Sustainable Brand Transformation - Case of the Meat Industry and the Adoption of Alternative Protein Products

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Abstract

Climate change represents one of the most formidable challenges of our time. This challenge is lively discussed in politics and increasingly influences corporate strategies, and most importantly, slowly changes consumer demand and sentiment. An area particularly affected by these changes is the meat industry. Environmentalists and many scientists heavily criticize meat products and their over-consumption in western societies. Meat alternatives or alternative proteins represent an often discussed approach towards solving this issue, replacing traditional meat products with plant-based variants, tasting and looking just like the original. Apart from startups, many incumbent meat processing companies have also entered this market. Contrasting extant branding literature and the common opinion of most branding practitioners, some meat companies even use their established brands on these products.

The present thesis uses a three-stage case study process to explain why some meat processing companies follow this strategy while others do not and further investigates how both product categories can be managed and communicated under a single brand. This paper offers valuable insights for managers, particularly of strong heritage brands, encouraging them to use their well-established brands on green brand extensions, even if they are active in environmentally-challenging industries. Furthermore, this thesis also underlines the need for more and, most importantly, updated research on green brand extensions and sustainable branding in general.

Zusammenfassung

Der Klimawandel stellt eine der grössten Herausforderungen unserer Zeit dar. Er wird nicht nur in der Politik lebhaft diskutiert, sondern beeinflusst auch zunehmend die Strategien und das Alltagsgeschäft von Unternehmen und bewirkt ausserdem eine langsame Veränderung des Konsumentenverhaltens. Ein Bereich, der von diesen Veränderungen besonders betroffen ist, ist die Fleischindustrie. Umweltschützer und Wissenschaftler üben teilweise heftige Kritik an Fleischprodukten und deren übermäßigem Verzehr in der westlichen Gesellschaft. Fleischersatzprodukte oder sogenannte alternative Proteine sind ein oft diskutierter Ansatz zur Lösung dieses Problems. Diese Produkte ahmen das Aussehen und vor allem den Geschmack von „echten“ Fleischerzeugnissen täuschend ähnlich nach, basieren aber auf pflanzlichen Inhaltsstoffen. Neben diversen Start-ups sind auch viele etablierte Fleischverarbeitungsunternehmen in diesen Markt eingestiegen. Im Widerspruch zur grossen Mehrheit der bestehenden Branding-Literatur und der allgemeinen Meinung der meisten Praktiker in dem Gebiet verwenden einige Fleischunternehmen sogar ihre etablierten Marken auf diesen Produkten.

In der vorliegenden Arbeit wird anhand mehrerer Fallstudien erläutert, warum einige Fleischunternehmen diese Strategie verfolgen und andere nicht. Zusätzlich wird untersucht, wie beide Produktkategorien unter einer einzigen Marke geführt und kommuniziert werden können. Damit bietet diese Arbeit wertvolle Erkenntnisse für Manager, insbesondere von starken, traditionsreichen Marken, und ermutigt sie, ihre gut etablierten Marken für nachhaltige oder gründe Brand Extensions zu benutzen, auch wenn sie in umwelt-technisch herausfordernden Branchen tätig sind. Darüber hinaus unterstreicht diese Arbeit auch den Bedarf an mehr, und vor allem aktueller, Forschung zu nachhaltigen Brand Extensions und nachhaltigem Branding im Allgemeinen.

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Abbreviations

APP……..……Alternative Protein Product
BLE……..…..Bundesanstalt für Landwirtschaft und Ernährung
CSR……...….Corporate Social Responsibility
DACH……...Germany, Austria, & Switzerland
FMCG……...……..Fast Moving Consumer Goods
LCA……..……..……Life-Cycle-Analysis
SLR……Systematic Literature Review
QCA……..…..….Qualitative Comparative Analysis

Sustainable Brand Transformation

Case of the Meat Industry and the Adoption of Alternative Protein Products

1. Introduction

1.1 Problem Definition and Purpose of the Study

In August 2020, "Rügenwalder Mühle," one of Germany's largest meat processing companies, founded over 180 years ago, announced that its sales of vegetarian meat alternatives outgrew the traditional meat offerings for the very first time. This transformation happened after the company entered the alternative protein products (APPs) market only six years earlier (Terpitz, 2020). With this move, Rügenwalder reacted to customer demand for a more sustainable and animal-friendly product (Rügenwalder Mühle, 2020). This consumer demand mirrors an urgent call from the scientific community, particularly the EAT-Lancet Commission on Food, Planet, & Health (EAT Forum, 2021), to change how we currently handle our food production.

Today, agriculture and food production are among the largest causes of global climate change. For example, the EAT-Lancet commission finds that food production is responsible for up to 30% of global greenhouse-gas emissions and 70% of freshwater use. Additionally to the existing impacts of food production, the expected global population growth will put us to the challenge of feeding up to 10 billion people by 2050 (Willett et al., 2019). According to the authors, mastering this challenge will require a change in food production and eating habits, particularly in the western or more affluent parts of society.

One part of the food chain particularly targeted by this proposition is the consumption of animal protein, e.g., meat, fish, seafood, dairy products, and eggs (Willett et al., 2019). Tim Lang et al. (2019) argue that reducing red meat by 50% will be necessary to ensure sustainable global nutrition, while global consumption of fruits, vegetables, nuts, and legumes needs to double by 2050. Furthermore, as actively changing consumer behavior is notoriously difficult, White, Habib, & Hardisty (2019) and Ranganathan et al. (2016) suggest minimizing disruption to consumers by slowly moving away from established habits and diets. Embracing this suggestion, many

consider alternative proteins a viable solution to this "protein crisis" (Sweet, 2019b, 2019a; Tziva, Negro, Kalfagianni, & Hekkert, 2019).

Alternative Proteins describe various products mimicking the taste, look, and texture of meat (Morimoto, Edgar, & J.Hirasuna, 1982) and are based on plants, insects, microorganisms, or cell cultures (Gerhardt, Warschun, Donnan, Ziemßen, & Suhlmann, 2020). Plant-based meat alternatives have been available for a long time but have seen a steep increase in popularity in recent years, mainly due to technological advancements from the so-called first-generation replacements like Tofu or Quorn towards second-generation or novel vegan meat replacements (Gerhardt et al., 2020; Witte et al., 2021). This technological development was in part fueled by significant venture capital investments into the field, most prominently into the silicon-valley startups Beyond Meat and Impossible Foods (Nierenberg, 2020). However, additionally, to startups, large Fast Moving Consumer Goods (FMCG) players and incumbent meat processing companies like Cargill, Tyson, Nestlé, or Unilever, as well as long-established family-butchers like the mentioned Rügenwalder Mühle started producing vegetarian or vegan meat replacements as well (Polansek, 2020; Wood, 2018).

Incumbent meat-processing companies face several additional challenges in introducing alternative protein products compared to startups. Unlike young startups, they are not simply building a new business but rather engaging with something that potentially disrupts their existing business models as these products directly address the externalities of meat production. The family-owned company Rügenwalder Mühle represents a fascinating example in this regard. Not only has the company fully embraced the trend towards alternative proteins, selling more vegetarian and vegan alternatives than actual meat products, but Rügenwalder also does so under its heritage meat brand. This strategy raises the question of why a traditional meat company would decide to include two, at first sight, opposing product categories under a single brand. Significant concerns from a branding perspective connected to this strategy include whether the brand's image might dilute from the viewpoint of existing customers being irritated by the new products as the company is known for

selling hearty meat products and now indirectly acknowledges that there is something inherently "bad" about its core offering (Majid & Russell, 2015). Another potential issue concerns vegetarian or vegan customers possibly not trusting the company and rejecting its meatless products because of its heritage and still existing meat business (Mehta & Agrawal, 2020). Nevertheless, Rügenwalder and a few other meat companies in Germany managed to overcome these potential hurdles and combined vegetarian alternatives and meat products under a single brand, thereby opposing the strategy of the majority of meat companies active in the field producing alternative protein products under a different or private-label brand.

These few exceptions managed to achieve something academic literature refers to as brand ambidexterity. Derived from the management theory of organizational ambidexterity (March, 1991), the concept of brand ambidexterity, introduced by Beverland, Wilner & Micheli (2015), describes the marketing- and brand-management capability of balancing the simultaneous pursuit of brand consistency and brand relevance. While brand consistency focuses on protecting and nurturing a long-established brand image and identity (Erdem & Swait, 1998; Keller, 1999), brand relevance generally requires companies to adapt to market changes, mainly through innovations (Aaker, 2012; Holt & Cameron, 2010). Naturally, the two goals of brand relevance and consistency often contradict each other and require constant balancing and reconciliation as focusing entirely on either one of the two poses severe risks to the brand's equity (Lee, O'Cass, & Sok, 2016; Stahl, Heitmann, Lehmann, & Neslin, 2012). The concept of brand ambidexterity shares its foundations with the extensive research on brand extensions and describes how companies can use them to achieve high brand consistency and relevance simultaneously (Beverland et al., 2015). In that regard, the challenges of meat processing companies represent an interesting field of study for three major reasons:

Firstly, meat production's environmental externalities, media coverage, and the resulting public pressure combined with changing eating habits start endangering the existing business of these companies (BLE, 2020). While some incumbents have completely neglected APPs as a potential innovation addressing the environmental

disadvantages of their main product, others introduced them under a newly developed or private-label brand, whereas a third group incorporated them into their core brand. Current literature provides little evidence explaining these different strategies. The scarce existing literature on brand ambidexterity has so far focused on comparing companies from various industries (M. B. Beverland et al., 2015; Iyer, Davari, Zolfagharian, & Paswan, 2021; Pecot, Valette-Florence, & De Barnier, 2019), the education sector (Nguyen, Yu, Melewar, & Hemsley-Brown, 2016) or on theoretical refinements (Moussa & de Barnier, 2020), but has not looked into differences within a single industry. Comparing different companies facing a similar market challenge allows for insights into organizational support structures and capabilities relevant to enabling and achieving brand ambidexterity, a research gap already identified by Beverland et al. (2015, p.607) in the limitations of their study.

The second research gap addressed by exploring meat companies and their alternative protein strategies concerns the reconciliation of consistency and relevance in their branding and communication strategy. Although there seems to be an agreement among scholars that both brand relevance and consistency should be perused simultaneously, only scarce scientific literature elaborates on common denominators or strategies that have the potential to mediate the tension between them. For example, while Beverland et al. (2015) established design-thinking as a viable mechanism triggering brand ambidexterity, concrete suggestions for (marketing) managers were not provided by scholars in the field. Therefore, exemplary cases potentially offer rich insights into specific marketing, communication, and branding tactics used by these best-practice examples.

Thirdly, a focus on maintaining brand relevance and consistency through sustainable brand- and product innovations/extensions further refines the theory on brand ambidexterity. Even though Beverland et al. (2015) have identified the mismatch between a brand's current positioning and an envisioned or emerging more sustainable future as a significant reason for the tensions between brand consistency and relevance, extant literature has not focused on this specific challenge.

Summarizing, the two overarching goals and contributions of the present dissertation are as follows:

1. Identifying organizational factors leading to brand ambidexterity.
2. Mapping potential marketing and branding activities that enable marketing managers to achieve brand ambidexterity through sustainable brand extensions.

Therefore, this dissertation extends the theory of brand ambidexterity in its overarching research questions by connecting it to the extant literature on sustainable innovations and brand extensions and the practical evidence of meat companies entering the market of alternative protein products. The overarching goals of this paper are accordingly transferred into the following two overarching research questions:

Overarching Research Questions

I: What organizational characteristics enable, support, or hinder companies in achieving brand ambidexterity through sustainable product innovations?

II: How can established brands, active in environmentally challenging industries, achieve brand ambidexterity through sustainable product innovations?

These two broad research questions are subsequently divided into four specific research questions, reflecting the focus of the empirical studies as introduced in the following subchapter.

1.2 Structure of the Dissertation

The remainder of this dissertation is structured as depicted in figure 1:

After the introduction, chapter two briefly introduces branding definitions as used in this paper before describing the theory of brand ambidexterity in more detail. Subsequently, the extant literature on product innovations and brand extensions is also summarized.

Chapter three presents extant literature closer to the research questions posed above, including existing academic knowledge on sustainable marketing & branding, particularly of food products. First and foremost, the chapter's central part presents a systematic literature review on sustainable or green brand extensions.

Chapter four provides this thesis's practical background, giving a short overview of the meat industry and introducing the alternative protein market, its recent developments, and a brief overview of related consumer behavior topics.

Concluding the theoretical part, chapter five provides the background to the core methodology used in this thesis, case studies, and establishes its epistemological research position.

At the beginning of the empirical section, in chapter six, an in-depth, single case study is conducted on the company "Rügenwalder Mühle," answering the specific research questions one and two:

RQ1: *What factors influenced Rügenwalder's decision to enter the alternative protein market with its established meat brand?*

RQ2: *What marketing and branding strategies enabled Rügenwalder Mühle to successfully market meat products and meat alternatives under a single brand?*

The study provides deep insights into the uniqueness of the family-owned company and its branding strategy. The depth of gathered data on Rügenwalder furthermore allows for a detailed reconstruction of marketing and branding decisions by the company during its transformation process. This first empirical study results in a preliminary model of organizational factors enabling brand ambidexterity.

This factor model is reviewed and refined in chapter seven, comprising a multiple case study of all five other meat companies in Germany, Austria, and Switzerland (DACH) using their established brands on APPs, thereby addressing research question number three, yielding a more refined conceptual model.

RQ3: *What factors influenced other meat companies in Germany, Austria, and Switzerland to enter the market for vegetarian meat alternatives with their established brands?*

Chapter seven concludes by comparing all six cases and relating them to the extant literature on sustainable brand extensions.

Chapter eight, encompassing the third study, completes the empirical part of the dissertation by comparing the obtained model to meat companies active in the alternative protein market but not using their established brands on these products in a qualitative comparative analysis. This last stage represents a further refinement of the conceptual model obtained in the prior studies. Finally, answering research question four, this study also provides guidance for companies considering introducing sustainable products under their established brands.

RQ4: *What factors influence whether meat companies use their established brands or create new ones for alternative protein products?*

Chapter nine discusses the obtained empirical results of the present dissertation and elaborates on its theoretical and practical contributions as well as its limitations and opportunities for further research. Finally, chapter ten summarizes and concludes this study.

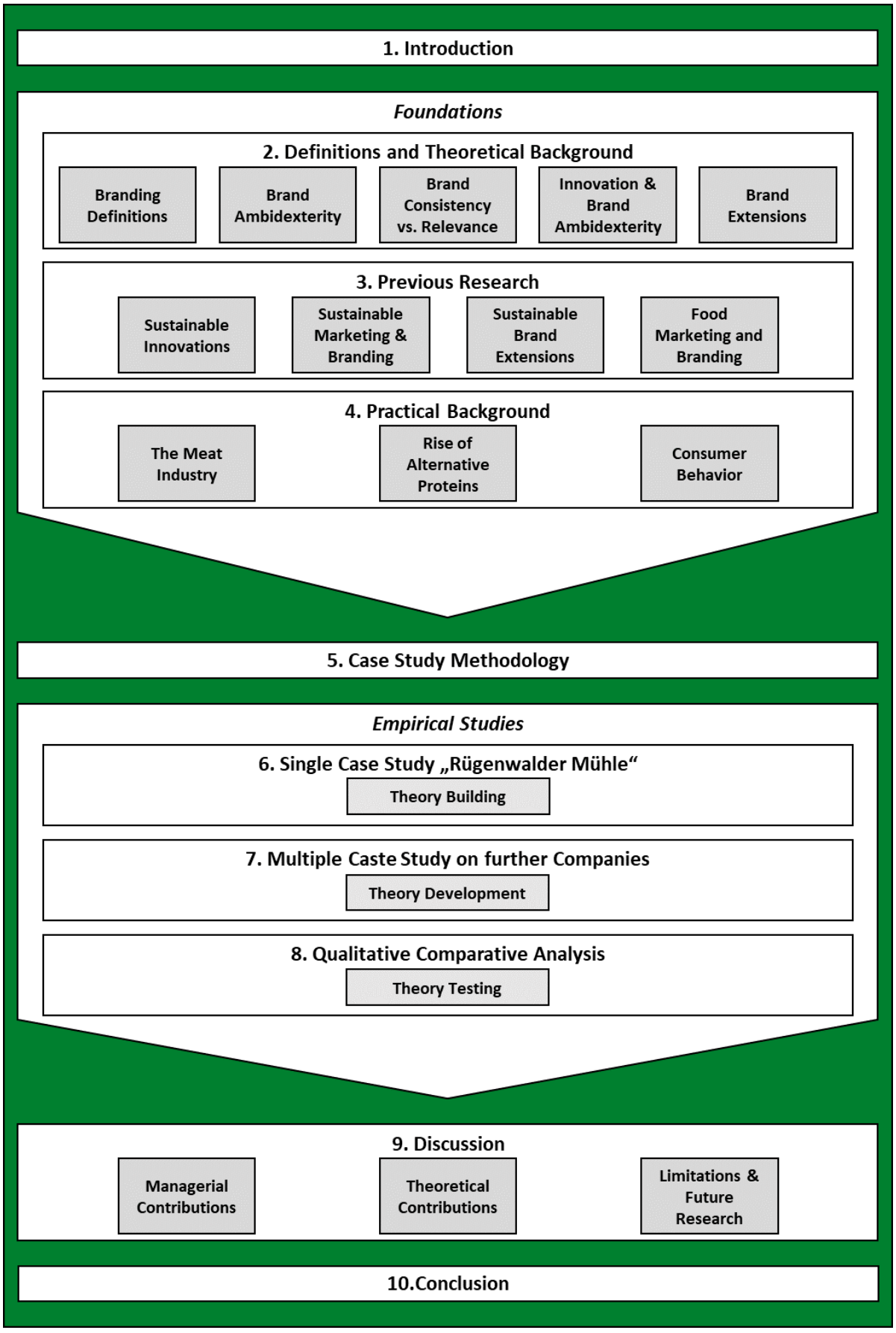


Figure 1: Structure of the Dissertation; Source: Own Representation

2. Theoretical Foundations

2.1 Definitions

Academic literature and more practically-oriented outlets feature a wide array of concepts, constructs, and definitions of branding. Although it is not an integral part of this dissertation to discuss these various subthemes, it is necessary to establish how they are understood and used within this research project.

2.1.1 Brand

The American Marketing Association (AMA) refers in its branding definition to the International Organization for Standardization (ISO) standard 20671, where a brand is considered an "*intangible asset, including but not limited to, names, terms, signs, symbols, logos, and designs, or a combination of these, intended to identify goods, services or entities, or a combination of these, creating distinctive images and associations in the minds of stakeholders, thereby generating economic benefit/values"* (American Marketing Association, 2021; International Organization for Standardization, 2021).

2.1.2 Brand Management

The branding definition already suggests that brands pose a particular value to corporations. This value needs to be fostered and managed on both a short and long-term basis (D. A. Aaker, 1992; K. L. Keller, 1993). Kapferer (2012) suggests that contemporary corporate brand management originates from a product or service as a primary source of value while communication structures orients and add tangible and intangible perceptions to the latter. Kernstock, Esch, Tomczak, Redler, & Langner (2014, p.13) see brand management as the interface between branding and strategic management and identify two main tasks:

- Building, growing, and maintaining a corporate brand to anchor it within the target audience successfully

- Manage the brand portfolio to create a clear and logical structured brand architecture utilizing the synergies between company and product brands.

2.1.3 Brand Awareness

Brand awareness refers to *"…the strength of a brand's presence in consumers' minds"* (Pappu, Cooksey, & Quester, 2005, p.145) and is furthermore defined as the ability of consumers to identify a particular brand within a product category (D. A. Aaker, 1996b; Foroudi, 2019; Percy & Rossiter, 1992; Yoo, Donthu, & Lee, 2000). This identification can occur by recognition or recall (K. L. Keller, 1993; Rossiter, 1993). Brand awareness is often measured using aided and unaided recall (D. A. Aaker, 1996b; Faircloth et al., 2001) and represents a key component of brand equity (D. A. Aaker, 1996b; K. L. Keller, 1993; Pappu et al., 2005).

2.1.4 Brand Personality & Brand Identity

According to David Aaker, the construct of brand personality describes: *"…a set of human characteristics associated with a brand."* (Aaker, 1997, p.347). These characteristics do not primarily present a utilitarian function to the customer but rather represent a symbolic or self-expressive function (Malär, Krohmer, Hoyer, & Nyffenegger, 2011) to them (K. L. Keller, 1993). Many scholars (Aaker, 1997; Azoulay & Kapferer, 2003; Geuens, Weijters, & De Wulf, 2009) compare a brand's personality traits to the well-established "Big Five" human personality dimensions (i.e., extroversion, agreeableness, openness, conscientiousness, and neuroticism.) an apply them to describe why customers choose certain brands over their competitors (Van Rekom, Jacobs, & Verlegh, 2006). Azoulay & Kapferer (2003) furthermore argue that brand personality, focusing on the mentioned human-like traits of a brand, is simply a part of the larger concept of brand identity that describes from a management perspective the uniqueness and essential idea of the brand (D. A. Aaker, 1996a; Kapferer, 2012).

2.1.5 Brand Image

Another term frequently used in academic and non-academic literature is the so-called image of a brand. Comparable to brand personality or brand identity, brand image describes specific non-tangible attributes of brands or products. Early publications do not provide a significant corporation purposefully creates a brand personality just introduced (Park, Jaworski, & MacInnis, 1986). A widely cited understanding of the construct brand image used today was introduced by Keller (1993, p.2), defining it as perceptions customers have about a particular brand reflected by the brand associations in their memory.

2.1.6 Brand Attitude

Brand Attitude represents one of the most commonly used constructs and a very popular scale in marketing and branding research, basically describing a person's like or dislike of a brand often moderated by the degree of familiarity (Faircloth, Capella, & Alford, 2001; Foroudi, 2019; Mitchell & Berger, 1989; Myers, 1967; Whan Park, Maclnnis, Priester, Eisingerich, & Lacobucci, 2010). Percy & Rossiter (1992, p.266) define brand attitude as: *"…a buyer's overall evaluation of a brand with respect to its perceived ability to meet a currently relevant motivation."*

2.1.7 Brand Equity

Many concepts and constructs related to branding are often broad, blurry, or difficult to quantify. This observation alos holds true for the brand equity term (Farris, Bendle, Pfeifer, & Reibstein, 2010, p.135). Nevertheless, it is one of the most commonly used and cited constructs to quantify and describe the importance and impact of brands.

David Aaker (1992) finds brand equity to be a set of brand assets and liabilities that are linked to the brand's name and symbol and can subtract from, as well as add to, the value provided by a product or service and eventually provides value to customers and firms alike. He also defines five core assets creating brand equity and their respective measures ("The Brand Equity Ten" (Aaker, 1996, p.105)):

1. Brand loyalty (*Price premium; Satisfaction/Loyalty*)
2. Brand name awareness (*Brand awareness*)
3. Perceived brand quality (*Perceived Quality, Leadership*)
4. Brand associations in addition to perceived quality (*Perceived Value, Brand Personality, Organizational Associations*)
5. Other proprietary brand assets (*Market Share, Price, and distribution Indices)*

Brand equity can be viewed from a financial and the customer's perspective (Keller, 1993; Lassar, Mittal, & Sharma, 1995; Netemeyer et al., 2004). The first primarily concerns the financial value of a brand, for instance, relevant during merger & acquisition activities and is commonly referred to as "brand value" (Gupta, Gallear, Rudd, & Foroudi, 2020; Sinclair & Keller, 2017). The second focuses mainly on the non-monetary value, influence, and effects brands have on consumer behavior. Keller (1993) labels this point of view Consumer-Based Brand Equity (CBBE) and defines it as *"the differential effect of brand knowledge on consumer response to the marketing of the brand. (p.8)"*

Substantial or high brand equity is also often used synonymously with a strong brand or strong brand performance (Keller & Swaminathan, 2013). However, there is no clear definition of what constitutes a brand's performance and what distinguishes it from the concept of brand equity. Chaudhuri & Holbrook (2001), for instance, use market share and relative price difference of two brands as indicators for brand performance while other authors include "softer" measures like brand image, brand awareness, brand loyalty, or brand recommendation (Foroudi, 2019; Iyer, Davari, & Paswan, 2018; Iyer, Davari, Srivastava, & Paswan, 2021).

2.2 Brand Ambidexterity

Protecting, developing, and increasing a brand's equity is considered the most critical task of any (marketing) manager, especially facing ever-changing market environments (Keller, 1993; Van Rekom et al., 2006). In order to guide managers in overcoming the discrepancies between innovating and protecting the historical image of a brand, Beverland, Wilner & Micheli (2015) introduced the concept of brand ambidexterity. They defined brand ambidexterity as: "*a marketing capability whereby a brand is strategically managed to create value through the pursuit of both consistency and relevance" (Beverland et al., 2015, p.592).* Figure 2 shows the core concept of Brand Ambidexterity, depicting the possible outcomes of different levels of brand consistency and relevance.

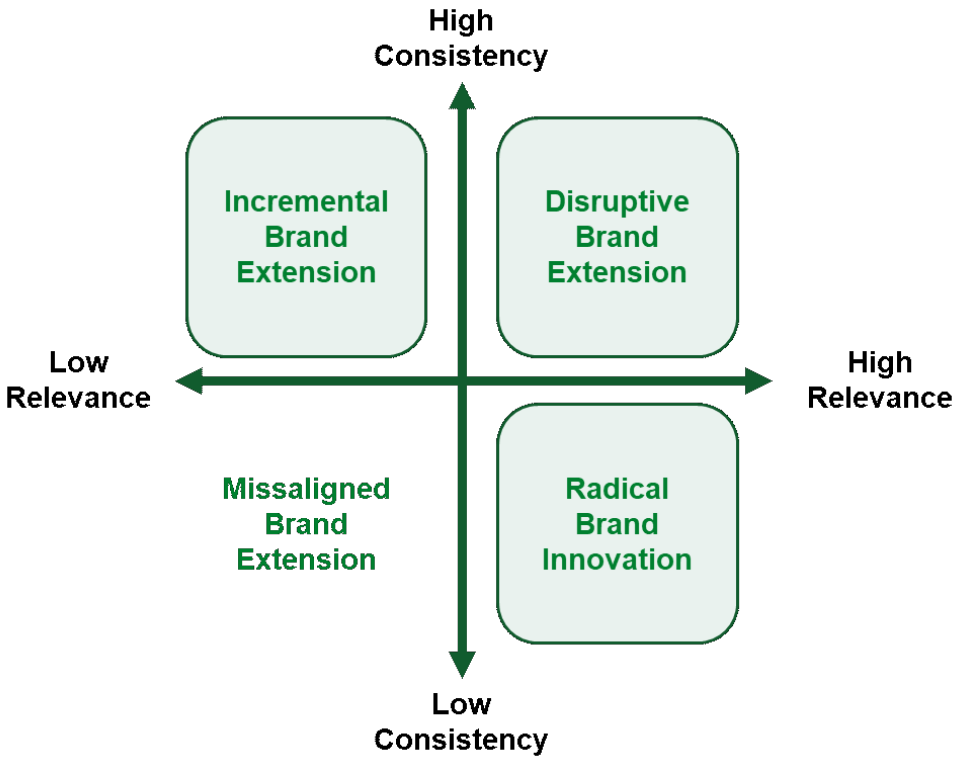


Figure 2: Brand Ambidexterity: Conceptual Dimensions of Brand Consistency and Relevance and their Outcomes; Source: Beverland et al. (2015, p.592)

Building on the renowned management theory of "Organizational Ambidexterity" (March, 1991; Raisch & Birkinshaw, 2008), describing exploitation in contrast to exploration strategies (Kyriakopoulos & Moorman, 2004), Beverland, Wilmer & Micheli (2015) applied this approach to study the tension between consistency and relevance of a particular brand. They define brand consistency as: "*…the*

standardization and preservation, over time and place, of a defined brand image and associated meanings" (p.590) and brand relevance as: *"...the perception that the brand has something that is personally relevant or appropriate to the consumer"* (p.590; as cited from Rosenbaum-Elliott, Percy, & Pervan, (2011)). As Beverland et al. (2015) suggest, the theory on brand ambidexterity generally describes the effect of new product or service introductions on an existing brand. Therefore, the authors used well-established concepts like brand extensions and incremental/radical innovations to complete their typology. Table 1 gives an overview of the relationships between the different constructs used in their typology.

	Ambidexterity	**Degree of Innovation**
Consistency	Exploitation	Incremental
Relevance	Exploration	Radical

Table 1: Relationship between Constructs used in the Theory of Brand Ambidexterity; Source: Adapted from Beverland et al. (2015, p.592)

The different structural components and antecedents of Beverland et al.'s (2015) typology on brand ambidexterity are subsequently described in more detail.

2.2.1 Antecedents of Brand Ambidexterity: Organizational Ambidexterity

Although first coined by Duncan (1976), today's understanding of the theory on organizational ambidexterity, and as a consequence also brand ambidexterity, is primarily based on March's (1991) seminal work on exploration and exploitation strategies applied to the context of organizational learning (Birkinshaw & Gupta, 2013; Gassmann, Frankenberger, & Sauer, 2016). Accordingly, organizational ambidexterity describes a firm's capability to manage two contradicting poles or demands equally well (Birkinshaw & Gupta, 2013; Gassmann et al., 2016). Often, these opposite poles represent long and short-term goals or strategies of organizations (Tushman & O´Reilly, 1996), are usually connected to innovations (Josephson, Johnson, & Mariadoss, 2016; O'Reilly & Tushman, 2013), and represent a considerable management task often requiring decision-makers to question the status quo by willingly cannibalizing existing business (Tushman & O´Reilly, 1996).

March (1991, p.72) connected exploration and exploitation to the difference between the refinement of existing technology and the invention of a new one and found that organizations will have to find a certain balance between these two poles. Finding this balance, however, entails several difficulties. Exploitation or the extension of existing competencies usually delivers instant and predictable results, while exploration strategies come with high uncertainty, and their returns often materialize after a more extended period (Gibson & Birkinshaw, 2004). Too much focus on exploitation might result in a "success trap" (Junni, Sarala, Taras, & Tarba, 2013), focusing on existing cash-cows or successful products possibly preventing organizations from developing meaningful, innovative new offerings. On the other side, an excessive focus on exploration strategies, like new product development, for instance, could lead to a "failure trap" where unfinished new ideas or products are put out in the market, quickly withdrawn due to their inadequacies, and quickly replaced by new ones (Levinthal & March, 1993).

Whether there exists a balance between exploitation and exploration or whether both should be equally pursued to achieve maximum performance outcomes is still widely discussed (Cao, Gedajlovic, & Zhang, 2009; Gibson & Birkinshaw, 2004; Junni et al., 2013; Lubatkin, Simsek, Ling, & Veiga, 2006). However, different scholars found significant positive effects of organizational ambidexterity on a firm's performance (Junni et al., 2013; O'Reilly & Tushman, 2013; Patel, Messersmith, & Lepak, 2013).

2.2.1.1 Organizational Ambidexterity & Marketing

Although the broad focus on the duality of exploitation versus exploration strategies generally represents the most common concept application, organizational ambidexterity was studied and adapted to various other contexts like organizational learning, technological innovation, strategic management, organizational design, and marketing (Raisch & Birkinshaw, 2008; Swift, 2016).

Kyriakopoulos & Moorman (2004) study the effect of market orientation, which the authors define as*: "…a set of organization-wide processes involving the generation,*

dissemination, and responsiveness to intelligence pertaining to current and future customer needs and a firm capability to anticipate market requirements ahead of competitors and to create durable relationships with customers, channel members, and suppliers" (p.220), on marketing exploration and exploitation strategies (Utilizing new vs. existing marketing capabilities). The authors find that market orientation enables high marketing exploitation and exploration levels. This view is supported by Atuahene-Gima's (2005) finding that higher levels of market orientation prevent companies from strategic inefficiencies and failures. Furthermore, ambidextrous market exploration and exploitation strategies are particularly beneficial in environments characterized by high competitive pressures and uncertainties (Kim & Atuahene-Gima, 2010; Mehrabi, Coviello, & Ranaweera, 2019).

Josephson et al. (2016) define Strategic Marketing Ambidexterity as an interplay between R&D (exploration) on the one side and advertising (exploitation) on the other. The authors conclude that firms with large amounts of financial slack, like well-financed startups, for instance, should strongly engage in exploration activities to uncover new product opportunities. In contrast, older companies with an existing, strong product portfolio should engage in exploitative marketing initiatives like advertising and sales, protecting their leadership positions (Josephson et al., 2016).

Mehrabi, Coviello, & Ranaweera (2019) define the two opposing poles of marketing ambidexterity as new product development and customer management. They reason that customer management primarily focuses on existing customers (exploitation) maintaining beneficial relationships with them.

It has to be noted that the whole "ambidexterity" theory or construct is not undisputed in academic literature. For example, Birkinshaw & Gupta (2013) admit that ambidexterity is only an academic construction rarely used by managers. Birkinshaw & Gupta (2013) and O'Reilly & Tushman (2013) furthermore criticize that due to the flexibility of the concept, it can be and already was, applied to almost any organizational phenomenon.

2.3 Components of Brand Ambidexterity

2.3.1 Brand Consistency

In line with others (Keller, 1999; Keller & Lehmann, 2006; Park et al., 1986), Beverland et al. (2015) underline the crucial importance of brand consistency, particularly for maintaining brand equity (Erdem & Swait, 1998) and tie the concept to exploitation strategies used by firms described in the theory of organizational ambidexterity. In other words, one of two viable strategies for corporates to be successful in a market is to focus on their existing competencies and assets (e.g., brands) and exploit them further. Park et al. (1986) already emphasized that a brand should be regarded as a long-term investment that needs to be nurtured and developed to sustain a long-term competitive advantage and particularly underline the importance of a consistent brand image in that regard.

In their work on brand signals towards consumers, Erdem & Swait (1998, p.137) understand brand consistency as a degree of overlap between two or more components of a company's marketing mix as well as the stability of brand attributes over time. Keller (1999) ties brand consistency to the meaning of a brand, including its core products, main benefits, satisfied needs, and USPs differentiating them from competing offerings. Aaker (2014) further develops this argument and identifies several reasons brand consistency appears to be a central part of every successful marketing strategy. Firstly, long-term consistency leads to strong and, most importantly, clear brand equity and local consumer base. Secondly, consistent branding can, over time, lead to virtual ownership of a whole category (Visa equals good coverage or Charmin means softness). Thirdly, customers are generally rather adverse and laggards when it comes to change. Consistent logos, messages, and positioning provide them with a sense of security (M. Beverland, 2006; Morhart, Malär, Guèvremont, Girardin, & Grohmann, 2013; Södergren, 2021). Following this reasoning, a brand's strategy or image should never change without a solid, well-researched reason (Aaker, 2014).

Particularly in larger, multinational, enterprises brand consistency also fosters alignment of internal stakeholders all over the globe with the brand's vision and core values (Bengtsson, Bardhi, & Venkatraman, 2010; Hatch & Schultz, 2001).

2.3.2 Brand Relevance

Despite its importance, Beverland et al. (2015) argue that consistency alone is unlikely to make a brand successful in the long run. Instead, a brand needs to stay relevant in the consumer's eye. According to the authors, this relevance arises from continuous innovations that are unlikely to originate through improving existing capabilities but rather exploring new technologies, knowledge, and opportunities that result in radically new products and services.

Fischer, Volckner, & Sattler (2010, p.824) define brand relevance as a brands' general role in a customer's decision-making process. Aaker (2011, 2012) furthermore considers a brand "relevant" when it develops product or service innovations that contain so-called "must-haves," creating a new category or sub-category rather than competing on existing offerings. These "must-haves" include the company's personality, especially its organizational values, a particular user experience, design, price point, or self-expressive benefits to the consumer (Aaker, 2012, p.44).

According to Holt (2004), brands remain relevant by addressing social contradictions and challenges customers face through constantly adapting the myths or corporate identity around them. Therefore, managers should be sensitive to shifts in customer sentiment and global socio-economic trends (Swaminathan et al., 2020). They need to respond to this new zeitgeist in an anticipative manner, focusing on customer equity (lifetime value of a brand's customers) rather than brand equity (Rust, Zeithaml, & Lemon, 2004). Gerzema & Lebar (2008) understand relevance as an indicator of how appropriate customers perceive a brand and how much it fits their lives (Datta, Ailawadi, & van Heerde, 2017). In line with Hold's view, Kapferer (2012, p.130) develops the construct of brand relevance, further arguing that brand relevance itself is no longer sufficient, especially in developed high-consumption societies as

customers crave for something higher in Maslow's pyramid, namely meaningfulness. Accordingly, Brands will have to provide something more than relevance as hyper-consumption or the accumulation of goods creates a feeling of emptiness within consumers.

Brand relevance also serves as a bridge between customer-based brand equity and sales-based brand equity (Datta et al., 2017) as financial market players view brand relevance as an indicator for increasing future profit potential, yielding in incrementally higher stock returns (Mizik & Jacobson, 2008)

The importance of brand relevance and relevance of a company as a whole was recently underscored by the CEO of McDonald's talking about learnings from the first months of the Covid-19 pandemic. Chris Kempczinski concluded that his single most important task as the chairman of the global food giant is to ensure that the brand "McDonald's" continues to be relevant in the consumer's eye. According to Kempczinski, this can be achieved through constantly putting out ideas and getting feedback from consumers rather than solely relying on well-established marketing campaigns or one-way communications and message control (Kelley, 2021).

2.3.3 Brand Consistency versus Relevance

The apparent contradiction or tension between brand consistency and brand relevance is central to the theory on brand ambidexterity. For example, Beverland et al. (2015) identified three core tensions shown in table 2. These tensions describe a mismatch between the brand's current positioning (consistency) and a desired or required future state (relevance). Particularly interesting for this research project is the third category focusing on an often rapidly emerging future challenging the brand's position, especially from an environmental point of view.

Tension-Type	External Source of Tension	Internal source of tension	Essence of the problem	Example consistency-logic
Brand position vs. Market	Customer-driven demand	Opportunity identification	Inability to exploit potential opportunities because they are perceived as "off-brand"	Demand for a professional range of products for adults vs. existing focus on children.
Brand position vs. Effectiveness	Equity problems	Strategic shortfalls	Inability to meet targets	«Green» products involve the sacrifice of performance
Brand position vs. Emerging future	Environmental calibration	Preemptive defense of equity	External changes impacting the relevance of core brand promise	Conflict between being a sustainable brand and an unsustainable industry

Table 2: Sources of Tension between Brand Consistency and Relevance; Source: Adapted from Beverland et al. (2015, p.597)

Although "Brand Ambidexterity" is the first construct exclusively addressing the balance between brand consistency and relevance, the broader topic has already received academic attention over the last few years.

For instance, Lee et al. (2016) relate brand consistency to a general focus on the brand (brand orientation) and its current areas of expertise. Furthermore, they compare the discussion on relevance to an innovation orientation or, more precisely, to the openness of a brand towards new ideas and continuous innovation. Additionally, they found brand and innovation orientation to have an inverted U-shaped relationship with brand performance, meaning that a (too) strong brand orientation or the focus on brand consistency may hinder firms from exploring new opportunities. Furthermore, a sole focus on stability or consistency can result in incremental innovations even when more significant improvements are needed, potentially leading to declining brand

equity. At the same time, high levels of innovation orientation endanger brand consistency by introducing innovations not in line with a broader, overarching brand image (Aaker, 2012; Beverland et al., 2015; Keller, 1999; Urde & Koch, 2014). Stahl et al. (2012) and Iyer, Davari, Zolfagharian, & Paswan (2021) make a similar argument suggesting that firms should not choose between brand management and customer management but rather follow both paths simultaneously. Urde & Koch (2014, p.481) summarize the challenge by suggesting two main questions companies have to ask themselves regarding the positioning of their brands: To what extend an organization should be guided by its identity and to what extent it should be responsive to the views and demands of others. Changing a brand's positioning, however, is generally seen as a notoriously difficult task (Park et al., 1986) that needs to be well-justified (Aaker, 2014), particularly when it comes to changes in a brand's design (Heinberg, Katsikeas, Ozkaya, & Taube, 2020).

Although scholars agree that both brand and customer orientation should be perused simultaneously, only scarce scientific literature is available on common denominators or strategies that have the potential to mediate the tension between brand consistency and relevance. For example, Van Rekom et al. (2006, p.188) suggest that managers identify and secure the "essence" of a brand. They define "brand essence" as features of a brand on which the consumer believes that most other brand features depend. Similarly and in line with other researchers (Iyer, Davari, Zolfagharian, et al., 2021), Urde (2016, p.31) suggests companies define the core of their brand by reducing it to its central values, attributes and messages without losing its fundamental meaning representing the organization, customers and all other relevant stakeholders alike. Accordingly, managers should consider different perspectives of their brand's core through communications or adapted value propositions before changing or removing significant elements.

