix elements relevant for a better understanding of the project and therefore it is not a business plan.

To proceed to the implementation of this project, there would be a need to develop a detailed business plan with projections for sales, margins and exhaustive budgets for example.

Combining all the insights from both researches we are able to design the Marketing-Mix and relevant elements regarding the marketing strategy for ‘‘Fruta com Cheiro’’. The first step is to present the path to develop the brand and which are the most important aspects to be communicated.

‘‘Fruta com Cheiro’’, as mentioned previously will be a new brand of fruit based on the premise of offering quality fruit that would differentiate itself from the remaining fruit on the market by its smell.

It will fulfill a market niche and will emerge of one of the first fruit brands in Portugal. This represents an opportunity for ‘‘Fruta com Cheiro’’ because it has market space to grow and become a top of mind brand and also because it can be a differentiation factor since it will allow consumers to choose a brand instead of a type of fruit, representing an advantage in comparison to other fruit producers.

In order to be able to provide such products to consumers, there will be a need to establish a partnership with fruit producers to ensure that ‘‘Fruta com Cheiro’’ is able to fulfill the demand with quality. These producers will be chosen accordingly to fruits selected to integrate this project and it will take into account how fitted is the smell and the quality according to the high standards required.

Combining all these factors, the brand should communicate to consumers several elements such as freshness, flavor but mostly smell. It should be focus on the fact that

“Fruta com Cheiro” goal is to deliver quality fruit based on the premise that smell is king and that consumers can rely on the brand as a symbol of quality and trust.

Segmentation and Positioning

Market Segmentation and Target Market Selection

The Market Segmentation will allow the selection of the consumers that are more willing to buy “Fruta com Cheiro” products and therefore will be the ones to whom the marketing mix will be directed. Under the research described above, the segmentation will be made to target women, aged between 35 and 55 years old that are responsible for buying fruit for their households and that value quality and other aspects besides price.

This goes accordingly to the developed research which besides confirming the validity of the research hypothesis also showed that women pay more attention to fruit quality and also consider that providing their family the best available produce one of their main responsibilities.

Positioning Statement

To women that care about quality, freshness but also smell, “Fruta com Cheiro” is a brand of fresh fruit, produced in partnership in several national fruit producers aimed at providing their customers the highest quality fruit with its intrinsic and original smell that would take consumers in a sensorial journey.

Marketing Mix

Product

As mentioned before, ‘Fruta com Cheiro’ is a new brand for fruit and it will offer consumers a variety of fruits under the premise of having the intrinsic smell of fruit. This is the factor that differentiates the product from its competitors and explores a unique opportunity that comprises the fact that, in Portugal, there are few brands of fruits and none of them differentiates themselves by the smell. As mentioned before, it would be an added plus in the sense that it would allow ‘Fruta com Cheiro’ to have the first move advantage and be the first brand of fruit, offering a variety of types with the same characteristic – smell – combined with high quality standards.

Placement

Products from ‘Fruta com Cheiro’ will be sold in both supermarkets and hypermarkets. According to the research, people that buy fruit, do it in bigger stores due to a wider variety, easy access and also because it is more convenient. In this section we also need to account for the fact that this choice will enable more consumers to become familiarized with the brand and will ensure that consumers, even though they are not searching for fruit under this premise, they will be able to find it.

Price

Taking into account the prospects from the developed research namely the fact that we are dealing with a market niche – people that value fruits’ smell – and also the fact that it will have higher product costs than regular fruit, there will be the need to

charge a premium price, aligned with the current market price for organic produced fruit – the ones considered to lead the market when it comes to premium pricing strategies.

The price comprises the compensation for farmers that are willing to participate in the project taking into account their possible losses for not producing fruit using other methods and also stands for the fact that “Fruta com Cheiro” will offer a high quality product with enhanced characteristics.

Promotion

When it comes to promote this brand, several actions can be performed both at the point of sale but also using some other traditional channels.

- At the point of sale – as mentioned, both supermarkets and hypermarkets – there will some promotions to offer consumers the possibility to taste and to smell product under the brand “Fruta com Cheiro” and also someone to explain them the concept. Also at the point of sale, there will some posters advertising the brand, next to brand’s fruit and also some information cards containing a calendar to inform people towards the best season to buy specific pieces of fruit.
- Taking into account the consumers’ profile, television seems to be a good vehicle to advertise the brand, especially in an early phase. In order to promote the brand some commercial will be on Sic Mulher, Sic and TVI. This will allow more consumers to know the brand and to search for in the point of sale;

- Channels such as magazines and internet can also be valuable but will serve as back up promotional tools for specific moments in time, for example summer or winter and will complement point of sale promotions.

The communication efforts should emphasize the quality and freshness of the fruit, paying more attention to the smell which is the differentiation factor of ‘‘Fruta com Cheiro’’.

Besides this, communication could also comprise the emotional factor associated with memories from the ‘‘olds times’’ when fruit had its intrinsic smell specially when communicating to the oldest share of the target market.

