

# Building Brand Through B2B Route—Del Monte in India

South Asian Journal of  
Business and Management Cases  
8(2) 215–227, 2019  
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in.sagepub.com/journals-permissions-india  
DOI: 10.1177/2277977919842477  
journals.sagepub.com/home/bmc



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## Abstract

Del Monte, a global food and beverage company, entered into Indian market in 2008. Del Monte established Joint Venture with Field Fresh which at that time dealt in exports of agricultural fresh produce. Yogesh Bellani, CEO of Field Fresh had the responsibility of establishing the Del Monte brand in India. Yogesh faced lots of challenges as there was very little brand awareness of the company and also there were many established players in the market. Del Monte first launched canned pineapples to be followed by canned fruit juices. Yogesh started building Del Monte brand on quality and timely delivery.

Yogesh targeted big quick service restaurants (QSRs) like Dominos, Sub Way, MacDonald, Pizza Hut and Burger King for supplying its products. This was a unique way of establishing the brand through B2B route. After having established the brand through B2B route, Yogesh targeted B2C market. Del Monte launched several new products like tomato ketchup, entire Italian category, and eggless mayonnaise through modern trade route. In initial years, Yogesh established the brand and created revenue for the company. Subsequently he focussed on improving the profitability. His current challenge was to manage both which are conflicting in nature. He was also thinking of brand repositioning for future growth.

## Keywords

Brand image, customer based brand equity (CBBE), FMCG market, brand repositioning, differentiation, quality

September 25, 2008, was a very important day for Yogesh Bellani, CEO, FieldFresh, India. He addressed the press conference to announce the Joint Venture of FieldFresh and Del Monte Pacific Ltd. One of the journalists asked Yogesh

Who is going to buy your products? Del Monte might be a legendary pedigree brand in the US and Europe but awareness about the brand in India is negligible. Will you be able to fight against already existing well-established players in the Indian market?

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Yogesh knew what the journalist mentioned was correct. He met many people in the initial phase of the launch of Del Monte in India, and they were not even able to pronounce the name of the brand properly. The challenge before Yogesh was to build the Del Monte brand in India where the market was dominated by ‘Maggi’ of Nestle and ‘Kissan’ of Hindustan Unilever Ltd. (HUL).

Del Monte, primarily known for selling packaged fruits, juices and tomato sauces, decided to initially launch canned pineapple and juices in India. The decision was taken keeping in mind the expertise of Del Monte in canned products and their popularity in other markets like the USA, Philippines and Europe. At that time in Delhi, canned fruits market was dominated by a local manufacturing firm Golden Crown.

## **FMCG Market of India**

Fast Moving Consumer Goods (FMCG) was the fourth largest sector of the Indian economy that reached the size of US\$52.75 billion in the financial year 2017–2018 from US\$25 billion in 2007–2008. FMCG sector in India was divided into three categories namely, food and beverage, healthcare, and household and personal care. Food and beverage accounted for 19 per cent of the total market which included health beverages, staples and cereals, bakery products, snacks, chocolates, ice cream, tea, coffee, soft drinks, processed fruits and vegetables, dairy products and branded flour. The urban segment was the largest contributor (55%) to the overall revenue generated by the FMCG sector in India.

Growing awareness, easier access and changing lifestyles had been the growth drivers for the sector. Growth in modern retail and an increased level of brand consciousness in India had led to a fall in the share of the unorganized market in the FMCG sector. In India, 100 per cent FDI is allowed in food processing and single-brand retail and 51 per cent in multi-brand retail. The dominant players in processed fruits and vegetables were Dabur, Godrej, Parle, ITC and MTR. In the packaged food category in India, the major players were HUL, Nestle, Britannia and Pepsico.

## **History of FieldFresh and Entry of Del Monte in India**

FieldFresh was established in 2004 as a joint venture (JV) between Bharti Enterprises, India and E. L. Rothschild Ltd, UK, each holding 50 per cent. E. L. Rothschild Ltd was one of the largest banking families in the UK. Bharti Enterprises was an Indian business conglomerate headquartered in New Delhi, India. Founded in 1976 and with its presence in 17 countries across Asia and Africa, Bharti Enterprises owned businesses spanning telecommunications, agribusiness, financial services and manufacturing. During initial years, FieldFresh limited its activities to exporting fresh fruits and vegetables to the UK.