Finally, the struggle of consistency versus relevance could also be seen as an opportunity for brands. As Holt (2004, p203) suggests, these tensions, particularly social ones, exist not only for brand managers but also in consumers' daily lives.

Therefore, they should be actively dressed and included in the brand's identity politics.

2.4 Innovations and Brand Ambidexterity

The brand ambidexterity literature, particularly the typology suggested by Beverland et al. (2015) and the discussion on exploration and exploitation strategies, in general, underlines the importance of innovations in this context.

2.4.1 Innovations and Branding

Introducing an innovation under a brand can have several advantages. According to Aaker (2007), these include higher potential differentiation, the creation of a potential new sub-category to avoid competition, higher credibility, and legitimacy to new technology. In addition, a brand's perceived innovativeness by customers or innovative reputation (Barone & Jewell, 2013) potentially has several positive effects on a product's perceived newness during its launch (Hetet, Ackermann, & Mathieu, 2019). Furthermore, successful innovations positively influence a consumer's brand awareness, image, and attitude and thereby increase the chances of success of future innovations in the long run (Brexendorf, Bayus, & Keller, 2015; Sharma, Davcik, & Pillai, 2016).

2.4.2 Classification of Innovations

A popular way to classify innovations is the degree of newness they represent either to the customers/markets or the firm (De Brentani, 2001; Garcia & Calantone, 2002; A. Herrmann, Tomczak, & Befurt, 2006). The most common description, therefore, is incremental versus radical innovations. Incremental innovations (also continuous or marginal innovations) describe small technological changes, product improvements, or extensions that minimally increase a product's performance (Dewar & Dutton, 1986). Radical innovations, also labeled breakthrough, fundamental or discontinuous innovations (De Brentani, 2001), however, represent truly novel technological

advancements or industry-wide discontinuities (Anderson & Tushman, 1990) that are entirely new to consumers (Dewar & Dutton, 1986; Garcia & Calantone, 2002; Paswan, Guzmán, & Pei, 2021) or markets (McDermott & O'Connor, 2002).

Incremental innovations are often less costly, more reliable, and easier to market but do not always cope with rapidly changing market environments (Aaker, 2011) and pose the risk of potential self-cannibalization (Herrmann et al., 2006). Incremental innovations are also generally within the firm's existing tools and competencies and do not require significant organizational or procedural changes (De Brentani, 2001; Dewar & Dutton, 1986; Ponnam, Sreejesh, & Balaji, 2015).

On the other hand, radical innovations offer customers unique benefits or technologies entirely different from industry norms (De Brentani, 2001). Dahlin & Behrens (2005) consider innovations radical when they are dissimilar from previous and current inventions and are adopted by customers/users, thereby influencing the content of future inventions. Significant challenges regarding radical innovations involve the high levels of technological and market uncertainties companies face (Dahlin & Behrens, 2005). These risks often demand senior management to support projects without a clearly outlined market potential (O'Connor, 1998) which would be necessary to justify high development costs and risks (De Brentani, 2001). Furthermore, from a branding perspective, radical innovations can potentially fail to gain necessary awareness or might be perceived as too risky and disappear quickly from the market, which would risk the equity of an established brand (Brexendorf et al., 2015).

Focusing on the customer or market perspectives of innovations, McDermott & O'Connor (2002) find even if the involved technologies can be considered radical, most challenges for companies during a new product introduction do not arise from new technologies but depend on whether the company is facing a more or less existing market or needs to develop one from scratch. Danneels & Kleinschmidt (2001, p.371) propose a more nuanced view stating that it is not crucial for new product performance if a company targets new customer segments or not but if it can use existing marketing capabilities.

2.5 Brand Extensions and Brand Ambidexterity

Beverland et al.'s (2015) note that brand extensions are an integral part of the challenge describing brand consistency versus relevance as many new product developments or innovations are introduced through such an extension. Accordingly, discussions around the fit or consistency of innovations in contrast to an established core brand are often channeled through the introduction of brand extensions.

2.5.1 Brand Extension Research – An Overview

Starting from the late 1960s (Kapferer, 2012) but particularly after the 1980s (Aaker & Keller, 1990; Boush & Loken, 1991; Tauber, 1988), brand extensions represent one of the most heavily-researched areas in marketing (Czellar, 2003). Brand extensions generally describe the effort of firms to capitalize on the brand equity of existing brands (Brand-name, for instance, see Keller & Aaker, (1992)) in one category for the introduction of new products in a different one (Broniarczyk & Alba, 1994; Tauber, 1988). Possible sources or bases for brand extensions are specific user types of brands, attributes (style, ethnic image, taste, ingredients), location, benefits (low calorie), symbols, or specific expertise (Honda in small engines) (Aaker & Keller, 1990; Tauber, 1988).

Besides the term "brand extension," the concept of "line extensions" is also widely used in academic and practitioner-focused outlets. Kirmani, Sood, & Bridges (1999, p.89) state that in contrast to brand extensions, line extensions like new colors, flavors, or varieties of existing brands and products occur in current product categories. Line extensions, therefore, constitute a high degree of similarity of both newly introduced products and particularly target market, catering towards the same needs and consumption-situations of the established brand (Kapferer, 2012; Keller & Swaminathan, 2013). Kapferer (2012, p.265) also notes that the distinction between brand and line extensions is often hard to define. He gives the example of a water company offering soft drinks for the first time. Although similar (bottled liquid), the new product addresses different customers, competes in another market, and could qualify as a brand extension.

2.5.2 Benefits and Risks of Brand Extensions

In general, brand extensions present companies with various benefits and advantages. First and foremost, they reduce the risk of new product failure by taking advantage of an existing brand image while entering new markets as customers' associations of parent-brand product quality, and existing brand awareness can be leveraged to enhance the core brand and even create new brand equity (Aaker & Keller, 1990). Consequently, brand extensions increase product trial rates and advertising efficiencies (Balachander & Ghose, 2003; Keller & Aaker, 1992; Smith & Park, 1992).

Besides, brand extensions potentially also pose risks and threats to their parent brand. In his seminal work, David Aaker (1990) already found that some extensions might be too much of a stretch, and old brands possibly add no value to the new product or innovation. However, an effect far more dangerous is described in the literature as "brand dilution" or the harm an extension can cause to its parent brand. Aaker (1990, p.53) notes that existing brand equity and associations could be hurt through the lower quality of an extension or undesired associations (diet coke implies that regular coke is unhealthy). Loken & John (1993) add that the chances of brand dilution are highest when brand extension attributes are not consistent with core values and attributes of the parent brand. Mainly extensions changing or contrasting identity-constructing functions of a brand and thereby risking brand authenticity were found to be especially harmful (Spiggle, Nguyen, & Caravella, 2012).

Additionally, Loken & John (1993) found dilution effects less likely to occur when customers perceive the extension as atypical. This conclusion of focusing on the degree of similarity as an indicator for dilution risk (only failed brand extensions that are close to the parent-brand pose a substantial threat to brand equity) is shared by various researches (Ahluwalia & Gürhan-Canli, 2000; Keller & Aaker, 1992; Keller & Lehmann, 2006; Milberg, Park, & McCarthy, 1997; Sood & Keller, 2012). Apart from being atypical, brand dilution effects are weaker if brand extensions are less salient (attention-getting), less relevant in the customer's eye, or highly inconsistent so that customers mentally disconnect them from the parent (Keller & Sood, 2003, p.15). Apart

from dilution effects, brand extensions close to the parent (line extensions) also pose higher risks of self-cannibalization (Aaker & Keller, 1990) not only affecting older, less profitable products lines but also the existing, more recently introduced "cash cows" of a firm (Roberts & McEvily, 2005).

However, significant dilution effects were found to require negative experiences with a brand extension (Sood & Keller, 2012) and can be averted by using a sub-branding strategy. In a sub-branding strategy, the extension uses another name in addition to the parent's one (Apple- iPhone, iPad) (Keller & Lehmann, 2006; Keller & Sood, 2003; Milberg et al., 1997).

2.5.3 Success Factors of Brand Extensions

The majority of academic literature in the field focuses on the success factors of brand extensions. Again, the most widely cited factors originate from Aaker's 1990 paper (Bottomley & Holden, 2001). Accordingly, consumer evaluations of brand extensions depend on the parent brand's quality and the fit between the original and extension category (Aaker, 1990, p.55). Park, Milberg, & Lawson (1991) emphasize that fit on a product level is not as important as the consistency on a superordinate brand-concept level. Building upon the results of Park et al. (1986), the authors state that brand concepts help customers to position different products into categories representing abstract meanings unique to particular brands (e.g., luxury, high status) stemming from unique features of the brand's core products (e.g., high price, design) (p.186). An extensive list of success factors and a summary of existing academic research on the topic is attached in Appendix A.

2.5.4 Communication and Positioning of Brand Extensions

Focusing on communication strategies of brand extensions, Meyvis & Janiszewski (2004) find that apart from many of the success factors already mentioned, managers should focus their marketing and communication efforts primarily on the accessibility of their brand's core benefit associations. Bridges, Keller, & Sood (2000) emphasize the importance of explanatory links between the parent brand and extensions salient in the customer's mind. Martin, Stewart, & Matta (2005) support this view and find that marketing communication should focus on messages reinforcing common goals of parent brand and extension to ensure brand equity transfer. Trying to highlight links with very poor-fitting extensions, on the other hand, proved to be harmful to both the parent as well as the extension (Bambauer-Sachse, Hüttl, & Gierl, 2011). Furthermore, if an extension is very distant from the parent, it becomes more critical for marketers to establish the so-called points of parity anchoring the extension in the targeted market. Congruence between the extension's points of difference (in the target market) and those of the parent in the original market may increase the adaption and acceptance of the extension (Keller, Sternthal, & Tybout, 2002; Keller & Swaminathan, 2013)

2.5.5 Brand Extension Authenticity

Spiggle et al. (2012) explore a new factor of brand extension success: brand extension authenticity. Their main argument centers around the assumption that cultural and relational factors are significantly important to a customer's brand extension evaluation. In addition to the generally accepted notion that fit criteria influence the adoption and success of brand extensions, Spiggle et al. (2012, p.980) suggest that: *"…brands are cultural categories that can generate strong connections with consumers and shape how they respond to the evolution of a brand, especially its extensions."* Accordingly, consumers identify with a strong, value-driven brand, and this connection needs to be protected and transferred to the extension.

Consequently, a brand extension is considered legitimate when it preserves the authenticity of the parent brand. The authors define brand authenticity in two ways:

Internal consistency reflects whether a brand is true to itself and maintains its essential core. External consistency reflects whether a brand is what it appears to be, not counterfeit, or not the result of spin or exaggerated claims. Spiggle et al. (2012, p.968) as cited from (Brown, Kozinets, & Sherry, 2003) and (Grayson & Martinec, 2004) Spiggle et al. (2012) furthermore model brand authenticity along the following four dimensions: maintaining brand standards and style (uniformity of design and sensory elements), honoring brand heritage (place of production, production method, traditions, (see also Newman & Dhar (2014)), preserving brand essence (fundamental values) and avoiding brand exploitation (not every commercial option is pursued, not only profit-focused). Brand extension authenticity was found to predict consumers' reactions towards brand extensions when they showed a robust self-brand connection even when relevance and similarity were relatively low, potentially allowing brands to stretch to spaces deemed inappropriate by earlier research. On the other hand, brand extension authenticity possesses less explanatory value for functional brands (Spiggle et al., 2012). Kapferer (2012, p.291) supports this view arguing that the stretchability of a brand increases according to its type. For example, starting from a product-centered brand being least-stretchable, moving towards know-how-, benefit-, and personality-focus until reaching a value-focused brand. Each step increases the possibility of an extension.

2.5.6 New Brand or Brand Extension?

Particularly interesting for this thesis is the work of Mccarthy, Heath, & Milberg (2001), focusing on whether a new brand or an extension should be introduced to a market. The authors found that newly created brands can perform as well or even better than brand extensions when customers are presented with conclusive and easily accessible product information. In their study, brand extensions only performed better under stations of limited information availability and better extension-parent fit. The authors conclude that creating a new brand might be the preferred option in a situation with high dilution risks. Sub-branding is another option in situations facing the risk of

brand equity dilution, representing the middle ground between a possible multi-brand strategy and a "full" extension (Heath, DelVecchio, & McCarthy, 2011).

3. Previous Research

As explained in the last chapter, the present dissertation addresses a specific tension in Beverland et al.'s (2015) typology (Table 2), namely the mismatch between the current positioning of the brand and an emerging future threatening its relevance. The authors have already identified sustainability issues as a prime example of this tension. Accordingly, sticking to the core components of the theory on brand ambidexterity just introduced, the following in-depth literature review will focus on sustainable innovations and how companies can introduce them as sustainable or green brand extensions.

3.1 Sustainable Innovations

3.1.1 Definition of Sustainable Innovations

Even though the field has received much attention in the last ten years, the state of academic literature on sustainable innovations is still at an early stage (Weidner, Nakata, & Zhu, 2020), and therefore not yet coherently defined. Varadarajan (2017), for instance, found 11 synonyms for the term in different publications. Hojnik & Ruzzier (2016) notice that in contrast to conventional innovations, most available definitions focus on environmental components and encompass the two significant consequences of sustainable innovations, fewer adverse effects on the environment and more efficient use of resources.

There is also agreement on the fact that these innovations can come in many forms like products, processes, organizational setups, or marketing tools (Bossle, Dutra de Barcellos, Vieira, & Sauvée, 2016; Hizarci-Payne, İpek, & Kurt Gümüş, 2021; Hojnik & Ruzzier, 2016; Weidner et al., 2020). Varadarajan (2017) adds that sustainable

innovations can be radical, incremental, exploitative, or explorative. This thesis will also subsequently use his proposed definition of sustainable innovations being *"a firm's implementation of a new product, process, or practice, or modification of an existing product, process, or practice that significantly reduces the impact of the firm's activities on the natural environment. (p.17)"* Furthermore, throughout the rest of the present dissertation, the terms "sustainable" and "green" are used interchangeably and treated as synonyms, signaling the just mentioned improved environmental attributes of products or services.

3.1.2 Enablers, Drivers, and Consequences of Sustainable Innovations

Extant literature finds two factors to be most enabling for the success of sustainable innovations: top management commitment towards an overall sustainability-centered product-innovation strategy (Dangelico, Pontrandolfo, & Pujari, 2013; Katsikeas, Leonidou, & Zeriti, 2016; Mariadoss, Tansuhaj, & Mouri, 2011) and the development of related internal capabilities (Bossle et al., 2016; Chen, 2008; de Medeiros, Ribeiro, & Cortimiglia, 2014; Katsikeas et al., 2016; Mariadoss et al., 2011; Weidner et al., 2020). In addition, the knowledge of environmental laws and regulations and especially the connected economic incentives are of particular importance for sustainability-centered innovations (Bossle et al., 2016; Dangelico, 2016; de Medeiros et al., 2014; Hojnik & Ruzzier, 2016; Katsikeas et al., 2016). Another success factor identified by Mariadoss et al. (2011) concerns a company's marketing capabilities. Accordingly, they are essential to the success of sustainable innovations as sustainable new products are often connected to higher uncertainties for prospective customers, reversely requiring more communication and marketing efforts.

Drivers of sustainable innovations observable in the literature are regulatory pressures (Bossle et al., 2016; J. Hartmann, Inkpen, & Ramaswamy, 2021), increased demand by consumers (Bossle et al., 2016; Hojnik & Ruzzier, 2016), cost reductions (Bossle et al., 2016; Dangelico, 2016; Hojnik & Ruzzier, 2016), the aim of companies to increase their internal and external reputations (Bossle et al., 2016; Dangelico, 2016), business-networks and collaborations (Bossle et al., 2016; Dangelico, 2016) as well as stakeholder

pressures (Dangelico, 2016; J. Hartmann et al., 2021). Among the factors moderating sustainable innovation efforts and competencies, researchers found company size (Chen, 2008; Hojnik & Ruzzier, 2016), public ownership (Weidner et al., 2020), and international activities (J. Hartmann et al., 2021) to have a positive effect whereas increased complexity of the business environment (Katsikeas et al., 2016) tends to inhibit the latter.

First publications on their outcomes find sustainable innovations to have a positive influence on brand image and reputation (Chen, 2008; Dangelico, 2016; Hizarci-Payne et al., 2021), cost savings (Dangelico, 2016), competitive advantage (Dangelico, 2016), and relations with B2B-customers (Wang, Zhao, & Hou, 2020).

3.2 Sustainable Marketing & Branding

Scholars have discussed green or sustainability marketing since the early 1970s (Hartmann, Apaolaza Ibáñez, & Forcada Sainz, 2005; Kassarjian, 1971; Kinnear, Taylor, & Ahmed, 1974; Meffert & Kirchgeorg, 1993). This thesis follows the definition of Kirchgeorg & Winn (2006), defining sustainability marketing as: "*…the planning, coordination, implementation and controlling of all market transactions in such a way that a sustained satisfaction of the needs of current and potential customers toward the achievement of corporate objectives is granted, while at the same time contributing toward reducing ecological and social impacts and restoring social and ecological health" (p.176).* However, only a few studies have focused on sustainable or green branding (Hartmann et al., 2005).

The following chapter provides a brief overview of current academic knowledge on branding challenges of green new product introductions.

3.2.1 Antecedents of Sustainable Branding - Corporate Social Responsibility

In their early paper on the rise of environmentalism as a marketing strategy, Menon & Menon (1997) describe four development phases of an "enviropreneurial marketing strategy." Accordingly, companies move from neglecting environmental issues as drivers of marketing strategy towards a resistant adoption of some aspects that are manifested over time and then finally establish a full-fletched enviropreneurial marketing strategy. Particularly in the early stages, companies used Corporate Social Responsibility (CSR) initiatives as PR or defensive strategies before including them in their core business (p.54). Therefore, CSR can be considered a forerunner of what Papadas, Avlonitis, Carrigan, & Piha (2019) call a strategic green marketing orientation.

Bhattacharya & Sen (2003) find CSR activities help consumers identify more easily with a company or brand than conventional positioning strategies due to greater abilities to humanize with the latter. Notably, Du, Bhattacharya, & Sen (2011) also found that customers generally accept business motives behind CSR initiatives as long as the overall effort was perceived as sincere. Other positive effects of CSR initiatives include increased chances of a brand to be included in the customer's consideration set (Papista & Dimitriadis, 2019), customers perceive product performance and abilities more favorably (Chernev & Blair, 2015; Du, Bhattacharya, & Sen, 2007), increased customer trust and share of wallet for retailors (Swaen, Demoulin, & Pauwels-Delassus, 2021), and improved brand differentiation (Bhattacharya, Good, & Sardashti, 2020).

It is important to note that the respective effects of CSR on corporate performance or brand-related metrics largely depend on industry-, product- or customer-related factors. Positive moderators include product quality & customers' CSR-support (Sen & Bhattacharya, 2001), brand dominance, brand-product similarity and customer involvement (Berens, Van Riel, & Van Bruggen, 2005), brand size (Rahman, Rodríguez-Serrano, & Lambkin, 2019) or a challenging general economic climate, e.g., recessions (A. Bhattacharya et al., 2020; Hirunyawipada & Pan, 2020). Hirunyawipada & Pan

(2020) add that companies' environmental commitments have stronger positive influences on firm performance in clean industries than dirty ones.

Bhattacharya et al. (2020), however, find no proof for positive effects of CSR initiatives on brand metrics like brand value or brand trust during stable economic times, while CSR information even led to less-favorable brand evaluations for luxury or self-enhancement brands like watches or cars (Torelli, Monga, & Kaikati, 2012).

3.2.2 Green Marketing and Branding - Green Brand Equity

Du et al. (2007), Swaen et al. (2021), and particularly Torres, Bijmolt, Tribó, & Verhoef (2012) find strong evidence of a positive relationship between CSR and brand equity. Chen (2010) first combined green marketing literature with the established brand equity framework and coined "green branding." She defines "green brand image" as *''…a set of perceptions of a brand in a consumer's mind that is linked to environmental commitments and environmental concerns. (p.309)''*, and green brand equity as *''…a set of brand assets and liabilities about green commitments and environmental concerns linked to a brand, its name and symbol that add to or subtract from the value provided by a product or service. (p.310)''* Chen (2010) furthermore shows that a green brand image, as well as the fulfillment of a customer's environmental desires (green satisfaction) and the trust customers place in a company's green products and claims (green trust) positively influence green brand equity.

Furthermore, positioning a company or brand as green resulted in improved brand attitude and brand loyalty (Ginsberg & Bloom, 2004; Hartmann et al., 2005), a more positive brand image (Ginsberg & Bloom, 2004; Vesal, Siahtiri, & O'Cass, 2021), and subsequently also higher brand value (Rahman, Rodríguez-Serrano, & Faroque, 2021). Ng, Butt, Khong, & Ong (2014) also find evidence of a spillover effect of general brand credibility positively influencing green brand image and the green brand's perceived value, ultimately leading to an increase in green brand equity.

Apart from environmental benefits, customers' perceived ethical behavior of a company was also found to increase brand equity, moderated by recognition benefits

(strength of a brand) and brand image in general (Iglesias, Markovic, Singh, & Sierra, 2019). Interestingly, brand heritage harmed this relationship. This finding implies that younger brands can convey being more ethically better than old, established ones. Therefore, the authors suggest corporate heritage brands be consistent regarding their ethical commitments and promote a corporate culture supporting an ethical mindset among all employees (Iglesias et al., 2019, p.454). Arguing in a similar direction concerning political advocacy, Hydock, Paharia, & Blair (2020) propose that if a brand's customers are politically heterogeneous, taking a stand on a controversial political issue is likely to benefit small brands and harm larger brands.

3.2.3 The Burden of Sustainability - Perceived Product Performance

Having established the benefits of a green brand image and green branding strategies, it is essential to address one of the significant risks and drawbacks of environmentally branded products: Perceived product quality and performance.

Customers generally tend to perceive the quality of sustainable products (Sreen, Purbey, & Sadarangani, 2018; van Doorn, Risselada, & Verhoef, 2021) and their performance (Essoussi & Linton, 2010; Lin & Chang, 2012; Luchs et al., 2010; Newman et al., 2014) as inferior compared to conventional offerings. Furthermore, sustainability claims can be a liability for strength-related product attributes (Luchs, Naylor, Irwin, & Raghunathan, 2010), green products are perceived as less effective than conventional ones (Lin & Chang, 2012), and being "green" reduces product-efficacy perceptions of customers compared to conventional products (Pancer, McShane, & Noseworthy, 2017). Brough, Wilkie, Ma, Isaac, & Gal (2016) show that consumers engaged in green behaviors are stereotyped by others as being more feminine, confirming that firstly, women are in general more likely to engage in sustainable behavior and consumption (Sreen et al., 2018) and secondly that particularly men might be drawn away from engaging in sustainable behavior like buying green products for instance.

Ginsberg & Bloom (2004) even warn against consumer backlash because of being perceived as too green and the resulting abandonment by customer segments indifferent or even hostile towards green products or sustainable product attributes. In a very recent publication, however, Chernev & Blair (2021) summarize the contradicting literature on green branding effects on consumer behavior and argue in favor of what they call a halo-effect of sustainability, or the customers view of a company as a moral agent that overrides negative impacts of customers underlying believes that sustainability comes at the expense of product performance.

3.2.4 Communication & Positioning of Sustainable Products

The just presented hurdles for green products as well as green brands to trigger more sustainable consumer behavior highlights the importance of green positioning and communication strategies (Meffert & Kirchgeorg, 1993) that, if well-executed, can improve brand perceptions and increase brand equity (Chen, 2010; Hartmann et al., 2005).

Green brand positioning strategies should be based on functional product attributes like specific environmental advantages of the product as well as emotional benefits (Hartmann & Apaolaza-Ibáñez, 2012; Hartmann et al., 2005). Hartmann et al. (2005, p.21) suggest that green brand communication should convey pleasant, emotional images of nature next to brief and precise descriptions of the environmentally beneficial product attributes. In a later study on the energy sector, Hartmann & Apaolaza-Ibáñez (2012, p.1260) find that emotional messages should appeal to the customer's sense of community, highlighting the benefits of green energy for the local environment and community. This view is also shared by White, Habib, & Hardisty (2019), adding that guilt-evoking communication triggers sustainable consumer behavior as well as eco-labeling (Gaspar Ferreira & Fernandes, 2021; Sarkar, 2012) and the suggestion of specific actions/consumption decisions to tackle them.

Gershoff & Frels (2015, p.108) furthermore argue that consumers typically have clear preconceptions of central and peripherical attributes of products. Therefore,

sustainable R&D investments and communication strategies should focus on these central attributes. For instance, investments in recyclable packing, even though a laudable cause, might not perceived as genuine when the product itself is not (perceived as) sustainable at all (Gershoff & Frels, 2015).

Furthermore, companies should use less strong language to address a customer segment or target audience that is not yet concerned about environmental issues (Kronrod, Grinstein, & Wathieu, 2012) and ensure transparency in all communications to prevent any allegations of greenwashing (Lin, Zhou, & Leckie, 2020).

3.3 Sustainable Brand Extensions: A Systematic Literature Review

3.3.1 Methodology

The following subchapter aims to merge the discussed theory of brand ambidexterity and the overview of the extant literature on sustainable branding and innovations and focuses them on the research question of this study. This goal requires exploring and mapping current knowledge on green or sustainable brand extensions and their effects on the parent brand. A systematic literature review (SLR) will subsequently be applied to identify relevant academic literature.

The need for such a systematic review may arise from several potential requirements. Tranfield, Denyer, & Smart (2003, p.207) note that traditional reviewing methods sometimes lack thoroughness and sensemaking and can be biased by the reviewer and therefore lack rigor. SLRs are particularly suited to summarize evidence regarding the benefits and limitations of specific topics and to uncover research gaps or suggest areas for further studies (Kitchenham & Charters, 2007). SLRs furthermore offer a higher chance to summarize all existing knowledge or information about a phenomenon (Kitchenham & Charters, 2007), a benefit that is particularly valuable for this thesis summarizing the existing, often fractured literature on sustainable brand extensions.

The following systematic review is structured according to the four phases suggested by Okoli (2015, p.885). These include planning, literature selection, data extraction, and execution.

3.3.1.1 Planning Phase

The first phase of an SLR focuses on identifying specific research questions to be answered with the review (Kitchenham & Charters, 2007). The following research questions derived from the general focus of the dissertation guided the SLR:

- What strategies can established companies use to introduce sustainable innovations and brand extensions?
- How do consumers view green brand extensions of established companies?
- How do these brand extensions affect the parent brand?
- How can these brand extensions be communicated?

3.3.1.2 Selection Phase

This stage of the SLR requires defining a screening process consisting of specific inclusion and exclusion criteria used during the search process (Okoli, 2015). The most critical part of this screening process regards the appropriate selection of keywords used in the search process (Tranfield et al., 2003). Table 3 lists the terms used in the present SLR.

First Term(s)	Second Term(s)
Green	Brand Extension
Sustainable	New Product Introduction
Environmental (friendly)	Brand Transition
Eco (logical)	Brand Transformation

Table 3: Systematic Literature Review Search-Terms; Source: Own Representation

Every first term was connected, if possible, at the specific database, with a Boolean "and" to every second term (e.g., green brand extension, green new product introduction). Following Cartwright, Liu, & Raddats (2021), who recently published a systematic literature review in the field of industrial marketing, and other authors

(Brereton, Kitchenham, Budgen, Turner, & Khalil, 2007; Gotsch & Schögel, 2021; Okoli, 2015), the following electronic databases were searched using the terms specified above in the title, keywords, and abstracts:

- EBSCO
- Emerald
- Scopus (Including Science direct)
- Web of Science
- Google Scholar

This review includes scientific papers published from 2000 until September of 2021. Included publications needed to be peer-reviewed and written in either German or English and originate out of the broad research areas of "Marketing," "Sustainability," or "General Management." No restrictions were placed on the research methods used. However, only publications using established companies or existing brands as research subjects were included. As suggested by Bandara, Furtmueller, Gorbacheva, Miskon, & Beekhuyzen (2015) and Tranfield et al. (2003), forward and backward sampling (literature mentioned in the paper or key paper cited by other authors) of highly-cited papers, or papers particularly relevant to the research question was used to identify publications that might have been missed using the pre-defined search-grid.

3.3.1.3 Extraction Phase

During this phase depicted in figure 3, the number of relevant papers was reduced by a manual screening process that applied the predefined exclusion or inclusion criteria to the obtained results. In order to assess the quality of the remaining publications, they were subjected to the following three criteria based on Bandara et al. (2015):

- Are the inclusion criteria explicitly mentioned in the paper?
- Does the publication give any practical recommendations on introducing sustainable products under established brands?
- Are these recommendations based on clear, well-presented evidence?

After the first round of broad, manual screening of the results on each database, 67 publications were selected for a more thorough review. Subsequently, after reviewing every paper based on its abstract and type of publication (journal, conference paper, book chapter, case study), 32 papers published in peer-review journals progressed towards the next stage of an in-depth, full-text review. This review excluded 21 papers not particularly addressing the research questions described above. The addition of two more papers through forward- and backward-sampling brought the final number of relevant publications to 13.

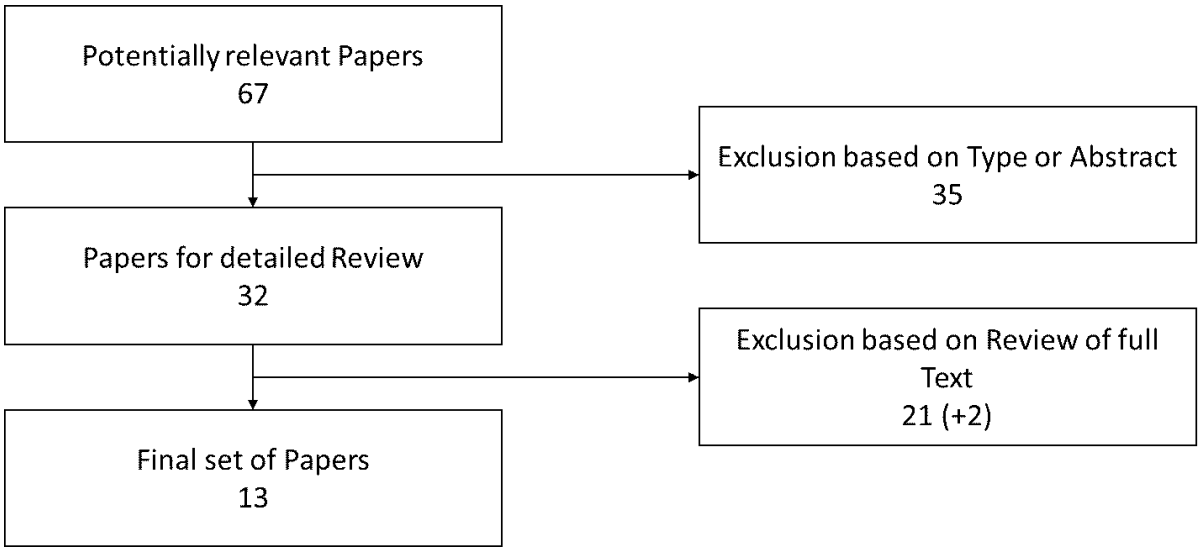


Figure 3: Overview of the Paper Selection Process; Source: Own Representation

3.3.1.4 Execution Phase

During this last step, the obtained papers were stored in the reference manager "Mendeley" and entered into Excel with key information like authors, publication date, journal, theory & methodology used, and a summary of the key results. This overview is provided in Appendix A. The extracted papers were analyzed and clustered as presented in the following sub-chapter as a final step.

3.3.2 Analysis & Synthesis of existing Research

Figure 4 gives an overview of the covered themes in existing research on green or sustainable brand extensions. While most publications deal with evaluations of green

brand extensions, other focal issues identified concerned the pricing strategies for green brand extensions in relation to an established product range, communication strategies for green brand extensions, the decision whether to introduce a new green brand versus an extension and the effects of green extensions on the parent brand. As indicated in figure 4, some papers address two of the identified research areas. Subsequently, the systematic literature review findings are reported, clustered according to the identified categories.

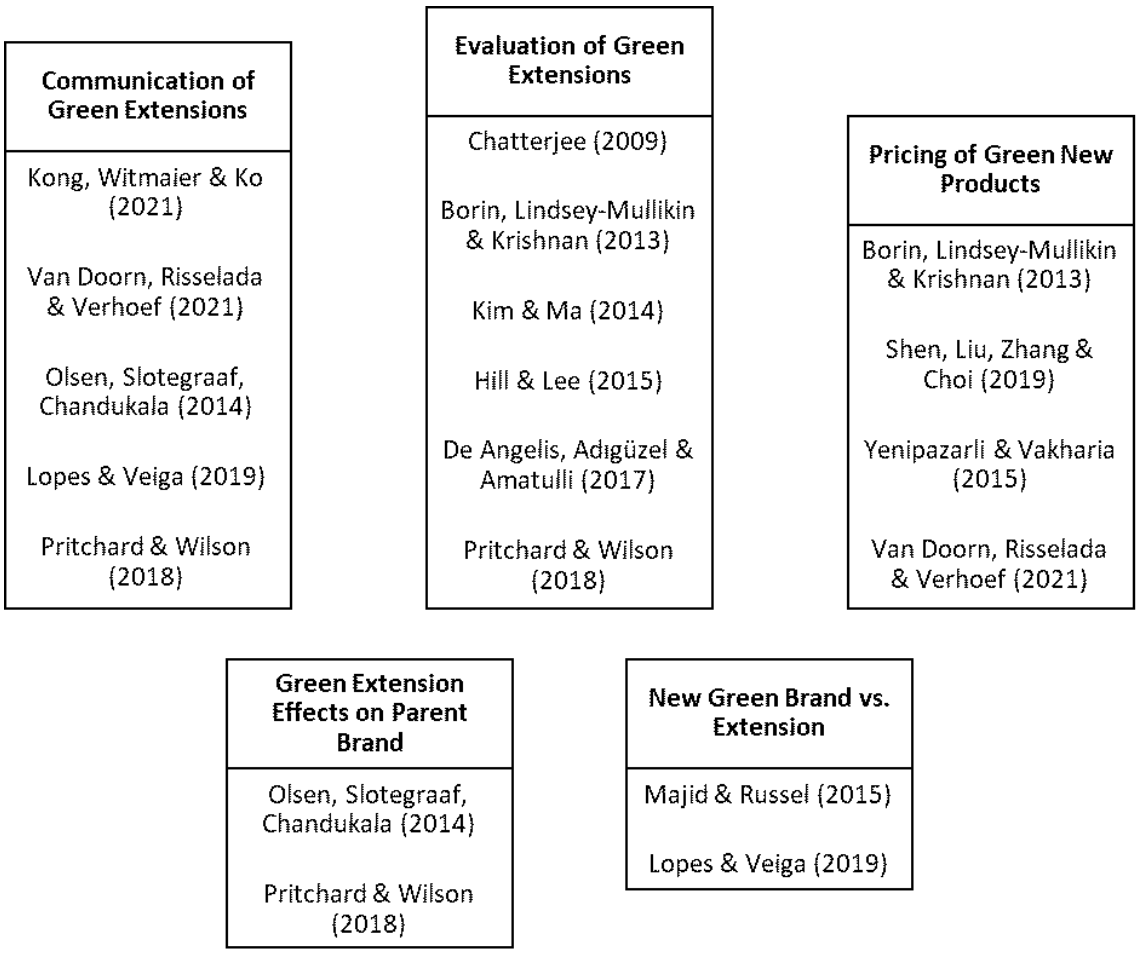


Figure 4: Research Themes of Literature on Green Brand Extensions; Source: Own Representation

3.3.2.1 Evaluation of Green Brand Extensions

In an early work, first coining the term "green brand extension" in academic literature, Chatterjee (2009, p.380) distinguishes green line from green category extensions.

Summarizing, the author states that green line extensions will create higher returns with existing customers, however risking self-cannibalization leading to the conclusion that large brands should focus on line extensions, retaining existing, increasingly environmentally conscious customers. At the same time, small niche players can benefit more from extending to other product categories.

In their work on possible greening strategies of established brands, Borin et al. (2013) report a generally positive impact of sustainable new product introductions on consumers' purchase intentions. However, these positive effects could only be reported for environmentally savvy customer segments. Furthermore, green strategies showed no impact on customers not sensible to environmental issues. These findings are supported by the results of Kim & Ma (2014), arguing that green brand extensions appeal to environmentally-conscious consumers in general, while the authors also could not find compelling arguments that the same holds for consumers loyal and familiar to the established brand. However, the authors conclude that real fans of a brand are likely to buy green product extensions anyway as they have developed strong brand attachment and trust over time. These findings suggest that green brand extensions could succeed even within the established non-green customer segment as long as existing key brand characteristics and values are not diluted or contradicted (Kim & Ma, 2014, p.178).

Notably, a significant amount of literature in the intersection between sustainability and brand extensions investigates this phenomenon in a fashion context (De Angelis, Adıgüzel, & Amatulli, 2017; Hill & Lee, 2015; Kim & Ma, 2014; Kong, Witmaier, & Ko, 2021). Hill & Lee (2015, p.216), for instance, find that even against harsh criticism of fast-fashion brands because of their unsustainable behavior (several fashion lines a year, bad working conditions in low-wage countries), consumers might perceive the seemingly opposing poles of "Sustainability" and "Fast Fashion" as fitting. However, this perception depended on whether the brand's efforts were seen as sincere, in line with the brand's image in general, and designed to be long-lasting.

Arguing similarly regarding the perceived fit of green brand extensions, De Angelis, Adıgüzel, & Amatulli (2017) suggest that luxury fashion brands should follow

different product-design strategies depending on the targeted customer type. Accordingly, consumers are already familiar with the brand demand consistency between green new products and previous offerings. Therefore, new green products should not resemble established green brands or companies to cater to these customers. However, this effect could not be confirmed for customers showing low familiarity or non-usage of the brand, suggesting that in order to address environmentally conscious non-users, luxury companies could align new green new product design according to existing, green brands on the market (De Angelis et al., 2017, p.1526).

Pritchard & Wilson (2018) confirm the general positive effect of green new products on corporate reputation in their study on sustainable services in the US-energy industry. In agreement with De Angelis et al. (2017) and Hill & Lee (2015), they confirm that perceived green extension-parent-fit is a strong moderator for the relationship between green new product introductions and corporate reputation. However, this effect was reversed, even leading to negative evaluations of green brand extensions when they were too closely associated with a parent brand suffering from severe criticism and bad reputation (Pritchard & Wilson, 2018, p.47).

3.3.2.2 Pricing of Green Brand Extensions

A relatively well-researched topic in the field of econometrics is pricing- strategies of green new products in relation to existing conventional or unsustainable offerings.

As a sobering insight for sustainability advocates, Borin et al. (2013, p.124) find that even environmentally-engaged customers are unwilling to pay a price premium for green products. However, van Doorn et al. (2021, p.191) partially oppose this finding, arguing that price promotions show weaker effects on trial rates for green new products than conventional ones, suggesting that too aggressive price-cuts and promotions can harm the sustainable image of green new product introduction.

Shen, Liu, Zhang, & Choi (2019) explore possible pricing strategies for introducing green-new products during the presence of non-sustainable alternatives in the same

market. The authors find that green products yield higher profits when priced after conventional ones. However, they also caution against simultaneous pricing strategies as they harm profits, particularly when their functionalities are easily substitutable (p.323). Particularly concerned about green products cannibalizing the established conventional or "brown" offerings, Yenipazarli & Vakharia (2015) assume that any green new product introduction will draw customers away from established brown offerings and suggest a flexible pricing strategy using a relatively moderate price premium on green new products in order to maximize overall profits. Furthermore, in a market characterized by a high proportion of green consumers, the price premium should be high, partly to counter the decline and cannibalization of brown product sales. On the other side, if the market for sustainable products is just in a development stage, firms should try to cater towards price-conscious green consumers slowly transitioning away from the brown segment (p.311).

3.3.2.3 New Green Brand versus Extension

In a publication especially close to the topic of this dissertation, Majid & Russell (2015) explored whether brand extension or new brand introductions offer better value retention for green products in the US used-car industry. Comparing after-market data of five different car manufacturers over seven years, Majid & Russell (2015) found that stand-alone hybrid brands like the Toyota Prius retained greater value than extensions of non-green brands, suggesting that the unique greenness of a brand offers certain benefits. On the other hand, Lopes & Veiga (2019, p.563) presented opposing results, finding clear benefits for extending an existing brand over introducing a new one to the market. According to the authors, well-known brands should be leveraged to enhance consumer interest in green new product introductions, particularly when promotion in mass media can be used.