On the other hand, when communication is done at the point-of-sale, the most relevant aspects are the sensorial appeal of smell and the quality that consumers can expect from ‘‘Fruta com Cheiro’’.

CONCLUSIONS

There are some relevant remarks to be done in relation to ‘‘Fruta com Cheiro’’, taking into account that the goal of this thesis was to prove that the idea of having a brand of fruit that differentiates itself through smell was viable - which was proven by the two exploratory methods used – and not to make a business plan.

There is a market niche for such a project and to be introduced in the Portuguese market that would be a need for additional research and development although this thesis serves as base when it comes to exploratory insights.

	Imports (tons)			Exports (tons)			Imports (1000 €)			Exports (1000 €)		
	2012	2013	Growth Rate	2012	2013	Growth Rate	2012	2013	Growth Rate	2012	2013	Growth Rate
Total Fruits	568306	645209	13,5%	326933	288069	-11,9%	529947	449606	-15,2%	326663	336940	3,1%
Nuts	8519	8709	2,2%	18821	20245	7,6%	10457	39108	274,0%	34330	67668	97,1%
Bananas	135687	142259	4,8%	14164	4002	-71,7%	81907	82047	0,2%	10593	2577	-75,7%
Figs	1627	1502	-7,6%	191	185	-3,0%	2932	2642	-9,9%	584	602	3,0%
Pineapple	45943	47891	4,2%	13491	21042	56,0%	29139	28209	-3,2%	8852	13217	49,3%
Citrus	94674	122055	28,9%	118009	93030	-21,2%	70988	52909	-25,5%	67545	60615	-10,3%
Grapes	26901	30500	13,4%	5051	5596	10,8%	38390	34202	-10,9%	7603	8871	16,7%
Watermelons/Melons	79700	92902	16,6%	5450	3933	-27,8%	52324	40487	-22,6%	3803	3916	3,0%
Apples	53052	57713	8,8%	22198	24092	8,5%	43440	31626	-27,2%	14778	14820	0,3%
Pears	13770	17106	24,2%	96502	82111	-14,9%	15219	10108	-33,6%	74794	68112	-8,9%
Cherry	1184	2441	106,1%	122	29	-76,0%	5191	2685	-48,3%	383	116	-69,8%
Peach	40815	49741	21,9%	3235	6282	94,2%	34502	26162	-24,2%	2786	4580	64,4%
Strawberry	16965	16113	-5,0%	4739	3587	-24,3%	21285	25104	17,9%	10158	8896	-12,4%
Kiwis	9043	10205	12,8%	10404	13261	27,5%	10698	8702	-18,7%	8887	11212	26,2%
Plums	6852	8937	30,4%	4836	2341	-51,6%	9044	6034	-33,3%	4806	2980	-38,0%

Annex 1: Imports and Exports (in tons and in 100€) of the main fruits in Portugal (2012 and 2013)

Annex 2 : Interview Guide

Warm-up

Good morning/ afternoon/ evening. My name is Sofia and I'm currently a student of NOVA Schools of Business and Economics and I'm doing my thesis and therefore I'm conducting a research related with fruit.

For this purpose, I would like to interview you for approximately 45 minutes using a non-directive method that means that I will not ask you questions about the subject, like it was a questionnaire but, instead, I will ask you a broad question and you will be free to say whatever comes to your mind about the subject.

In order to analyze our interview later, I would like to record it, if it is okay with you. It will remain anonymous and you will not be contacted after the interview.

Pre-recruiting questionnaire

Are you a frequent consumer of fruit?

- 1) No → thank you for your time (end of interview)
- 2) Yes → continue

Initial Question

Can you tell me about your experience when you bought fruit last time?

Topics to be developed

- Key decision factors (price, quality, promotions, ...)
- Where the purchase occurred
- Purchase of seasonal products (?)
- How the choice of each piece of fruit was made (randomly, aspect, smell, brand)
- Origin (?)
- Changes in quality lately/ what do you miss (?)

Profile

Age	<input type="text"/>
Gender	<input type="text"/>
Occupation	<input type="text"/>

Level of studies	<input type="text"/>
Household size	<input type="text"/>
Marital status	<input type="text"/>

BIBLIOGRAPHY

- **Mallhorta, Naresh K.** 2012. *Marketing Research: An Applied Approach*. Pearson
- **Kotler, Philip and Keller, Kevin Lane.** 2011. *Marketing Management*. Prentice Hall
- **Wood, Marian Burke.** 2012. *Marketing Plan Handbook*. Prentice Hall
- **Trott, Paul.** 2008. *Innovation Management and new product Development*. Prentice Hall
- **Malhorta, Naresh K.** 2009. *Marketing Research: An Applied Orientation*. Prentice Hall
- **Clow, Kenneth E. and James, Karen E.** 2013. *Essential of Marketing Research: Putting Research into Practice*. SAGE Publications, Inc.
- **Kotler, Philip and Armstrong, Gary.** (2008). *Principles of Marketing*. Pearson