Going through this phase of the journey, the partners realized that neither Bharti Enterprises, which had, till that point, focused on telecom and retail sector, nor E. L. Rothschild brought any experience of agriculture to the JV. They also experienced the complexity in the Indian agricultural sector and felt the need to connect with some organization having expertise in agriculture related business. Thus, Bharti Enterprises forged an alliance with Del Monte Pacific Ltd—a global branded food and beverage company which offers premium quality healthy products with headquarter in Singapore.

Del Monte Foods, a subsidiary of Del Monte Pacific, was a global food and beverage company established in the year 1882 in the USA. It was one of the largest producers, distributors and marketers of branded processed food for the US retail market. The prominent brands in its portfolio included Del Monte, S&W, Contadina and College Inn. The group sold packaged fruits and vegetable, tomato sauces, condiments, pasta, broth and juices, under these brands.

## Initial Challenges

Reminiscing about his initial days in FieldFresh, Yogesh said:

Being the first employee of Del Monte, the challenge was to put the business together. The big question at that time was—How to launch the brand in India? Neither did Bharti own a distribution network nor did Del Monte have manufacturing facility in India.

Yogesh knew that in order to establish a brand in India, he would first have to work on creating brand awareness and subsequently build the brand image. Yogesh decided to launch one of Del Monte's best-known products—canned pineapple—in the Indian market by importing from the Philippines, where Del Monte had the largest integrated plantation factory in the world, controlling 27 per cent of pineapple business in the world.

Creating brand awareness and building retail market required huge investments in advertising and promotion, so Yogesh thought of initially targeting food services like bakeries and chefs who manufactured pastries. This was the beginning of Del Monte's journey into the business-to-business (B2B) sector.

In order to create awareness, immediately after the launch in Delhi, Yogesh organized conferences for distributors and chefs. Distributors in the conference asked Yogesh, 'Why would anyone buy your product?'

Yogesh went ahead explaining the differentiating factors of canned pineapples of Del Monte. The distributors of cut pineapples in India complained of two major issues: inconsistency in supply and inferior quality. The supply was unpredictable because in India pineapples were grown only for the limited time period and for the rest of the year it had to be imported from Singapore and Dubai. The quality was suspect as the pineapples that were imported from Singapore and Dubai were of inferior quality and they reached India almost near the expiry date or sometimes even after the 'best before' date. Yogesh told them

What if I say that the supply of the pineapple will be consistent throughout the year and there will be no loss of sale because of non-availability and every time you open the can you will find the best quality pineapple. Because we source the best quality of pineapples in the world and process them at the state-of-the-art manufacturing facility so that the quality is consistent.

He further assured

You need not worry about searching a different supplier every time the import is being done. The product will always be delivered at your doorstep. Now you need not worry about supply and quality but just concentrate on developing the market and seeking out buyers.

To the distributors Yogesh emphasized the best and consistency quality and timely delivery as differentiating factors. The price of the product was fixed at 20 per cent higher than its competitors such as Golden Crown and Morton. However, the price set could only cover the cost of the product initially. Despite higher prices, the Del Monte brand of canned pineapple gradually started garnering acceptance among the B2B customers. Thus, in 2009, began the journey of building the Del Monte brand in India (Annexure 1).

The next challenge was to set up a distribution network of responsive channel members. Sharing the experience of finding channel partners Yogesh narrated

People in India had very little knowledge about the canned and organic fruits of Del Monte. I had to build the market by educating chefs and bakery owners and it would take time. Meanwhile, we needed more products so that distributors can get more opportunity to sell and improve their return on investment

In one of the meetings, a senior official of Del Monte India suggested that instead of setting up their own, they should buy the membership of an existing distribution network. But in India, at that time there were no big distribution houses. The established companies like HUL had their own distribution network. Del Monte then started bidding for companies that had a good distribution network, but they were not successful. In one of the bids for the company, Fun Food, which had a good distribution network in India, Del Monte was the second bidder. This company in 2008 was worth ₹250 million and it was bought by a German company for a whopping ₹1,250 million. Yogesh understood that they cannot buy a company just to use its distribution network at such a high cost.