3.3.2.4 Green Extension Effects on Parent Brand

One of the most influential academic papers for this dissertation is the work of Mitchell Olsen, Rebecca Slotegraf, and Sandeep Chandukala (2014), published in the Journal of Marketing. The authors address a gap in the literature on whether the introduction of green new products can change the attitude of an existing brand, particularly focusing on brand-specific effects. Furthermore, the authors also examine the moderation effects of green message quantity and valence, source credibility, and product type on the relationship between green new product introductions on brand attitude. Building on existing research on brand extensions, social identity theory, and framing theory, Olson et al. (2014) propose a comprehensive conceptual framework on the interconnection of these effects. Notably, their model also distinguishes virtue and vice products (van Doorn & Verhoef, 2011). Products with high virtue attributes offer "healthful" long-term benefits, while vice attributes refer to the instant gratification of desires and tend to be less healthy, for instance (Olsen et al., 2014, p.123). Using a three-stage least squares model consisting of 75 FMCG companies in the United States, Olsen et al. (2014) could generally confirm that green new product introductions improve an existing brand's attitude. Particularly relevant for this thesis are their findings for old or established brands. According to the authors, green new products tend to benefit young vice brands more than old ones, as they are subjected to well-established consumer associations. However, the authors argue that because of this reason, green new products might not always improve brand attitude and suggest brand managers introduce these products under a sub-brand rather than directly under the established parent (p.134).

In line with Olsen et al.'s (2014) findings, Pritchard & Wilson (2018, p.47) confirm the general positive effect of green new products on corporate reputation, however, moderated by the company's reputation and particularly its industry. In their study on sustainable services in the US-energy industry, using a 135-years old energy provider's green brand extension, the authors built their research around an old company operating in an, according to Olsen et al. (2014), vice industry, primarily due to its dependency on fossil fuels.

3.3.2.5 Communication of Green Brand Extensions

Olsen et al. (2014) also explored messaging or communication strategies for green brand extensions by different kinds of established brands. In line with the authors' expectations, fewer sustainability claims on new products resulted in enhanced brand attitude evaluations while the valence of these claims had no measurable effects. However, product type and brand age (Iglesias et al., 2019) were critical moderators of the relationship between green new product introductions and brand attitude changes. Their main findings and implications are summarized in table 4:

Brand Profile		**Recommendations for Improving Brand Attitude**
Brand Longevity	**Product Type**	**Green New Products and Green Claims**
Young	Vice	Introduce a higher number of green new products, but reduce the number of green claims.
Young	Virtue	Green new product introductions have no significant effect on brand attitude.
Old	Vice	Introduce a higher number of green new products, but reduce the number of green claims. Too many green claims will decrease brand attitude.
Old	Virtue	High number of green product introductions only have a minimal effect. Therefore, the number of green claims should be limited.

Table 4: Key Results Olsen et al. (2014); Source: Adapted from Olsen et al. (2014)

In a recent publication, Kong, Witmaier & Ko (2021) found that looking at German consumers, sustainability-promoting posts on social media displaying a fashion brand's green extension positively influence the brand attitude of luxury and non-luxury products alike. However, this effect reverses for customers with high existing brand knowledge. Van Doorn, Risselada, & Verhoef (2021) find sales figures of newly introduced products with sustainability claims lower than conventional launches and also attribute them a higher likelihood of failure. However, this negative impact can be reduced by a company's good reputation gained through a consistent and well-

communicated CSR strategy prior to the product launch. Pritchard & Wilson (2018, p.47) suggest that companies with sustainability issues consider "dual-level" communications strategies when introducing green new products, avoiding generating direct connections to the parent brand. Lopes & Veiga (2019) further add that positive emotional communication should be employed when segmentation is challenging. However, in the presence of a prevention-focused customer segment, communication tactics targeting their loss-aversion offer higher benefits to the brand.

3.3.3 Summary of Results

To summarize, the advice academic literature has to offer for companies considering green brand extensions is not only scarce but sometimes even conflicting. Table 5 gives an overview of the results from the systematic literature review and the sometimes-contradicting results.

Undisputed/general findings:
• Existing Customers prefer green line extensions over category extensions (Chatterjee, 2009). • The general importance of parent brand – extension-fit was also confirmed for green extensions, particularly regarding the cause/socio-ecological problem targeted by the green extensions (De Angelis et al., 2017; Hill & Lee, 2015; Pritchard & Wilson, 2018). • Self-cannibalization of established, brown product offerings by green brand extensions is a realistic but unavoidable threat that can be partly countered by employing flexible pricing structures (Shen et al., 2019; Yenipazarli & Vakharia, 2015). • The number of green claims should be limited when introducing green brand extensions (Olsen et al., 2014).
Contradicting and case/brand-dependent findings:
• Green new product introductions are generally perceived positively by existing and prospective customers (Borin et al., 2013; H.-S. Kim & Ma, 2014; Pritchard & Wilson, 2018), but several conditions moderate this effect: o Only if customers are environmentally conscious/savvy (Borin et al., 2013; H.-S. Kim & Ma, 2014). However, existing non-environmentally conscious "fans" of a brand might buy these products anyway (H.-S. Kim & Ma, 2014), o but only if they are consistent in style and usability with pre-existing offerings of the brand (De Angelis et al., 2017)

○ Evaluations of green brand extensions also suffer when they are too closely aligned to a vice parent brand (Pritchard & Wilson, 2018).
• Customers were also susceptible to the pricing of green brand extensions. On the one hand, most customers are not willing to pay a price premium for these new products (Borin et al., 2013). However, price promotions were also found to have a weak effect on trial rates of green new product introductions (van Doorn et al., 2021).
• Stand-alone green brands offer better value retention over time than green brand extensions (Majid & Russell, 2015). However, green brand extensions also offered significant benefits by leveraging well-known large brands' existing brand equity (Lopes & Veiga, 2019).
• Established brands do benefit from green brand extensions (Olsen et al., 2014; Pritchard & Wilson, 2018), but this is, again, contingent on the specific case/brand under observation. For instance, green new products were more beneficial to younger vice brands than older ones (Olsen et al., 2014).
• Sustainability claims appeal to current and non-users of a brand but possibly harm brand associations of established customer segments (Kong et al., 2021) and might even increase chances of new product failures (van Doorn et al., 2021).
• Sustainable new product introductions and related claims are essential to the extension itself but might need to be separated from a vice parent brand to avoid adverse spillover effects (Pritchard & Wilson, 2018).

Table 5: Findings of Systematic Literature Review; Source: Own Representation

Concluding, table 5 summarizing the extant literature on sustainable brand extensions shows that there still exists a considerable uncertainty on how exactly how sustainable innovations should be added to an existing product portfolio. Moreover, while some findings seem universally applicable to various industries and brand types, many are valid only for the case under investigation or contradict a different study, requiring more research like the present dissertation.

3.4 Sustainable Food Marketing & Branding

Concluding the elaborations on preexisting research, the following subchapter presents vital insights from food marketing and branding, mainly focusing on sustainable or organic food products.

3.4.1 The Value-Action Gap in Food Marketing

Even though it is still under discussion whether or not, or under which conditions specifically, organic products are more sustainable than conventional ones (Muller et al., 2017; Seufert, Ramankutty, & Foley, 2012; Tuomisto, Hodge, Riordan, & Macdonald, 2012) the good amount of academic literature on overcoming consumer's barriers towards their consumption as well as labeling and communicating these products offers valuable insights for marketing other sustainable food products, like APPs, for instance.

Comparable to most other sustainable products, organic food faces the challenge of a hard to overcome value-action gap, describing in this particular case the difference between consumers' attitude towards organic food and their actual purchase behavior (Hughner, McDonagh, Prothero, Shultz, & Stanton, 2007; Magnusson, Arvola, Koivisto Hursti, Åberg, & Sjödén, 2001). Mainly because of this reason, organic food marketing and especially the connected consumer behavior research was described as containing many paradoxes, inconsistencies, dilemmas, and confusion in general (McDonagh & Prothero, 2005), making it challenging to predict consumption patterns in this field (Juhl, Fenger, & Thøgersen, 2017). Furthermore, apart from behavioral inconsistencies, the primary challenge in marketing organic food products concerns making them more attractive for a broader audience (Van Doorn & Verhoef, 2015) while at the same time, price still represents the main buying-decisive criterion even for environmentally engaged customers open to organic consumption (Apostolidis & McLeay, 2019; Bezawada & Pauwels, 2013; van Doorn & Verhoef, 2011).

3.4.2 Influencing Factors on Organic Purchasing

Van Doorn & Verhoef (2015) find that targeting environmentally conscious consumers represents a promising strategy for brands selling organic products. However, the vast majority of the available academic literature suggests a different approach or at least different focal points in positioning these products, namely targeting hedonistic or self-centered benefits or drivers of organic product consumption, above all health consciousness and nutrition self-efficacy (Cho & Baskin, 2018; Hughner et al., 2007;

Mai & Hoffmann, 2012). In a recent review, Mai, Hoffmann, & Balderjahn (2021) support these findings stating that marketers should address their target segment's self-centric or hedonistic motivations rather than other-oriented motives to generate sustained, long-lasting purchases. This finding is particularly interesting as many marketing campaigns of sustainable products highlight nature or the customers' contribution to society.

Furthermore, while consumers generally prefer local or national products over imported or foreign ones (Newman, Turri, Howlett, & Stokes, 2014), this effect was weaker for organic offerings (Pedersen, Aschemann-Witzel, & Thøgersen, 2018; Thøgersen, Pedersen, Paternoga, Schwendel, & Aschemann-Witzel, 2017). Supporting categorization theory, van Doorn & Verhoef (2011, p.175) use the already mentioned distinction between virtue and vice products and show that organic virtue products make up a significantly larger share than vice products in the Dutch market. Additionally, the authors find customers somewhat reluctant to buy organic products in vice categories and report a negative relationship between organic products and perceived product quality in vice food categories.

3.4.3 Branding of Sustainable Food Products

Sharma et al. (2016) suggest companies use their brand equity and R&D expenditures to signal adequate levels of product innovation to reduce customers' uncertainty connected to the quality and taste of organic offerings. However, large multinational brands and their associated strong brand equity might also hurt organic product sales as customers could perceive these established brands as too traditional and attached to their conventional food offerings (Sharma et al., 2016, p.5668). Similarly, Ryan & Casidy (2018) also suggest marketing managers align their brand's values with those of their target segment and ensure a positive brand reputation to increase organic food's attention and purchasing likelihood.

Trust in credence-attributes of products and a further step brands is particularly important in the organic food segment and still represents one of the biggest hurdles

to convince non-users (Nuttavuthisit & Thøgersen, 2017). Generating and sustaining these trust levels becomes even more challenging when a brand is involved in a food safety scandal. Roy, Tata, & Parsad (2018, p.31) find that a customer's emotional brand can create a sense of forgiveness among customers but only if countermeasures and other trust-building actions are communicated honestly and sincerely.

3.4.4 Introducing Organic Products next to Conventional Products

Particularly relevant and interesting to this thesis were a few academic papers that looked into the effects organic product introductions can have on an existing, conventional product range and how the two segments interact with each other, especially when introduced under the same brand.

In general, introducing organic products next to established segments hurts or cannibalizes strong national brands more than retailers' private-label brands, for instance, as they are closer in terms of pricing and perceived product quality (Bezawada & Pauwels, 2013). More precisely, perceptions of social and environmental performance and product quality significantly decreased for established mainstream products when organic products entered the market. This effect was also persistent when sustainable and conventional products were sold under the same brand name (Grunert, Hieke, & Wills, 2014). In line with this argumentation, Mehta & Agrawal (2020) use experiments to show that extensions into organic products are evaluated more favorably by customers if they originate from an organic parent brand than a non-organic one. Anagnostou, van Trijp, & Ingenbleek (2015) also show that adopting sustainability labels on some products of established brands can entail unwanted side effects. While the labels may appeal to environmentally and socially responsible customer segments, improving a company's image and reputation, they could also have adverse spillover effects on existing customers loyal to the non-organic mainstream brand, causing the latter's equity to erode solely. This dilution happens mainly because of alerting existing consumers that not all products offered by the company or brand comply with the new, organic product line's stricter environmental or social standards (Anagnostou et al., 2015, p.428).

Bezawada & Pauwels (2013, p.44) suggest that larger, well-established national brands acquire organic brands from smaller companies or develop their own products with clearly distinct branding from the parent. Acquiring small brands can be especially useful for minimally processed foods like dairy, produce, or cereal, where small, local brands have a higher sales impact than larger national ones. Providing slightly different evidence, Ryan & Casidy (2018, p.245) find that customers positively perceive the launch of an organic product line under an established brand name with a preexisting good reputation.

4. Practical Background

4.1 The Meat Industry

The following pages give a short overview of the meat industry's challenges and figures focused on Austria, Germany, and Switzerland. The thesis focuses on these three countries due to their similarity in consumer behavior (meat consumption) and market structure as well as practical reasons, mainly to focus the study and particularly the data gathering process.

4.1.1 Meat Production & Consumption in Germany

Meat consumption and production are deeply rooted in Germany's (culinary) culture (Benning et al., 2021). This connection translates to total revenues of the country's slaughtering and meat processing companies of roughly 44.5 billion € in 2020 (German Federal Statistical Office, 2021a) as well as to an annual per capita consumption of 57.3 kg, down from 63.9 in 1991[1] (German Federal Ministry for Food and Agriculture, 2021). Out of about 128.000 people working in the sector in Germany in 2020, the German Federal Statistics Office only listed seven companies in the meat processing sector with more than 1000 employees and 23 with 500-999 employees (German Federal Statistical

[1] An extensive graph is attached in Appendix B

Office, 2021b). What might look like a diverse field of many small players is, in fact, an industry dominated by a few large companies, especially slaughtering companies. In 2019, the top-10 pig-slaughterhouses, Germany's most popular meat, had a combined market share of roughly 80%. The largest three (Tönnies 16,7 million pigs per year, Westfleisch 7,7M And Vion 7,6M) already account for nearly 60% of the whole pig market. Similar conditions apply to the beef and poultry sector (Bundesanstalt für Landwirtschaft und Ernährung (BLE), 2020). A table listing the ten largest meat companies in Germany is attached in Appendix B. Facing a highly consolidated retail and supplier situation in Germany, traditional mid-sized companies in the processing field (sausage & ham production, for instance) started to disappear or merge. Additional to the competitive environment, recent scandals like Covid-19 outbreaks in connection with working and living conditions of temporary workers, discussions on animal welfare, and the outbreak of the African swine flu (Germany's pig industry is highly export-oriented) pose further challenges to the industry (Bundesverband der Deutschen Fleischwarenindustrie e.V., 2020).

4.1.2 Meat Production & Consumption in Austria and Switzerland

Comparable to Germany, Austrians and Swiss are large meat consumers as well. With a per-capita consumption of 60.5 kg, Austria ranks on top of the three, with Switzerland consuming the lowest amount with 50.9 kg per person per year in 2020[2]. Just like in Germany, pork represents the favorite meat of Austrian and Swiss people (Heinrich Böll Stiftung, Global 2000, & Vier Pfoten, 2021; Proviande Genossenschaft, 2021; Statistik Austria, 2021). However, the similarities between Austria and Switzerland do not manifest in the structure of their meat industry. Even though both dominating retailers in Austria, SPAR, and the REWE-group are vertically integrated into meat processing, the country still represents a diverse market of a few slaughterhouses and several mostly family-owned processing companies. Switzerland, however, is dominated by the two major retailer's production branches,

[2] A detailed comparison is attached in Appendix B

Bell (Coop) and Micarna (Migros). The five biggest meat processing companies of Austria and Switzerland are depicted in Appendix B as well.

4.2 The Rise of Alternative Proteins

4.2.1 Definition of "Alternative Proteins"

According to Phillips & Williams (2011), one of the first definitions of the term "Alternative Proteins" as it is understood today can be traced back to a patent application by Morimoto, Edgar, & J.Hirasuna in 1982. In this patent titled "Extruded Protein Product," the authors patented parts of the technology still used to produce many of the currently available products on the market. Their patent defined meat analogs as being "*…prepared from an aqueous protein solution comprising heat-coagulable protein. The heat coagulable protein in the solution is denatured before or after the intimate mixing with a starch and an alkali metal sulfite, the moisture level of the resulting mixture is adjusted to a level suitable for extrusion in equipment that shapes and forms a fibrous protein product having meat-like texture;…a meat analog is a food product made to resemble a meatflesh material such as chicken, beef, pork or seafood" (Morimoto et al., 1982, pp.1–2).*

Defining the term "meat replacements," the Swiss Federal Agriculture Agency follows the suggested definition by Morimoto et al. (1982), defining them as products trying to mimic character trades (texture, taste, or an ingredient in meals) of meat (Herrmann & Bolliger, 2021, p.7). Gerhardt, Warschun, Donnan, Ziemßen & Suhlmann (2020, p.4-5) offer a more detailed differentiation categorizing alternative protein products as:

- Classic vegan meat replacements: Products made out of tofu, seitan, mushrooms, or jackfruit but do not resemble the taste of meat and only represent a niche market catering towards long-term vegans.
- Classic vegetarian meat replacements: First-generation meat alternatives (Sausages, for instance) often contain animal-based ingredients like eggs. Taste is closer to meat compared to classic vegan replacements.
- Insect-based meat replacements: Products made out of insect protein, for instance, mealworms and crickets.

- Novel vegan meat replacements: Plant-based products with taste and texture resemble meat due to sophisticated production processes.
- Cultured meat: "Real" meat cultivated from single cells in bioreactors.

Figure 5 provides an overview of the terminology and categories used in the field of alternative proteins. "Alternative proteins" can be understood as a collective term that describes every product mimicking meat. The category "plant-based" describes various non-animal protein sources refined through extrusion. These include whey, soy, peas, and other legumes (Bashi, McCullough, Ong, & Ramirez, 2019; Phillips & Williams, 2011). In contrast to the plant-based products and the ones based on microorganisms (fungi, algae, hey), the categories "Insects" and "lab-grown meat" represent products still based on animal protein. Especially lab-grown meat has received much attention recently (Kateman, 2020). In this work, the terms alternative proteins, meat analogs, and meat replacements are used synonymously the describe the overall product category. The present dissertation's empirical part will exclusively focus on 2nd generation or "novel" plant-based meat alternatives. This limitation has several practical reasons: Firstly, meat alternatives based on fermented microorganisms and cell cultures are not market-ready yet and therefore not relevant from a marketing-management or branding perspective. Secondly, products based on insects, for instance, burgers, are available in the target region of this paper, Germany, Austria, and Switzerland, are frequently subject of consumer behavior literature (Jetzke et al., 2019) but failed to generate significant market share. Thirdly, as mentioned, traditional meat replacements have been available for some time and are well-established in their niche markets. However, recently introduced, plant-based products have gained market share over the last years and managed to resemble the taste and texture of meat and are therefore an interesting category to explore, particularly because they are adopted by many established players in the meat industry.

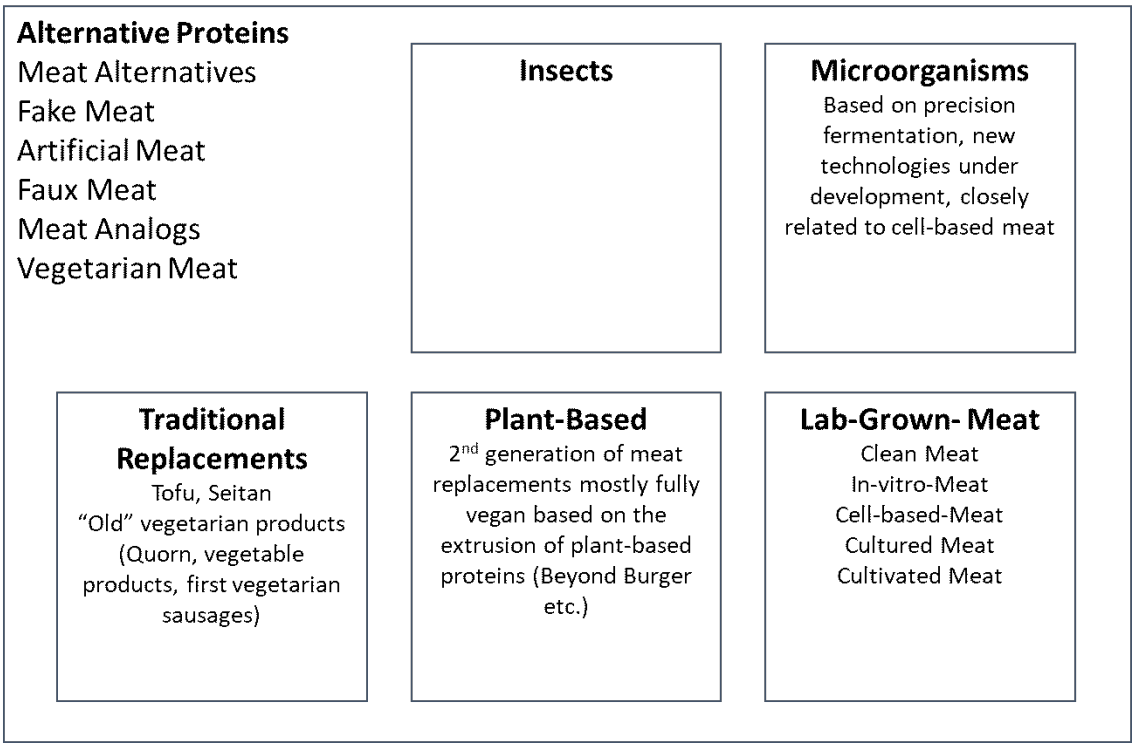


Figure 5: Terminology and Classification of Alternative Proteins; Source: Own Representation based on Bryant & Barnett, 2019; Carsten Gerhardt et al., 2020; Stephens et al., 2018; van der Weele, Feindt, Jan van der Goot, van Mierlo, & van Boekel, 2019; Witte et al., 2021)

4.2.2 Meat Alternatives as Solution to the Externalities of the Meat Industry

Even though it is established from a scientific standpoint that global meat consumption has to change to counter climate change and feed 10 billion people by 2050 (Poore & Nemecek, 2018; Willett et al., 2019), it is still not entirely clear how much plant-based APPs can contribute to a possible solution (Caprittio, 2019; Smetana, Mathys, Knoch, & Heinz, 2015).

Although the logic of replacing meat, converting plant based-proteins through animals into a raw material with products directly made of plants is compelling, proving the actual benefits through Life Cycle Analysis (LCA) is complex (Newburger & Lucas, 2019; Tugend, 2019). Most experts agree that more detailed analyses on the impact of APPs are necessary, but the general direction appears to be very promising, suggesting that replacing meat with APPs has a significant positive effect on the environment (Heller & Keoleian, 2018; Nijdam, Rood, & Westhoek, 2012; Tziva et al., 2019).

Another important consideration concerning the impact of APPs is whether consumers are just adding these products to their diets or actually replacing meat purchases. As a first answer to this question, Siegrist & Hartmann (2019) observed a negative correlation between meat consumption and consumption of substitutes in their study. This result would suggest that APPs replace meat rather than just being consumed additionally.

4.2.3 Startups in the Alternative Protein Field

The alternative protein market has seen many investments from established (meat) companies, venture capitalists, and celebrities. These investments have primarily focused on early-stage start-ups, particularly in the field of cultured meat and precision fermentation, prompting some experts to caution investors about the risk of a food-tech bubble (Belderok, Doortje, & Sabrine, 2021). Nevertheless, total investments in alternative proteins reached 16 billion US$ during the last ten years, supporting an estimated number of over 1000 start-ups globally (Dongoski, Bourquard, Holland, & Ritch, 2021). Beyond Meat and Impossible Foods have already been mentioned in the introduction as two of the most famous ones. Impossible Foods, with its two founding rounds worth US$700 million in 2020 and a further US$700 million in 2021, currently represents the highest-funded start-up in the field (Rodriguez et al., 2021).

4.2.4 Current and Future Market Estimations of Alternative Proteins

Naturally, in a market developing as quickly as the alternative protein field, estimations about market size and future projections are difficult to make. However, virtually every large business consultancy and other financial industry player have taken on this task, trying to predict the market developments for meat replacements in the following years.

Summarizing, available analyses do not even agree on the current size of the global meat alternatives market, let alone its future potential. Current estimations range from

US$ 27 billion to US$120 billion globally by 2025. A detailed list of these projections is attached in Appendix B. Apart from business consultancies, academics also tried to estimate the market potential of alternative protein products, mainly focusing on customers' willingness to try these novel products and use them to substitute meat in established products (Slade, 2018). An overview of existing literature on this topic is provided in Appendix B as well.

4.2.5 Alternative Protein Production & Consumption in Germany, Austria, and Switzerland

Naturally, the largest producer, as well as consumer of APPs of the three countries studied in this dissertation, is Germany, with products sold worth 181 million € in 2020, representing a 229% increase from 2019 (Smart Protein Project, 2021) and a less than 1% share compared with meat products of the same category (German Federal Statistical Office, 2021c). Austrian consumers bought meat replacements worth 25 Million € in 2020, a 56 % increase compared to 2019 (Smart Protein Project, 2021).

Even though Switzerland is roughly one-tenth the size of Germany, products worth close to half of the German revenues are sold in the country (see also Appendix B). The country's agricultural ministry recently published the first official report on the production and consumption of APPs in Switzerland. Out of 5.433 billion CHF of total meat sales, 117 Million were APPs, up from 60 Million CHF in 2016, translating to a little over 2% market share. Furthermore, APPs showed an annual growth rate of 18.1% since 2016, with a significant increase of 49% between 2019 and 2020. At the same time, meat sales increased by 2%, and sales of insect-based products even decreased. Vegetarian burger patties are especially popular among swiss consumers. Every sixth patty sold in retail outlets was plant-based in 2020 (Herrmann & Bolliger, 2021).

4.3 Alternative Proteins and Consumer Behavior

Customer acceptance plays a pivotal role in the success of meat alternatives. In their study, Strycula, Stott, Olsen, Eden, & Roberts (2019) surveyed 3,100 consumers in developed countries (US, UK, Germany) and reported that 79% of respondents show a generally high awareness of plant-based meat, but only 36% of respondents have "trialed" these products. Reasons for German customers to try these products included curiosity, climate concerns, animal welfare, health concerns, and good taste. Furthermore, 51% of the respondents considered APPs a viable solution to feeding the world's growing world population (German Federal Ministry of Food and Agriculture, 2020). Closely connected to the rising popularity of APPs is a profound change of consumption patterns in the DACH region. Strycula, Stott, Geiger, et al. (2019) report a share of 9% vegetarians in the US, UK & Germany, including roughly 2% vegans. Additionally, 55 % of Germans stated that they are actively trying to reduce their meat consumption, following a flexitarian diet (German Federal Ministry of Food and Agriculture, 2020). According to the German Society for Nutrition, flexitarians are "flexible" "vegetarians" that still like to eat meat but actively limit their consumption and reject factory farming (German Society for Nutrition, 2021). Flexitarians hint towards a crucial point in the adoption of APPs. They are not primarily consumed by ideological vegans or vegetarians and need to appeal towards a customer segment that is still familiar with the taste of the original product. This assumption is supported by the German Ministry for Food and Agriculture survey results finding that 85% of queried people having tried APPs eat meat regularly (German Federal Ministry of Food and Agriculture, 2020).

4.3.1 Customer Acceptance and Adoption of Alternative Protein Products

Subsequently, a brief overview of extant consumer behavior literature on APPs is presented clustered according to Everett M. Rogers' (2003) fundamental work on the diffusion of agricultural innovations. A complete list of reviewed papers is attached in Appendix B.

4.3.1.1 Product Attributes

Sensory attributes, meaning taste and texture of a product, are among the most critical factors influencing the consumers' decision to use APPs. (Apostolidis & McLeay, 2016; Hoek, Luning, et al., 2011). Further important product attributes include price (Apostolidis & McLeay, 2016; Lang, 2020) and similarity to existing meat products, especially to attract first-time users (meat-eaters) (Hoek, van Boekel, Voordouw, & Luning, 2011; Tziva et al., 2019).

4.3.1.2 Personal Values

In line with consumer research on organic products, hedonic values, most importantly perceived healthiness, are essential for the acceptance of APPs as well (Gómez-Luciano, de Aguiar, Vriesekoop, & Urbano, 2019; Strycula, Stott, Geiger, et al., 2019). Furthermore, environmental concerns had a more significant effect on the willingness to buy APPs than concerns on animal welfare (C. Bryant & Barnett, 2018).

A critical factor in marketing APPs is potential consumers' existing dietary preferences, especially concerning meat consumption. Although only a few studies are trying to measure the direct influence of meat consumption habits on the willingness to purchase APPs (C. Bryant et al., 2019; Lang, 2020), there is a whole theoretical construct called "meat attachment" discussed in the literature (Dowsett, Semmler, Bray, Ankeny, & Chur-Hansen, 2018; Graça, Calheiros, & Oliveira, 2015; Lacroix & Gifford, 2019).

4.3.1.3 Anthropology and Sociology

Another critical factor is the meal context within which APPs are prepared or eaten. We eat within our cultural habits and customs. Therefore, based on Elzerman et al. (2011), Elzerman, Hoek, van Boekel, & Luning (2015), and Hoek et al. (2013), the marketing and consumption context of APPs is very much relevant to the consumers' perception of familiarity, for instance.

4.3.1.4 Demographics

Younger people tend to be more open towards APPs (Belderok et al., 2021; Siegrist & Hartmann, 2019; Slade, 2018; Strycula, Stott, Geiger, et al., 2019), as are people with higher income (Belderok et al., 2021; Gómez-Luciano et al., 2019; C. Herrmann & Bolliger, 2021; Strycula, Stott, Geiger, et al., 2019) and higher education (Graça, Oliveira, & Calheiros, 2015). Furthermore, focusing on Switzerland, people living in urban areas in the German-speaking part of the country were more likely to buy APPs than French-speaking western Switzerland (Herrmann & Bolliger, 2021). Finally, looking into gender effects, men are more attached to meat than women (Vainio, Niva, Jallinoja, & Latvala, 2016). Consequently, women are generally more open to reducing their meat consumption and replacing it with APPs (Apostolidis & McLeay, 2016).

4.3.1.5 Communication & Information

Media coverage and marketing campaigns highlighting APPs can also positively affect the adaption of the latter as the general public awareness of the product category increases (Elzerman et al., 2015; Gómez-Luciano et al., 2019). Despite the already mentioned factors, an interesting field of study is the placement of APPs at the Point of Sale. Gravely & Fraser (2018) and Vandenbroele, Slabbinck, Van Kerckhove, & Vermeir (2019) suggest that in line with other research on the "familiarity factor," meat alternatives should be placed next to the product they intend to replace and not in a separate vegetarian section.

The academic insights on consumer behavior and APPS are evolving rapidly, and studies published in 2020 or 2021 might relate to the products of 2016 or 2017, which are considerably different from many products currently available on the market. Nevertheless, what becomes clear after reviewing this consumer behavior literature is in line with Witte et al.'s (2021) findings, summarizing that APPs have to be improved to achieve parity with meat products along three dimensions in order to gain higher market shares: Taste, Texture, & Price.

5. Methodology

5.1 Case Study Research

5.1.1 Definition

In general, case studies describe an intensive qualitative or quantitative analysis of a single unit or a small number of units whereby a unit is considered a case (Easton, 2010; Flyvbjerg, 2011; Seawright & Gerring, 2008; Yin, 2018). Scientific case studies are furthermore characterized by:

- The holistic (Easton, 2010) description and exploration of a practical challenge and its complex interrelations through different viewpoints and perspectives (Schögel & Tomczak, 2009)
- An in-depth data collection using multiple sources of data (Beverland & Lindgreen, 2010; Easton, 2010; Yin, 2018)
- An iterative theory-building process (Schögel & Tomczak, 2009)
- Clear, predefined boundaries or research settings (Flyvbjerg, 2011)

In her influential publication, Eisenhardt (1989) finds case studies particularly suited for situations with limited preexisting knowledge about the issue or phenomenon at hand. Also, when new findings contradict extant insights or theories, inductive theory building from case studies is especially helpful as it does not necessarily rely on established literature or empirical results (p.548). Table 6 provides an overview of the benefits and drawbacks of case study research designs.

Benefits and Strengths of Case Studies
+ High likelihood of generating novel theory out of contradiction or contradictory evidence (Eisenhardt, 1989).
+ Theories derived from cases studies are usually testable by easily measurable constructs (Eisenhardt, 1989).
+ Theories from case studies are likely to be empirically valid (Eisenhardt, 1989).
+ Theories derived from cases studies are “ideal” for falsification (Flyvbjerg, 2011; Welch, Piekkari, Plakoyiannaki, & Paavilainen-Mäntymäki, 2011)

+	Results usually have high practical relevance (Schögel & Tomczak, 2009; Yin, 2018).
+	Rigorous theory building from cases is highly objective as close adherence to the data keeps researchers "honest." (Eisenhardt & Graebner, 2007, p.25)
+	Case studies have comparative advantages to other research methods in settings characterized by high path dependencies. Additionally, measurement errors and omitted variables are less likely to accrue than frequentist research (Bennett & Elman, 2006).
+	Case studies are particularly suited to addressing issues of process and change (Lindgreen, Di Benedetto, & Beverland, 2021).
	Drawbacks and Weaknesses of Case Studies
–	Intensive empirical evidence might lead to overly complex theories (Eisenhardt, 1989; Schögel & Tomczak, 2009).
–	A phenomenon-driven approach with few cases can result in very narrow theories that are hard to generalize (Andersen, Dubois, & Lind, 2018; Eisenhardt, 1989; Siggelkow, 2007).
–	Selection biases might overstate or understate certain relationships (Flyvbjerg, 2011).
–	Data collection requires lots of time and effort (Schögel & Tomczak, 2009).

Table 6: Pros and Cons of Case Study Research; Source: Own Representation

5.1.2 Case Study Research Designs

In line with other authors (Perry, 1998; Yin, 2018), Schwandt & Gates (2017) define three general types of case studies:

- Descriptive Case studies represent the most common type of case study and often provide a complete portrayal of a phenomenon in a single case design.
- Hypothesis Generation & Theory Development case studies are exploratory, can focus on one or many cases, and often generate several propositions for further testing.
- Hypothesis & Theory Testing case studies follow an explanatory logic and a within-case analysis using process tracing and case comparisons and often consist of several cases.

Evident from this typology and Perry's (1998) argumentation, a significant decision regarding case study research designs concerns the number of cases to be explored. Depending on the research question or goal of the project, researchers can either choose a single or multiple-case approach. Yin (2018) furthermore differentiates between holistic and embedded case studies. In contrast to holistic studies focusing on the whole entity, embedded cases are explored using subunits to obtain more nuanced results. Single-case approaches provide rich grounds for theory building but tend to generate very narrow theoretical constructs (Andersen et al., 2018). Whether a multiple-case approach offers more benefits than a single study depends on the studied phenomenon and its underlying cases (Flyvbjerg, 2011; Lindgreen et al., 2021; Yin, 2018).

5.1.3 Case Selection & Types of Cases

In case studies, cases are not randomly sampled or selected but rather carefully chosen according to the research question at hand or theoretical framework to be tested (Eisenhardt, 1989; Flyvbjerg, 2011; Perry, 1998). However, this non-random selection and the connected non-representativeness of case studies complicates generalization efforts significantly and requires the definition of clear boundaries and goal definitions of research projects (Eisenhardt, 1989; Yin, 2018). Therefore, some research designs that focus on comparing cases (Most different, most similar, and diverse) require a multiple case approach. In contrast, others concentrate on unusual instances (extreme, deviant, or influential cases) that are often discussed using single-case designs (Eisenhardt & Graebner, 2007). The latter is particularly well suited for theory development purposes (Flyvbjerg, 2011). An overview of standard sampling and case selection methods is provided in Appendix C.

5.1.4 Crafting a Case Study

Having established the theoretical foundations of the case study method and its application and selection criteria, the next step in the research process usually focuses

on data collection & analysis. Figure 6 shows an overview of an exemplary case study research process based on the fundamental work and recommendations of Yin (2018) & Eisenhardt (1989).

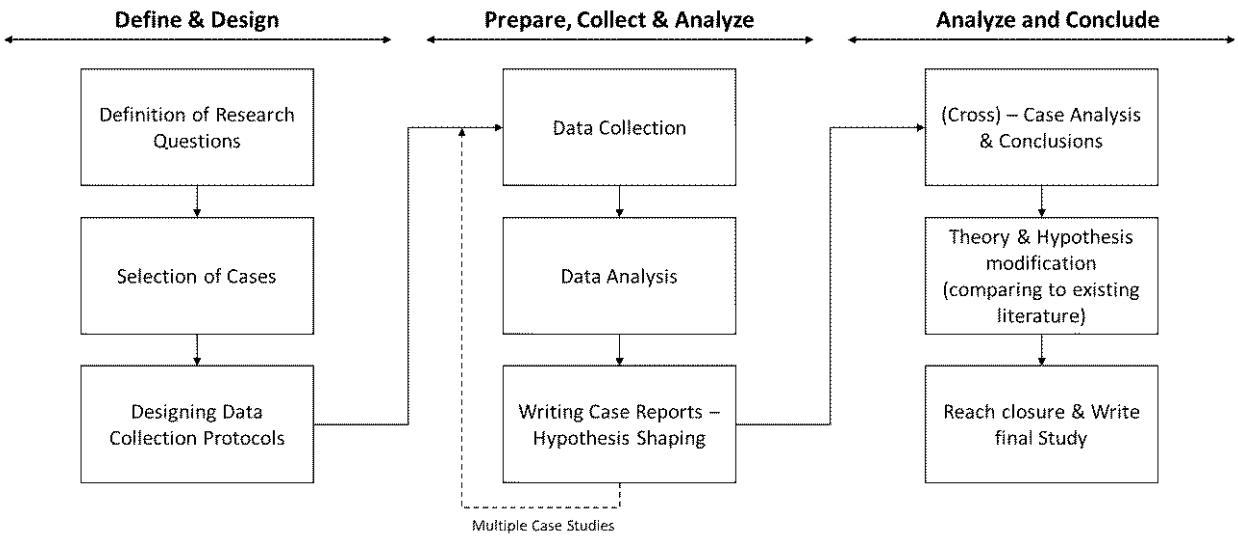


Figure 6: Case Study Research Process; Source: Own Representation based on Eisenhardt (1989) & Yin (2018)

5.1.5 Data Collection

The single most important consideration, not only during data collection but also in case studies generally, is to include evidence from different sources and viewpoints (e.g., data triangulation) to avoid potential biases(Eisenhardt & Graebner, 2007; Lindgreen et al., 2021). Yin (2018) furthermore suggests creating a database with original data, codebooks, and memos during the collection process, also helping to triage materials to reduce the number of evidence, particularly from online sources not contributing towards theory generation or refinement.

5.1.6 Data Analysis

Although there is no generally specified analytic framework or procedure for analyzing case studies, the two most prominent authors in the field, Yin and Eisenhardt, propose several recommendations and options for systematic sense-

making of the often messy and diverse data. Yin (2018, chapter 5), for instance, offers five analytical techniques to write compelling case studies:

1. Pattern Matching: Comparing patterns (processes or outcomes) from the data with an established theory or predicted outcomes.
2. Explanation Building: Starting with an initial, tentative theoretical statement or proposition, the emerging case data is continuously compared against this hypothesis, and the latter is revised accordingly.
3. Time Series Analysis: Precise representation of chronological events and sequences, beneficial to answer "how" & "why" research questions.
4. Logic Models: Often graphic representations of interdependencies on an individual or organizational level showing cause-effect-cause-effect patterns.
5. Cross-Case Synthesis: Contrasting every variable and its identified expression across the two (or more) cases. Eisenhardt (2007) furthermore suggests starting with categories or dimensions rather than variables to look for within-group similarities in connection with intergroup differences.

5.1.7 Quality Measures and Rigor in Case Study Research

From a positivist viewpoint, the quality and value of case study research is generally discussed according to four criteria: internal validity, construct validity, external validity, and reliability (Andersen et al., 2018; M. Beverland & Lindgreen, 2010; Gibbert, Ruigrok, & Wicki, 2008; Shadish, W., Cook, T., Campbell, 2005; Welch et al., 2011).

5.1.7.1 Internal validity

Internal validity concerns the actual existence of the identified causal relationships (Andersen et al., 2018; M. Beverland & Lindgreen, 2010). In addition, internal validity can be ensured or increased through triangulation of theoretical lenses (Gibbert et al., 2008) as well as pattern matching (Andersen et al., 2018; Gibbert et al., 2008) and the

search for negative cases to rule out alternative explanations (M. Beverland & Lindgreen, 2010).

5.1.7.2 Construct validity

Construct validity refers to the absence of structural measurement errors influencing the operationalization process (Andersen et al., 2018; Yin, 2018). Especially data triangulation or the usage of multiple data sources is a powerful tool to increase construct validity (Andersen et al., 2018; M. Beverland & Lindgreen, 2010; Gibbert et al., 2008; Piekkari, Plakoyiannaki, & Welch, 2010; Yin, 2018).

5.1.7.3 External validity

Regarding the generalizability of case study results or findings, external validity is generally higher for multiple case studies providing cross-case comparisons (Beverland & Lindgreen, 2010; Gibbert et al., 2008). Additionally, a detailed explanation of the studied population or research setting and case boundaries also increased the chances of developing more externally valid theories and insights (Andersen et al., 2018; M. Beverland & Lindgreen, 2010; Piekkari et al., 2010).

5.1.7.4 Reliability

To ensure the replicability or reliability of case study results, Gibbert et al. (2008) & Yin (2018) suggest crafting research protocols and providing a complete database or overview of all available documents, transcripts, and other material.

5.1.7.5 Rigor in Case Study Research

To further increase the quality criteria just introduced, three specific tools, namely process tracing, the search for alternative explanations, and Qualitative Comparative Analysis, offer opportunities for more rigorous analysis in case studies.

Process tracing generally involves the following steps (Bennett, 2010; Schwandt & Gates, 2017):

1. Theory or hypothesis development of causal processes or mechanisms leading to effects and outcomes in the case
2. Collecting evidence for the existence of these processes and their effects
3. Identification and formulation of potential alternative explanations for the observed effects
4. Collecting of evidence disproving alternative explanations

Siggelkow (2007, p.23) strongly recommends focusing on alternative explanations of presented findings and a thorough argumentation of why they are unlikely to hold and finds them to strengthen the persuasiveness of any implication put forward by case study research.

Another helpful tool applicable for multiple case studies is a Qualitative Comparative Analysis (QCA), examining patterns of similarities and differences across cases to identify configurations of causal conditions or influential factors (Mahoney, 2007; Schwandt & Gates, 2017; Yin, 2018).

5.2 Epistemological Background

This chapter describes the epistemological background or philosophical understanding of scientific research and its findings that come with selecting and interpreting case studies as the primary research method of this thesis. The challenge of generalization from case studies is deeply connected to the epistemological position of the researcher conducting the study. Considering the two opposing schools of thought in the philosophy of science, positivism and constructivism, the specific challenges of case study research become evident.

While positivist research assumes a universally existing, objective reality or truth that can be explored, explained, and measured, using the validity criteria introduced above, constructivism rejects this view and follows the logic of multiple, subjectively

constructed realities and therefore question the goal of generalizability (Andersen et al., 2018; Flyvbjerg, 2011). This difference also manifests how the two main philosophical streams understand theory development. While the positivist paradigm usually builds upon deductive theory testing, constructivists follow an inductive theory-building approach (Perry, 1998). Even though proponents of case study research argue that it can be applied independently of philosophical directions (Schwandt & Gates, 2017) or that method selection should be phenomenon-driven rather than by philosophy (Schögel & Tomczak, 2009), using the example of a single case study, positivists would not consider this research approach worthwhile as it does not provide results easily applicable to other samples. For constructivists, case studies represent an accurate description of the author's (biased) understanding of events and interrelations (Andersen et al., 2018; Stake, 1995; Welch et al., 2011). The positivistic criticism of case study research might be fueled by the broad and unreflected acceptance and diffusion of Robert Yin's approach towards case study research in business literature, characterized by his pursuit for objectivity and positivist results (Piekkari et al., 2010). Flyvbjerg (2011, p.305) addresses general misconceptions about case study research in his work and argues in favor of case knowledge being transferable even without formal generalizability.

In case study research, a research approach that potentially reconciles the opposition of positivism and constructivism is "contextual explanation." According to Welch et al. (2011), contextual explanation assumes that case studies can generate causal explanations in an environment of contextual richness. Contextual explanations, therefore, explain interrelationships without "laws" and account for time and place of events, for instance, and thereby reject the full-positivistic model of causation in favor of a more complex understanding of reality (Welch et al., 2011, p.750). Table 7 provides an overview of major philosophical directions in relation to case study research.

Table 7 also illustrates the difference between a fully constructivist approach to case study research and the mentioned critical-realist view of contextual explanations. In contrast to constructivist views, proponents of contextual explanation like Bhaskar (2014) follow a critical realism-logic and acknowledge the existence of a reality beyond

subjective perceptions and construction but also consider that our comprehension of reality is highly dependent on social phenomena and structures.

Dimension	Inductive Theory Building	Natural experiment	Interpretive sense-making	Contextualized explanation
Philosophical orientation	Positivist (empiristic)	Positivist (falsificatio nisitc)	Interpretative/ constructionist	Critical realist
Nature of research process	Objective search for generalities	Objective search for causes	Subjective search for meaning	Subjective search for causes
Case Study outcome	Explanation in the form of testable propositions	Cause-effect-linkages	Understanding of actor's subjective experiences	Explanation in the form of causal mechanisms
Attitude to generalization	Generalization to population	Generalizati on to theory	No generalization, only particularizati on	Contingent and limited generalizations
Role of context	Contextual description is only a first step	Causal relation-ships are isolated from the context of the case	Contextual description necessary for understanding	Context integrated into explanation
Main Advocate	Eisenhardt	Yin	Stake	Bhaskar

Table 7: Research Paradigms in Case Study Theorizing; Source: Adapted from Welch et al. (2011)

The presented philosophical views of case study research also have direct implications for this thesis. As explained in the introduction, the first empirical study will focus on the single case of the company "Rügenwalder Mühle." However, using this sole case

as a foundation for theory-building would be problematic. To be introduced into more detail in the next chapter, Rügenwalder represents an interesting but, using the classification suggested by Seawright & Gerring (2008), also extreme case. Accordingly, extreme cases show either extreme values on the dependent or independent variable of interest or, in other words, represent an unusual instance in the broader sample. Particularly this rareness makes the case valuable for further investigations. Rügenwalder, the first company in the DACH region to widely adopt APPs and integrate them into its established brand, undoubtedly represents such a case. However, Seawright & Gerring (2008) also caution against selecting cases according to their dependent variable, precisely describing the approach of the present thesis. Instead, this thesis builds upon an extreme case with its dependent variable and looks for influential factors or independent variables and underlying causal relationships. Even so, this approach is only considered problematic when researchers treat the results of an extreme case as representative of a larger population (Seawright & Gerring, 2008, p.301). Consequently, this thesis uses the single case merely as an inductive starting point offering exploratory insights and first hypothesis or influential factors to be further used in the downstream processes of theory refinement (multiple case study) and theory testing (QCA). Thereby, the introduced philosophical understanding of contextualized explanation is used as a guiding principle also manifested through using the presented methods of process-tracing in the first and second and comparative analysis during the third part of the empirical study.

6. Single Case Study "Rügenwalder Mühle"

6.1 Introduction

The theoretical introduction on the theory of brand ambidexterity, the challenges of sustainable brand extensions, and the significant environmental externalities of meat production are subsequently connected in the first empirical part of the present dissertation by exploring a single case study on the company Rügenwalder Mühle, a traditional meat processing company that has become the German market leader in alternative protein products. Studying this company represents the first step in answering the overall research questions of the thesis as it serves as the starting point for theory development. As mentioned earlier, current academic literature only offers limited and often conflicting recommendations for managers of established brands planning to introduce sustainable new products or brand extensions, particularly in challenging, publicly controversially debated environments like the meat industry.

An in-depth discussion of a practical example addressing these controversies offers the possibility to supplement and refine existing theories and transfer them into one construct addressing the specific research problem. The single case study, therefore, addresses the following research questions:

RQ1: What factors influenced Rügenwalder's decision to enter the alternative protein market with its established meat brand?

RQ2: What marketing and branding strategies enabled Rügenwalder Mühle to successfully market meat products and meat alternatives under a single brand?

6.2 Design of the Study

The first empirical part of this dissertation combines the two methods of firstly a qualitative longitudinal case study (Yin, 2018) with secondly a modified grounded theory concept (Gioia, Corley, & Hamilton, 2013; Glaser & Strauss, 2017) to map and analyze the company's development from a traditional meat processing company

towards a diversified food manufacturer. Studying a phenomenon as complex as Rügenwalder's brand transformation, involving several management decisions and reactions to changing business environments and interactions with multiple stakeholders, requires the in-depth approach of a single case study (Eisenhardt & Graebner, 2007; Kristal, Baumgarth, & Henseler, 2020).

After explaining the data-gathering and analysis process as well as the initial grounded theory process, the emerging theoretic construct is discussed in contrast to existing knowledge to provide first assumptions for further testing.

6.3 Case Selection

The empirical case study in this first part of the dissertation deals with the company Rügenwalder Mühle - Carl Müller GmbH und Co. KG, from now on referred to by its brand-name "Rügenwalder Mühle," "Rügenwalder," or "the company." Founded in 1834, by Carl Müller in the, at the time, German region of Pommern (now Poland), Rügenwalder is still a family-owned company, now led by its 7th generation. In the aftermath of the second world war, the family had to flee from their ancestorial home to the German region of "Ammerland," building a new production site from scratch at Westerde and later in Bad Zwischenahn near the city of Oldenburg. After generations five and six have grown Rügenwalder from a local butcher to an industrial meat producer supplying retailers in the whole country and beyond, the year 2020 marks another turning point in Rügenwalder's history. Not only was it announced that the company for the first time sold more plant-based meat replacements than traditional meat and sausage products, but its owner at the time, Christian Rauffus, also decided to step down to the advisory board handing over to his son Gunnar representing the family's 7th generation. This decision resulted in a management board without any family members for the first time in 187 years (Rügenwalder Mühle, 2021a). In 2020 the company employed 770 staff members producing 26 different products (seven meat, seven vegetarian, 12 vegan) with a net turnover of 233.7 million € (Rügenwalder Mühle, 2021b).

Rügenwalder was chosen as the host company for this case study for several reasons. First and foremost, the company's transformation from a meat processor to Germany's leading supplier of APPs is interesting, to say at least. Notably, neither a well-funded startup nor a large multinational like Nestle or Unilever is dominating this market but rather a 187-year old family-owned company (Terpitz, 2021) with a revenue representing roughly 0.3% of the one of global FMCG-powerhouse Nestlé (Nestlé, 2021) also active in the field with its "Garden Gourmet Brand." With an unaided brand awareness of 20% compared to 4% of Garden Gourmet or 3% of Beyond Meat, for instance (Strycula, Stott, Geiger, et al., 2019), Rügenwalder already represented the most well-known alternative protein brand in Germany in 2019. Within six years, Rügenwalder's product portfolio changed from containing no plant-based products to more than 50% of its production. All that happened under its major brand featuring an over 100-year-old logo with two sausages.



Figure 7: Rügenwalder Logo; Source: Rügenwalder(2021a)

The list of potential pitfalls for the company in this particular case seems endless. Excluding necessary changes of production capabilities, other internal resources or resistance from loyal employees/butchers, from losing existing, potentially ideological meat customers on the one hand to not appealing to fundamental vegans on the other end, simply looking at potential consumer backlash reveals major hurdles such a strategy might entail. However, to pre-empt the results of this study, even though Rügenwalder encountered most of the mentioned challenges during the last seven years, none of them stopped the company on its road towards integrating APPs as a sustainable alternative into its core offerings, apparently achieving brand ambidexterity (Beverland et al., 2015). Selling and marketing the old and new "world" simultaneously represents a remarkable achievement worthwhile of further exploration. The following analysis will surface deep insights into the strategies the

company used to address the diverse challenges of its transformation process, mainly showing how they used a sustainable brand extension in a way that preserves the consistency of the company's heritage brand.

6.4 Data Collection

Often, cases are selected due to existing or preferential data access, offering an easier way to obtain in-depth insights (Kristal et al., 2020). This selection criterion could not be applied in the present case. Studying the development and transformation of Rügenwalder required a vast amount of data gathering and data triangulation to ensure the finding's validity (Beverland & Lindgreen, 2010; Gibbert et al., 2008; Piekkari et al., 2010). Accordingly, the present case study builds upon evidence from 16 different sources as suggested by (Eisenhardt & Graebner, 2007; Welch et al., 2011; Yin, 2018). Table 8 provides an overview of all sources.

Origin	Specific sources
Semi-structured Interviews	Interview A: Lothar Bentlage, CEO/Member of the executive board of Rügenwalder from 1998 until 2020, former Head of Sales, with the company since 1991, interview conducted via Zoom in March 2021, length: 1h 44 minutes Interview B: Godo Röben, CMO from 1995 to 2021, phone conversation on October 20th, 2021, length 33 minutes Interview C: Michael Hähnel, CEO since 2020, member of the advisory board from 2018-2020, interview conducted via Teams on October 21st, 2021, length: 51 minutes
Corporate Homepage	Homepage data was used primarily to obtain current figures and corporate history, plus two files included in the later analysis
Press releases	30 press releases available on the corporate website dating back to 2019
Social Media	Analysis of posts and comments on Facebook, Instagram, LinkedIn, and Twitter
TV & Cinema-Spots	20 TV and cinema spots from 1995 to 2020
Sustainability Reports	4 reports from 2010, 2012, 2013 & 2021

Annual Reports	Annual reports of the years 2009 to 2019
Videos of stakeholder talks	Group discussions with the at the time two CEO's and several stakeholders from 2018 & 2019
Speeches	2 public speeches of the CMO Godo Röben (2017, 2021)
Podcast	1 podcast with the, at the time, CMO Godo Röben (2020)
Case studies	One case study from 2009 published in a book on Brand Management written by the CMO and owner of Rügenwalder and a short study from 2015 published in a trade journal for family businesses
Secondary Interviews	39 Interviews from 2010 to 2021 published in various media sources with high-ranking managers of the company
Editorial in publications from Managers	Two articles written by the CMO Godo Röben published in a marketing practitioner journal (2013, 2019)
Articles in trade press	77 articles in food or meat-related trade journals
Articles in general press	61 articles in general press (Weekly or daily papers)
Articles in marketing-related press	46 articles in marketing or branding focused practitioner journals
Google search	Confirmatory google search for additional sources

Table 8: Overview of Evidence used in the Rügenwalder Single Case Study; Source: Own Representation

Like most case studies, the present analysis relies upon in-depth interviews with key-decision markers (Eisenhardt & Graebner, 2007; Flint, Woodruff, & Gardial, 2002; Kristal et al., 2020). Several senior managers and the current owner-family (6th and 7th generation) were contacted in late 2020 with interview requests, primarily via email but also through LinkedIn, phone calls, and even a letter. Apart from the owners/chairmen of the supervisory board, the contacted decision-makers included the long-term managing directors of Rügenwalder, Godo Röben (Marketing + R&D) and Lothar Bentlage (Sales), the, in 2020 newly appointed, CEO Michael Hähnel as well as Claudia Hausschild (Head of Corporate Communications). Although phone calls to the PR department and any contact attempts toward the owner family remained unanswered or were declined several times, both the long-term sales director and CEO Lothar Bentlage, who retired in 2020, as well as on a later point former CMO and Head of R&D Godo Röben and the current CEO Michael Hähnel

agreed to an interview. The author is particularly grateful to Lothar Bentlage for the 1-hour 44-minute talk providing various insider knowledge at an early stage of the research process, thereby representing one of the cornerstones of this case study. All interviews were conducted in a semi-structured manner and according to standard criteria for academic interviews with field experts. As suggested by Jäger & Reinecke (2009), an interview guide was used to narrow down the broad topics to be discussed while still allowing for maximum flexibility regarding particular topics to capture the interviewees' thoughts and opinions. The interview guide was not sent to the interviewees prior to the talk. The guide complemented with notes taken during the interview is attached in the supplemental materials of this thesis. The main parts of the interviews revolved around four broad questions:

1. Why did Rügenwalder enter the alternative protein market in the first place?
2. Why did the company use its established meat brand?
3. What challenges did the management face during this transformation process?
4. How did Rügenwalder communicate the transformation process/ the introduction of the vegetarian meat alternatives?

Even though Godo Röben could not give an official interview/statement due to contractual obligations, he agreed to review the preliminary results of this study and provided valuable feedback. In addition, after requesting an appointment for over half a year, the current CEO, Michael Hähnel, also agreed to an interview. The supplemental materials provide the interview guides and detailed transcripts of the interviews with Lothar Bentlage and Michael Hähnel, as well as notes taken during the discussion with Godo Röben.

An obvious source for further data is the corporate webpage of Rügenwalder. The corporate webpage was primarily used to obtain information on the company's long history and to gather press releases from the last three years. These 30 press releases can be found in the supplemental materials as well.

Social media posts are particularly interesting for deriving and explaining Rügenwalder's communications strategy, particularly during the first introduction of APPs. In this study, the social media platforms Facebook, LinkedIn, Twitter, and

Instagram were reviewed to understand the company's communication efforts. Furthermore, also focusing on Rügenwalder's communication strategy, YouTube was searched for TV and cinema spots using the search term "Rügenwalder Mühle." The 20 identified short clips, dating from 1995 to 2020, provide interesting insights into the company's changing brand communication. The adverts and some exemplary social media posts are provided in the supplemental materials.

Representing traditional data sources for case studies, Annual reports from 2010 until 2020 were obtained on the official outlet from the Federal German Finance Department, the "Bundesanzeiger." In addition, the latest sustainability report was downloaded from Rügenwalder's webpage.

Publicly available speeches, keynotes, discussions, and podcasts with senior managers provided particularly rich data. A search for the names of the CEOs and owners on Google and YouTube surfaced one public video interview and one podcast featuring Godo Röben. Furthermore, the author recorded a public keynote Godo Röben gave in early 2021. Especially relevant and insightful were the video recordings of two stakeholder discussions held in 2018 and 2019. These events allowed stakeholders like vegans, food bloggers, farmers, and other interested people to ask the two CEO's Godo Röben and Lothar Bentlage, diverse, often critical questions about Rügenwalder's transformation process. All recordings, speeches, and the podcast were downloaded and transcribed. The stakeholder talks were shortened as some discussed topics did not focus on the central questions covered in this thesis.

In a book on brand management, owner Christian Rauffus and the CMO Godo Röben, together with a brand consultant, published a detailed essay/case study explaining the company's development from a sausage manufacturer towards a well-known food brand in the German market, providing a detailed overview of management decisions and strategies until 2009 (Rauffus, Röben, & Esch, 2009). Due to this comprehensive summary, all other data gathering processes focus on the time after this publication, starting with 2010.

Most sources used in this study were acquired during a systematic search for trade literature and press articles. This systematic search was conducted using the research platform "Wiso." It features a broad spectrum of scientific but primarily business-related resources. These include more than 17 million articles from 770+ trade journals and 230+ million articles from the daily or weekly press, especially from, but not limited to, the German-speaking part of Europe (GBI-Genios Deutsche Wirtschaftsdatenbank GmbH, 2021).

A not further specified search on the Wiso-platform using the term "Rügenwalder Mühle" limited to results from 2010 yielded 4192 articles[3]. The author decided against further narrowing the search criteria (title search, for instance) to obtain a sufficient data depth. The same procedure was repeated using the names of the company's top management: Christian Rauffus (468 hits), Lothar Bentlage (312 hits), and Godo Röben (920 hits). In the absence of further reduction options provided by the platform, all results had to be screened manually using a two-stage process. The first round of qualitative assessment focused on the type of article/source, eliminating results like job offerings in local newspapers, simple product ads or product launch announcements in food magazines, and the mandatory publications of product recalls. The second stage required all articles to be read into detail to eliminate further double-entries (many smaller local papers use the same sources/articles or some magazines provide slightly different articles in their online and offline offerings) and all other results not broadly relating to the overall (marketing) strategy of Rügenwalder.

This search for secondary sources was accompanied by a search on Google using the same terms as on the Wiso-platform. This search only added a few sources, mainly from Germany's largest vegetarian business network, "vegconomist," and a few smaller sources.

This extensive data-gathering process surfaced 39 secondary interviews with Rügenwalder's top-management, 77 articles about the company in food-themed trade journals, 46 articles in publications focusing on marketing, branding, and sales,

[3] Figures from October 18th, 2021

including two editorials written by Godo Röben, as well as 61 articles in general weekly/daily press. Particularly the magazines and trade journals specialized in the food sector, first and foremost, the generally well-informed "Lebensmittelzeitung" provided a large amount of additional and valuable insight.

A detailed list of every single source used in the present case study is provided in Appendix D. Original sources, transcripts, documents, as well as audio and video material are provided in a database (Yin, 2018) in the supplemental materials. The transcripts of the primary interviews, stakeholder events, podcasts, and speeches by Rügenwalder managers resulted in 131 single-spaced, Arial 10-font-pages. Due to the abundance of analyzed data and the confidentiality agreement with interview partners, specific sources are not indicated throughout the analytical chapters of this thesis.

6.5 Rigor and Data Quality

The already mentioned database provided in the supplemental materials represents a cornerstone in ensuring the results' reliability and replicability. Construct validity is ensured by the already mentioned data triangulation of the various sources, primarily through the detailed description of the data gathering process (Beverland & Lindgreen, 2010) presented above.

The interview with key managers of the company ensures a high level of primary data quality and relevance. Additionally, the Wiso-platform represents a significant quality benchmark concerning secondary data as it only includes trusted news resources. Furthermore, the chronological structure and the direct quotes provided in the result-section help establish a transparent chain of evidence, increasing construct validity (Kristal et al., 2020). Finally, to involve external opinions, the case study structure and the data processing and analyzing process were pitched in several doctoral seminars, at a poster session during the AMA-winter conference, and during a one-week methodology seminar focusing on qualitative comparative analysis.

6.6 Data Analysis

According to Lindgreen, Di Benedetto, & Beverland (2021), data analysis in case studies is usually performed in two different ways, a within-case and a cross-case analysis. Naturally, a single case study only uses a within-case analysis. This within-case analysis is accomplished by several steps of qualitative coding, converting the obtained raw data into better understandable components or dimensions (Eisenhardt, 1989; Gioia et al., 2013). However, before this coding process was started, all materials obtained during the data-gathering stage (transcripts, pdf-articles from the Wiso-platform, videos, and other sources) were transferred into the qualitative research tool ATLAS.ti. This software package is beneficial during large qualitative research endeavors like the present one. After transferring all documents to ATLAS, they were all systematically renamed and sorted according to their type, source, and year of publication. This step supported the subsequent coding process and the documentation of sources provided in the appendix and supplemental materials.

The data analysis was conducted using a three-step approach focusing on data reduction, presentation, and theory generation using well-established grounded theory guidelines, particularly those suggested by Dennis A. Gioia (Gioia et al., 2013). The whole process is summarized in figure 8.

Firstly, the organized data was analyzed using ATLAS.ti's “Quotation” function. Thereby relevant passages of the various sources were marked. This process was especially beneficial for secondary articles and interviews as they often contained parts not relevant to this study. This first analytical round resulted in 891 quotations and 148 direct quotes from interviews. A second analytical round ended with 736 quotations (quotations with similar meanings or double entries were deleted) and 331 codes.

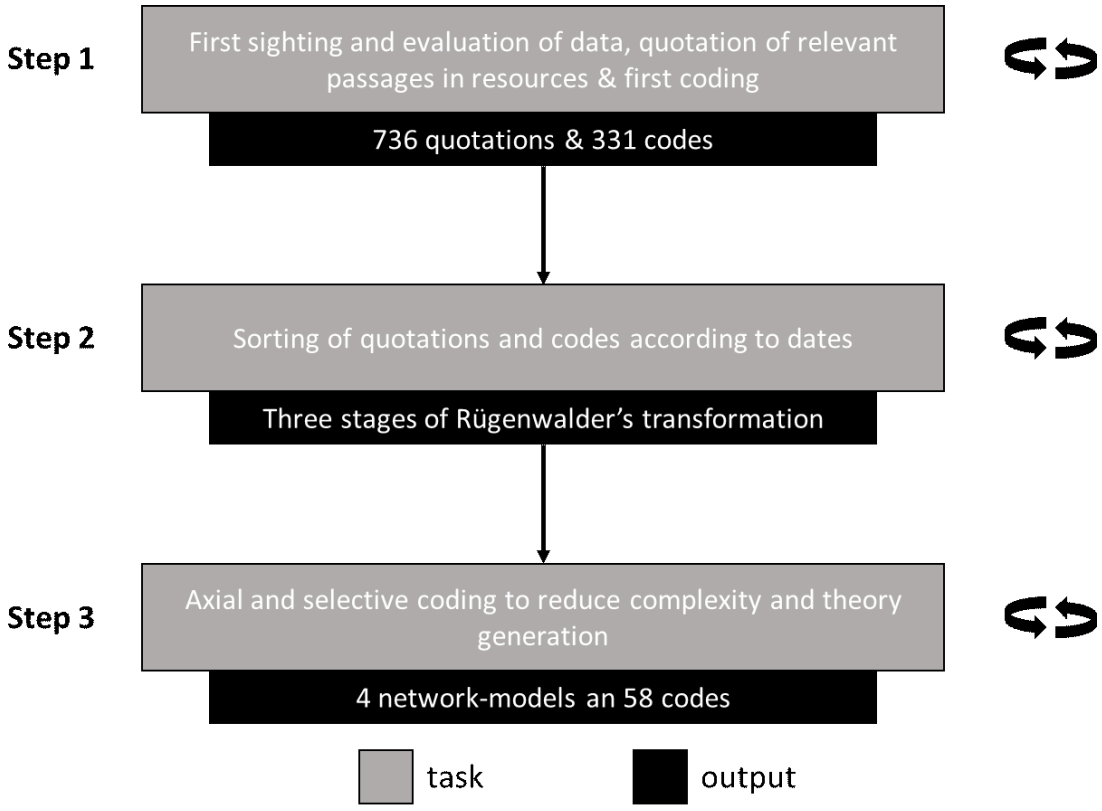


Figure 8: Data Analysis and Coding Process; Source: Own Representation

In the second step, the first, large number of quotations (and codes) was assigned to their respective years in order to create a representation of chronological events or time-series analysis, a strategy suggested by several authors, particularly for single case studies (Kristal et al., 2020; Lindgreen et al., 2021; Welch et al., 2011; Yin, 2018). This process helped to understand the dynamic development of Rügenwalder and aims to reduce overall complexity. This analysis led to the recognition of three stages within the time series, described in detail in the findings-chapter:

- Foundation stage (1995-2014)
- Development & Growth stage (2014-2020)
- Restructuring stage (2020-2021)

The third step of the analysis focused on data reduction and theory building. As this study followed an inductive grounded theory approach, data reduction did not progress alongside some predefined categories derived from literature, for instance, but instead tried to paint a holistic picture of the company, its management, its corporate culture, and most importantly, the background behind its strategic branding

decisions. The first part of this stage was characterized by various rounds of axial coding (Corbin & Strauss, 1990), slowly reducing the number of overall codes by removing duplicates, merging highly similar or too simplistic descriptive codes. The first round of axial coding lowers the number of overall codes to 85. Next, another axial coding iteration aiming to construct or identify overarching aggregate dimensions (Gioia et al., 2013) was performed. This process was supported using ATLAS.ti's "code group"-function, allowing an easy aggregation of similar codes using groups and color schemes. Finally, all remaining 85 codes were allotted to different groups were transferred into the program's "network" view allowing for a graphic representation of the codes and code groups. Being able to connect codes and code groups graphically helped to identify interrelations and to narrow down the number of relevant codes further. Several iterations of this selective coding process and a constant (graphical) back and forth of different networks of aggregated code groups led to a final number of 58 codes. These 58 codes represent an encompassing view or explanation of the company Rügenwalder Mühle. Figure A, attached in Appendix D, shows the final iteration of the overall network view of all codes and how they are related to each other. However, this model was still too complicated to serve as a basis for theory building. Therefore, the resulting overall code system was further reduced by separating it along four themes/questions that emerged during the process. The four resulting networks were the last iteration of selective coding (Corbin & Strauss, 1990), aiming to integrate and refine emerging theories and identify the central theme or core concept further reduced to eventually answering the research question of the present case study.

The data analysis and the coding process were conducted in German. Furthermore, virtually all available sources on Rügenwalder, including the interviews with senior management, were also conducted in German. Therefore, coding directly in English would have likely altered the meaning of the quotes and codes. The author, therefore, decided to translate the outcome of the data reduction process.

Table A in Appendix D provides an example of the coding and data reduction process used in the study. A complete list of first and second-order codes is provided in the

supplemental materials. In addition, the ATLAS-project file of the present study containing all quotations is also attached in the supplemental materials.

6.7 Findings

6.7.1 Time-Series Analysis

In order to fully grasp the transformation process of Rügenwalder Mühle, this time series analysis establishes some major events starting before the beginning of the actual observation period (data collection) in 2010. Table 9 provides an overview of Rügenwalder's development over the last ten years, listing annual revenues, the share of APPs in these revenues, Rügenwalder's market share in the APP segment, and the number of employees and annual marketing budget.

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Revenue (mill. €)	166.5	172	173.5	175.3	175.1	204.6	203.9	201.4	211.9	242.4	290
Share of vegetarian products	0%	0%	0%	0%	<1%	19%	26%	25%	27%	34%	50%
Market share of APPs in Germany	0%	0%	0%	0%	?	?	?	33%	38%	45%	40%
Employees	392	383	398	438	450	534	575	549	563	620	740
Marketing Budget (mill. €)	18	?	?	20	20	>20	<20	<20	>20	29	31.7

Table 9: Selected Figures of Rügenwalder from 2010-2020; Source: Own Representation, based on Annual Reports and Secondary data

6.7.1.1 Foundation Stage (1995-2014)

Rügenwalder experienced significant transformation events even before introducing alternative proteins. Until the 1990s, the company was a traditional, family-owned, medium-sized meat processor, offering almost 400 different articles to retailers and wholesalers across. However, one product, the „Rügenwalder Teewurst," accounted for half of the company's production. Therefore, Rügenwalder decided to cut its product portfolio to only four subcategories with the "Teewurst" at the center. This rationalization was also caused by another strategic finding of Rügenwalder at the time. Even though some large German meat players had already established some brands, the sausage market was generally considered a commodity market with many small players with virtually no brands. Therefore, in 1995, owner and CEO Christian Rauffus and the newly hired Head of Marketing, Godo Röben, decided to build a brand around their flagship product, the Teewurst. The product was positioned as traditionally grounded and hefty. This message was strongly conveyed using a soon-to-be-famous TV spot featuring a rider and a feast in front of the brand's signature logo, the red windmill. This spot, highlighting traditional values, was created by Otto Pahnke, who demanded the, at the time, horrendous sum of 8 million D-Mark for producing and airing the clip. The investment paid off, with the Teewurst's revenues doubling in the following four years. Inspired by the first success, the company soon introduced another brand/product to the market, a liver sausage called "Pommersche." Referring to the company's original home, this brand was positioned using similar values like the earlier Teewurst (origin, craftsmanship, traditional production techniques) and massive advertisement support. The second product became an instant success with sales topping more than 50 million € in the first year, representing the leading product in this segment.

Trying to institutionalize this success, the company's management found that "Teewurst" and "Pommersche Gutsleberwurst" shared the same brand personality and created an umbrella brand: The Rügenwalder Mühle. This new umbrella brand was used as a platform to introduce more products like the "Schinkenspicker" in 2000

or the "Pommern Spiess" in 2004, again following the proven concept, all supported by large TV campaigns.

Another essential milestone representing a significant transformation was the first Teewurst sold in a plastic cup in 2005 rather than the traditional sausage skin, reacting to changing consumer behavior, moving away from the service counters in supermarkets to self-serving shelves. This process represented a significant challenge to Rügenwalder as it was harder to convey the message of "traditional craftsmanship" in these new packaging's.

Moving towards the next decade, the traditional messaging of Rügenwalder slowly started to change. While their messaging still focused on enjoying food together with friends and family, scandals in the meat industry led the company to convey more rational arguments for their products. This process included a partnership with the renowned "Institut Fresenius" in Germany, providing third-party labeling for the company's "Free-from" campaign, underscoring the naturalness of their products.

Even in challenging times for the industry, the company did not reduce its marketing efforts. Since 2011, brand value analyses were conducted annually rather than every five years, and 2012 even marked a point when the brand's storytelling became a reality. Having advertised with the imaginary windmill for almost 20 years, Christian Rauffus started building an actual 17-meter windmill of their brand icon close to the corporate headquarters in Bad Zwischenahn. Despite these investments and high popularity among German consumers, the company was compelled to invest even more in reinforcing brand equity and trust. In 2013, Rügenwalder started a new communication campaign named "Family business with a face." This new strategy replaced Jörg Pilawa, the testimonial used since 2009, with employees, including the owner Christian Rauffus, featured in TV advertisements and on the packaging of its products.

Late 2013 marks the beginning of Rügenwalder's critical reflection of the meat industry. Christan Rauffus publicly voiced sympathy for the, at the time, politically discussed mandatory veggie-day in canteens and found the people in Germany

overeat meat. Even more direct in his criticism on the current state of the meat industry, Christian Rauffus stated in 2014 that:

> *If we are not careful, meat and sausages will become the future cigarette. (WAMS_14.09.2014)*

6.7.1.2 Development & Growth Stage (2014-2020)

It was against this difficult business background characterized by constant criticism of the meat industry and changing consumer behavior in general that Rügenwalder Mühle announced the launch of a vegetarian product line in December 2014. A vegetarian variant of one of their core articles, "Schinkenspicker," was designated to be its first offering in that area. At the time, these products were based on egg protein and rapeseed oil. This new product category was announced under the established Rügenwalder umbrella brand, constituting the key event for this case study.

Asked whether he was afraid of diluting the brand's image with this strategic decision, CMO Röben just stated that he was not and compared the decision to the short outcry after Rügenwalder first introduced their sausage in a plastic cup 10 years earlier.

> *It is simply a matter of adapting to the market. There are 800,000 vegans, seven million vegetarians, and 42 million flexitarians in Germany. The segment of vegetarian meat replacements is growing by 30 percent a year. It is still a niche, but in five to ten years, it will probably be a market segment on its own* (*RLH_01.12.2014)*

Godo Röben spent the whole marketing budget for 2015, more than 20 million Euros, on anchoring the message "Rügenwalder is now producing vegetarian products as well" into the minds of his customers. A few months later, it became clear that Röben, the primary force behind the introduction of the vegetarian product line, delivered another success. The company's production was overwhelmed with orders for their vegetarian products. This first success triggered the introduction of various new vegetarian articles, requiring a constant expansion of production capacities.

After an outstanding 2015, the following year was characterized by the beginning of a consolidation process (see table 9). After substantial infrastructure investments and the integration of lots of new coworkers in a short amount of time, Rügenwalder slightly decreased its innovation pace. 2016 also marked the beginning of a few controversies regarding the new product segment. While vegans demanded that the company stop all meat production and source its plant-based ingredients organically from Europe, farmer's unions voiced their opposition against the meat processors' new strategy. They called for a boycott of Rügenwalder products, deeming Rauffus' criticism of mass-meat production and potentially abolishing meat a simple PR-gag.

2017 saw another important milestone in Rügenwalder's history. From February onwards, Christian Rauffus stepped back from his operational duties and moved together with his successor and son, Gunnar Rauffus, to the newly created advisory board of the company. Godo Röben and Head of Sales, Lothar Bentlage, took over the company's operational leadership and headed the new management board. Even in the background of a stagnating meat alternative market in 2016 and 2017, Lothar Bentlage and Godo Röben still expected the vegetarian products to increase their share in Rügenwalder's revenues to 40 % in 2020 from 25 % in 2016. Nevertheless, Rügenwalder invested in their meat products as well, introducing an organic range. This decision also implied that for the first time since late 2014, meat products were advertised alongside their vegetarian counterparts in the TV ads, focusing on strengthening the umbrella brand with the same budget as usual despite the challenging times.

After two years with declining revenues, 2018 & 2019 were years of solid growth. Not only invested Rügenwalder 15 million € into its production capabilities of APPs, but it also launched another massive communication campaign on TV, social media, and print. However, the rapid growth of the vegetarian product line also caused some "casualties" within the traditional product range. In order to supply the increased demand of APPs, Rügenwalder decided to cut the meat-based Currywurst out of their portfolio. Even though the product was not performing as planned, this decision received much media attention.

6.7.1.3 Restructuring Stage (2020-2021)

In January 2020, Gunnar Rauffus took over the position of owner and chairman of Rügenwalder from his father, Christian, and instated Michael Hähnel as the company's new CEO. Hähnel, a former member of the company's advisory board and experienced FMCG manager, hereafter headed the five-person management board. Despite earlier announcements, Lothar Bentlage stepped down as Head of Sales in June 2020 after being with the company for 28 years, handing it over to his colleague Jens Wiele.

Apart from management and structural changes, the vegetarian/vegan market was still on the rise with an increase compared to 2019 of more than 70%, making 2020 the most successful year in the company's history (table 9). Several new products, the connected communication push across several channels using different spots, and, as Michael Hähnel explained, an increased in-home consumption during the first lockdown in the pandemic reinforced this trend. This boost also caused a significant milestone in the company's history. For the first time since their introduction in late 2014, Rügenwalder sold more meat replacements than conventional meat-based products in July 2020. This immense growth led the company to abandon its internationalization efforts to supply the raring demand in Germany. Rügenwalder also started to experience shortages of plant-based raw materials and invested in soy-production within Germany, catering to consumer sentiments concerning soy imported from the American continent.

Even more incisive than 2020, 2021 brought several changes to Rügenwalder's senior management. First and foremost, in February 2021, Godo Röben, the strategic mastermind behind the company's efforts in the plant-based field, left the company after being its CMO for more than 25 years. Röben was replaced by Steffen Zeller, the responsible CMO for Iglo's APP introduction. Further management changes included Dr. Jonas Lohmann as new board member responsible for HR, IT & Digitization, Mark Bülow as new Head of Corporate Strategy and Supply chain, replacing the long-standing operations manager Thomas Wittowski, and Patrick Bühr as new Head of Product Development.

Apart from these immense restructuring efforts, the plant-based sector continued its rapid growth leading to several further issues. Rügenwalder is now looking for a second or even third production site to supply this demand. Scarce production capabilities paired with still increasing demand even forced the company to outsource or discontinue its less-popular articles. However, recent polls show that the brand is still hugely popular among German consumers despite these challenges. 96.5% of Germans know the brand and a majority connect it to vegetarian and meat products alike, presenting evidence for the successful ongoing transformation of the company.

6.7.2 Structural Analytics and Concept Building

As explained earlier, the different rounds of selective coding and data-reduction yielded 58 second-order codes. These codes were further summarized in 11 aggregate dimensions. A complete overview of the respective codes for every dimension is depicted in Figure B in Appendix D. Even though these aggregate dimensions represent a coherent summary of the various codes, they proved too broad for specific concept building.

During the iterative coding process, it became clear that the vast amount of data allows for explanations far exceeding the original research question of why Rügenwalder used its established meat-brand on APPs. Therefore, the following analysis suggests four conceptual models describing Rügenwalder's transformation towards Germany's leading alternative protein company, answering the following four questions:

(1) Why did Rügenwalder decide to introduce meat alternatives in the first place?

(2) Why did Rügenwalder decide to use its established meat brand on these products?

(3) What were or still are the consequences of introducing vegetarian meat replacements?

(4) How did Rügenwalder communicate the monobrand[4] strategy?

A specific code network was generated in ATALS to answer each of the four questions. These full network models are provided in figures C, D, E, & F of Appendix D. The

[4] The term "monobrand strategy" is hereafter used to describe the usage of an esablihed or single brand on APPs

full networks were furthermore summarized in more lucid models (figure 9, for instance), serving as the basis for the following discussion on the respective influential factors, answering the four emerging themes or sub-research questions of this single case study.