### **Initial Success in B2B Segment**

In 2009, the Indian market for fruit juices was dominated by tetra pack and Polyethylene terephthalate (PET) bottles. The canned packaging was not common as it was higher in price. Yogesh was facing a dilemma whether to launch Del Monte fruit juice in a can or tetra pack. If they went for the canned product then its price would be higher than its competition but canned packaging was considered to be sleek and very aspirational. On the other hand, if they launched tetra pack whose shelf life is just 6 months, against 18 months of canned juice, they would spend at least 3 months in shipping and customs clearance and the product would reach the market near the expiry date. Ultimately, Del Monte decided to launch canned juices in India because they had been successful with this product in markets of the USA, Philippines and Europe (Annexure 1).

Yogesh also had to find the matching target segment for canned juices. The segment that appeared promising to him was the 'aspirational group', who have higher income and see value in the can. The canned juices were positioned by the company on 'sleekness', 'taste' and 'coolness' (Annexure 2). Around the same time, Red Bull, Pepsi and Coke had also launched the canned soft drinks targeting the same aspirational consumers. Yogesh knew that this offering would be a better fit for 'out of home' consumption and will sell more from places that consumers touch while on the move like schools, offices or college canteens.

Del Monte started looking at 'out of the home' and 'on the move' markets and the first breakthrough came with Café Coffee Day (CCD). He reminisces

It was not easy but we could crack the account because our product was world class and was relevant for CCD. At personal level, I also had a good relationship with CCD management. This was how we started our journey in the B2B segment. I knew the volume would be limited as this is a niche product and prices are higher but this would go a long way in creating brand awareness.

### **Setting Up the Manufacturing Plant**

Yogesh knew that for the channel members to earn a decent return on investment, the company needed to offer a product for mass consumption with price parity with the competition. This ruled out all imported products because they would be expensive due to high import duty. As a result, Del Monte

decided to explore the possibility of manufacturing products in India. A quick market survey revealed that manufacturers in the food industry in India would not be able to meet the standards of Del Monte.

In the first quarter of 2009, it was decided that the company would start its own manufacturing. It was decided to have Hosur, a city in the state of Tamil Nadu about 35 km from Bengaluru, as the location for putting up the plant and in June 2009 Del Monte started the work on building the plant. It was an ₹1,150 million (US\$16.22 million) plant spread over 101,171 m<sup>2</sup>, one of the highest investments in a single location plant in the food industry at that time. This plant was commissioned to manufacture juice products from pineapple, orange, mango and green apple; beverages with other ingredients and flavours; culinary products like sauces, ketchup, mayonnaise, mustard sauce, packaged foods and Italian cuisine. Yogesh knew that if they had to succeed in the Indian market and build a good brand image for the company, they had to produce a high-quality product for which the manufacturing process needed to be of world class. This was one of the steps of Del Monte to create tangible differentiation through best quality. Yogesh while talking to his marketing team once mentioned

If you want to build a brand in India the first and foremost layer of defense has to be the best of class quality, nothing more or nothing less. If you don't give the consumer quality product, he will never come back to you. If the consumer rejects in her first trial, there is no market left. The core hygiene has to be quality.

The location of the plant was chosen strategically. Del Monte was trying to build the business in India through differentiation. Yogesh knew that for creating differentiation, inputs, such as ingredients, technology and packaging material, may not necessarily come from India. This meant that he needed to build a supply chain that is import friendly. For this the location of Hosur was ideal, it was just 5 hours' drive from Chennai port, which made it suitable for import and, in future, for exports too.

At the time when Del Monte was building the market in North India, it found that most of its key competitors like Maggi and Kissan were manufacturing either in North or West India. The affinity of the competitors to produce in North and West India was due to the concentration of market and easy access to the agricultural produce which was the raw material for processed food. Since there was no player in South India, so for Del Monte this became the market of choice to cater to. The market was small and not fully developed, but there were many opportunities for growth as the competition was also less. Another factor which made Hosur a preferred choice for manufacturing was its location in agro-horticulture zone, so fruits like mangoes and vegetables like tomato were easily available.

## **Building Brand Through B2B Route**

Till that time the brand did not exist in the market, Yogesh felt, resorting to above the Line (ATL) promotion would have been very expensive. This meant that in order to build a brand it was essential that customers experience the products of Del Monte. Yogesh was now required to find customers who will value their products and have scalable demand. Hotels were one such segment but upon talking to them he found that individually they did not have a scale.

Yogesh then looked at big fast food chains like Dominos which, he knew, will value Del Monte's products and possess scalable demand. In early 2010, Yogesh went to meet Ajay Kaul, a senior official of Domino's, to find out as to where can Del Monte add values. Ajay's team mentioned that they were struggling with the pizza sauce and if Del Monte can supply it as per the international standard, this may pave the path for Del Monte's entry into Domino's. He went back, discussed it with his team and within a period of 4 months this product was ready and subsequently they started selling it to Domino's.