6.7.2.1 Reasons for Introducing Meat Alternatives

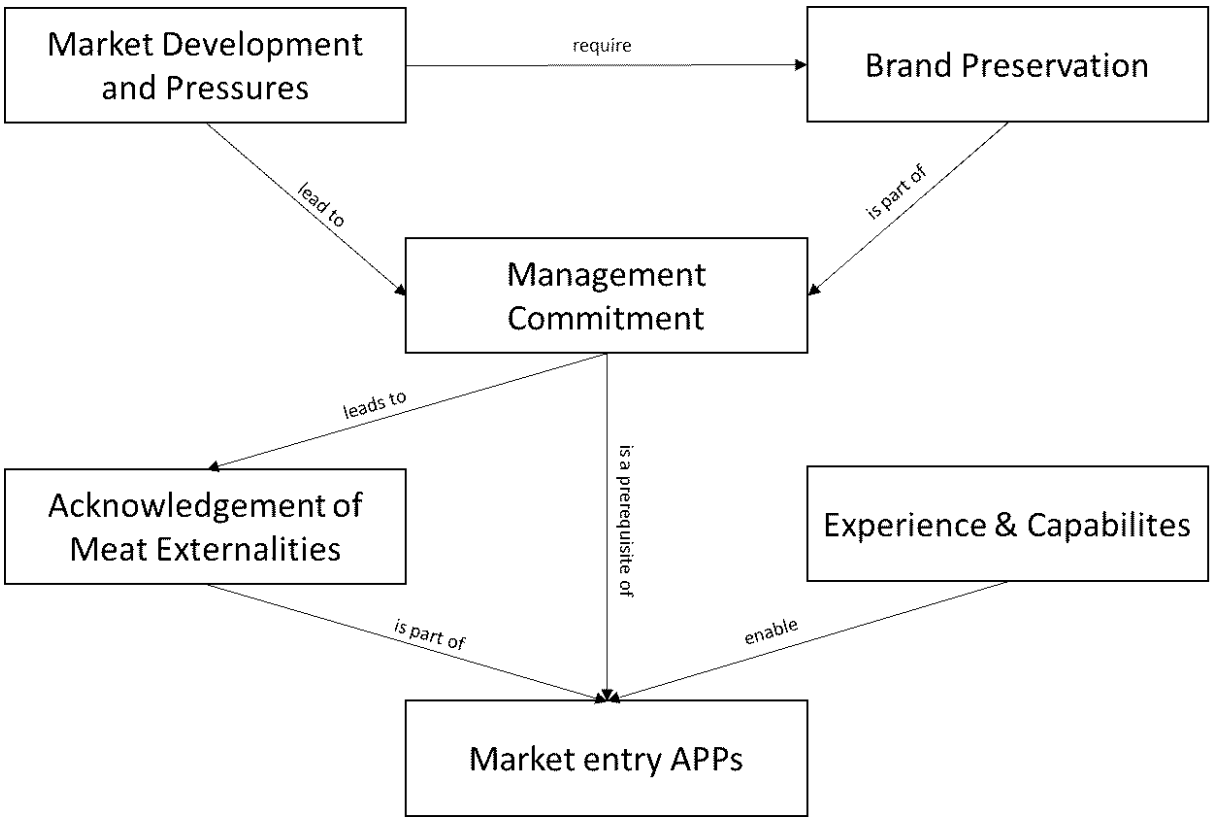


Figure 9: Reasons for APP Market Entry; Source: Own Representation

Market developments and pressures

An apparent primary reason for Rügenwalder's early meat alternatives engagement was the changing and, above all, the declining market for meat and sausages in particular. This decline started to show significant effects on Rügenwalder between 2010 and 2014. In the beginning, Rügenwalder tried to counter this development with various new meat-product introductions, but as Lothar Bentlage admitted, the launches' impact was limited. In this background, Christian Rauffus publicly criticized

his guild for the first time in summer 2013, acknowledging that the sausage market is in an irreversible decline, voicing understanding for this development, and vegetarians turning away from meat products.

The whole situation worsened in the first months of 2014. Revenues plummeted, Rügenwalder started to cut costs wherever possible and even feared that it had to lay down workers for the first time in its history for economic reasons. With senior management deeply worried about the situation, Godo Röben put forward his long-held plan and suggested introducing vegetarian products as a possible way out of the dire situation. At the same time, extensive market research also showed first signs of the rising number of flexitarians encouraging the management to enter this virtually non-existent market.

Brand equity preservation

Having established the problematic market situation before and at the time of the launch of the vegetarian product line, another closely connected influencing factor is Rügenwalder's strong commitment to branding. Being a central part of the company's strategy, preserving its brand's equity was pursued at any cost. Rügenwalder, facing the lousy reputation of the meat industry, felt the need to reassure consumers in their trust towards the brand. Already at the time, in 2012 or 2013, Rügenwalder Mühle was by far the strongest, most renowned brand in the sausage segment with 95% of aided brand awareness. Therefore, Rügenwalder, the highly exposed market leader in its segments, simply had to react swiftly to this declining trust in the meat industry. During the interview, Lothar Bentlage explained the situation in more detail, sharing that the management considered the vegetarian products a chance to renew their brand, making it more relevant to a younger but especially more critical target audience.

Management Commitment

Particularly the collaboration of CMO Godo Röben with then-owner Christian Rauffus constitutes another influential factor in Rügenwalder's rapid APP-market entry. Godo Röben was hired by Rauffus in 1995, aged 26, as the first marketer in the company. Together, Röben and Rauffus built the Brand Rügenwalder Mühle, starting with a marketing budget of 50.000 German Marks at the beginning. Röben delivered several successful new product introductions and marketing campaigns until 2010. Röben is also generally considered the driving force behind Rügenwalder's vegetarian advances. Unhappy with the situation in the meat industry, he even thought about quitting if he had not had the chance to change the company's business model at its core substantially. In early 2014 Röben utilized the problematic economic situation of the company as a reason to finally move forward with his long-held plan to introduce the vegetarian product line. Having the whole company put against him, only his boss, Christian Rauffus, even under doubts, supported him from the beginning in front of the company's other management, employees, and even the advisory board. The deep trust between Röben and Rauffus was also visible in various interviews given by the manager. He often mentioned that having his boss behind him was probably the only reason why Rügenwalder succeeded in its transformation process. The best proof for the owner's long-term mindset is probably the deep dedication senior management showed to the company. Bot managing directors Lothar Bentlage and Godo Röben have been working for Rügenwalder for more than 25 years before they departed in 2020 and 2021. This steady leadership, supported by the deep trust of the owner, doubtlessly supported the market entry into APPs.

Experience & Capabilities

The willingness to take risks is evident throughout Rügenwalder's history. Starting from cutting down the extensive product portfolio in the 1990s, introducing radically new packaging, or most prominently developing new umbrella-brand spending more than 10% of annual revenues on marketing requires a certain amount of boldness and

courage, particularly from the top management. Not only does the first introduction of APPs require a significant amount of risk-taking, as described, the company also put its total 20 million Euro marketing budget into the vegetarian products in 2015 just based on initial success in the first weeks of the year. This courage also stems from a general corporate culture described by an interview partner as allowing for mistakes, putting trust into employees, and not being guided by achieving quarterly KPI's. Summarizing, Rügenwalder's corporate culture, combined with its eventful past, helped the company build up a certain degree of experience with transformation processes and the related changing business environment.

Another, more tangible argument for introducing APPs for Rügenwalder but any meat processing company, in general, is that most meat alternatives, particularly sausages, can be produced on the same machines and, most notably, with the same people like traditional meat products. These circumstances allow the company to leverage existing knowledge from meat production and transfer it to the other field with only limited adoptions and investments.

Acknowledgment of meat externalities

Although most certainly not the primary cause of Rügenwalder's transformation as a whole company, concerns about the externalities of meat productions likely influenced Godo Röben and Christian Rauffus and represented a necessary step in protecting the earlier mentioned brand equity. Furthermore, different public statements before the launch suggest that the managers slowly prepared their stakeholders for what was about to come. For example, Rauffus stated in 2013 that Germans overeat meat and little later coined his almost famous cigarette comparison. In the same interview, he reasoned further:

> *We invited someone from the Club of Rome, and he explained that we were living as if we had five planets. I'm not a green person, but he is right when I think that through. My son would much rather keep the company going if he can say he is going out of his way to make the world go a little further. Taking over the factory and making tons of Teewurst like 100 years ago is not a job for a well-educated young man today. (WAMS_14.09.2017)*

From a marketing perspective, Röben added that the images of factory farming can hardly be opposed using communication tools and potentially hurt the Rügenwalder brand, further outlying that excessive sausage-consumption might cause health issues.

Summarizing, the reasons for Rügenwalder's entry into the market for meat replacements are manifold. The overall market decline and the related change in consumer behavior and preferences play a significant role in this process. Particularly quality-oriented consumers, clearly the target audience of Rügenwalder being a price-premium brand, were increasingly opposing a high consumption of meat products for environmental, ethical, or health reasons. This circumstance threatened the carefully nourished equity of the strong Rügenwalder Mühle Brand, forcing management to react. The early reaction and swift reaction to this evolving trend and the resulting entry into the APP-market were supported by the company's existing capabilities acquired during the last decades, good corporate culture, and committed senior management willing to take risks and publicly acknowledge the challenges of our time. Alternatively, as a reporter from the German magazine "Spiegel" put it in 2015:

> *Genuinely speaking, what drives Rügenwalder is likely a mix of good business sense, necessary innovation, a bit of ethical responsibility, and an ageist company owner* (Kwasniewski, 2015).

6.7.2.2 Why did Rügenwalder use its established Meat Brand on the Alternatives?

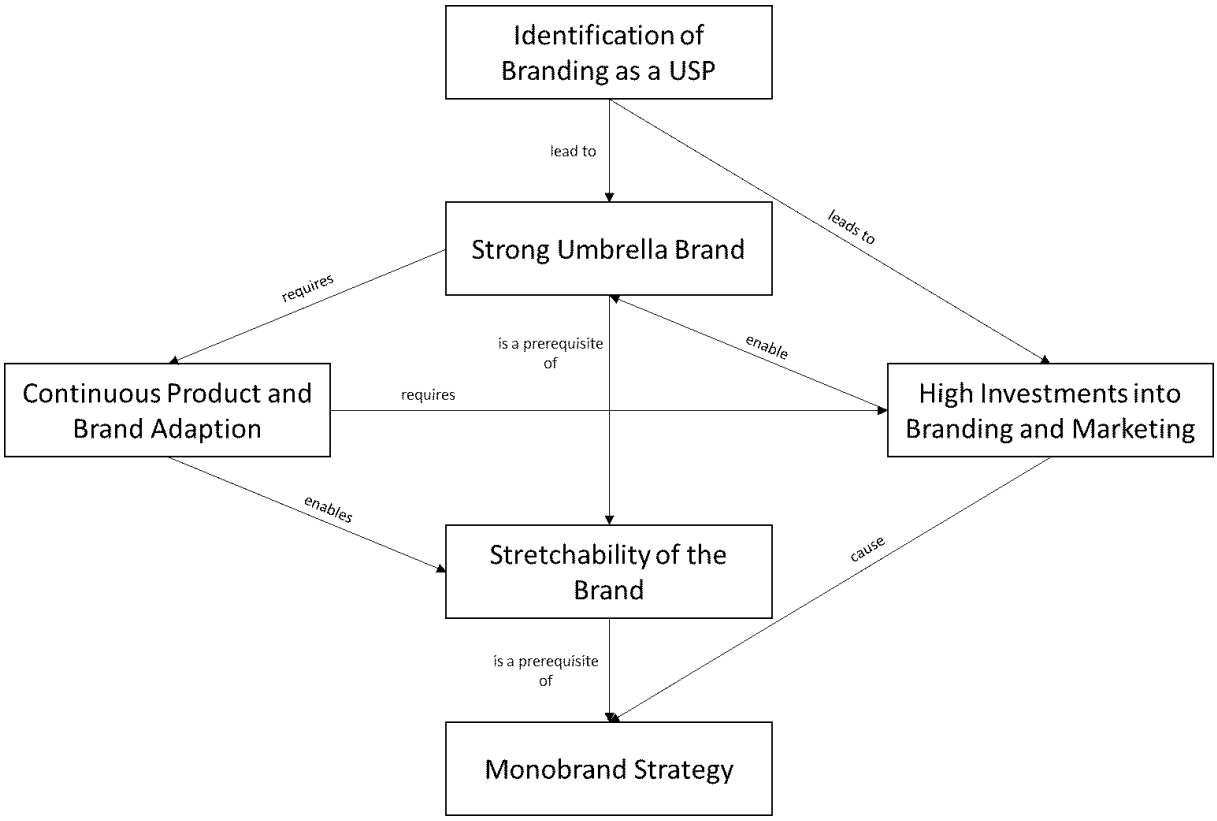


Figure 10: Reasons for Monobrand Strategy; Source: Own Representation

Strong Umbrella Brand

After the great success of the original branded products, Teewurst and Pommersche, and a few other new product launches in the early 2000s, the company bundled its marketing efforts under a single umbrella brand, "Rügenwalder Mühle." Rügenwalder still advertised the different product brands, particularly right after a new launch, but always accompanied by campaigns reinforcing the umbrella brand as God Röben explained in 2013:

> *If we only spent three million euros on each brand, we would become too quiet. When launching a new product, it gets its own spot and the appropriate advertising pressure to get into the minds of end consumers. After that, the power of the umbrella brand must be sufficient to support the individual products. As a medium-sized company, we cannot provide long-term support for our seven product brands. (W&V_01.07.2010)*

As cited above, the deeper focus on a single umbrella brand also allowed the company to deploy its large marketing budget more efficiently. As a result, in late 2010, "Rügenwalder Mühle" was already the strongest meat brand in Germany, beating other established meat brands like Meica, Gutfried, or Herta.

High Investments into Branding & Marketing

Closely connected to the strong umbrella brand are the company's marketing expenditures. Over the years, the company displayed a significant amount of boldness and invested astronomical sums in brand building, particularly in communication campaigns on TV but later on also in social media.

Table 9 shows the development of Rügenwalder's marketing expenditures from 2010 to 2020. Taking 2010 as an example, the company already spent more than 10% of its 166 Million € annual revenue (18 Million Euros) on marketing. To put that in perspective, the latest Nielsen figures listing the biggest marketing spenders in Germany from 2020 suggest that LIDL, with its roughly 350 Million Euro budget spends 1,3% of its revenues on marketing. Amazon spent 1% and Coca-Cola 8.3%. Rügenwalder still, in relative terms, outspent these FMCG powerhouses with its 31.7 million Euro budget corresponding to well over 10% of its revenues in 2020 (Nielsen Media Germany & Statista, 2021).

Continuous Product and Brand Adaption

Another essential component in Rügenwalder's monobrand strategy is the continuous adoption of its products and communication. While the major events in the company's recent history like assortment reduction, brand building, or packaging innovation have already been described in detail, smaller, incremental changes play an essential role in explaining this decision as well. These minor adaptions are generally caused by changes in consumption patterns surfaced by customer and market research. Some of these examples include the Teewurst's fat-content reduction from over 50% to less than

a third, the adoption of the "free-from"-label[5] , or the introduction of more convenience articles. Rauffus once explained that to be successful in the long run, his company has to innovate constantly and, most importantly, not stick to traditions but instead take up macro trends and listen to consumers and react to changing sentiments.

Naturally, this adoption of product offerings also requires constantly evolving brand communication. Rügenwalder built its brand around a value base of heritage & tradition in the early days. Its TV spots were always shot outside, highlighting what Röben once called "fressig," meaning they had to show proper eating or feasting. Starting in the mid-2000s, with customers being increasingly health-oriented, the setting of the spots changed as well. They were still shot outside but rather than some medieval horsemen, the German presenter Jörg Pilawa highlighted the benefits and naturalness of Rügenwalder Products to himself and his family, thereby switching to a more rational tone. When scandals hit the industry Rügenwalder, mainly CMO Röben, swiftly switched towards brand communication focusing on reassuring customers, providing them safety with authentic portraits of the company's employees rather than simply relying on their sentiment towards the good old times.

Stretchability of the Brand

A logical prerequisite for Rügenwalder to introduce vegetarian meat replacements is the stretchability of its brand. Two of the factors already mentioned, the strong umbrella brand and the continuous adaption of products and brand communication, substantially support this stretchability.

Concerning brand communication, for instance, even when the company changed significant parts of its messaging, the key elements: the red windmill, nature, people as part of a community, and the concluding strong bite into a Rügenwalder product remained the same for decades, allowing the company to combine its traditions with necessary strategic renewal. Furthermore, the brand continued to be connected with craftmanship while increasingly pushing convenience products. In other words,

[5] No artificial flavor enhancers, colorants, glutens and lactose.

"Rügenwalder Mühle" manages to address current (consumer) trends without sacrificing its existing customer base. With this 10-year experience of balancing continuity and change, the management team was well prepared to face the challenge of stretching the brand even further to what seemed to be an obvious misfit for a sausage producer. Godo Röben was confident from the beginning of the vegetarian launch that the strong umbrella brand would carry these products and stated that he was not concerned about Rügenwalder's image and was confident that any initial irritations concerning the brand's credibility would quickly pass. However, Röben did not only trust his gut feeling when estimating the stretchability of "Rügenwalder Mühle" and the potential effects of the monobrand strategy. Long internal discussions, several consultancies, and an in depth-customer survey preceded the decision. While virtually every brand consultant or marketing agency urged Röben to create a new brand, the customer feedback was positive. Therefore, the company's management decided to stick to the consumer opinion and introduced the vegetarian line under the established brands against all warnings from the marketing professionals.

Monobrand strategy

In summary, the last two conceptional models provide the information necessary to answer the central question of this case study: "Why did Rügenwalder use its established brand on APPs?"

Firstly, "Rügenwalder Mühle" was and still is a really strong, well-known brand in Germany. Over the years, the company invested a tremendous amount of money and created something unique in the industry. Top management simply had to react to macro-challenges, scandals in the meat industry, and changing consumer behavior towards more healthy and vegetarian food. Furthermore, it is essential to stress the more hidden reasons behind the monobrand approach. There was a significant amount of risk and uncertainty attached to using a meat brand on vegetarian products but creating a separate brand was never an option for the company's management. The brand "Rügenwalder Mühle" is the foundation of the company. Abandoning it

and moving towards a multi-brand strategy would likely have caused far more issues than a potential social media firestorm by vegetarians or hard-core meat lovers. It was the only viable option to do both, protect existing brand equity and ensure the economic wellbeing of the company, or to cite Christian Rauffus asked about the brand-image-risks of the management's strategic decision:

> *What good is a brand's identity or image that is no longer relevant? (HB_23.10.2015)*

If Rügenwalder Mühle remained a meat brand, it might have declined over time with more resources shifted towards the vegetarian brand. However, on the other hand, vegetarian products would not be as successful as they are today without the support of the strong umbrella brand, as Lothar Bentlage explained:

> *Our brand recognition helps us to survive in the market and against competitors. Customers know: Wherever it says Rügenwalder on the label, there is plenty of flavor in it - whether with or without meat. (LP_01.04.2019)*

Secondly, as already briefly mentioned, there is a simple economic reason for the monobrand strategy. If Rügenwalder had decided to introduce another brand, they would not have had enough financial resources to finance both in a way they are used to, with marketing budgets already that high for a single brand.

Therefore, the company built upon its exiting brand, already showing many expendable or stretchable attributes that might not be visible at first sight. After already catering towards customers being more concerned about health and supply-chain issues, the vegetarian products presented an admittedly large step but only one in a series of changes to the brand over a prolonged period whereby the company always managed to keep its core intact while innovating it at the same time.

6.7.2.3 Consequences of Introducing vegetarian Meat Replacements?

The following two constructs describe the consequences of Rügenwalder's shift towards offering vegetarian meat replacements, first on a general corporate level (Figure 11) and second from a communications point of view (Figure 12).

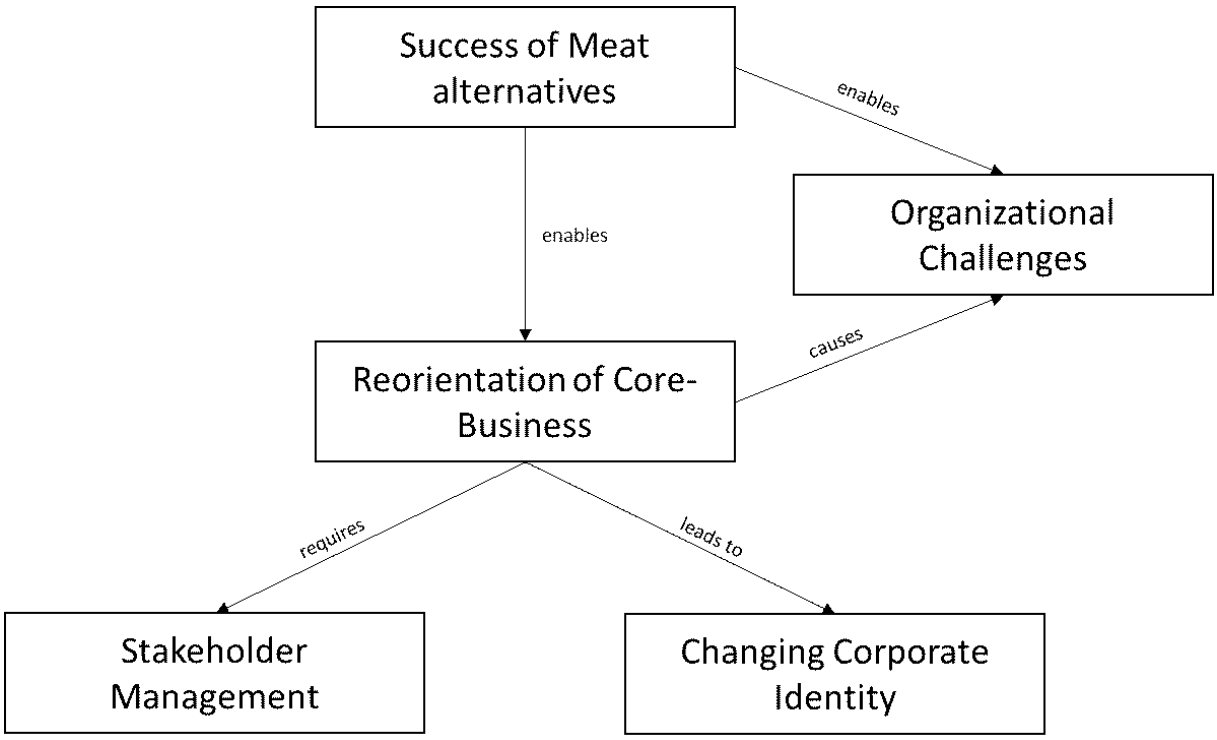


Figure 11: Consequences of Focus on APPs; Source: Own Representation

The success of meat alternatives

Against the estimations of Rügenwalder's management, sales for their new product category took off from the beginning. In early January 2015, only a few weeks after the official launch, Rügenwalder was already struggling to meet the demand for its vegetarian Schinkenspicker and was short of raw materials and production capabilities. However, these early days were only a glimpse of what was about to follow in the next six years.

Table 9 impressively depicts the extraordinary growth and success of Rügenwalder's vegetarian product line. At the end of 2020, when vegetarian products already made-

up half of the company's revenues, the growth rates continued to be astonishing. In the background of a stagnating or slowly declining meat business, Rügenwalder grew 80% since 2014, with continuous growth rates of the vegetarian segment of 73%[6] compared to 2019 and a demand spike of over 100% during the first lockdowns in the Covid-19 pandemic. However, this considerable success caused significant challenges to the company.

Organizational Challenges

Many of the organizational challenges caused by this rapid growth were already introduced in the time series analysis. They reach from non-existing purchasing processes for plant-based resources within the company, the lack of employees, too little storage capabilities, long waiting times for new, urgently needed machines, to a simple lack of production space, forcing the company to look for alternative production sites. Accordingly, the company heavily invested in its production capabilities. Publicly available figures from interviews disclose investments of 15 million € in 2015 and 2019 and further 20 million € each year in 2020 and 2021 only to extend Rügenwalder's production capabilities.

However, these "material" challenges are only part of a bigger picture of organizational transformation at Rügenwalder. The new CEO, Michael Hähnel, was hired in 2020 to guide this process and implement new structures suitable for the company's further expansion plans. Hähnel described this challenge in an interview:

> *You always have to find the right amount of pace and change that grows the organization and does not break it. The word "growing pains" describes this state quite well. Suddenly you have to question and readjust processes as well as familiar structures. This went all the way down to individual CVs. (STER_14.12.2020)*

[6] The alternative protein market grew at 65.4% during that time

Reorientation of core business to meat alternatives

Despite the organizational challenges, the enormous growth of the vegetarian product line led to a re-orientation of the company's core business. As meat replacements increasingly became more successful, Rügenwalder moved its focus towards these products. This switch was evident in public statements concerning constantly increasing sales targets, the discontinuation of some meat products in favor of vegetarian alternatives, and the early dedication of the company's enormous marketing budget solely to meat alternatives from the end of 2014 until mid-2017. Connected to these reorientations was also a shift in Rügenwalder's corporate identity.

Changing corporate identity

Rügenwalder's changing corporate identity mainly concerns a publicly pronounced transition of the company's self-concept from a traditional meat or sausage producer towards a diversified food company. Another sign for this imminent change and particularly notable for a meat company were Rügenwalder's statements regarding the potential abandonment of meat products in the future. Christian Rauffus once said that his company was "not married to meat" and highlighted together with Godo Röben the possibility that, if customers decide so, the company will stop producing meat altogether in the future:

> *If people no longer want animals to die for their food, then Rügenwalder is simply a food brand and not a sausage brand. (W&V_16.02.2016)*

Stakeholder Management

The company's transformation process also required intensive external and internal stakeholder management. Godo Röben once mentioned that aligning all internal stakeholders was the most formidable challenge in Rügenwalder's transformation process. In order to convince critical butchers, he wrote a comprehensive 90-minute speech outlining the externalities of global meat production and how the changing markets would affect Rügenwalder as a company. In the background of the difficult market situation in 2014, Röben held his speech during two staff meetings in front of all the company's employees and finally convinced them to join his endeavor.

While internal hurdles presented the most significant challenges, the company also had to manage external stakeholders in an intensity it was not used to before introducing the vegetarian line. Not only was the company for the first time involved in political lobbying, for instance, by joining the discussion on the nomenclature of meat alternatives or mandatory CO_2-labeling for food products, it was now also involved with the German Union of Vegetarians and similar interest groups addressing their concerns and wishes and even including them in new product development.

Naturally, Rügenwalder's monobrand strategy also caused criticism from hard-core vegans suspecting greenwashing behind a meat company's vegetarian efforts on the side and traditional meat-lovers criticizing the company for this in their eyes unnecessary move of producing highly unnatural products on the other[7]. Furthermore, farmers and other meat companies were critical or even cynical about the move, describing the company as a traitor to its craft and history. Rügenwalder, however, addressed all severe concerns and focused on explaining its transition to customers and stakeholders. Rügenwalder's specific communication strategy is discussed in the final conceptual model of this case study.

[7] Some examples for these accusations and heated discussions, almost exclusively taking place on Facebook, are provided in the supplemental materials.

6.7.2.4 How did Rügenwalder communicate the Monobrand Strategy?

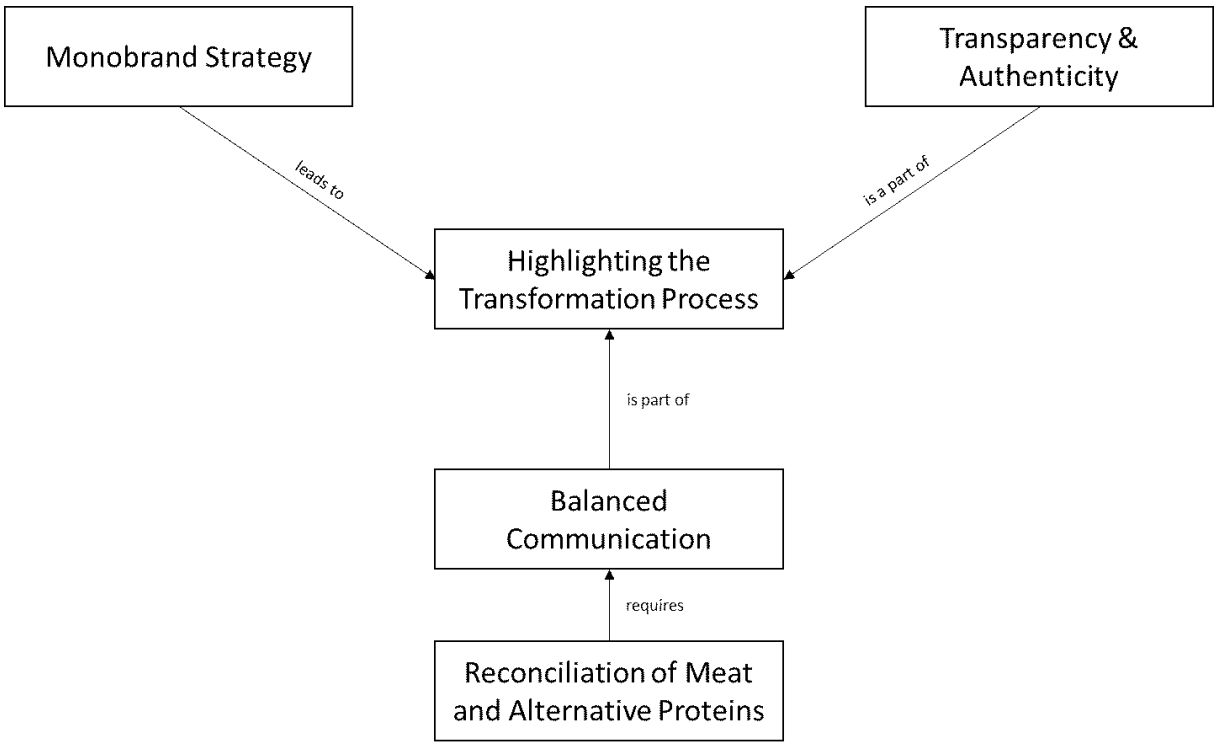


Figure 12: Key-elements of Rügenwalder's Communication Strategy; Source: Own Representation

Even though negative feedback, shitstorms, or hate speech occurred not as frequently as initially expected by its management, the company still had to adopt a unique approach towards communicating and advertising its new product range alongside the meat products.

Highlighting the transformation process

The core of this approach is Rügenwalder's effort to highlight its transformation process. This particular goal is already observable in managers' statements highlighting the company's changing self-concept, from the traditional meat processor towards a food manufacturer. Notably, Godo Röben often used comparisons to other industries to illustrate his company's current and potential future state. For example, he often compared, what he called, protein transition to the mobility and energy

transition on a macro level, stating that just like gasoline is replaced as fuel for cars by electricity or hydrogen, Rügenwalder is doing the same with their sausages and plant-based ingredients. Röben also used examples from the food sector, such as introducing non-alcoholic beer or decaffeinated coffee, highlighting their acceptance in the market. While these comparisons were almost exclusively used in settings like interviews and stakeholder talks, Rügenwalder's end-consumer communication, highlighting the transformation process, was grounded upon two central pillars: a balanced way of communicating as well as transparency and authenticity.

Balanced Communication – Reconcyling Meat and Alternative Proteins

"Balanced communication" describes a summary of different tools and tactics the company used to reduce the potential friction between the two seemingly opposing product segments, trying to combine them under the roof of "Rügenwalder Mühle." However, this balancing or harmonizing way of communicating was less an active decision than a necessity. At the beginning of the plant-based reorientation in 2014, no one at Rügenwalder could predict the success of the new product line. Mangers were confident that traditional meat products would be the core of their business for years to come. Meat products were, and still are, the brand's heritage, engraved in the Brand's DNA and the main reason many consumers know Rügenwalder. Combined with the strategy of using a single brand for both categories, this initial economic and historical dependence on meat required the reconciliation of both categories. This monobrand strategy presented the company's management with a significant challenge, as Lothar Bentlage explained to the author, underscoring the importance of nurturing the existing meat business alongside the vegetarian offerings as well.

Rügenwalder addressed this challenge by investing in the quality of its meat offerings, introducing sustainability and animal welfare programs, and re-entering the challenging market for organic meat in 2017 after the first attempt in this sub-category was discontinued a few years earlier due to disappointing sales figures. 2017 also marked the first time for more than two years that a significant part of Rügenwalder's

marketing budget was allocated to meat-products, promoting the organic line in two TV-Spots[8], after primarily advertising for plant-based products since the end of 2014. The new organic line was advertised alongside the conventional and vegetarian products, representing a significant step towards reconciling meat and plant-based products.

Closely connected to managing both product lines simultaneously, and probably the company's single most crucial success factor in its communication strategy is that it does not try to push customers towards a specific direction concerning their consumption patterns. While many of the startups in the field constantly bash meat consumption for its adverse effects on the environment and underline the ethical wrongdoing of killing animals to make the consumer feel guilty about eating meat, Rügenwalder, at the background of its heritage and still existing meat-range, adopted a different strategy. The company does not judge consumers for their consumption preferences but instead offers them the option to try a new, plant-based product that is just as tasty as the original. Contrary to many younger companies active in the field, Rügenwalder worked on reducing the ideological separation between meat-eaters and vegetarians/vegans from the beginning in 2014.[9] The core element of any communication effort was always to give customers a choice and let them decide, and as Godo Röben often mentioned, not to be perceived as "missionaries" telling customers what to do. The company's marketing team was particularly cautious not communicating any sacrifice of the customers' habits or preferences in food consumption as Röben explained in 2018:

> *The meat revolution is like the energy and mobility revolution: If you try forbidding people to do something, it will go bad. All the calls from "Please take the bus and train and leave your car at home" to "Please use less electricity" are just as futile as demands for a "Veggie Day." We humans do not want to and will not voluntarily give up*

[8] Videos 12, 16 & 17 in the appendix

[9] Rügenwalder's first TV commercial told the story of one of the company's leading product developer's friends who was vegetarian but missed the taste of the traditional Rügenwalder product. This commercial (#7 in the appendix) combined the focus on the company's employees and conveyed the message that meat-lovers and vegetarians do not need to be divided, ending in the traditional outside-eating scene.

> *anything. That is why the industry has a central role: A companies' task is to make existing products better - then everyone will be happy without anyone having to sacrifice. (WW_16.02.2018)*

Even though some of the company's management, particularly CMO Godo Röben, were deeply convinced that Rügenwalder should convince or nudge customers away from meat consumption towards more vegetarian products, they largely avoided stating this intention or transporting this message in brand communication.

Transparency & Authenticity

Rügenwalder's balanced communication was primarily supported by transparency and authenticity in their messaging. Already addressing customers' concerns about meat production with the successfully employee-focused campaign, Rügenwalder extended this approach during the introduction of the plant-based product line opening up towards customers and other interested or concerned people. Various events and interviews aimed at all kinds of stakeholders were regularly held to explain the company's transformation and continue the reconciliation between meat and plant-based products. Closely connected to this openness and transparency are two other characteristics of Rügenwalder's communication strategy: The already mentioned acknowledgment of the issues in meat production and actively addressing the potentially perceived dissonance of a sausage producer moving into the vegetarian sphere.

Acknowledging meat issues was a central but delicate task for the brand, avoiding ideological standpoints. While Christian Rauffus and Godo Röben were vocal in their (self) criticism in several interviews, Rügenwalder's brand communication was much more gentle and subtle in its critique, instead of focusing on the unifying themes introduced above. This unification was also partly achieved through actively addressing the, at least to some, contradiction of vegetarian and even vegan products produced by a meat company. Accordingly, Rügenwalder was always open about its

heritage and vision and, up and foremost, the reasons behind the transformation process.

6.8 Discussion

6.8.1 Summary and Future Direction of Rügenwalder



Figure 13: Summary of Rügenwalder Case; Source: Own Representation

Figure 13 summarizes the main factors of Rügenwalder's success and its uniqueness, both in the meat industry and beyond.

"Rügenwalder Mühle" was and still is one of the strongest food brands in Germany and represents the most critical asset for the company. Over decades, the iconic red windmill has transported its down-to-earth attitudes and core values. Continuous significant investments powered this strong brand for the same period. As explained above, this strong commitment is a significant part of why the company used its established brand on APPs. Introducing another brand with the same support would simply not have been financially feasible.

Nevertheless, financial constraints are not the only rationale behind this decision. Once established that Rügenwalder can only support a single strong brand, one might think that introducing meat replacements only protects existing brand equity and slowly transitions the brand away from its meat heritage towards a more relevant food brand focusing on plant-based products. While this is the case, Rügenwalder did not only support its old meat brand with the new product category. As the compnay´s senior managment concurringly confirmed, Rügenwalder's vegetarian products are as successful as they are right now not despite but rather because of the established meat brand. So, it is still today, at the company's background producing more plant-based products than "real" meat, much more of an asset than a liability. People buy Rügenwalder's vegetarian products because of their deep trust in the brand's values and traditional craftsmanship and its roots as an almost 200-year-old family-owned business. Apart from ideologists, these meat-based core values still mean a lot for many flexitarians trying to reduce meat consumption and constitute a clear USP for Rügenwalder, differentiating it from new startups in the field or newly developed brands by large FMCG companies. This dependence on the established brand and its meat product naturally led to a more balanced and restrained brand communication of Rügenwalder, which turned out to be another success factor for the company. Rügenwalder only found out in recent large-scale consumer interviews that this reconciliation and less-dividing tone is precisely what consumers want. They do not want to hear about additional conflicts or be discredited because of their food choices. People apparently just want to enjoy their food together and in peace with others, whatever they prefer. This message is what the red windmill and the people beneath it sitting in the countryside enjoying the Rügenwalder Mühle products have transported and communicated for the last 30 years.

Furthermore, a unique corporate culture has enabled all these success factors. Not only the relentless belief by the company's senior management in the power of branding and marketing but even more the deep trust between the then owner Christian Rauffus and the senior management, particularly Godo Röben and Lothar Bentlage, as well as a long-term-oriented culture allowing for experimentation, fostering the willingness

to take risks and most importantly forgiving mistakes is something that has hugely benefitted the company during its transformation process. Furthermore, the efficient structures of an, in the beginning, comparatively small family-owned company supported the decision-making processes as well.

To summarize, Rügenwalder will even if plant-based products continue to gain higher shares within the company[10], continue to invest in its meat products despite facing a potential loss due to increasing animal-welfare standards not mirrored by increased end-consumer prices. The company's meat brand and its engraved butcher-craftsmanship are simply too valuable to its brand.

6.8.2 Contrasting the Case of "Rügenwalder Mühle" to the Extant Literature

The brand „Rügenwalder Mühle" represents an even more interesting case when contrasted to the discussed extant literature on green brand extensions. While it is in line with some general findings on sustainable brand extensions like the extension-cause-fit or the positive effect of well-known brands on the attention for green products, for instance, it defies large parts of the existing literature and guidelines on sustainable brand extensions for old, established brands under challenging settings like the meat industry. Table 11 provides an overview of the main findings from chapters three and four of this thesis contrasted with this case study.

[10] In 2021 the approximate share is expected to be 60% plant-based 40% meat products.

Theoretical recommendations/findings	Rügenwalder Case evidence
Confirmed findings	
The cause or socio-ecological problem the extensions address needs to be similar to the parent to be perceived as fitting and sincere by consumers (De Angelis et al., 2017; Hill & Lee, 2015; Pritchard & Wilson, 2018).	Rügenwalder uses its brand extensions to address the company's core product's externalities directly. Combined with Rügenwalder's communication strategy, consumers apparently perceive plant-based meat replacements as a fitting and sincere green extension of its meat brand.
Consumers' high perceived environmental impact of a category leads to higher returns for green brand extensions (Chatterjee, 2009).	The meat sector causes several ecological issues, confirming Chatterjee's (2009) findings of green brand extensions greater value in these high-impact categories.
Customers positively perceive the launch of an organic product line under an established brand name with a preexisting good reputation (Ryan & Casidy, 2018).	The strong "Rügenwalder Mühle" Brand is well-extendable even in the vegetarian segment due to its good overall reputation.
Well-known brands should be leveraged to enhance consumer interest in green new product introductions, particularly when promotion in mass media can be used (Lopes & Veiga, 2019).	In line with the above reasoning, the present case confirms the findings of Lopes & Veiga (2019), describing the setting of Rügenwalder's market entry of APPs particularly, leveraging the strong meat brand to attract customers.
Existing fans of a brand might buy new green products anyway (H.-S. Kim & Ma, 2014) if they are consistent in style and usability with existing products (De Angelis et al., 2017).	These combined findings of Kim & Ma (2014) and De Angelis et al. (2017) underscore a crucial factor in the success of Rügenwalder's vegetarian product line. Unlike early products and brands offered in the meat replacement field, Rügenwalder specifically catered towards a growing number of flexitarians that have already been in contact with the "Rügenwalder Mühle" brand rather than just narrowing the scope of these new products down to vegetarians or vegans. For this reason, the close resemblance of meat replacements to existing meat products is a critical factor in getting more flexitarians to try APPs. If the new product's taste, look, and most importantly, are prepared like existing ones,

	customers are much more likely to accept them and switch (Hoek, Luning, et al., 2011).
The number of green claims should be limited for old brands in vice industries (Olsen et al., 2014).	This study did not explore particular claims on Rügenwalder's products or commercials. However, the suggestions of Olsen et al. (2014) could be seen as in line with the company's balanced and restrained communication approach.
Neutral findings	
Customers prefer green line-, over green category extensions (Chatterjee, 2009).	It is unclear whether plant-based products represent a new category compared to traditional meat. However, the same user context tends to classify it as a line extension and should therefore be perceived preferential by consumers.
Green brand extensions are only perceived positively if customers are environmentally friendly (Borin et al., 2013; H.-S. Kim & Ma, 2014).	Rügenwalder has not disclosed any data supporting this assumption. As discussed, the reasons for buying alternative protein products are manifold, from environmental concerns to health-related motives, animal welfare issues, and sometimes even curiosity. Particularly during the initial stage of the transformation, health-, and environmentally concerned customers fueled this early growth. However, with APPs getting more popular in a mass-market, this limitation might no longer exist.
Contradicting findings	
Olsen et al. (2014) find that green brand extensions benefit young brands more than old ones and suggest old brands use a sub-branding strategy.	This case contradicts Olsen et al.'s (2014) results with a very old brand in a vice industry not using a sub-branding strategy to escape potentially harmful associations with meat or the meat brand.
Value retention of a stand-alone green brand is better than the one of a green extension (Majid & Russell, 2015).	The present case does not provide evidence to comment on this finding. However, it is unlikely that a standalone vegetarian brand of Rügenwalder would have received the same attention and generated the same value compared to the extension strategy.

Evaluations of extensions suffer when aligned too closely to the parent brand in a vice category, and therefore these connections should not be directly communicated (Pritchard & Wilson, 2018).	The meat industry, troubled with various scandals and environmental issues, can be considered a vice industry without a doubt. Rügenwalder, however, still decided to closely connect parent brand and green extension and communicate this connection heavily, proving a strong and trusted brand even outweighs a challenging industrial setting.
Self-cannibalization is often an issue when sustainable and conventional products are offered and potentially can be countered by introducing a new pricing structure (Shen et al., 2019; Yenipazarli & Vakharia, 2015).	Rügenwalder's management has not reported any cannibalization issues. Although the company's meat production stagnated or slightly declined over the past years, this cannot be considered proof for product cannibalization as the whole meat/sausage market declined over time.

Table 10: Comparison of Theoretical and Case Study findings; Source: Own Representation

Taking the literature on organic food marketing as an example, extant work predicts that "Rügenwalder Mühle," unquestionable a strong national brand, should get hurt by introducing a more sustainable product line next to its conventional products, as their traditional products are perceived as having lower quality and (sustainability)-performance (Bezawada & Pauwels, 2013), particularly under the same brand name (Grunert et al., 2014; Mehta & Agrawal, 2020). Accordingly, Rügenwalder has risked hurting its meat products and brand by alerting consumers to the downsides of its core offering (Anagnostou et al., 2015) simply by acknowledging them by introducing the vegetarian line (Kong et al., 2021; van Doorn et al., 2021). Therefore, according to the extant literature, being an old, heritage brand (Iglesias et al., 2019), Rügenwalder should have introduced the vegetarian products under a subbrand (Bezawada & Pauwels, 2013; Olsen et al., 2014) in order to be separated from the parent avoiding adverse spillover effects in both directions (Pritchard & Wilson, 2018).

As presented, Rügenwalder took a different path and leveraged its strong, existing brand (Ryan & Casidy, 2018) to introduce vegetarian meat-replacements as a green brand extension. Using the balanced communication strategy discussed above, Rügenwalder managed to establish exploratory links between the parent brand and

extension, reinforcing the common goals and values of meat and vegetarian/vegan products (Bridges et al., 2000; Martin et al., 2005). Furthermore, by constantly and transparently communicating the goals and challenges of its transformation process and focusing on the common denominators between the two product segments, the company managed to conserve its brand's authenticity (Spiggle et al., 2012). Thereby, the case also confirms the findings of Kapferer (2012), suggesting that value-based brands are easier to extend than solely product-benefit-focused ones.

Rügenwalder, therefore, represents a best-practice example combining brand consistency and brand relevance, focusing the brands' product offerings towards plant-based products and more sustainability in general increases its relevance, particularly within a younger target audience. Furthermore, in recent years, sustainability and climate change have become ubiquitous topics in media, politics, and public life in general. Therefore, even though some consumers might deny the necessity of any actions or innovations to counter the major effects of climate change, a large majority most likely perceives Rügenwalder's efforts as reasonable and in line with the general public opinion. Moreover, as the topics of "sustainably" and "climate change" are highly salient with consumers, they might not perceive the company's or brand's actions as highly inconsistent with its past but rather a, admittedly significant, step in a row of brand innovations in order to adapt to changing times.

7. Multiple Case Study of other Meat Companies using their established Brands on Meat Replacements

7.1 Introduction

Building upon the initial explorative findings of the single case study on "Rügenwalder Mühle," the following multiple-case analysis represents the next step in the theory-building process concerning influential factors on brand ambidexterity and monobrand strategies in the meat industry. The factors already surfaced during the single case will subsequently be refined and compared to the few other companies utilizing their established brands on meat replacements as well. The small number of other meat companies active in this field provide a fertile ground for a multiple case study, further sharpening the emerging theory and contributing to its generalizability. After briefly explaining the data gathering-, analysis- and selection- methods used in this study, both a within- and a cross-case analysis will be presented to compare the different companies to each other, Rügenwalder, and extant academic literature, thereby answering research question three of this study:

RQ3: What factors influenced other meat companies in Germany, Austria, and Switzerland to enter the market for vegetarian meat alternatives with their established brands?

Naturally, this second study is built around similar questions compared to the first study trying to identify factors that led the other companies to follow Rügenwalder's monobrand strategy, particularly setting the following objectives:

(1) Identify commonalities and differences between the companies under investigation

(2) Showcase potentially different influential factors on monobrand strategies compared to the Rügenwalder Case

(3) Generate a more generally applicable theoretical construct

7.2 Design of the Study

The following study is designed as a multiple holistic case study (Yin, 2018) describing meat companies in the DACH region, like Rügenwalder, using their established meat brands on alternative protein products. While the single case in the first study focused on exploring an extreme case or phenomenon, the multiple case study aims to replicate these results, identifying common patterns and extending them to a theoretical construct (Eisenhardt & Graebner, 2007). Eisenhardt suggests that multiple case studies result in more robust theories because they focus on theory development rather than phenomenon description. This study largely follows Eisenhardt's & Graebner's (2007) recommendations on conducting these multiple case studies. Generally sticking to the approach already adopted in the single case design concerning data collection, triangulation, and analysis, a few changes were required for this second study's coding process, allowing for coexistence between an inductive and deductive approach towards theory generation and refinement. In contrast to a single-case study, this study will be conducted using the two-stage process of firstly a within-case analysis briefly describing each case individually and secondly a subsequent cross-case comparison highlighting the commonalities and differences between them.

7.3 Case Selection

The present empirical investigation aims to create or refine a theoretical construct. Therefore, a sufficient number of companies needs to be included. While reaching this theoretical saturation presents a significant challenge for most multiple case studies, primarily due to the high resource requirements to include a large number of cases (Eisenhardt, 1989; Yin, 2018), the present study does not face such issues. As there are only, apart from Rügenwalder, five other companies in the DACH region using meat brands on vegetarian replacements, a discussion of the whole population showing this particular property (Eisenhardt & Graebner, 2007) is feasible in the scope of the present study, making a case-selection more or less obsolete. According to Stake (2006), this number also lies within an optimum of 4 and 10 cases, allowing for generalizability while not overwhelming the researcher.

The five companies were identified during extensive desk research, listing all meat companies active in the alternative protein market from the DACH area. Beneficial during this task was a top-100 list of German meat producers published yearly by the renowned trade journals "Allgemeine Fleischerzeitung" and "Fleischwirtschaft"(Allgemeine Fleischerzeitung, 2020). All companies on the list, with annual turnovers ranging from 76 million € to 7.3 billion €, were systematically checked for any product offerings or investments in the alternative protein field. This desk research yielded 15 German meat producers actively selling or investing in meat alternatives. These German companies are supplemented by four Swiss and two Austrian meat firms. The Austrian and Swiss companies were identified using industrial reports and further desk research. A complete list of all identified meat companies active in the alternative protein business is provided in the supplemental materials. Table 11 lists the companies included in the present multiple case study:

Company	Brand	Brand-Focus	Annual sales in million € (2020)	Employees	Age of Brand (years)
PHW-Gruppe		Poultry products	2740	10000	56
Zur Mühlen Gruppe ApS & Co. KG		Poultry products	1000	4000	50
WOLF Wurstspezialitäten GmbH		Sausages	320	1600	96
EWG Eberswalder Wurst GmbH		Sausages	120	500	44
Meica Ammerländische Fleischwarenfabrik Fritz Meinen GmbH & Co. KG		Sausages	~100	~400	113

Table 11: Key Facts about Companies included in the Multiple Case Study; Source: Own Representation, based upon Allgemeine Fleischerzeitung (2020) *and Corporate Webpages*

7.4 Data Collection

Like the study on Rügenwalder, the present multiple case study is based upon different data sources to ensure construct validity through data triangulation. The availability of secondary data strongly varied between the cases. While Gutfried and Wiesenhof "produced" a large amount of secondary data over the years, it was more challenging to obtain articles or interviews on smaller companies like Meica or Eberswalder. Therefore, the primary efforts during the data-collection process were to acquire interview partners for each firm to overcome this lack of available resources. Besides Eberswalder, interviews with key decision-makers were conducted for every case (table 12).

Brand	Interviewee	Date	Duration & tool
Wiesenhof	Marcus Keitzer Board Member of the PHW-group responsible for alternative proteins	22.09.2021	55 minutes; interview conducted via MS-Teams
Gutfried	Maximilian Tönnies CEO of the zur Mühlen Gruppe and co-owner of the Tönnies Group	03.12.2021	47 minutes; interview conducted via MS-Teams
Wolf	Christian Wolf Owner & CEO	06.09.2021	55 minutes; interview conducted via MS-Teams
Meica	Andrea Stange CMO	08.11.2021	33 minutes; interview conducted via MS-Teams

Table 12: List of Interviewees for the Multiple Case Study; Source: Own Representation

All semi-structured interviews were conducted using an interview guide (Jäger & Reinecke, 2009), balancing critical questions posed to every interviewee and case-dependent on topics of interest while still allowing for the interviewees underlying opinions to be heard. General questions posed to every interview partner included:

(1) Why did you/your company enter the market for meat alternatives in the first place?

(2) Why did you/your company decide to use its/your established meat brand on vegan/vegetarian alternatives?

(3) What challenges and opportunities did this strategy pose to you/your company?

Interview guides were not sent to the interviewees before the talk and included in the supplemental materials of this dissertation.

Other sources used to compile the multiple case study largely resemble the approach of the Rügenwalder case. While corporate webpages presented valuable data sources in all analyzed cases, the availability of social media data significantly differed between them. Wiesenhof, Gutfried, and Wolf are relatively active on social media, using predominantly Facebook or Instagram. Contrasting, Meica's last Facebook post for its "Curry-King" subbrand dates back to December 2019. Furthermore, Eberswalder does not even use social media at all. A common denominator, however, seems to be mass-media advertising. Wiesenhof, Gutfried, and Meica extensively advertised on TV over several years, while Wolf is primarily engaged in radio advertising and short clips on TV. All available, current and historic, advertisements were downloaded from YouTube or corporate webpages, reviewed, analyzed, and attached in the supplemental materials.

If available, sustainability reports were also obtained from corporate web pages. In addition, the latest annual reports, mainly from the fiscal year 2019/2020, were downloaded for each company from the German "Bundesanzeiger" online tool. Furthermore, public speeches, podcasts, keynotes, and other audio or video material featuring senior management of the companies addressing alternative proteins were acquired using a YouTube and Google search, transcribed, and included in supplemental materials.

An essential resource, also used to prepare the interviews, was a systematic keyword search for the companies' names limited to results from Germany in the already introduced "Wiso" research database. Again, the larger brands Gutfried (1163 hits)

and Wiesenhof (2658 hits), belonging to multinational companies, yielded many results. On the other hand, the search for secondary sources, particularly the smaller brands Meica (45 hits) and Eberswalder (44 hits), only surfaced limited material.

The screening process was conducted similarly to the first study, structured in two rounds, firstly sorting out double-entries, product-ads, and remaining entries not concerning the companies. Secondly, a detailed content assessment focusing on the relevance to the research question of all remaining articles. Finally, the extensive Wiso-search was complemented by a Google search looking for significant sources that might have been missed during the earlier stages of the data gathering process.

This data-gathering process surfaced a total of 21 press releases, 30 television spots, nine annual or sustainability reports, five speeches/podcasts, 23 secondary interviews, and 253 secondary sources from the trade or general press. A detailed list of every single source used in this multiple case study, sorted by company, is provided in Appendix E. Original sources, transcripts, documents, as well as audio and video material are supplied within the supplemental materials. The transcripts of the primary interviews, podcasts, and speeches resulted in 87 single-spaced, Arial 10-font-pages.

Ensuring validity, replicability, and reliability of the results, this multiple case study followed the same guidelines as the single study on Rügenwalder concerning the database provided in the supplemental materials, the triangulation process supported by the various sources, and the pursuit for obtaining relevant primary sources (Beverland & Lindgreen, 2010).

7.5 Data Analysis

The five present cases were diagnosed using Eisenhardt's method of within-case and cross-case analysis (Eisenhardt, 1989; Eisenhardt & Graebner, 2007). Before beginning the coding process, all materials obtained during the data-gathering stage were transferred into ATLAS.ti to be renamed and sorted according to various categories

(company, year, type of source) The full ATLAS.ti project file is provided in the supplemental materials as well.

In a first step representing the within-case analysis, each case was analyzed individually to understand the developments within each company and the specific reasons for entering the market for vegetarian meat alternatives in the first place, particularly the rationales behind the individual monobrand strategies. The interplay between inductive and deductive analysis presented a significant challenge during the coding process. While the Rügenwalder case was analyzed purely from an inductive lens, trying to identify general emerging themes, the present multiple-case study already builds upon these findings and therefore follows a more deductive approach. However, only looking for already established patterns and themes would likely result in less accurate results. Thus, the deductive coding process using the 58 final codes from the Rügenwalder study was complemented, if necessary, by new codes describing emerging themes or topics identified in the new cases. After applying axial and selective coding, if necessary, to the newly generated codes, a time-series analysis together with further elaborations on specific key results and themes are presented for every company individually. Like the Rügenwalder case, coding and first analytical steps were conducted in German and translated only during the last stage of writing down the aggregated results. The codebook and all documents are included in the Atlas.ti file in the supplemental materials. All subsequent within-case-analyses are structured according to five broad categories identified and used in the Wiesenhof-case, providing the most significant number of data sources:

(1) Time-series-analysis
(2) Factors behind alternative protein engagement
(3) Brand Strategy
(4) Brand Communication Strategy
(5) Stakeholder Communication & Sustainability Management

After the individual case analyses, the brands are in a first step compared to each other, highlighting similarities and differences between them and in the final stage, extending the classic multiple case-approach suggested by Eisenhardt (1989),

compared to the emergent theory of the single Rügenwalder case as well as to the extant theory of sustainable brand extensions in the field. Figure 14 depicts the data analysis approach followed in this multiple case study.

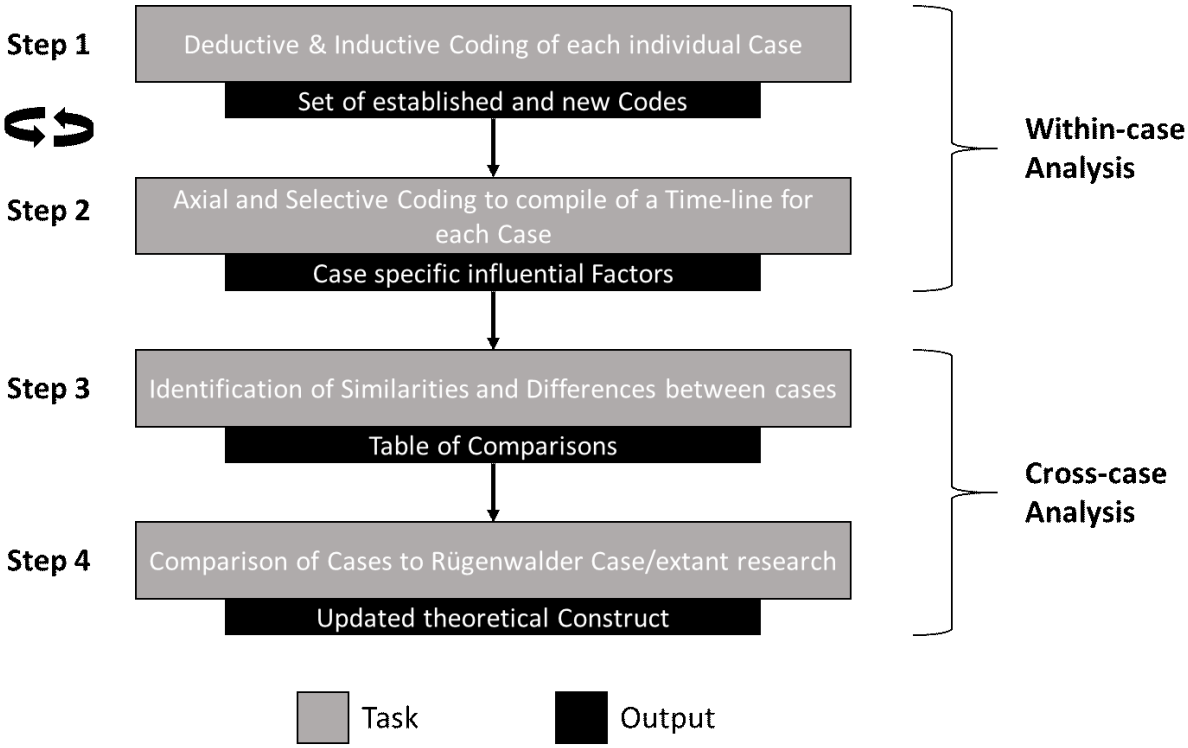


Figure 14: Multiple Case Study Process; Source: Own Representation

7.6 Findings Within-Case Analysis

7.6.1 PHW Group - Wiesenhof

Based in Rechterfeld in the German state of Lower Saxony, the PHW (Paul-Heinz Wesjohann) Group is the country's largest, fully integrated poultry producer and processor. The group's business is segmented into three categories:

1. Poultry (Hatcheries, breeding, feed production, slaughter, fresh meat, convenience products, sausages, disposal)
2. Alternative protein sources (plant-based and lab-grown meat replacements)
3. Health (Animal and human)

With an estimated 350 million slaughtered hens in 2020 (Poultry International, 2021), the poultry business and its famous "Wiesenhof" brand represent the group's largest unit. The 49 subsidiaries consolidated in the PHW Group generated annual revenue of 2.7 billion Euros in 2019/2020 and employed more than 10.000 workers.

7.6.1.1 Time-Series Analysis

The journey of the PHW-group started in 1932. Paul Wesjohann founded a small trading company and a chicken hatchery, while Heinz Lohmann entered the poultry business, fathering the "Goldhähnchen," Germany's first chicken brand in 1956. In 1965 Lohmann and Wesjohann started their cooperation founding a joint hatchery also marking the birth of the famous "Wiesenhof" brand. Subsequently, already in the second generation of the respective families, the business partners moved into the animal medication (1968), the poultry slaughter business (1972) as well as first investments abroad (1978). In 1987 the two families established a collaborative umbrella organization, the Lohmann-Wesjohann Group, to be restructured into today's PHW-Group in 1998. By the early 2000s, the PHW-Group and its Wiesenhof brand have become Germany's largest poultry producer, active the whole supply chain from breeding, feeding, slaughtering, processing, and marketing chickens, turkeys, and ducks and their meat products.

The sheer size of PHW's operation, slaughtering more than one million chickens daily in Germany alone, and rising criticism concerning factory farming, in general, put the company at the center of the public eye resulting in various controversies over the years. For example, in 2010, Peta-activists documented animal abuse in Wiesenhof-farms were leading to a legal fight between the company and the animal-right NGO. More recently, besides continuing pressure from NGOs, the PHW-group was criticized for moving its legal company seat to Lichtenstein, allegedly for tax reasons, Covid-19 outbreaks in their factories, subcontractors' living and working conditions, and multi-resistant germs on slaughtered chickens.

As a reaction to public pressure and changing customer sentiment, Wiesenhof did not only increase the number of poultry from animal welfare programs in the offerings, the PHW group also introduced its first vegan meat replacements in March 2015 under the food-service brand "Paul's Veggie" and later in 2015, a vegan mortadella and meat sausage aimed at end-consumers under the "Wiesenhof" brand.

After slowly adding more products in the vegetarian/vegan niche market, the PHW-group increased its efforts and investments in potential future meat technologies in 2018. After appointing Marcus Keitzer as board member responsible for alternative proteins, several investments into startups, the cultured meat sector, partnerships with other companies, and an own vegan production followed. These investments include an exclusive partnership with the American startup Beyond Meat and creating a new, dedicated vegan brand called "Green Legend" in 2020. A list of all startup investments and partnerships of the PHW-Group is provided in Appendix E. Today, the company's overall strategy towards alternative proteins rests on the following four pillars:

1. Own vegetarian/vegan product line (Wiesenhof Bruzzler/Green Legend)
2. Distribution partnerships (Beyond Meat, Eat Just)
3. Strategic investments (SuperMeat, Good Catch)
4. Joint Ventures for further investments (Green Meadows)

The various investments of the PHW group represent an interesting example of a meat company leveraging its existing capabilities in the plant-based market. The PHW group uses its expertise in large-scale food production, logistics, regulatory know-how, quality management, and particularly distribution through its contacts with various retailers in Europe to coach and help these startups grow and prosper. In 2018, representing the latest available figure, Wiesenhof's plant-based products accounted for 5% of the group's sausage turnover. However, this segment grew at a rate of over 50% in 2020 alone.

7.6.1.2 Factors behind Alternative Protein Engagement

Contrasting the Rügenwalder case and many other meat processors producing APPs, the PHW group did not enter this market because of economic pressures or declining revenues. Unlike red meat, poultry consumption, Wiesenhof's core product is still on the rise in Germany. However, rising sustainability and animal welfare concerns did play a role in the group's decision-making paired with the company's just mentioned existing production and distribution capabilities.

Another supporting factor often articulated by senior management of the PHW-group was the steady rise of flexitarians within the German public. Similar to the Rügenwalder-case, flexitarians rather than vegans or vegetarians represent the target segment of PHW's meatless offerings, corresponding to a target group of 60-70% of consumers in Germany rather than the 10% vegetarians and vegans. The company even explored this trend in detail, conducting and recently publishing a study on the topic in cooperation with the "Forsa" market research institute. Connected to the increasing number of flexitarians was also a slow decline of ideological barriers between vegetarians/vegans and omnivores, enabling the group's diverse investments and cooperation with vegan startups.

7.6.1.3 Brand Strategy

Closely connected to the group's meatless efforts is its core poultry brand, "Wiesenhof." Wiesenhof was used as an umbrella brand for the group's products since the late 1960s, representing one of the most famous meet brands in the country, particularly for poultry. Wiesenhof's brand awareness steadily increased over the years, reaching 80% (aided) in 2000 and over 90% by 2014. The early 2000s also saw the rise of Wiesenhof's most popular subbrand, the "Bruzzzler," quickly becoming the most successful fried sausage or "Bratwurst" in the country, also responsible for much of the company's recent sales growth. However, CMO Ingo Stryck emphasized in an interview from 2004 that despite the tremendous success of the "Bruzzler subbrand, the company still highlights the parent brand "Wiesenhof" on every single product they sell. Having such a strong brand in combination with the several scandals,

shitstorms, and controversies around the company presents a formidable challenge to Wiesenhof's brand management as CEO Peter Wesjohann admitted in 2017:

> *There are dozens of sausage brands in Germany, but only one meat brand: Wiesenhof. And it has a brand awareness of over 90 percent. That makes us the first target for critics and opponents from all directions. (WIWO_07.08.2017)*

Especially interesting and noteworthy for this study is PHW's brand strategy over the last five years, marking the introduction of vegan meat replacement products. While the first products were introduced under a newly created brand exclusively aiming at food-service customers ("Paul's veggie"), all subsequent products like cold cuts, for instance, were introduced under the established "Wiesenhof" brand or the "Bruzzzler" subbrand. With the 2020 introduction of "Green Legend," the dedicated vegan brand, most products were moved from Wiesenhof to the new brand. However, the vegan variant of the "Bruzzzler" remained under its meat parent. The PHW group considers Wiesenhof a brand standing for high-quality poultry primarily aimed at the German Market. The company's management did not want to dilute this brand equity and therefore decided to introduce a new umbrella brand for the plant-based segment with one exception, the "Bruzzzler." The Bratwurst is a highly successful subbrand in itself, also representing the best-selling and well-established vegetarian product in PHW's range with an already existing customer base.

7.6.1.4 Brand Communication Strategy

The PHW-Group also invested significantly in Wiesenhof's brand communication. Over the years, Wiesenhof employed several testimonials, from famous goalkeeper Oliver Kahn to singer Dieter Bohlen and ice-skater Katharina Witt. The long-running engagement of the comedian Atze Schröder promoting the "Bruzzzler" subbrand is particularly notable. The testimonial marketing for "Bruzzzler" also represents the core of the company's focus on TV advertising, the most considerable expense in Wiesenhof's significant marketing budget.

As another central part of the Wiesenhof brand communication, the PHW group also heavily invested in sport sponsoring in basketball, ice hockey, handball, and particularly as the primary sponsor of the soccer club Werder Bremen putting the "Wiesenhof" brand on the player's jerseys since 2012. However, this engagement also leads to reoccurring criticism and controversies in the club's fan base due to the scandals connected to the brand. The PHW group also used the Wiesenhof sponsoring on the Werder jerseys to engage with its stakeholders and communicate sustainability efforts. Examples, therefore, are two special occasions when the company decided to replace the traditional Wiesenhof-logo on the jerseys with the logo of the German Animal Welfare Association in 2015, promoting its "Privathof"-program with increased animal welfare standards and the newly introduced vegan brand "Green Legend" in 2021, promoting the "Veganuary."

Notably, the brand's social media communication focuses only and Instagram and YouTube, either promoting or showcasing their products or pushing content created through the Werder Bremen sponsoring.

7.6.1.5 Stakeholder Communication & Sustainability Management

Even though stakeholder communication plays a significant role for the brand and the whole PHW-Group, this exchange does not take place on social media platforms. Instead, these efforts were pursued through interviews in traditional mass media, direct meetings with NGOs like Peta, publications focusing on policymakers, and lobbying in favor of allowing mungo-beans (JUST Egg) with EU regulators. Other reactions to the constant public pressure on the company included increased sustainability efforts. As a result, the PHW group produces "climate-neutral" at all of its German "Wiesenhof" production sites and was also named one of the world's 50 "Sustainability and Climate Leaders" by the UN, mainly because of the group's engagement in the alternative protein field.

Another notable point about the Wiesenhof-case is the company's substantial investment into its meat product, basically translating to increased improvements of

animal welfare conditions of chickens sold under the Wiesenhof brand. For instance, starting in 2000, Wiesenhof steadily increased the share of products sold under its "Privathof"-program, offering more space to the individual chicken while also drastically reducing the use of antibiotics. As a result, Wiesenhof's products' share with animal welfare standards exceeding legal requirements under various programs increased to 90% until the end of 2020 (3.75 million chickens a week).

This investment into PHW's meat products is also in line with its future market estimations and self-image. The PHW- group is in the middle of a business transformation process, heavily invested in various types of alternative proteins, already describing itself as a protein supplier and food producer rather than a meat processor. However, even though the company follows the official strategy of "Growth from diversity," senior management, including the group's owner Peter Wesjohann, often emphasized the continuing dependence on animal protein from poultry in the future.

7.6.2 Gutfried - Zur-Mühlen Gruppe - Tönnies

Gutfried has now been for many years Germany's most popular brand for poultry sausage and cold cuts, particularly if made from turkey. It also represents one of the oldest meat brands in the market looking back at more than 50 eventful years. Initially developed by the company Nölke, it now belongs to the "zur Mühlen Gruppe" and is, therefore, part of the Tönnies meat-empire and offers various poultry-based products like cold cuts, convenience articles, and sausages as well as an increasing number of plant-based meat alternatives.

7.6.2.1 Time-Series Analysis

Heinrich Nölke founded his company in 1924 in the German Westphalia region, initially focusing on pig fattening. Identifying increased demand for poultry in Germany of the late 1950s, the second generation of the company's owning family, first and foremost Heinrich's son Ulrich Nölke, focused solely on this business segment and later introduced poultry cold cuts as the first company in Germany in 1968. In 1971 Ulrich Nölke used the name of the family's estate to create the Brand "Gutfried" (**Gut Fried**richsruh) after that used on these poultry cold-cuts until the present day. The brand launch was already supported by advertisements in magazines, soon accompanied by TV campaigns, making it the first meat brand to advertise on national television. Since that time, Gutfried received several awards for its marketing, and its famous slogan coined in the late 1980's "Gutfried ist gut für mich," still represents the brand today.

During the following years, the company Nölke and its brand Gutfried continued to grow, reaching annual revenues of 430 Mio. € in 2004. However, this growth was primarily fueled by several acquisitions and takeovers that turned out to be relatively unsuccessful and needed to be repelled soon after. Additionally to the economic turmoil, also caused by rising raw-meat prices, the company was a key witness in the so-called "Wurstkartell," a by Nölke's testimony uncovered cartel of virtually every large Germany sausage producer in the year 2010, resulting in a significant loss of trust from end-consumers but even more importantly from the company's retail customers. The ongoing tense economic situation of Nölke finally forced the at the time owner Frank Nölke to sell his company to the "zur Mühlen Gruppe," a conglomerate of several German heritage-meat brands bought by the manager Perter zur Mühlen and his company. The zur Mühlen Group itself was taken over by the even larger Tönnies Group in 2014[11].

Soon after the Tönnies-takeover, in early 2015 and thereby at the peak of the first "veggie-hype," Clemens Tönnies, CEO and co-owner of the Tönnies group, decided to enter this market as well by introducing a small product range aimed at the

[11] See Box 1 in Appendix E for more information on zur Mühlen and the Tönnies Group

foodservice sector with a brand called "Tillman's" followed by products aimed at the end consumer under the recently acquired Gutfried brand.

Under new ownership, the brand recovered during the following two years and became a central part of zur Mühlen's marketing efforts. Pushing through the decline of the meat-replacement market in 2017-2018, followed by the reduction of the vegetarian offerings and criticism by Clemens Tönnies concerning the taste of the new products, Gutfried's vegetarian sales continued to grow, particularly during the early stages of the Covid-19 pandemic in 2020. 2021 saw not only an increase in products offered by Gutfried and other Tönnies brands in the alternative protein field but also high investments into production facilities for this product line and expected revenues of 30 million € representing 10% of Gutfried's total turnover. The company aims to increase this share to 122 Million € annually by 2025.

7.6.2.2 Factors behind Alternative Protein Engagement

Just like for any other larger player in the meat business, the rising number of flexitarians played a role in the decision of the Tönnies group the enter the market for meat replacements, as Max Tönnies explained in one episode of the group's podcast in 2021:

> *Our target group is not the 5 percent vegans who would not buy Gutfried anyway because they just say: "Yes, I am vegan out of conviction. I am against the food producers". They probably do not buy Nestlé either. Not Garden Gourmet or Vegetarian Butcher from Unilever, because they just also say, "These are big corporations, we do not want to support them." Our goal are the 60 percent flexitarians that we address with Gutfried. (Tönnies trifft Tönnies_26.08.2021)*

Even though Clemens Tönnies was quite reluctant at the beginning, his son Max, in his position as CEO of the zur Mühlen Group, supported the new product line even against the will of his father during the challenging years of 2017-2019 at the background of declining sales figures in the segment. Another supporting factor mentioned by Max Tönnies is that Nölke, the original parent company of Gutfried, has

been producing vegetarian products like Tofu-sausages or soy-based meatloaf under a store brand for health food shops for more than 40 years and therefore had already acquired substantial knowledge and capabilities in the area.

7.6.2.3 Brand Strategy

Interestingly, Gutfried, not Rügenwalder, or Wiesenhof is considered the oldest meat brand in Germany, showing its strength, particularly in poultry cold-cuts. Much earlier than the other major two meat brands in the country, Gutfried invested in mass media advising, mainly focusing on TV and Radio. With its iconic "Gutfried is gut für mich"[12] slogan, the brand had an early focus on a relatively young audience opting for poultry products, mainly because of perceived health benefits compared to "traditional" meat products made from beef and pork. After introducing several new products, including a subbrand for children (Gutfried Junior), by 2003, the brand owned the most significant market share (26%) in poultry cold-cuts in Germany. This popularity was partly attributed to the brand's high marketing spending. In 2006, Gutfried already spent 6.5 Million € on advertising, increasing to 8.5 million € in 2010. In the same year, Nölke also closed down large parts of its private-label business, focusing primarily on its "star" Gutfried.

Naturally, Nölke's economic difficulties and uncertainties also harmed the Gutfried-brand as marketing budgets were cut to "zero" for several years. Nevertheless, the brand could retain large parts of its popularity and was revied and financially supported in 2016 during Tönnies' first entrance into the alternative protein market. What is particularly interesting about the group's brand strategy on meat replacements is that Tönnies used two established brands (Gutfried & Tillman's) alongside a newly created one (Vevia). However, this strategy can be explained by considering the different customers of the respective brands. Tillman's focuses on food service and is not known to end-consumers, while the brand Vevia offers only vegan products. Gutfried's significant brandy equity also led the zur Mühlen Group to use

[12]"Gutfried is good for me"

the brand as the anchor for the recent plant-based push, as CEO Max Tönnies explained in 2021:

> *We will use Gutfried as a lighthouse brand." The brand stands for conscious and healthy nutrition. (Tönnies trifft Tönnies_26.08.2021)*

In 2021, zur Mühlen added another meat replacement brand called "es schmeckt" into its portfolio and introduced a series of vegetarian convenience products labeled "wie" or "just like" under the Gutfried brand supported by an extensive mass-media campaign. Notably, while these newly introduced products include vegetarian nuggets and schnitzels, the company also offers vegetarian fish sticks under the established Gutfried brand. This extension beyond replacing classical poultry products represents an interesting move and tests the stretchability and applicability of the meat brand even further.

7.6.2.4 Brand Communication Strategy

Gutfried was the first meat brand to advertise on German national television. Apart from promoting on TV early on, Gutfried also used radio in its media mix from 2011 onwards. From the 1980s forth, Gutfried conveyed the message of being a healthy alternative to red-meat cold cuts. Several campaigns promoting "pleasure without regrets" reinforced this USP. This positioning only changed marginally over the years and is still visible today with the brand using its "Gutfried ist gut für mich" slogan on the vegetarian meat replacement as well, providing a prominent foundation for this brand extension.

Gutfried, just like its competitors Rügenwalder and Wiesenhof, also used testimonial marketing. German TV anchor Johannes B. Kerner served as the brand's face in various ads from 2004 until 2012. After the takeover in 2017, Gutfried stuck to its focus on TV advertising, for instance, during the popular reality-TV show "Dschungelcamp" in 2020, accompanied by social media accounts on Facebook, YouTube, and Instagram also utilizing influencer marketing. In 2020 Gutfried also advertised for its conventional, organic, and vegetarian sausages simultaneously on all its channels for

the first time. While Gutfried's YouTube channel only receives new content on a scarce, irregular basis, the brand is active on Facebook and Instagram, mainly highlighting new products (meat and vegetarian alike) and sharing recipes.

7.6.2.5 Stakeholder Communication & Sustainability Management

Neither the brand Gutfried nor its parent company, zur Mühlen, are engaged in any stakeholder communication apart from the mentioned advertisements. At the same time, all potential critical topics regarding the externalities of meat production are covered by the Tönnies holding and its several stakeholder initiatives, including the T-30 sustainability strategy focusing on increased animal welfare for pigs and therefore on investments in the group's core meat product. Notably, while Gutfried does not address any sustainability measures or animal welfare conditions of the poultry used in its production, the Tönnies group regularly highlights Gutfried's vegetarian offerings as part of its sustainability strategy.

Apart from its sustainability efforts, the Tönnies group also moves away from its public self-image from a meat-producing slaughterhouse towards a diversified food producer active in various business segments.

7.6.3 Wolf

WOLF Wurstspezialitäten GmbH is a traditional family-owned meat processor from Bavaria. It mainly produces different kinds of sausages and cold-cuts, selling them under the family name and brand "Wolf" while also producing for retail brands. In its fourth generation, still led by the "Wolf" family, the company focuses on regional specialties from Bavaria and Thuringia, products used for barbecuing, convenience-meals, and more recently, vegetarian and vegan meat replacements. The firm employs around 1500 people that generated annual revenues of 320 million € in 2020.

7.6.3.1 Time-Series Analysis

Alois Wolf founded his small butcher shop in 1925 in the, at the time, German region of Mies, today belonging to the Czech Republic. In the aftermath of the second world war, the family, as part of the German-speaking minority in the region, had to move westwards and settled down in Schwandorf, Bavaria, where Alois' son, Karl Wolf, reopened a butcher-shop and a connected restaurant in the 1950s. During the 1970s, already with the family's third generation working in the business, the company grew from a small butcher shop to a large producer of various meat and sausage products. The 1990s saw the company's probably most significant strategic decision in its history when then owner and CEO Reinhard Wolf decided to invest in the eastern part of Germany even before the reunification, finally opening a new production site in Thuringia in 1995. Only four years later, Wolf bought the company Forster specialized in convenience-, and traditional products from the Nurnberg region (Nürnberger Rostbratwürste). These two strategic decisions still influence the company's setup and product portfolio. From the mid-1990s onwards, Wolf produced regional sausages from Bavaria and Thuringia that are, due to protected geographical indications, only allowed to be made in the specific regions of the company's now three production sites (Nurnberg, Thuringia, Schwandorf). In 2020, current owner Christian Wolf summarized his strategy facing an increasingly consolidated meat market:

> *As a family business, we have positioned ourselves accordingly. As a result, we rank among Germany's most important sausage producers and stand out with regional, origin-protected products such as Thuringian and Nuremberg Bratwurst. (AFZ_01.07.2020)*

This strategy seemingly pays off as Wolf, now the fourth-largest player in the German sausage market, sold more than 82 million "Thüringer Rostbratwürste" in 2020, resulting in a nationwide market share of 58%.

During the last two years, Wolf increasingly shifted its focus towards a younger, more health-, and lifestyle-focused audience, introducing organic, vegetarian, and even vegan products, mainly aimed at barbecuing. This process also brought significant investments into production facilities, market and consumer research, and a currently

ongoing rebranding effort with the major launch of the vegan product line in early 2022, making this case even more relevant and interesting to the present thesis.

Based on the company's future four pillars (Local specialties, barbecue-products, convenience meals, and meatless products), Christian Wolf not only pursuits the company's transformation towards a diversified food producer but also follows the ambitious goal of reaching annual revenues of 500 million € until 2026 compared to 320 million € in 2020.

7.6.3.2 Factors behind Alternative Protein Engagement

Like many competitors, Wolf launched its first vegetarian products in 2015. However, the company did not advertise them at all. Nevertheless, the company acquired early experiences in the field already marketed under the Wolf-brand name but not advertised in Germany. Facing a significant decline of sausage consumption in Germany and the general criticism and a trend away from meet particularly among younger consumers, Wolf recently decided to re-enter the alternative meat market as part of a company-wide restructuring and rebranding process. Wolf is also focusing its current vegetarian product development, particularly on strong products in its existing barbecue portfolio, meaning plant-based alternatives of Nürnberger or Thüringer sausages or the replacement of minced meat in many of the company's convenience meals, for instance.

7.6.3.3 Brand Strategy

Being a traditional family-owned company using the family name on its products, Wolf naturally invested in maintaining a good reputation and brand image as Christian Wolf explained in 2007:

> *For us as a medium-sized company, our brand is our capital. The Wolf family bears responsibility for our products as a sender. (LZ_05.10.2007)*

Notably, Wolf managed to establish its brand name as a traditional producer of East-German specialties even without being historically routed in the region. From the 1990s on, Wolf was perceived as a traditional Bavarian and Thuringian brand. From that time on, the company constantly reinforced this positioning, also through early investments into brand communication in the new German states in 1991/1992. Today, Wolf represents the most popular and well-known sausage brand in this part of the country, even outperforming Rügenwalder.

Furthermore, the company has been producing for private labels for a very long time, a trend Christian Wolf actively began to counter in 2013 with a brand relaunch, moving the brand more towards the premium segment of the sausage market. 2021 marked the beginning of Wolf's second rebranding and restructuring efforts uniting three business units and seven different product categories under the umbrella brand "Wolf, Echter Essgenuss" ("Wolf, real delight").

7.6.3.4 Brand Communication Strategy

Alongside the increased branding efforts in the late 1990's Wolf also invested in its marketing communication. The company, for instance, was an early adopter of online marketing, launching a very successful webpage in 2002. While most of Wolf's communication focused on product advertising, particularly at the point of sale, the company started to advertise its brand in general rather than just for specific products in 2003. Contrasting the earlier examples of Rügenwalder or Wiesenhof, apart from short inserts preceding local weather forecasts, Wolf primarily uses radio and

billboard advertising to promote its brand rather than focusing on classic TV advertising.