Very soon, Del Monte started supplying other products as well and gradually became one of the most preferred vendors of Domino's. All the vegetarian toppings of Domino's including the pizza sauce and low-cost cheese, olives, pineapple, corn, jalapeno and red paprika were supplied by Del Monte.

Yogesh also started to talk to other potential customers, such as Subway, KFC and Pizza Hut. He invited their officials to visit Hosur plant and they were quite excited to see the facility as they had not seen such a facility outside the USA. This is how the relationship started with other customers.

According to Yogesh, the supplies that Del Monte made to quick service restaurants (QSRs) in India in the year 2017–2018 were more than ₹1,000 million (US\$14.11 million) (Annexure 3). This was done to only five QSRs—Subway, KFC, Burger King, McDonalds and Pizza Hut. For these five customers, all the other suppliers were in North India, it was only Del Monte that had its plant in South. This turned out to be very advantageous for the company and it was due to this competitive advantage that Del Monte got entry into McDonald's. Cremica which was the supplier to McDonald's established its factory in 1995 with the assurance that McDonald's will only buy from Cremica. McDonald's never changed their suppliers and it was only in 2011 that they started buying from Del Monte and that too only for South India.

Yogesh while reminiscing the success of Del Monte in the B2B market which helped in creating favourable brand image mentioned

Del Monte currently sells 80 million sachets of tomato ketchup every month. That is a billion consumer touch-points every year. Which ATL can deliver you this at no cost? Which print campaign can promise you this? When you are in a good mood, enjoying food in the company of friends and along with it, you get one sachet of Del Monte tomato ketchup. Nobody has thrust it on you. When the consumer tries it usually, he finds it good and that leaves a good impression in the mind of the consumer. So, the brand awareness and brand image that gets created is fundamentally strong.

Yogesh further says

B2B and modern trade played a huge role in allowing Del Monte to expose its brand and to communicate the products, to allow consumers to taste and feel the product, to allow the company to do sampling and knowledge sharing.

Yogesh was satisfied with the initial success that he had got in B2B segment but he also knew that the path ahead was not easy and in order to gain market share and increase revenue for the company he had to now target the mass market. He thought on issues of affordability and differentiation to gain ground in a big way.

## **From B2B Market to B2C Market**

By now through B2B channel, brand Del Monte was positioned as a good quality, healthy brand which also had good taste. The real differentiation in the business-to-consumer (B2C) category came when Del Monte launched two sauces namely 'Twango' and 'Zingo' in late 2010. These products were developed by new product development (NPD) team for the Indian market as per the tastes of Indian Consumer. 'Zingo' was sweet chilli garlic, very much suiting the Indian palette and 'Twango' was sweet and sour ketchup with a pineapple twist. These were developed as dipping sauces.

Yogesh knew that the product that would give the highest revenue was tomato ketchup, but this was also sold by the brands like 'Maggi' from Nestle and 'Kissan' from HUL, and they were well established

brands. So, Yogesh, in order to get the young brand registered in minds of the consumer, launched 'Twango' and 'Zingo'. The peculiar names were also chosen so that they create curiosity in minds of the consumer. Del Monte then advertised 'Twango' as red chilli sauce which can be consumed with 'samosa', an Indian snack. Its advertisement 'Del Monte India—Oye Ruk Oye' (Annexure 4) also got very good reviews and the product got massive traction on the ground. The idea was to create consumer curiosity and trials through differentiation, and he knew once the consumer comes into the Del Monte franchise outlet, the main consumption would be ketchup, but instead of using ketchup as communicating vehicle, Del Monte stressed on these two sauces.

As customers started demanding sauces, Del Monte soon realized that they were not fully equipped with a distribution network to cater to the mass market. Capacity also became a problem as the outsourced plant at Meerut which was manufacturing for Del Monte was also not ready to cope up with the demand. As a result of ATL marketing, a lot of people started looking for the product and it was not there. It was at that time Yogesh realized that it was ahead of times for Del Monte to do consumer distribution in India for a consumer drive through ATL.

Sachets through B2B route had become the calling card for Del Monte, and the company was known through ketchup. Also, as the business of Del Monte with KFC, McDonald's and Subway increased, because of their high reach, the sachet of Del Monte started going out to more consumers who could now experience their product.