The already mentioned local roots of its sausage specialties using slogans like "Schmeckt nach Lieblingswurst" ("Tastes like your favorite sausage") or "Das Beste von uns daheim" ("Only the best from our home") were always central in Wolf's radio adverts airing in the sausage-hotspots of Germany (Bavaria, Saxony & Thuringia).

During the current rebranding and restructuring process, Wolf also performed several market-, and customer analyses resulting in four different personas subsequently used to guide all future brand communication efforts. On the one hand, the company's traditional meat-based products are still promoted using conventional mass media (billboard, radio, print), catering towards "traditionalists" and "classical families." However, on the other hand, a younger audience will be predominantly addressed using social media. The first proof of this strategy can already be observed on the brand's very active Facebook account displaying sport sponsoring of local and regional soccer clubs or product advertisements and seasonal vegetables and recipes, even highlighting the Veganuary.

7.6.3.5 Stakeholder Communication & Sustainability Management

Apart from a few more minor controversies regarding service contractors and the unionizing of workers, Wolf and its products have not been publicly criticized. Maybe due to this reason, sustainability communication did not play a significant role in the company's history. However, the brand's transition process from a sausage producer towards a food company also encompassed a public commitment of Christian Wolf towards more sustainability, the introduction of an organic product range, and the goal of producing climate-neutral as soon as possible.

7.6.4 Meica

The Meinen & Kahmann GmbH, located in the Ammerland-region of northern Germany, notably right next to Rügenwalder, owns another of the country's most famous meat and even food brands in general, "Meica," a name derived from the company's founders, primarily known for its sausages in glass packaging sold nationwide in German retail. Even though relatively small, the company has a record of introducing several successful subbrands over the years, all supported by popular TV campaigns. However, compared to most other companies in the sample of the present dissertation and particularly in contrast to the brand's mass marketing efforts, only minimal public information like interviews or newspaper articles are available on the company, making the interview with Meica's current CMO even more valuable.

7.6.4.1 Time-Series Analysis

Founded in 1908 by the farmer and butcher Fritz Meinen, the company Meica introduced its first product brand ("Original Ammerländer") in 1960, marking the beginning of a long line of successful new business product- or subbrand introductions. The most famous ones are listed in table 13.

Year	Product-brand	Year	Product-brand
1992	Mini-Wini	1996	Bratmaxe
1993	Deutschländer	2001	Curry King
1994	Trumanns	2003	Kohl König

Table 13: List of major Meica-Product-Brands; Source: Own Representation based on Meica (2021)

Particularly Mini-Wini (small sausages for children), Deutschländer (cross-over of several sausage-types), Bratmaxe (Bratwurst), and Curry King (ready-made "Currywurst" heated the microwave) became very successful over the years, always nurtured through a constant TV advertisement. Just like the other major German meat brands, Meica decided to enter the alternative protein market in 2015 as well, introducing vegetarian options for the brands "Mini-Wini," "Bratmaxe," and "Curry King."

7.6.4.2 Factors behind Alternative Protein Engagement

Like many other companies in the field, Meica already had acquired prior experience with meat alternatives before entering the market under its established brands in 2015, producing convenience products and vegetarian sausages for a health-food brand called "Ökoland." Apart from the increasing number of flexitarians, the openness of the company's retail customers towards the new product range was mentioned as an additional supporting factor. Meica explained their reasoning to the consumer on its homepage:

> *More and more people today are deciding to reduce their meat consumption or go completely vegetarian. With our new vegetarian products, they can eat the way they want without giving up the full Meica enjoyment. At Meica, we know what makes a good sausage: it must be of high quality and, above all, taste delicious. That is our claim, which we have been following for over 100 years. As Germany's number one sausage brand, we want to produce the best vegetarian sausages with this principle in mind. Meica makes the sausage - now also vegetarian! (Meica, 2021)*

7.6.4.3 Brand Strategy

As indicated, Meica's sub-or product-branding strategy is unique and developed only within ten years (see table 13). Rather than using the parent brand "Meica" on every new product, the company decided to introduce a product brand under the umbrella "Meica" and managed to advertise for product brands while never losing touch with the parent, ending every spot with the slogan "Meica macht das Würstchen" (Meica makes the sausage) resulting in unaided brand recognition of 86 % of Meica in Germany in 2018.

This strong umbrella brand, combined with several product brands having different personalities, also provided the company with various options concerning introducing vegetarian products. While senior management deemed "Deutschländer," one of Germany's leading sausage products, as being too conservative, they decided to utilize product brands aimed at a different and mostly younger target audience, like

Bratmaxe and Curry-King, to introduce the new product range. On the other hand, introducing a new brand for vegetarian products would have required much more financial resources, particularly at the background of Meica's usual marketing support for its brands.

An interesting sidenote to Meica's unique brand strategy is the fact that the mastermind behind all product brands introduced in the 1990s as well as the famous jingles was brand-guru Otto Pahnke, not only responsible for the marketing of the Storck-group (Merci) but also for the brand communication of Rügenwalder Mühle. Otto Pahnke's agency continued to be responsible for Meica's entire marketing until 2018.

7.6.4.4 Brand Communication Strategy

Otto Pahnke created several iconic TV spots for Meica and its product brands. Most famous was, and still is, the advert explaining the name and promoting the benefits of the "Deutschländer" sausage showing a conversation between a foreman-butcher and his apprentice. Several spots, all on national television, followed over the years, all ending with the decade-old claim "Meica macht das Würstchen" Meica sticks to this TV focus until the present day. This circumstance can be explained with the company's focus on maximizing the reach of its advertisements among the targeted segments. During the last few years, starting with the 2017 "Bratmaxe" campaign, Meica slowly added social media to its advertising portfolio, not actively engaging with consumers on these channels but rather through paid content.

Focusing on vegetarian products, Meica did not air specific spots for this category but included "add-ons" at the end of every spot alerting the consumer towards the vegetarian option for each product.

7.6.4.5 Stakeholder Communication & Sustainability Management

Meica is not engaged in any form of stakeholder or public communication apart from advertising its products. While the company offers some information on its

sustainability efforts focusing on energy efficiency in its production or employees, it does not address general meat production issues. Apart from a clear strategy of the owners not to communicate any company-specific details, high financial and personal resources necessary for active stakeholder-communication on multiple channels also present a significan burden to the company. Notably, Meica has not faced any public outrage, firestorms, or large-scale criticism until today.

7.6.5 Eberswalder

Looking back at a troubled past, the Eberswalder Wurst GmbH, with annual revenues of 120 million € and 550 employees in 2020, represents one of the largest sausage manufacturers in the Berlin-Brandenburg region today, focusing on regionally sourced specialties while constantly building a strong brand over the last years that was also extended to vegetarian sausage products in 2015.

7.6.5.1 Time-Series Analysis

Formerly the largest meat production collective in Eastern Germany (Schlacht- und Verarbeitungskombinat Eberswalde), founded in 1977, employing over 3000 workers, the predecessor-company of Eberswalder was broken up after the fall of the Berlin wall, finally declaring insolvency in the year 2000 after several changes of ownership. In 2002, only generating revenues of about 45 million € annually, Investor Eckhard Krone took over its leftovers, closed the slaughtering business, and redeveloped and modernized its sausage production. From 2016 onwards, Krone's son, daughter, and son-in-law took over the operational responsibilities of Eberswalder, with Eckhard Krone stepping back to the advisory board of the firm.

During the last years, Eberswalder constantly reinforced its nostalgic "DDR"-brand by focusing on its core offerings of regional sausage products. In 2015, Eberswalder extended its core offerings introduced its first vegetarian product, fried sausages called "Vegetarios." The company's products are listed nationally in German retail with a

clear focus on the "new" states of eastern Germany, particularly in the capital region of Berlin.

7.6.5.2 Factors behind Alternative Protein Engagement

Interestingly, Sebastian Kühn, responsible for Marketing & Sales at Eberswalder, admitted in a press release that the initial spark for the company's vegetarian product range came from retail customers rather than internal strategic considerations, with the senior management even being skeptical of alternative protein products in the beginning. However, after years of slow growth, Eberswalder, just like the other players in the field, observed an increased demand by flexitarians causing the company to consider new additions to its vegetarian product range.

7.6.5.3 Brand Strategy

Building upon its popularity dating back to "DDR"-times, Eberwalder's new management concentrated on reinforcing and leveraging the brand from the mid-2000s onwards by underscoring its ties to the Berlin-Brandenburg region, reducing the share of private-label products. In a press release from April 2020, Eberswalder claimed to have reached a brand awareness in this region of 95%. Unfortunately, due to several declined interview requests, this popularity also represents the only potential reason for the brand to use its established meat brand on vegetarian sausages.

7.6.5.4 Brand Communication Strategy

Eberswalder's brand communication primarily focuses on local sport sponsoring of large-well-known teams, for instance, the ice hockey club "Eisbären Berlin" or the Bundesliga football club "1. FC Union Berlin", among other things supplying sausages for stadium-catering. Eberswalder also dedicated a large part of its webpage to its sponsoring activities. Apart from sport sponsoring, the company is not engaged in any significant brand or marketing communication. Furthermore, Eberswalder is not

active on any social media channel. Sebastian Kühn explained this during an interview in 2021 with a highly constrained marketing budget of the medium-sized company.

7.6.5.5 Stakeholder Communication & Sustainability Management

Even though the company is neither involved in any stakeholder engagement on social media nor exposed to public criticism, it is very much focused on improving the quality and sustainability of its meat products. Being an integral part in the "100% Regional Imitative" Eberswalder not only partners with farmers, a slaughterhouse, and local retail to offer regional products with increased animal welfare standards, it thereby also strengthened its brand equity as a poll in 2019 showed, ranking the company as most sustainable meat producer in Eastern Germany.

7.7 Findings Cross-Case Comparison

After presenting and discussing each meat company using established brands on APPs individually, they were subsequently compared to each other to identify commonalities and differences. Following Eisenhardt's (1989) guidelines, the present study uses the following five broad categories similar to the structure of the within-case analysis to compare the different brands in a table format:

(1) Company characteristics (Table A)

(2) Reasons for entering the meat alternatives market (Table B)

(3) Brand & Brand Strategy (Table C)

(4) Brand Communications (Table D)

(5) Sustainability- and Stakeholder Management (Table E)

The specific factors alongside the categories used to compare the brands in the respective categories were derived from the single case on Rügenwalder but also during the data analysis and reduction process of particularly the largest two companies/brands in the present sample, Wiesenhof, and Gutfried. All tables are attached in Appendix E. Their main findings are summarized below:

7.7.1 Company Characteristics

A striking first similarity between all brands concerns their ownership status. All brands/companies in the present sample are family-owned, independent of their size. This similarity might be caused by the industry's history of small-scale, regional butchers slowly growing towards becoming larger companies. Nevertheless, as presented in the concluding study of this thesis, there are already some publicly traded or non-family-owned players in the market. Even though all of the present brands are family-owned, they still differ in their connection to the family name and the company itself. The most traditional meat brand in the sample is Wolf, using its family name as a brand name for almost a hundred years. Meica represents a slight variation of this traditional setting, the acronym of the two founding families still owned and managed by one of the founding families. The other three brands are not directly connected to the owning families or their names. Eberswalder was acquired 20 years ago by its current owners. Gutfried joined the Tönnies-portfolio through the takeover of the previously family-owned Nölke-company, and the PHW Group created Wiesenhof in the 1970s.

Interestingly, brand or company size is not a strong indicator for a monobrand strategy. The largest brand in the sample, Wiesenhof, is more than ten times larger than the smallest one, Meica. Naturally, by looking exclusively at relatively large companies with the ability to supply regional or national retail, this study is biased towards a specific minimum size. Still, it cannot confirm any effects of company size beyond this threshold. One could assume that small companies stick to their established brands because of resource constraints or large companies tend to introduce new ones precisely because of more financial resources. Both assumptions cannot be confirmed by looking at this study's five brands.

Another interesting factor describes the presence of a slaughter-business unit at the brand's parent company. As explained earlier, during the introduction of the meat industry in the DACH region, the sector was separated mainly between slaughterhouses and meat processors. Only a few companies today are still engaged in both activities. Examples, therefore, are the PHW-Group and Tönnies, two of the

largest slaughterhouses in Europe, being among the brands using a monobrand strategy. However, this connection to the slaughtering process might expose them to increased public pressure and criticism.

Two other factors that might complicate a monobrand strategy are start-up investments and a strong reliance on producing retailers' private-label brands. One would assume that a company acquiring various startups, like the PHW Group, could be tempted to create a new brand or sell APPs under a young startup brand. Even though PHW/Wiesenhof introduced a new vegan brand after initially selling all products under its heritage meat brand, it still stuck to the vegan Bruzzzler option. Similar logic applies to the private-label involvement of the companies. If a company has a strong focus on producing store brands for retailers, it is unlikely to develop its own brand in the first palace or even introduce APPs under that brand. Even though most of the studied companies manufacture these private-label products, the most significant part of their revenues is still generated by products sold under the core brand.

7.7.2 Reasons for Entering the Meat Alternatives Market

At first sight, all meat brands share the same prerequisites concerning their general market environment. As explained, meat consumption is slightly declining in Germany, Austria, and Switzerland while vegetarianism and, most importantly, flexitarianism continue to get momentum. Particularly the “rise of the flexitarian” represents a factor mentioned by every company or in every interview conducted with a senior executive. The trend started to intensify in late 2014/early 2015, marking the time when all companies from the present sample entered the alternative protein market, also supported by retailers willing to list a large number of products. To summarize, the demand for meat alternatives has, for the first time, in 2015 become large enough to allow larger meat processors focusing on high volume production to enter the field previously occupied by small startups or old-fashioned health-food stores. Even though the alternative meat market went through a rough time from 2017 until 2019, with Wiesenhof and Gutfried reducing their offerings and Wolf almost

exiting the market entirely, it bounced back even stronger in 2019 and particularly in 2020 during the early stages of the Covid-19 pandemic. However, a closer look at the specific market situations of the companies reveals some differences. Wiesenhof and Gutfried are exclusively producing poultry-products, a segment of the meat market that is still slowly growing. The other three brands produce products made of red meat and are particularly hit by changing consumer preferences.

Another factor that supported all established meat companies in entering the alternative protein market is their existing knowledge of food production. Meat brands did not only possess the capabilities to safely and cleanly produce food products, but they also already had established business relationships with retailers, all factors start-ups still need to master. Additionally to the transferability of meat-related capabilities towards the alternative protein segment, Gutfried, Wolf and Meica had experience producing vegetarian products, either for other companies or, in Wolf's case, through its foodservice business unit.

7.7.3 Brand & Marketing Strategy

Naturally, the most exciting comparison concerns the actual brands of the meat companies used on the APPs. Starting with apparent similarities, all companies in the sample possess very strong heritage brands.

According to a recent study, Wiesenhof, Gutfried, and Meica were after Rügenwalder, Germany's most popular meat brands (VuMA, 2020). Wolf and Eberswalder, on the other hand, are very popular in their target region. Apart from being popular, all discussed brands are rather old. While Meica and Wolf have been in business for about 100 years, Wiesenhof and Gutfried were founded in the 1960s during strong economic growth and the rise of TV advertising. Even Eberswalder, the youngest brand in the sample, heavily relies on its heritage in eastern Germany, being the sole larger survivor of classic "DDR" food manufacturers.

Related to brand strength are the respective marketing budgets. Even though hard to objectively compare due to the lack of reliable figures, the data gathering and

analyzing process surfaced various evidence allowing for a qualitative comparison of marketing and brand communication budgets. Starting from the bottom, Eberswalder has the least resources at hand but still appears as a minor sponsor of a Bundesliga soccer club. Wolf is expected to have higher marketing spending with different sport sponsoring engagements and radio and scarce TV advertising. Both focusing on TV and other mass media channels, Gutfried and Wiesenhof spend similar amounts on ads (Nielsen estimated Wiesenhof's 2019 advertising budget to be 5.7 million € (Nielsen, 2020)). In addition, Wiesenhof is the jersey sponsor of the soccer club "Werder Bremen." Strikingly, according to Nielsen-figures, the smallest brand in the sample has, even in absolute terms, the largest advertising budget. Meica spent 12.1 million € in 2019 on its TV and radio campaigns, translating to approximately 10% of its revenues (Nielsen, 2021). Summarizing, all discussed brands show significant marketing and brand communication efforts, many of them with established communication schemes, like jingles or slogans known to the German public for decades.

An interesting differentiation between the cases is the use of subbrands. Wiesenhof and particularly Meica already had one or several meat-subbrands in the market before introducing vegetarian products. This fact opened up possibilities for the companies concerning the branding of vegetarian products. Meica introduced vegetarian products only under brands aimed at a younger, less conservative audience. Simultaneously, Wiesenhof offers a vegetarian option in its popular Bruzzzler-subbrand while moving all other products to a newly generated brand. This strategy of combing an established with a newly created brand is also followed by the Tönnies group, introducing a dedicated vegan brand alongside Gutfried and the food-service brand "Tillman's."

Concerning the stretchability of the brands, it was interesting to observe that most companies, trying to bridge the seemingly opposing product categories, focused on common goals or applications of meat and vegetarian products. Therefore, a good example is Gutfried, already positioned as a health-conscious brand aimed at customers potentially interested in buying meat alternatives. Meica, on the other hand,

simply added a vegetarian option to the successful Curry-King range offering customers an easy switch in an already established meal setting. The same holds for Wolf, prompting its sausage-USP for decades.

7.7.4 Brand Communication

Closely related to brand strategy and marketing budgets is brand communication. The three largest spenders in the sample, Meica, Wiesenhof, and Gutfried, strongly focus on mass media, particularly TV. On the other hand, Wolf airs short TV spots but focuses on radio advertising, while Eberswalder does not invest in any mass-media advertising. Notably, three of the five companies are also active in sport sponsoring, mainly soccer.

Apart from Wolf being quite active on Facebook, posting diverse content, the studied brands are not very active on social media. Wiesenhof uses Instagram to highlight its sport sponsoring and occasionally posts new product launches and recipes. Similarly, Gutfried uses Facebook and Instagram to post new product offerings and provide cooking ideas. Meica created a Facebook account in 2017 for its Curry King subbrand that has not posted new content since 2019, while Eberswalder is not active on social media at all.

Another interesting comparison provides the analysis of the valence of vegetarian products in the brand's communication. Wolf and Eberswalder do not advertise their vegetarian products apart from their web pages. However, Christian Wolf announced a first campaign for his vegetarian product range in 2022. Meica used short "add-ons" at the end of its TV- and radio spots to alert consumers to the new vegetarian options, while Gutfried already advertised for its vegetarian products alongside its conventional range on television as well as on social media. The highest valence of vegetarian products in a brand's communication is observable at Wiesenhof with a dedicated TV spot featuring the Bruzzler testimonial Atze Schröder advertising for the vegetarian version of the Bratwurst. Furthermore, the dedicated vegan brand "Green legend was also featured on Werder Bremen's jerseys during the "Veganuary" in 2020.

7.7.5 Sustainability & Stakeholder Management

A clear distinction is observable in how the analyzed brands address stakeholder concerns, particularly regarding meat production's externalities and sustainability challenges. The smaller companies Eberswalder, Meica, and Wolf, offer close to no public information or commitment on sustainability topics. However, while all three offer a small range of organic products, Eberswalder is engaged in a project focusing on local sourcing and supporting regional structures. This reserved sustainability and stakeholder communication might be related to the fact that these three brands have not been exposed to widespread public criticism.

It was established earlier that Wiesenhof and Gutfried are the only brands still connected to slaughterhouses, directly exposing them to many issues of the meat supply chain. Accordingly, the PHW-Group and the brand Wiesenhof are deeply involved in improving animal welfare conditions for its poultry and follow a strategic plan towards becoming a more sustainable company. Interestingly, Wiesenhof is much closer connected to the slaughtering activities of its parent by public criticism than Gutfried. As explained in the within-case analysis, Gutfried neither engages in stakeholder or sustainability communication nor improves its meat product's footprint. However, and contrasting the brand Wiesenhof, Gutfried has not been targeted by NGOs or other stakeholder groups so far even though belonging to the Tönnies Group, arguably one of the most controversially discussed companies in recent years. Customers do not relate Gutfried to Tönnies, as another company founded the brand. Another potential explanation regards the primary raw material of Gutfried's product, poultry. The Tönnies Group is not engaged in poultry production, which might benefit the brand.

Concerning the public image of the larger three companies/brands in the sample, it is also interesting to observe that during the last two years, characterized by the considerable growth of the meatless segment, the PHW Group, the Tönnies-Group, and Wolf all publicly communicated their switch form a meat processing company towards "protein suppliers" or diversified "food producers" underscoring the seriousness in which the companies push and believe in their vegetarian product lines.

7.8 Comparison of Rügenwalder with other Brands

In the second analytical step, the gathered insights from the cross-case comparison are subsequently compared to the evidence from the single-case study on Rügenwalder to identify commonalities between the companies and brands. The comparison tables are presented in Appendix E, Tables F-J according to the established categories used during the within-case comparison. A summary of the results is provided in the following.

7.8.1 Company Characteristics

Rügenwalder, as well as the other five brands, represent a mostly homogeneous sample concerning their parent company's characteristics. Rügenwalder, due to the rapid recent growth, is among the larger brands in the sample, having approximately the same size as Gutfried.[13] All brands have a clear focus on the German-speaking market and offer comparable product categories (sausages, cold cuts, Bratwurst, convenience products) either made of white (poultry, chicken) or red (Pork & Beef) meat before the launch of their respective vegetarian products. However, what differentiates Rügenwalder from others is the company's strict focus on branded products. While the other companies in the sample are all engaged in producing store-brands for retailers, Rügenwalder was never involved in private-label production.

7.8.2 Reasons for Entering the Meat Alternatives Market

Comparing the prerequisites and conditions under which the different brands entered the alternative protein market surfaces some interesting details and unique characteristics about the Rügenwalder case. While the company indeed was the first mover among German meat companies in selling vegetarian meat replacements starting in December 2014, it was only months ahead of its main competitors entering the field at the beginning of 2015. Rügenwalder, however, displayed much more

[13] Gufried a spart of the zur-Mühlen Gruppe did not publish detailed sales figures. According to interviews with Maximilian Tönnies, Gutfried's revenues are estimated to be in the 300 million € ranage in 2020.

conviction and dedication towards the new product segment from day one, both internally and in public communication. As explained in the single case study, that might be connected to Rügenwalder being exposed to the decline of the traditional sausage market much more than other brands. The company mainly offered traditional sausage products like "Teewurst" and "Pommersche," undoubtedly representing the sample's most traditional or old-fashioned ones. This circumstance, paired with Rügenwalder not having prior experience producing vegetarian products, makes the company's rapid transformation even more impressive.

7.8.3 Brand & Marketing Strategy

Compared to the general company characteristics, Rügenwalder resembles the rest of the sample on a brand level. Concerning its history and heritage, Rügenwalder represents the oldest and, according to a poll by Germany's largest broadcasters, also the strongest meat brand in the country (VuMA, 2020). Moreover, connected to the brand's strength, Rügenwalder also dwarfs the marketing budgets of all other companies in the present study. Notably, only Meica comes close to Rügenwalder's marketing spending, at least in relative terms.

Another essential characteristic, compared to other brands using a monobrand strategy, is the company's focus on a single umbrella brand. Contrasting Meica's strategy, for instance, Rügenwalder already decided in the late 1990s to focus its marketing activities on the parent/umbrella brand rather than on the successful products brands.

7.8.4 Brand communication

A factor that clearly differentiates Rügenwalder from the other meat brands is its communication strategy concerning product advertising and other stakeholders.

Even though the brand has a long-standing focus on TV advertising comparable to Meica, Wiesenhof, and Gutfried, Rügenwalder far exceeds the other brands in its social media presence and particularly in its efforts towards advertising for the vegetarian

product range. While the other brands in the sample, apart from Wolf, use social media predominantly to advertise their products or to highlight sponsoring activities, Rügenwalder is engaged across several channels to explain and introduce the new product category and its general transformation to consumers. These efforts also manifested in the company's marketing budget from late 2014 until 2017 entirely used to increase awareness for the new vegetarian meat replacements. Contrasting the other brands slowly increasing advertising for vegetarian products, in some cases alongside their meat products, Rügenwalder just recently started to emphasize its brand communication back on the traditional meat range. Rügenwalder, from the very beginning, did not cautiously enter the alternative protein market like the other brands but rather with the full force of its marketing power, putting the vegetarian products next to their meat counterparts or even giving them their dedicated ads.

7.8.5 Sustainability & Stakeholder Management

Related to Rügenwalder's advertising efforts, the company is the only brand in the present sample actively engaged in stakeholder communication on social media. Although the brand is not exposed to large-scale criticism in general press or by NGOs, a circumstance that might be supported by the absence of a slaughter business unit, analyzing the brand's Facebook page surfaced various nasty discussions and accusations from both sides of the ideological spectrum. Rügenwalder, however, is the only company among the studied brands engaging with these stakeholders online, trying to reconcile the tensions explaining the company's views and the reasons behind its transformation.

Notably, one would expect that Rügenwalder is also among the leading brands improving its meat products' footprint. However, while the company does sell some organic products, it only recently started its first initiatives to increase animal welfare conditions for its conventional meat range as well. Wiesenhof or Eberswalder have been involved in this topic for much longer. However, Rügenwalder follows the most detailed sustainability strategy, publishing a detailed report and specific targets.

7.9 Summary and Model Adaption

The presented multiple cases study generally supports the influential factors identified during the analysis of Rügenwalder Mühle. Rügenwalder's monobrand strategy was traced back to the fact that the company has developed a very strong umbrella brand nurtured by high investments into advertising and brand communication over many years. Similar strategic considerations concerning these factors can also be observed at the other brands.

The following list summarizes the main reasons articulated explicitly by key management justifying their monobrand strategies of the specific brands:

Wiesenhof: "Bruzzzler" is a very strong subbrand with an established customer base.
Gutfried: Brand was used on vegetarian products due to its well-known core of being healthy and low in fat, allowing for "Pleasure without remorse."
Wolf: Consumers are already familiar with the well-known regional sausages under the Wolf brand, and the company wants to leverage this benefit
Meica: Company has strong, established product brands, just like Rügenwalder, supported by significant advertising spending that supported the vegetarian extension

Table 14: Summary of Monobrand-Causes; Source: Own Representation

Even though some companies like Eberswalder, Meica, and Rügenwalder mentioned that their marketing budgets would not allow the creation of another brand, this reasoning should be questioned. It is possible and likely that the mutual dependency between a strong brand, the necessary high marketing budget, and the resulting resource constraints exists. Still, it most certainly does not represent the primary reason for the companies not switching towards a new brand for alternative protein products. As the Wiesenhof-case illustrates, even if there are enough resources available to create and support a new brand, introducing vegetarian products under a powerful meat brand, leveraging existing brand equity was still the preferred option, even for a brand as heavily criticized as Wiesenhof.

Summarizing the commonalities between Rügenwalder and the other five brands, the following six factors, leading meat companies to introduce APPs under their established meat brands have been identified during the two series of case studies (see also figure 15):

a) Having a strong, well established;
b) Heritage brand;
c) Supported by significant marketing investments/a large marketing budget;

of a company that is

d) Family-owned;
e) Focusing on the production of branded products rather than private-label store brands, and possesses:
f) Existing capabilities relevant to the new vegetarian product line.

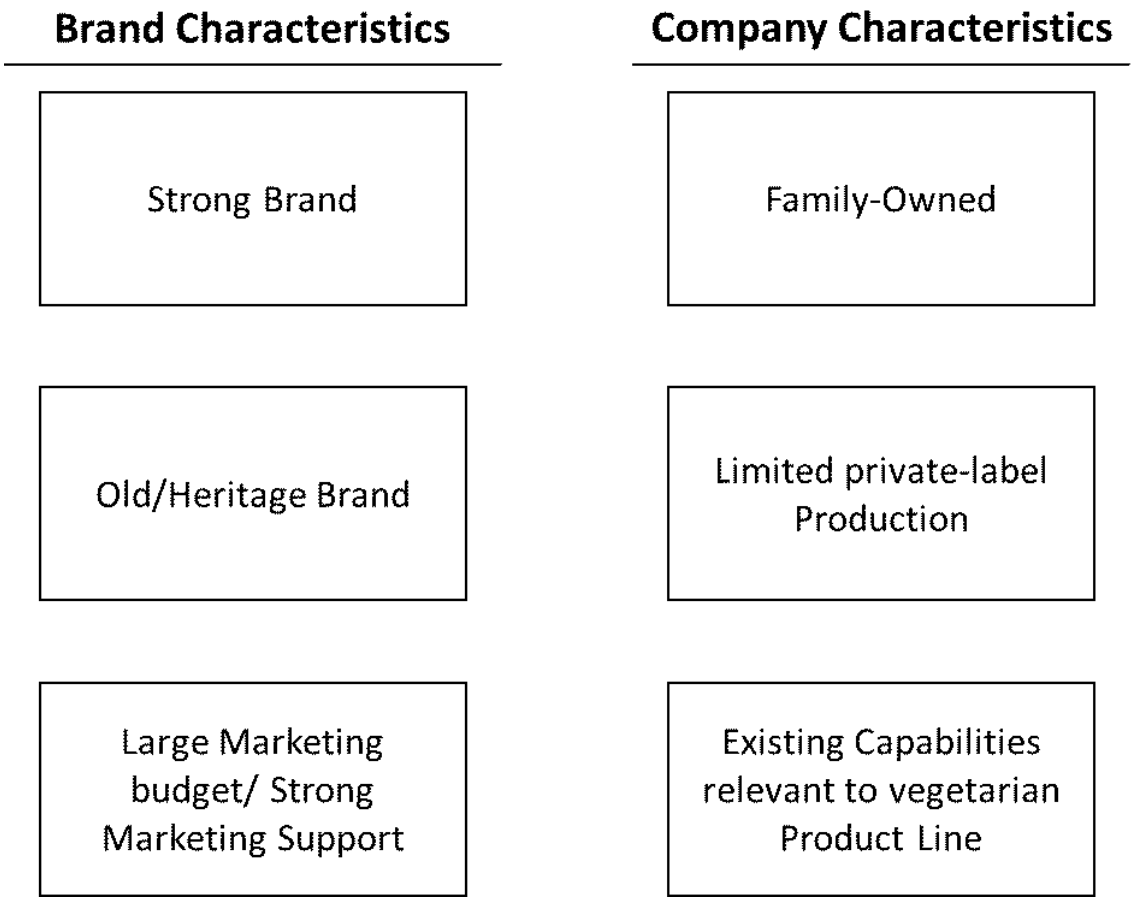


Figure 15: Brand and Company Factors leading to a Monobrand Strategy; Source: Own Representation

7.9.1 Comparison to the Extant Literature

Comparing the insights gathered during the multiple case study process with extant literature on sustainable or green brand extensions generally confirms the overlaps and contradictions identified in the Rügenwalder case.

Being traditional meat companies like Rügenwalder, the five brands added to the explanatory model of monobrand strategies in the meat industry, thereby supporting the findings of De Angelis, Adıgüzel, & Amatulli, (2017), Hill & Lee (2015) and Pritchard & Wilson (2018) arguing for a necessary overlap between socio-ecological problem caused by the parent and the one addressed by the extension. Most importantly, the present results reinforce Lopes & Veiga's (2019) results finding that well-known brands should be leveraged to generate consumer interest in new, sustainable products. Finally, the suggestion of Kim & Ma (2014) that existing customers or fans of a brand will buy the sustainable extensions anyway is also supported, particularly if style and usability are similar to existing products (De Angelis et al., 2017). All companies using their meat brands on vegetarian alternatives are well-known regionally or nationwide and extended towards the product (sub)-categories that are very similar to their existing offerings (e.g., Meica offers a vegetarian version of Bratmaxe and Curry King or Wolf of its popular local Bratwurst specialties).

Even though the presented results support the benefits discussed in the extant literature of extending a well-known brand, they also clearly underline the previously identified contradiction to Olsen et al.'s (2014) suggestions regarding old brands in vice or environmentally challenging industries. Furthermore, the studied brands align their extensions closely to the parent, thereby contradicting the findings of Pritchard & Wilson (2018) as well, particularly arguing against this direct connection between extension and parent if the latter operates in a vice industry.

8. Comparative Analysis of Meat Companies in Germany, Austria, and Switzerland

This concluding analytical stage compares influential factors on monobrand strategies identified during the single and multiple case study with other established meat companies active in the alternative protein field to test and verify the suggested explanatory model. Analyzing each meat company not using its established meat brand through a traditional multiple case study approach like the five preceding cases would generate an abundance of data making it nearly impossible to process present the various instances within the scope of the present dissertation. A Qualitative Comparative Analysis reduces this complexity and provides an overview of these companies and their characteristics.

This chapter is structured as follows: First, the methodology is briefly introduced and discussed. The second step includes a description of the data gathering process, while the third and final part of this chapter involves the actual execution of the Qualitative Comparative Analyses and the discussion of its results. These steps aim to compare the six monobrand-companies to their competition, thereby answering research question four of this dissertation:

RQ4: What factors influence whether meat companies use their established brands or create new ones for alternative protein products?

8.1 Methodology

8.1.1 Definition and Reasons for Conducting a Qualitative Comparative Analysis

Getting increasingly popular in Management and Marketing research (Seny Kan, Adegbite, El Omari, & Abdellatif, 2016), a Qualitative Comparative Analysis (QCA), initially developed by Charles Ragin in 1987 (Ragin, 2014), describes a method based on the comparison of different cases and influential factors leading to a specific

outcome, thereby focusing on similarities but even more on differences between them to establish and discuss causal relationships (Stokke, 2007). The main logic behind this method rests upon the assumption that cases should be understood as configurations of their attributes (Ragin, 2014) that are interconnected with each other, with attributes being stripped away if deemed unrelated to the analyzed outcome (Marx, Cambre´, & Rihoux, 2013). Consequently, and in line with the philosophy of the case-based methodology in general, QCAs support the holistic view on phenomena case studies usually provide (Fiss, 2009) by looking at the interplay of many different factors (configurations) rather than treating them in an isolated manner using conventional regression analysis for instance (Misangyi et al., 2017). According to Meuer & Fiss (2020), this approach allows researchers to effectively analyze and conceptualize causal complexity characterized by the following three challenges that cannot easily be addressed using classic linear regression models (Misangyi et al., 2017):

- Multiple Conjunctural Causation (Ragin, 1987, p.23): Multiple causations or conditions combined lead to an outcome
- Equifinality: A system can achieve a particular state/outcome in more than one way
- Causal Asymmetry: Combinations of causes leading to an outcome might be different from combinations leading to its absence

Furthermore, QCAs allow for analytical simplifications and reductions even when the number of cases/observations is too small for "classic" statistical analysis like regressions, therefore bridging the worlds of small-sample qualitative, case-oriented research and the large-sample orientation of quantitative analysis (Stokke, 2007). Initially developed for a sample of 10-50 cases, more recent studies have applied the method in large-n samples with thousands of cases aided by more sophisticated software tools (Marx et al., 2013; Meuer & Fiss, 2020; Misangyi et al., 2017).

This study's goal and the number of cases at hand represent ideal prerequisites for conducting a QCA. Furthermore, the analysis allows for a discussion on possible alternative explanations of the already derived findings. The following subchapter briefly explains the different steps needed to conduct a QCA, mainly following the guidelines presented by Fiss et al. (2013) & Meuer & Fiss (2020).

8.1.2 Procedure/Steps

8.1.2.1 Identifying relevant Cases and Causal Conditions

The first step and one of the most significant decisions concerns selecting the cases included in the QCA (Stokke, 2007). Comparable to case studies in general, case selection significantly affects the validity and generalizability of the derived conceptual models. However, the specific setting of this research project predefines both sample size and case selection, including all meat companies in the DACH region. This clear focus leaves the question of which potential, influential factors or conditions to include in the analysis.

Researchers involved in theory-refinement have not specified a minimum or maximum of conditions but generally found that few causal conditions might lead to a model with minimal validity while adding a large number of conditions increases the complexity of the study exponentially. As cases are organized in a truth table listing the presence or absence of the specific condition for every case, every additional condition doubles the number of rows in the table (Marx et al., 2013). While there remains uncertainty about the particular number of conditions to be included, QCA-researchers agree on the finding that conditions themselves should derive from theoretical expertise and deep knowledge about the case and research context (Fiss, 2011; Meuer & Fiss, 2020).

8.1.2.2 Constructing the Data-Set

Once the potentially relevant conditions have been determined, the next crucial step describes their definition of absence/presence or membership within a specific case. While the classic or crisp-set QCA is based upon binary or Boolean operators (0/1, e.g., a condition is absent or present) (Stokke, 2007), fuzzy set QCAs allows for more refined states than the absence or presence of a condition, determining its level of membership. Establishing meaningful standards for calibrating these membership scores presents a

formidable task to the researcher that needs to be carefully executed in a constant back and forth between case data and theoretical considerations (Ragin, 2021).

8.1.2.3 Examine possible Necessary Conditions

The first analytical step of a QCA involves identifying necessary and sufficient causal conditions within so-called sub-or supersets (Ragin, 2021) of the studied outcome. Necessary conditions describe factors or configurations that are either present or absent for (almost) all cases showing a specific outcome, representing a subset of the respective attributes (all cases with a particular outcome display a particular attribute or configuration of more attributes, however, not all cases with a particular attribute must exhibit the outcome) (Misangyi et al., 2017). Sufficient conditions, on the other hand, describe causal configurations that are observable for at least one case with the outcome in question but not in cases showing a different outcome (In other words, cases with specific attributes must exhibit the outcome, but other configurations, with other attributes, lead to the same outcome as well) (Marx et al., 2013; Misangyi et al., 2017; Stokke, 2007).

8.1.2.4 Constructing the Truth Table and resolving Contradictions

After identifying necessary and sufficient conditions, all identified causal conditions and the outcome variable are transformed into the first iteration of a data matrix called truth table (Table B in Appendix F) consisting of 2^k rows, with "k" representing the number of causal conditions identified earlier. Each truth table row now depicts a single combination of the analyzed attributes and outcomes, listing all mathematically possible combinations. The selected cases are subsequently sorted into the rows showing the respective configuration and outcome, resulting in rows with and many more without empirical cases (Fiss, 2011; Marx et al., 2013). The number of rows in the truth table is furthermore reduced by summarizing cases with identical conditions.

Subsequently, the first step of reducing complexity centers around optimizing the consistency of cases in each row. Consistency herby refers to: "…*the degree to which*

cases correspond to the set-theoretic relationships expressed in a solution" (Fiss, 2011, p.402). Differently put, cases with identical configurations of attributes exhibiting different outcomes constitute contradicting rows with consistency values different from "0" or "1". These contradicting rows are not uncommon, particularly in larger samples, and can be dealt with in two different ways. Firstly, in large samples, acknowledging that perfect consistency might be impossible to achieve, establishing certain thresholds (80% consistency, for instance) represents a pragmatic approach towards this issue. Secondly, like the present study, smaller samples offer the opportunity to resolve these contradicting cases by either removing them or adjusting certain attributes or conditions based on in-depth case knowledge. (Meuer & Fiss, 2020). The resulting revised truth table is now ready for further analysis.

8.1.2.5 Analyzing & Simplifying the Truth Table

Having resolved contradicting rows and cases, the final analytical step of a QCA involves simplification through two major steps: Paired comparison and assumptions addressing an issue called limited diversity.

In the first step, paired comparison utilizes Boolean algebra to logically reduce the truth table to simpler combinations (Fiss, 2011; Ragin, 2021). Simply put, if two configurations, leading to the same outcome, only differ in one attribute, the causal condition that distinguishes the two sets of attributes can be discarded as a potentially irrelevant influential factor. The two lines of the truth table can be combined to a single reduced one. This comparison is repeated for every case pair in the truth table, resulting in a list of causal combinations (the solution to the minimization problem). Particularly larger data sets lead to a vast amount of necessary comparisons requiring software tools like "fsqca" used in the present thesis (Marx et al., 2013).

However, this paired comparison is often confronted with the problem of limited diversity. Limited diversity refers to the non-existence of cases for some potential configurations requiring the researcher to make assumptions about these non-existing configurations based upon discussing case knowledge to minimize the truth table

(Stokke, 2007). A procedure also called counterfactual analysis most commonly performed by software, therefore distinguishes between three different potential logically reduced solutions of the truth table (Fiss, 2011):

- A **complex** solution avoiding the reduction of any logical remainders (rows without cases)
- An **intermediate** solution only reducing (easy) counterfactual cases that have been reviewed by the researcher based on theoretical or case knowledge
- A **parsimonious** solution reducing any rows with logical remainders to obtain an as simple as possible solution

These solutions are based upon Ragin's (2021)[14] & Fiss' (2011) differentiation between easy and difficult counterfactual cases. In easy counterfactual cases, the researcher can, simply by comparison with other similar combinations actuality showing cases, ask whether adding another causal condition would make a difference? If this is not the case, the row can be removed from the truth table. In difficult counterfactual cases, the researcher has to determine whether removing a condition would alter the outcome, naturally a question much harder to answer. This consideration of unobserved cases represents one of QCA's substantial benefits compared to traditional regression analysis (Misangyi et al., 2017).