The next phase was to build the consumer brand through the modern trade route. Modern trade gave Del Monte a space to interact with its consumers. Del Monte did a massive amount of sampling and also created a lot of visibility for their products through modern trade. Besides sampling and visibility, the company also kept merchandisers who could give more information about the product.

Del Monte is also credited with building the Italian category in India. This started towards the end of 2009 and today in 2019 Del Monte is the market leader in this category. Usually, in new and small category companies start with few Stock Keeping Units (SKUs) but Yogesh started with the full range. He explains the rationale behind this move

The idea was the majority of the customers who were not aware of Del Monte as a brand and have consumed Italian food out of the home in some restaurant or party, when they will come to the store and see the range of Italian, they will be able to associate Del Monte with Italian and may buy the product. So actually, we did a pseudo of communicating through the shelf, the need for the consumer to pick up the Del Monte product. This worked out very well and today Del Monte is the number one brand in pasta (36%) and olives (45%) in India.

## **The Success of Del Monte' Mayo in Indian Market**

With the commissioning of the plant in Hosur, Del Monte decided to manufacture mayonnaise. Once the production started, the challenge was to find the market. The problem with mayonnaise was that it had a very short shelf life and was sensitive to heat. Till now Del Monte in India had only done long shelf life products. The sales team was very nervous as for how to deal with this product. The process started slowly, it appointed a product manager and started distribution only to selected outlets.

In 2011 and 2012, Del Monte worked on building mayonnaise in the food service. Yogesh wanted to build scale and technical competence and expertise in the subject of mayonnaise. At that time, mayonnaise was largely growing due to QSR and out-of-home consumption.

In the first 2 years, Del Monte built a lot of volume in out-of-home consumption whether it was fast food chains like McDonald's, Subway or bakeries or parties. During this time, lot of alternate cuisines started picking up in India such as pasta, burgers, salads, sandwiches, momos, and all of them started using Del Monte's mayonnaise.

Yogesh mentions

I have a philosophy that biggest calling card for building the brand is 'quality' because if you give a good quality product to your consumer, he will come back to you. If he comes back you are in business and you will have a lot of opportunities to optimize cost to scale that you are having. But if you build on cost from the very first day you will end up making an inferior quality product. Therefore, the first layer of advantage has to be quality. The second layer of advantage must be building scale to optimize cost and the third layer has to be an element of differentiation.

Del Monte's mayonnaise had all the three. Along with supreme quality, the content being eggless served as a differentiating factor (Annexure 5). In India where a large number of people are vegetarian and the product had a dual application where it could be used for both vegetarian and non-vegetarian food preparation, it was readily accepted by the consumers. According to Yogesh, currently (2019) it is one of the largest selling product of Del Monte.

After initial success in out-of-home consumption market, Del Monte started looking at the retail market. In 2013, to understand consumers better, Del Monte went for conducting marketing research. Focus groups and home visits were conducted. During the visit, it was found that middle income and lower income were heavy consumers of mayonnaise. They had their own local cuisines in which the use of mayonnaise was very innovative. They also used it with Indian snacks and packed lunch for kids to school. Because of this factor, Del Monte's Mayo was positioned as a product having multiple usages, 'Works Every Time' (Annexure 6) to increase its acceptance to be consumed along with Indian snacks also.

When everybody was sharing their experiences of home visits, it came out that these heavy users of mayonnaise were looking for value in the product. Since the consumers were looking for value, so Yogesh decided to launch a big 900-g pack (Annexure 6). The challenge was till then Del Monte was neither the market leader in retail sales nor had the consumer tried their smaller pack but Yogesh went ahead with this idea because he knew that this had a clear value proposition—a great price and a differentiated pack. He also knew that if the heavy consumers tried their product then he would be able to convert them to buy the big pack.

## **Building Brand Through Extensive Distribution**

The challenge that Yogesh undertook in the last couple of year was to grow the business and build the brand through extensive distribution. Yogesh took the challenge, and in 2016 they launched an extensive drive for food service to increase its penetration. In 2016 they moved current distribution from about 100 towns to around 180 towns, this increased to around 250 towns in 2017 and in 2018 Del Monte had covered about 350 towns all across the country. In all these 350 towns, there is one direct distributor. The company is also distributing its products through indirect distribution networks. For this Del Monte follows super stockist model. This model is followed for regions where the size of the town is small, distances are large and consumption is not very high. For example, in Kerala, a state in South India, there are very small towns so there a super stockist is appointed, and he then takes care of



distribution for the smaller towns in the region. The super stockist model was new for the company and was started in 2017. Yogesh while talking about opportunities in the retail market mentions

If we see the average revenue for an FMCG company then around 20–25 percent business comes through wholesale business. Del Monte has just moved into this wholesale business, which means there are still a lot of opportunities for growth.

## Customer-based Brand Equity: Keller Model

Brand equity, according to Keller, is the effect that brand knowledge has on consumer response to the marketing stimuli of a brand, with the effect occurring when the brand is known and when the consumer possesses favourable, strong and unique brand associations (Keller, 1993, 2001, 2003). The Customer-based Brand Equity (CBBE) model identifies four steps which denote questions asked by customers and represent a ‘branding ladder’, with each step dependent on achieving the previous one. These steps consist of six brand building blocks, with a number of sub-dimensions. To build a strong brand, the aim is to reach the pinnacle of the pyramid where a harmonious relationship exists with customers.

Briefly overviewed, the first step of the CBBE model is to ensure the correct ‘brand identity’. Answering the first question, customers ask about brands—Who are you?—the purpose is to create an identity of the brand and an association with a specific product class or need. Making sure that the brand stands out, and that customers recognize it and are aware of it. The initial step consists of the brand building block, ‘salience’.

The second step answers the customer question—what are you?—by establishing ‘brand meaning’ in their minds and linking brand associations with certain properties. Two brand building blocks make up this step—‘performance’ and ‘imagery’. ‘Performance’ defines how well product meets customers’ needs. Performance consists of five categories: primary characteristics and features; product reliability, durability and serviceability; service effectiveness, efficiency and empathy; style and design; and price.

‘Imagery’ refers to how well the brand meets customers’ needs on a social and psychological level. The brand can meet these needs directly from a customer’s own experiences with a product or indirectly, with targeted marketing, or with word of mouth.

The next step is ‘brand response’ whereby the proper customer responses to the brand identification and meaning are elicited. This step is achieved with the ‘judgments’ and ‘feelings’ building blocks and answers the question—What about you? Customers’ responses to the brand fall into two categories: ‘judgments’ and ‘feelings’.

Customers constantly make judgments in four dimensions about the brand: quality (actual and perceived quality), credibility (expertise—which includes innovation, trustworthiness and likability), consideration (relevancy of the product the unique needs) and superiority (compared with competitors’ brands).

The response of customers towards the brand depends on how it can evoke feelings directly and emotionally. According to the model, there are six positive brand feelings: warmth, fun, excitement, security, social approval and self-respect.

‘Brand relationships’ constitutes the final step in the CBBE pyramid where brand response is converted to an intense, active loyal relationship between customers and the brand. Addressing the customer question of—what about you and me?—the final brand building block and the pinnacle of the pyramid is ‘resonance’. The brand resonance is achieved if customers feel a deep, psychological bond with the brand.

Keller breaks resonance down into four categories: behavioural loyalty (regular, repeat purchases), attitudinal attachment (customers love the brand and consider it as a special purchase), sense of community (with people associated with the brand, including other consumers and company representatives) and active engagement (with the brand even when customers are not buying or consuming it).

Keller's conceptual framework provides guidance in building, measuring and managing brand equity. Following three references will initiate the reader with the seminal work of Keller and will help students of branding to map the case to the framework:

1. Conceptualising, measuring and managing customer-based brand equity (Keller, 1993).
2. Building customer-based brand equity (Keller, 2001).
3. *Strategic brand management: Building, measuring and managing brand equity* (Keller, 2003).

## **The Way Forward—Brand Repositioning for Growth**

Looking forward Yogesh understands that most of their products are aligned to health and wellness. Del Monte juices are either 100 per cent or have very high fruit content, packaged fruits like blueberries, cranberries are a source of anti-oxidants. Olive oil intrinsically is a healthy oil. Del Monte manufactures pasta from 100 per cent durum wheat, which is the highest quality wheat and also makes whole wheat pasta which is one step ahead in terms of nutritional value. The only thing that Yogesh realizes that Del Monte has not positioned itself as a health and wellness brand. He realizes that from brand perspective along with quality, health and wellness can add good texture to the imagery of brand Del Monte. He is looking forward to creating another layer of texture for the brand where people look at the brand as being committed to consumer's health and wellness apart from being aspirational and good quality product brand. He is now thinking of whether to use the same global sub-brands in India, which Del Monte has positioned as health and wellness brands in other global markets or come up with a new brand for Indian markets. But he is not clear that to create that affinity to health and wellness and to make positioning clearer, a sub-brand may be a right call out or not.

The challenges for Yogesh for the last couple of years have been on improving profitability and to scale up sales. He mentions

The first five years was to build the market and create revenue. After having done this, the next five years was to improve on profitability and currently we are looking to improve both. The challenge now is to manage the twin task which is conflicting. The last couple of years have been the story of improving profitability and maintaining growth rates. The growth rates currently are in mid-teens but extremely profitable. Can we maintain this growth rate going forward while keeping track of profitability?

### **Declaration of Conflicting Interests**

The author declared no potential conflicts of interest with respect to the research, authorship and/or publication of this case.

### **Funding**

The author received no financial support for the research, authorship and/or publication of this case.

**Annexure 1.** Year-wise Launch of Different Del Monte' Products in India

Year	The Launch of Del Monte' Products
2009—2013	Imported pasta, fruit drink cans, canned fruit, extra virgin olive oil, tomato ketchup sachet, dried prunes, table olives, Zingo, Twango, tomato ketchup 1 kg spout and other SKUs (500 g, 1 kg glass bottle), eggless mayonnaise for foodservice, introduces pomace olive oil range, mayonnaise in glass bottles in retail, Chinese sauces, dried cranberries added to expand dried fruit range beyond prunes
2014	Extra light olive oil added to the olive oil range; enters domestic pasta space; launches eggless mayo 900-g spout in retail
2015	Expands whole wheat pasta range to include two more shapes—Spirali and Spaghetti, expands tomato ketchup range to include sweet and spicy and no onion no garlic 1 kg SKU; smaller table olive SKU range (235 g) added
2017	Tetra 1 l fruit juice range in foodservice

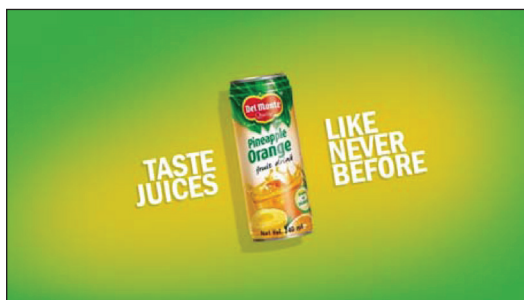
**Source:** Company records.

**Annexure 2.** Canned Juice Promoted on Taste, sleekness and coolness

Don't be a sucker campaign, Del Monte (2016).

The aim of the campaign was to draw the attention of people towards Del Monte's juices which are available in cans, not tetra packs, and which are a safe and a healthy option. The campaign, through rap, targets its competitors and it spreads the message of being a brand with a difference.

Print advertisement of Del Monte canned juice, India.



**Source:** Company records.

**Annexure 3.** Del Monte Sales and Market Share in Major Categories

Retail			B2B		
<b>Ketchup and Sauces in Modern Trade</b>	<b>2010</b>	<b>2017</b>	<b>Ketchup and Sauces</b>	<b>2014</b>	<b>2017</b>
Category size (in ₹million)	1,060	2,370	Category size (in ₹million)	8,400	9,700
Del Monte share (per cent)	0	4	Del Monte share (per cent)	7.7	9.6
<b>Emulsions in Modern Trade</b>	<b>2013</b>	<b>2017</b>	<b>Emulsions</b>	<b>2014</b>	<b>2017</b>
Category size (in ₹million)	220	450	Category size (in ₹million)	3,200	4,800
Del Monte share (per cent)	0	10.3	Del Monte share (per cent)	15.4	17.4

**Source:** Company records.

**Annexure 4.** 'Del Monte India—Oye Ruk Oye', Commercial, 2010 of 'Zingo' and 'Twango'

Available at <https://www.youtube.com/watch?v=Rc-ETPcSIHU>

The aim of this commercial was to highlight the unique taste of new sauces launched by Del Monte, 'Zingo' and 'Twango' as per North Indian palette.

**Annexure 5.** Del Monte's Mayo Sold in 900-gm Value Pack



Source: Company records.

**Annexure 6.** Del Monte's Mayo Promoted as a Product Having Multiple Usages, 'Works Every Time'



Source: Company records.

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