8.1.2.6 Evaluating Results

The concluding step of every QCA consists of a thorough interpretation of the obtained causal recipes discussing whether the combination of attributes makes sense in relation to existing and established theoretical and practical knowledge. Furthermore, it is essential to determine how well the results of the QCA connect to the individual cases under study (Fiss, 2009, 2011).

[14] Originally published in 2008

8.1.2.7 Performing a QCA for the Negation of the Outcome

As introduced earlier, QCAs are non-symmetrical research methods meaning that performing another round for the negation of the results (in the present case looking for factors hindering monobrand strategies) might yield interesting additional results diverging from the original solution (Fiss, 2011; Meuer & Fiss, 2020).

8.1.3 Criticism on QCAs

Obvious difficulties and reasons for methodological criticism in QCA's primarily arise from three directions: The inclusion and measurement of conditional variables, their calibration of membership scores, and the assumptions used during the counterfactual analysis (Meur, Rihoux, & Yamasaki, 2009). Addressing the main criticism about the QCA-method regarding the selection of influential conditions, (Marx et al., 2013, p.35) argue that even though excluding the possibility of an omitted variable bias entirely is not possible, the constant back and forth between truth table and minimization reveals many contradictions leading to the inclusion of new potentially relevant and exclusion of unnecessary causal conditions. To provide guidance and rigor in QCA-based research, Greckhamer, Furnari, Fiss, & Aguilera (2018) introduced several guidelines and best practices also followed by the present study and summarized in table A of Appendix F.

8.2 Data Collection

The companies included in the QCA-sample were identified in a desk-research process explained in the methodology chapter of the multiple-case section of this thesis. In general, data collection for the QCA followed a similar strategy compared to the other case studies. A "Wiso"-search was conducted for every company/brand in the sample accompanied by a google-search, a quick look on the companies' social media accounts, if available, as well as a search for annual reports on the "Bundesanzeiger" online tool for companies based in Germany. However, the primary sources of evidence, particularly for companies focused on private-label production with

minimal corporate communication, were corporate web pages and in-depth interviews. Especially the interviews with key-decision-makers of the various companies proved valuable in acquiring the necessary case-specific knowledge to conduct a QCA. 16 Interviews with 11 out of the 16 companies added in the QCA could be conducted. All interviews followed a semi-structured approach using an interview guide (Jäger & Reinecke, 2009) based on company-specific questions cornering their alternative protein- and marketing strategies. All interviews were transcribed and added to the supplemental materials together with their respective interview guides, resulting in 255 Arial 10-font single-spaced pages of transcripts. Table 15 lists all interviewed managers.

Company	**Interviewee**	**Duration and Tool**
Bell/Hilcona/Green Mountain	Marcel Allemann Head of Sales Bell Food Group AG	51 min; MS-Teams; # 1
	Martin Henck CEO Hilcona AG	35 min; MS-Teams; # 2
Micarna/V-Love	Ralph Langholz Head of Alternative Proteins Micarna SA	50 min; MS-Teams; # 3
	David Wallmer Brand Manager "V-Love" at Migros	74 min; MS- Teams; # 4
	Stefan Nolte Head of Business Unit "Plant-Based" at Migros Industry	46 min; MS-Teams; # 5
Ospelt Group	Alexander Ospelt CEO and owner of the Ospelt Group	93 mins, In Person at Corporate HQ in Bendern (LIE); # 6
Orior Group	Michael Leutwyler Head of Marketing & Sales Food Service Orior Group	60 min; Zoom (by Nicole Keller); # 7 56 min; MS-Teams (Martin Berger); # 8
Frost Meat	Christoph Schöppl CEO of Planty of Meat	56 min; Phone; # 9
Kupfer	Maximilian Kupfer CEO and co-owner of Kupfer	27 min; MS-Teams; # 10
Ponnath	Max Ponnath Export Manager and CEO of Ponnath	60 min; Zoom (by Nicole Keller); # 11
	Michael Ponnath CEO and Owner of Ponnath	66 min; MS-Teams; # 12

The Family Butchers	Hans-Ewald Reinert CEO and Owner of The Family Butchers	51 min; MS-Teams; # 13
Vion Food Group	Willem Cranenbroek General Manager of ME-AT	55 min; MS-Teams; # 14
Vossko	Dietmar Vosskötter CEO & Owner Bernhard Düringer Head of Sales Switzerland & Project Lead Alternative Proteins	59 min; MS-Teams; # 15
Windau	Petra Meier Head of International Sales & Alternative Proteins	32 mins; MS-Teams; # 16

Table 15: List of Interview Partners for the QCA; Source: Own Representation

The interviews and secondary sources were subsequently transferred to ATLAS.ti for further analysis. The data gathered on the 16 companies/brands were compiled in short mini-cases supporting the calibration process of the respective causal conditions included in the QCA. The short company/brand profiles are presented in Appendix F, clustered according to the respective countries. All primary & secondary sources used to compile the cases are also listed in Appendix F. Tables 16, 17, & 18 below provide an overview of all included brands.

8.2.1 Austria

Meat Brand	Meat Logo	Alternative Protein Brand	Alternative Protein Logo
Neuburger		**Hermann Fleischlos**	
Landhof		**Die Ohne**	

Table 16: List of Meat Companies using new Brands on APPs - Austria; Source: Own Representation

8.2.2 Switzerland

Meat Brand	Meat Logo	Alternative Protein Brand	Alternative Protein Logo
Bell/Hilcona		Green Mountain	
Micarna		V-Love	
Ospelt/Malbuner		Like Meat	
Orior		Happy Vegi Butcher	

Table 17: List of Meat Companies using new Brands on APPs - Switzerland; Source: Own Representation

8.2.3 Germany

Meat Brand	Meat Logo	Alternative Protein Brand	Alternative Protein Logo
Abbelen		The Good One	
Rasting (Edeka)		Plan „B“	
European Convenience Food		Vegeta	

Frost Meat		**Plenty of Meat**	
Kupfer		**Loz Veganoz**	
Ponnath		**Vantastic Foods**	
Reinert und Kemper (TFB)		**The Plantly Butchers**	
Vion		**ME - AT**	
Vossko		**Veggie Club**	
Windau		**Only private-label brands**	**N/A**

Table 18: List of Meat Companies using new Brands on APPs - Germany; Source: Own Representation

8.3 Data Analysis

The actual data analysis and execution of the QCA follows the procedure introduced during the methodology section of this chapter and the technical guidelines provided by Ragin (2017) concerning the software used to perform the present study, "fsQCA."[15]

8.3.1 Causal Conditions

While the case selection for the present study can be described as straightforward, using the predefined sample of meat companies active in the APP-market, selecting causal conditions presented a more formidable challenge. Causal conditions leading to monobrand strategies were derived from the preceding single and multiple case-study and the short-cases compiled for this study. Starting with the explanatory model after the multiple case study, the following conditions, potentially influencing monobrand strategies, are included:

1. "Strong heritage meat brand"
2. "The company is family-owned"
3. "Focus on branded products rather than private-label or retail brands"

The mini-cases and interviews conducted before the QCA furthermore surfaced two more potentially influential conditions:

4. "Startup-investment"
5. "House of Brands"

Subsequently, the causal conditions and their calibrations are briefly explained, thereby concluding the second step of the QCA.

8.3.1.1 Strong, Heritage Meat Brand

Naturally, it is difficult to define a strong brand clearly and differentiate a strong from a weaker one. Closely related to the discussion and definition of brand equity at the

[15] fsQCA is an open-source software package provided by: "Charles C. and Sean Davey. 2016. Fuzzy-Set/Qualitative Comparative Analysis 3.0. Irvine, California: Department of Sociology, University of California" downloaded from: https://www.socsci.uci.edu/~cragin/fsQCA/software.shtml

beginning of the theoretical chapter, tying "brand strength" to a single indicator is not feasible. High values of aided or unaided brand awareness, a figure often published by Nielsen and other market research agencies, represent one possibility to quantify the strength of a brand. While the author did not verify particular scores of the respective brands, the qualitative data analyses often surfaced secondary sources mentioning high customer awareness/strength of a specific meat brand. Further helpful indicators for "brand strength" were the in-depth interviews with senior managers. Interview partners often explicitly mentioned their company's focus on branding or their goals of "protecting the strong brand," for instance.

8.3.1.2 Family-Owned

The Rügenwalder-case has vividly demonstrated the structural benefits of a family-owned company. In addition to the Rügenwalder, all companies in the multiple-case study were family-owned as well, making this condition an interesting one to study in the QCA.

8.3.1.3 Strong Private-Label Focus

It is common among meat companies in Germany, Austria, and Switzerland to produce products not under their own brands but for a private-label brand for their retail customers. Only two out of 22 companies from the present sample are not engaged in some extend of private-label production (Rügenwalder, Neuburger). Therefore, the causal condition is not labeled "Private-label Production" but rather "Private-Label Focus," depicting the overwhelming business focus of a company, e.g., branded products vs. private-label products. Companies generally do not publish specific proportions of branded or private-label products. Still, the interviews and the analysis of secondary materials ensured a clear assignment of the cases in either of the two categories.

8.3.1.4 Startup-Investments

A particular learning during the data-gathering process of the QCA was that some meat companies in the sample, apart from the large PHW-group, are also invested in alternative protein startups. This relatively easy to identify dichotomous condition (existence or non-existence of an alternative protein startup) is expected to result in companies using the startup brand on the new product category rather than their established meat brands.

8.3.1.5 House of Brands

Just like "Startup investment," meat companies already having more than one meat brand in their portfolio are also expected to opt for creating a new brand rather than using one of their established ones on APPs. However, this condition only applies to clearly distinct meat brands, not product brands used by Meica or Rügenwalder, for instance.

The just presented causal conditions included in the QCA represent the final iteration of back and forth between adding and removing different potentially influential factors from the truth table. Two of these dropped conditions include:

- Strong Marketing Support: An iteration of the QCA included a condition trying to model the size of the respective marketing budgets or a company's commitment towards branding. This fuzzy condition was not only hard to quantify and calibrate but also redundant to "Strong Meat Brand."
- Heritage Brand: Few companies within the sample (Ponnath & Kupfer, for instance) have a long heritage but an almost unknown brand, while all strong brands, on the other hand, built upon their well-established heritage. Consequently, the differentiation between strong and heritage brands did not yield a "better" or more consistent solution. Therefore, it was dropped from the analysis and combined, resulting in the "Strong Heritage Meat Brand" condition.

The final iteration of the raw data set including the five causal conditions potentially leading to the outcome "Monobrand strategy" is depicted in table 19, displaying all 22 meat companies analyzed in the present study, whereby "1" connotes to the presence and "0" the absence of a condition or the outcome.

Case	House of Brands	Strong private-label Focus	Startup Invest-ment	Strong Heritage Meat Brand	Family-owned	Mono-brand Strategy
Rügenwalder	0	0	0	1	1	1
Eberswalder	0	0	0	1	1	1
Gutfried/zMG	1	0	0	1	1	1
Meica	0	0	0	1	1	1
Wiesenhof	0	0	1	1	1	1
Wolf	0	0	0	1	1	1
Neuburger	0	0	0	1	1	0
Landhof	1	1	0	1	1	0
Bell/Hilcona	1	1	1	0	0	0
Micarna	1	1	1	0	0	0
Ospelt/Malbuner	1	1	1	1	1	0
Orior Group	1	1	0	0	0	0
Abbelen	0	1	0	0	0	0
Rasting	0	1	0	0	0	0
E. Conv. Food	1	1	0	0	0	0
Frost Meat	0	1	0	0	0	0
Kupfer	0	1	1	0	1	0
Ponnath	0	1	1	0	1	0
TFB	1	1	0	1	1	0
Vion	1	1	0	0	0	0
Vossko	0	1	0	0	1	0
Windau	0	1	0	0	0	0

Table 19: Raw Data Set of the QCA; Source: Own Representation

8.3.2 Necessary Conditions

Marking the first analytical step of the QCA, the analysis of necessary conditions shown in table 20[16] suggests that both a strong heritage meat brand and being a family-owned company are prerequisites for having a monobrand strategy. This first table

[16] All subsequent tables represent remodeled outputs form the fsQCA software. Original output files are attached in the appendix and the supplemental materials.

also shows that no company using its established brand on meat alternative has a strong focus on private-label products.

	Consistency	Coverage
House of Brands	0.166667	0.111111
Strong private-label Focus	0.000000	0.000000
Startup Investment	0.166667	0.166667
Strong Heritage Meat Brand	1.000000	0.600000
Family-owned	1.000000	0.461538

Table 20: Analysis of Necessary Conditions; Source: Own Representation

Fiss (2011) considers conditions "necessary" when achieving consistency scores of or above 90%. "Family-owned" and "Strong Heritage Meat Brand" show perfect consistency (values of "1"), meaning that the causal conditions represent a so-called superset of the outcome "Monobrand strategy." The coverage-value of 0.6 (6/(6+4)= 0.6), however, signals that "Strong Heritage Meat Brand" is a necessary but insufficient condition translating to the existence of strong meant brands that did not lead to monobrand strategies (four out of ten in the present sample).

8.3.3 Set Coincidence

Another analysis preceding the actual truth table algorithm explores the overlap between the respective causal conditions or "Set Coincidence." Table 21 shows the degree of overlap for all combinations with "Strong Heritage Meat Brand" and "Family-owned" having the highest score with 76% overlap (all strong brands in the sample are family-owned). In general, there is no significant further overlap between the sets indicating a balanced selection of causal conditions.

Strong private-label Focus & Strong/Heritage Meat Brand	0.136364
Startup Investment & Strong/Heritage Meat Brand	0.142857
Strong private-label Focus & Startup Investment	0.3125
House of Brands & Strong/Heritage Meat Brand	0.266667
House of Brands & Strong private-label Focus	0.5
Strong Heritage Meat Brand & Family-owned	**0.769231**
Strong private-label Focus & Family-owned	0.272727
House of Brands & Startup Investment	0.25

Table 21: Set Coincidence of Causal Conditions; Source: Own Representation

8.3.4 Computation of Truth Table

Table 23 shows the first iteration of the truth table algorithm, combining similar configurations in one row. Row three contains the five cases Rügenwalder, Eberswalder, Meica, Wolf, and Gutfried. These cases combine the causal conditions "Strong Heritage Meat Brand" and "Family-owned" with the absence of the other three. However, the consistency-score of 0.8 (4 out of 5 cases led to a monobrand strategy) reveals a contraction within the row. "Neuburger" seems to be an outlier not using its established meat brand on APPs. As discussed in the mini-case, Neuburger uses a sub-branding strategy putting the meat-alternative brand very close to the meat-parent. Therefore, for this iteration of the QCA, the consistency value is manually altered to "1" in fsQCA considering Neuburger a case using its own brand on APPs rather than deleting the brand entirely.

In order to address limited diversity, fsQCA requires the researcher to provide a manual input "helping" the software reduce logical remainders based on case knowledge towards an intermediate solution, as discussed in the methodology section. The following assumptions were made regarding the expected effects of the respective causal conditions:

	Should contribute to Monobrand – Strategy when cause is		
Causal Condition	**Present**	**Absent**	**Present or Absent**
Private-label Focus		**X**	
House of Brands		**X**	
Startup Investment		**X**	
Strong Brand	**X**		
Family-owned			**X**

Table 22: Input of Case Knowledge to compute Intermediate Solution; Source: Own Representation

House of Brands	Strong private-label Focus	Startup Investment	Strong/Heritage Meat Brand	Family-owned	# of cases	Monobrand strategy	Cases	Raw consistency
1	0	0	1	1	1	1	Gutfried	1
0	0	1	1	1	1	1	Wiesenhof	1
0	0	0	1	1	5	1	Rügenwalder, Eberswalder, Meica, Wolf, Neuburger	0.8
0	1	0	0	0	4	0	Abbelen, Rasting, Frost, Windau	0
1	1	0	0	0	3	0	Orior, European Convenience, Vion	0
1	1	1	0	0	2	0	Bell, Micarna	0
0	1	1	0	1	2	0	Kupfer, Ponnath	0
1	1	0	1	1	2	0	Landhof, TFB	0
0	1	0	0	1	1	0	Vossko	0
1	1	1	1	1	1	0	Ospelt	0

Table 23: Reduced Truth table; Source: Own Representation

8.3.5 Solution

8.3.5.1 Complex Solution

	Raw coverage	Unique coverage	Consistency
~Strong private-label ● ~Startup Investment ● Strong Brand ● Family-owned	0.833333	0.166667	0.833333
~House of Brands ● ~Strong private-label Focus ● Strong Brand ● Family-owned	0.833333	0.166667	0.833333
Solution Coverage: 1 **Solution Consistency: 0.857143**			

Table 24: Complex Solution of the Truth Table Minimization; Source: Own Representation

8.3.5.2 Parsimonious Solution

	Raw coverage	Unique coverage	Consistency
~Strong private-label Focus	1	1	0.857143
Solution Coverage: 1 **Solution Consistency: 0.857143**			

Table 25: Parsimonious Solution of the Truth Table Minimization; Source: Own Representation

8.3.5.3 Intermediate Solution

	Raw coverage	Unique coverage	Consistency
~Strong private-label Focus ● ~Startup Investment ● Strong Brand ● Family-owned	0.833333	0.166667	0.833333
~House of Brands ● ~Strong private-label Focus ● Strong Brand ● Family-owned	0.833333	0.166667	0.833333
Solution Coverage: 1 **Solution Consistency: 0.857143**			

Table 26: Intermediate Solution of the Truth Table Minimization; Source: Own Representation

Taking the intermediate solution as an example[17], the two rows in the solution table (Table 26) correspond with two terms of potential avenues leading towards the

[17] The complete original output of fsQCA is attached in Appendix E.

solution "Monobrand strategy, connected with the Boolean operator "Or." The Boolean operator "And" or ("●") connects the causal conditions between the terms while "~" stands for the non-existence of the specific condition. In other words, the intermediate solution suggests a monobrand strategy when: Either the company is not primarily focusing on private-label production, is not invested in startups while having a strong brand and being family-owned (term 1), or it has only a single meat brand, no focus on private-label products, a strong brand while being family-owned (term 2). Term 1 thereby encompasses the cases of Rügenwalder, Eberswalder, Gutfried, Meica, Wolf and Neuburger, while term 2 includes Rügenwalder, Eberswalder, Meica, Wiesenhof, Wolf and Neuburger (Table 26).

Raw coverage describes the proportion of membership in the outcome condition (Monobrand Strategy) explained by each solution term. In the present case, each term includes 5 out of 6 companies with a monobrand strategy, translating to a row coverage of 0.83. Unique coverage measures the degree of membership of cases only covered in the specific solution term. In the present analysis, both terms contain one case not included in the other term (Gutfried and Wiesenhof), resulting in a unique coverage of 1/6 or 0.167. The consistency score of 0.83 indicates that, as both terms contain six cases, one of the cases covered by the terms does not pursue a monobrand strategy (Neuburger), leading to a score of 5/6 or 0.83. The solution coverage of "1" indicates that all cases of the sample using a monobrand strategy are included in the combination of the two solutions terms. In contrast, the solution consistency of 0.857 refers to the number of positive cases divided by the number of overall cases covered by the combined solution (6/7).

Due to the relatively small number of positive cases, the complex and intermediate solutions are identical. In contrast, the parsimonious solution is reduced to a single causal condition present in all positive cases, namely the absence of a strong private-label focus. As is often the case in QCAs with a small to medium sample size, the parsimonious solution tends to over-simplify the analysis, leading to an explicit recommendation of authors like Ragin (2021) or Fiss (2011) towards using the intermediate solution for further theoretical considerations.

The intermediate solution of the Boolean minimization algorithm provides two potential configurations leading towards a monobrand strategy and hints towards three anomalies in the sample, the case of Neuburger and the causal conditions "Startup Investment" & "House of Brands."

8.3.6 Solution Refinement

Neuburger represents an interesting outlier of a well-known, strongly-supported meat brand not applied to APPs. A common way to deal with these contradictions/outliers in QCAs is to drop the case from the data set. Removing "Neuburger" from the analysis yielded the following intermediate solution displayed in table 27: (all other conditions, cases, and researcher inputs remained unchanged)

8.3.6.1 Intermediate Solution without the Case "Neuburger"

	Raw coverage	Unique coverage	Consistency
~Strong Private-label Focus ● ~Startup Investment ● Strong Brand ● Family-owned	0.833333	0.166667	1
~House of Brands ● ~Strong private-label Focus ● Strong Brand ● Family-owned	0.833333	0.166667	1
Solution Coverage: 1 **Solution Consistency: 1**			

Table 27: Intermediate Solution of the Truth Table Minimization without "Neuburger"; Source: Own Representation

Dropping Neuburger from the analysis increases the consistency of both solution terms (all cases fulfilling their respective terms are positive ones) and the overall solution. Apart from Neuburger not being a positive case, two companies in the sample are responsible for the rater complex intermediate solutions with two longer terms, namely Wiesenhof and Gutfried. Both companies differ from the other three monobrand-strategists in only one causal condition, "Startup-investment" in the case of Wiesenhof and "House of Brands" in the case of Gutfried and the zur Mühlen Group. However, dropping one of the core cases from the analyses does not represent

a viable resolve mechanism for this QCA. Table 28 shows the results of a truth table analysis conducted without the condition "Startup Investment."

8.3.6.2 Intermediate Solution without the Condition "Startup Investment"

	Raw coverage	Unique coverage	Consistency
~Strong private-label Focus● Strong Brand ● Family-owned	1	1	0.857143
Solution Coverage: 1			
Solution Consistency: 0.857143			

Table 28: Intermediate Solution of the Truth Table Minimization without the Condition "Startup Investment"; Source: Own Representation

Dropping the condition "Startup Investment" results in a much simpler, single-term intermediate solution encompassing all five positive cases but still not showing perfect consistency due to the existence of the outlier case "Neuburger." Removing "House of Brands" mirrors the effect of eliminating "Startup Investment," leading to the same causal recipe and identical coverage and consistency values. Table 29 combines the last two iterations and drops both the causal condition "Startup Investment" and the case "Neuburger, "resulting in a causal recipe with "perfect" consistency and coverage scores for the combination of a family-owned strong brand not heavily engaged in private-label production.[18]

8.3.6.3 Intermediate Solution without the Condition "Startup Investment" and the Case "Neuburger"

	Raw coverage	Unique coverage	Consistency
~Strong private-label Focus ● Strong Brand ● Family-owned	1	1	1
Solution Coverage: 1			
Solution Consistency: 1			

Table 29: Intermediate solution of the Truth Table Minimization without the Condition "Startup Investment"& the Case "Neuburger"; Source: Own Representation

[18] All fsQCA outputs for the test-analyses are attached in the supplemental materials

Even though the companies in the sample represent the entire population of meat companies producing APPs in the DACH region, dropping cases or removing causal conditions cannot be regarded as an appropriate action considering the relatively low number of positive cases in the sample (6 out of 22). This limitation suggests adopting the initially presented intermediate solution as it also fulfills the generally accepted consistency threshold of 0.75 (Fiss, 2011) with a score of 0.857.

8.3.7 Analysis for negated Outcome

During the last step of a QCA, another iteration of the truth table minimization algorithm is conducted to negate the studied outcome, focusing on causal terms for negative cases or the non-existence of a monobrand strategy verifying the obtained causal recipe. This analysis follows the same procedure as the one explained, targeting the positive cases. Starting with the analysis of potential necessary conditions (table 30), it becomes clear that with a consistency value of 0.9375, a strong focus on private-label brands is present in almost every case apart from the already discussed brand "Neuburger."

8.3.7.1 Necessary Conditions for ~Monobrand strategy

	Consistency	**Coverage**
House of Brands	0.500000	0.888889
Strong private-label Focus	0.937500	1.000000
Startup Investment	0.312500	0.833333
Strong Meat Brand	0.500000	0.400000
Family-owned	0.437500	0.538462

Table 30: Analysis of Necessary Conditions for the negated Outcome; Source: Own Representation

Subsequently, the truth table is reduced towards the already established three different solutions. The intermediate solution is displayed in table 31[19]

[19] The complete fsQCA outputs for the negated analysis are attached in Appendix F

8.3.7.4 Intermediate Solution

	Raw coverage	Unique coverage	Consistency
Strong private-label Focus ● ~Strong Brand	0.75	0.75	1
House of Brands ● Strong private-label Focus ● Family-owned	0.1875	0.1875	1
Solution Coverage: 0.9375 **Solution Consistency: 1**			

Table 31: Intermediate Solution of the negated Truth Table Minimization; Source: Own Representation

The intermediate solution confirms the first insights obtained during the analysis of necessary conditions that having a strong private-label focus is an integral part of any non-monobrand strategy, either combined with a weak meat brand or a family-owned house of brands (Landhof, Ospelt, TFB).

8.4 Summary

Figure 16 provides a graphic overview of the QCA's results with the companies assigned to five different clusters. The first iteration of the QCA has proven that all companies using their established meat brands on alternative protein products combine two specific conditions: A strong heritage meat brand and being family-owned. These factors even prevailed, leading to a "positive" outcome when combined with conditions that were estimated to decrease the probability of monobrand strategies, namely being invested into alternative protein startups (Wiesenhof) or having more than one meat brand ("House of Brand") in the case of Gutfried being part of the zur Mühlen Gruppe. The QCA furthermore suggested that having a strong preexisting meat brand also, in most cases, directly rules out a strong corporate focus on producing private-label products. Therefore, this cluster was labeled "Brand Champions."

The second cluster contains some of the just mentioned exceptions of strong meat brands not used on meatless alternatives. Like the brand champions, the companies in the "Hesitants" cluster possess strong heritage meat brands and are still owned and led by families. Further analysis, however, reveals that the three large companies also

have a strong private-label focus additional to their own brands as well as other meat brands, differentiating them from the "Brand Champions." This cluster is evident in term two of the intermediate solution of the negated QCA.

The remaining three clusters are perfectly summarized by the first term of the negated intermediate solution, suggesting a strong private-label focus and the non-existence of a strong heritage meat brand as critical causal conditions. The "Private-label Producers" in the bottom-left corner of figure 16 represent stereotypical producers aiming at retail brands or food-service customers. All of the companies are not family-owned, and even though some of them use brands, these are only logos applied to some of their products if customers request it but cannot be considered "real" brands. The same holds for the cluster "Retail Brands" combining meat processing companies of Migros, Coop, and Edeka. While Rasting and Micarna rarely even use their name on products, Bell is well-known in Switzerland but does not support its brand through marketing activities. The last cluster includes three family-owned private-label brands, providing evidence that some old family brands like Kupfer and Ponnath focus on private-label production and do not leverage their company's heritage.

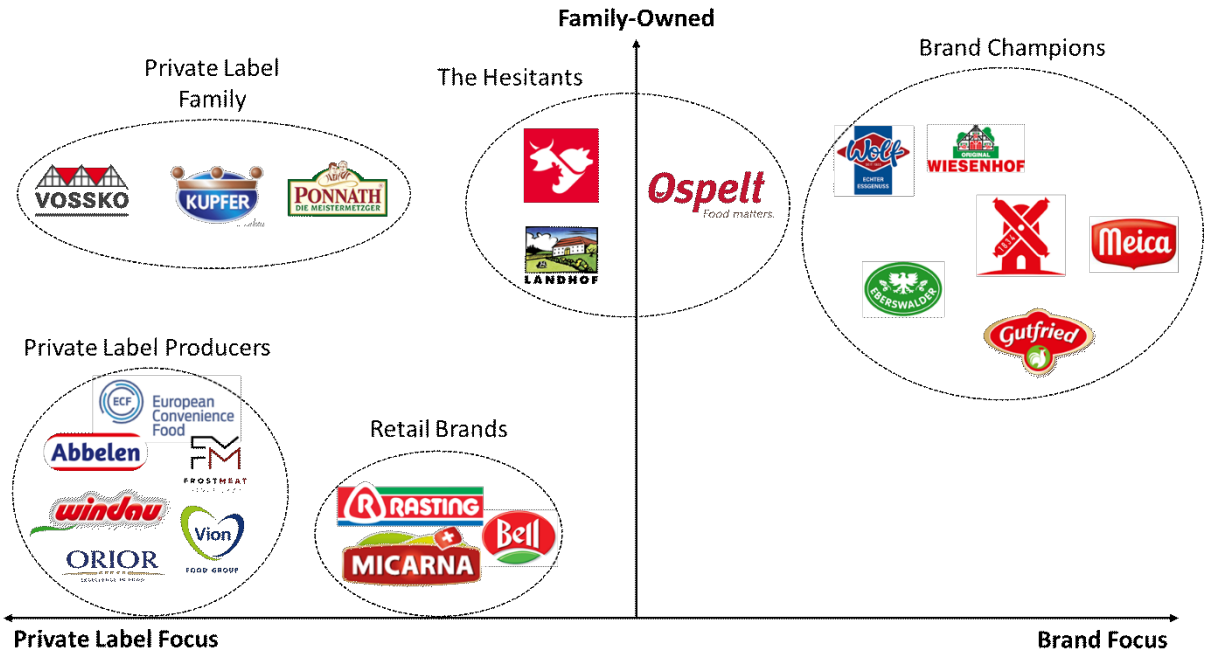


Figure 16: Overview of Companies according to Ownership Status and Business Focus; Source: Own Representation

9. Discussion & Contribution

9.1 Discussion

The main goal of this dissertation was twofold: Firstly, to identify and explore organizational factors helping companies achieve the state of brand ambidexterity through sustainable brand extensions. Secondly, the present research aimed to identify specific branding and communication measures helping managers reconcile brand consistency with brand relevance.

Explicitly addressing the first research focus by answering questions three and four, the multiple case study and particularly the concluding QCA carved out the organizational and brand-related prerequisites of achieving a status of brand ambidexterity. The present research confirms that brand ambidexterity requires a strong brand in the first place. Beverland, Wilner, & Micheli (2015, p.605) briefly mention in their paper that brand ambidexterity should be at the heart of every strong brand but do not specify what exactly constitutes the ladder. The present research finds that strong brands are not only defined by high brand recognition or awareness values but also significant investments in advertising and communication or, more broadly, a clear management commitment towards marketing and branding. Whether a brand was used on meat alternatives or not could be attributed to this brand focus of the parent company. The divide between private-label focused companies, even though some of them sell a small number of branded products, and companies having a long history of maintaining strong manufacturer brands, is not only visible in the results of the QCA but much more directly in the attitudes towards risk-taking and extending an existing brand expressed by CEOs and senior managers during the in-depth interviews.

Managers from companies included in the "Private-label" clusters depicted in figure 16 accordingly voiced strong concerns over a brand focus in the FMCG market in general. The CEO of a family-owned private-label producer stated that particularly in the German retail environment, characterized by strong discounters and customers

almost entirely focused on the price of the products, introducing new products under an established brand poses existential risks to the company. The manager furthermore underscores his firm belief that companies have to decide whether to focus on their manufacturer brands or supply retail with private-label products:

> *If you are familiar with the food retail sector and the challenges of selling in the discounter, particularly Lidl, it is simply a powder keg. If Lidl decides that you are not cheap enough, you are out. (CEO A, 2021)*[20]

> *There is nothing better than having a brand. I totally agree with you on that. If one could manage to build a brand. But I think you can only focus on one thing as a company. You can focus on branded products, but in that case, you lose the entire private-label area. For us, that would be too much volume that would be lost. (CEO A, 2021)*

Most private-label producers shared this view and ressentiment. Once the companies focused on producing private labels, they felt it was nearly impossible to overcome the hurdles of acquiring the capabilities needed to return towards branded products, even if they possessed family brands that used to be popular before this strategic reorientation. Apart from the general rejection of a branding focus, many private-label managers also expressed concerns about a meat brand's credibility towards vegetarian products.

> *This also has a historical background. On the one hand, we wanted to avoid driving away our meat consumers and just as much the other way around. Who would buy something vegan from a 100-year-old butcher? (CEO B, 2021)*

> *Many people in the meat industry are panicking that they will somehow get a shitstorm. This was also the case within our company, where people said: "Well, if we now make something vegan, sustainable, where you can see right away that there is a big meat company behind it." I think that was the issue for many companies, clearly separating these two business areas. (CEO C, 2021)*

[20] Names of interview partners are anonymized due to confidentiality agreements

The statements clearly show that there is still strong reservation against extending meat brands towards vegetarian products. Many managers still presume a clear ideological divide between meat-eaters and vegetarians/vegans and worry about their meat brand's consistency, even though most do not focus on producing branded products anyway. This finding supports Beverland et al.'s (2015, p.591) suggestion of a dominant logic among (brand) managers focusing on consistency rather than the relevance of their brands.

Further concerns were voiced by companies considering their meat brands too narrow for meeting their ambitions of internationalization or addressing new, younger target groups with plant-based products. Naturally, to a large part, this lacking confidence originates from a long-standing focus on private-label products and the missing marketing-support structures. Especially interesting for this research project are the three companies in the sample having a strong, well-supported brand but not utilizing it on their alternative protein offerings. These "Hesitants" summarize the challenges of meat processing companies concerning sustainable brand extensions and, in the next step, brand ambidexterity most appropriately. While the companies are aware of their brand's equity, they still struggle and hesitate to leverage it in the new product category, mainly because of the preconceptions just described for the private-label cluster.

> *I already produce vegetarian alternatives for a private label. We currently think about whether we need to have our brand or not. That is always difficult. But you could also position (heritage brand name) so that (heritage brand name) also stands for vegan products. We are clarifying that at the moment. We do not want to damage the brand with all our meat fans, and the question is how far we can stretch it. We are clarifying this with the meat community and with vegans. If we finally decide that it is not possible, for whatever reason, we will have to come up with something else, branding-wise. (CEO D, 2021)*

What makes the "Hesitants" reservations even more interesting to study is the presence of companies in the market resembling them in terms of heritage, structure, or brand focus but do use their brands on vegetarian meat replacements. These companies, introduced in the multiple case study of the thesis, clearly proved that despite having a heritage meat brand with strong equity, a stretch towards vegetarian products is possible without harming the existing business and being constantly under fire by NGOs, media, or ideological vegans. Even Wiesenhof and Tönnies, two of Germany's most criticized meat companies, managed to extend their brands without significant consumer backlash or irritation. The Wiesenhof-case proves that green brand extensions even work when a company uses the same brand simultaneously on a slaughterhouse processing more than one million chickens a day and on vegan sausages. Furthermore, senior managers' statements of some members of the "Brand Champion" cluster clearly show this strong conviction towards their brands and their belief in their extendibility.

> *(Name of Product Brand) is established, has its clientele, is well-known, and we have said, "We are not going to rename it now." It is not entirely stringent, but we said: "We will leave (vegetarian product under meat brand) alone now." (…) It is our most successful product! Therefore, we decided: "We will leave that for now and not unnecessarily try to change it to another brand." (Manager A, 2021)*

The manager's confidence in stretching and extending their meat brands towards vegetarian offerings did stem from their brand's substantial equity and a shift in consumer behavior concerning the broad acceptance of alternative protein products. All interviewees, from private-label companies and "brand champions "alike, confirmed that starting in the mid-2010s, the so-called "flexitarian" lifestyle increasingly became popular, describing a large customer segment of meat eaters trying to reduce their animal-based protein intake for health, animal welfare or environmental reasons. Combined with significantly improved product quality of second-generation meat alternatives, incumbent meat processing companies could address the emerging topics of "animal welfare," "sustainability," and "health-conciseness" with products tasting like the original and thereby appealing to this large

segment of flexitarians accustomed to the taste and texture of "real" meat (Chernev & Blair, 2021). This combination, a technological advance, and an emerging customer segment paved the way for the strong, established meat brands to extend towards a seemingly contradictory product category. It was no longer the 1% of vegans or 8-10% of vegetarians that bought meat alternatives but an increasingly large number of meat-eaters as well. Contrary to long-time vegans and vegetarians, these carnivores were used to the original taste and brand landscape of meat products. The companies using monobrand strategies identified this trend and extended their meat-heritage brands based on their core values and positioning towards the new category.

The quote of Maximilian Tönnies provides clear evidence for this strategy using the perceived healthiness and hedonic qualities (Mai et al., 2021) of Gutfried's products as a bridge to vegetarian offerings. Wiesenhof, Meica, Wolf, and Eberswalder follow similar strategies building upon the values, popularity, and particularly usage-context of their (product)-brands.

> *The brand stands for "pleasure without regret" and has a clearly defined core. "Gutfried ist gut für mich" is ultimately our slogan, which we have had for many years, and the combination of low-fat, low-cholesterol, healthy poultry sausage is close to the corresponding vegetarian product. Therefore, we also believe in it, have decided to hold on to it, have made market studies, and have seen that accordingly, Gutfried has high credibility to the vegetarian segment as well. (Tönnies & Tönnies, Episode 6; 2021)*

These strategies also resonate with extant literature suggesting that companies should build their extensions upon their brands' essence or core (Iyer, Davari, Zolfagharian, et al., 2021; Urde, 2016; Van Rekom et al., 2006). One CEO aptly summarized the benefits of using an established brand, stating that:

> *"Now with (competor name) and the Green Mountain, the Green Legend and so forth, how are you going to build brand identification when it all looks the same, and it is all kind of called the same thing? (CEO E, 2021)*

In other words, even though, as some interviewees mentioned, creating a new brand is not a formidable task, establishing and maintaining it presents a considerable challenge to start-ups and established companies opting for this strategy.

Summarizing the second and third empirical study, the present dissertation answered its research questions three and four by clearly pointing out the differences between companies using a monobrand strategy and those who decided to introduce new brands. The two opposing ends of the "branding spectrum" for meat and food companies in general, between having a strong private-label versus a strong brand focus, have clearly turned out to be the most influential factors determining the existence or absence of a monobrand strategy. Notably, and contrasting some reservations of private-label producers mentioned above, producing private-label products for a retailer and under a company's own brand simultaneously do not necessarily exclude each other. Only two out of 22 companies in the sample (Neuburger & Rügenwalder) do not produce for other companies/brands at all. The decisive factor is whether or not companies strongly focus on their brands and support them.

Furthermore, all companies included in the multiple case study were family-owned. This finding suggests that the organizational characteristics typically attributed to this ownership structure, a long-term orientation, or an efficient decision structure (Denison, Lief, & Ward, 2004; Kraiczy, Hack, & Kellermanns, 2015), for instance, are beneficial to a brand management approach focusing more on keeping the brand relevant rather than only consistent with its past. As family-owned companies represent most DACH meat companies, there are also family-owned companies not perusing monobrand strategies. These companies, however, either had a strong focus on private-label production, were invested in alternative protein start-ups, or possessed different meat brands (house of brands), thereby showing one of the three other factors potentially impeding monobrand strategies.

While the "brand champions," introducing APPs as green extensions to their established meat brands, can be considered "on the way" or transitioning towards reaching brand ambidexterity, they still trail behind the DACH leader in the

alternative protein segment. Rügenwalder Mühle has already achieved this state. Rügenwalder's entrance into the alternative protein field, therefore, also demands respect from its competitors:

> *In Germany, I have to say that Rügenwalder Mühle does by far the best job in terms of quality and the whole vision and strategy. They are saying that they are becoming a plant-based producer, they still make sausage, but consumers don't have a problem with it because they have a clear vision and strategy. They cleverly transferred the brand trust from Rügenwalder sausages to "Plant-Based." Hats off to them for how well that worked out. (CEO B, 2021)*

Answering research questions one and two, the in-depth single case study on the company Rügenwalder Mühle shed light on its uniqueness and offered valuable insights for other companies aiming to achieve brand ambidexterity. The prerequisites of Rügenwalder generally match those of most other meat companies in the sample. It was established that Rügenwalder was not the first-mover among meat companies offering vegetarian alternatives. All studied brands established their first products between 2014 and 2016, facing pressures on the meat market. Rügenwalder, producing a large amount of rather old-fashioned, hearty meat products, was particularly affected by the declining meat market and therefore reacted more swiftly and thoroughly. The unique, long-term commitment towards its umbrella brand and the connected high investments into marketing and branding put the company in a position ruling out the possibility of creating and supporting another strong brand for meatless alternatives. The extraordinary strong brand commitment and its exposure to the declining meat market explain why Rügenwalder committed itself towards a monobrand strategy, but what sets the company apart is the force of its execution.

Supported by a strong corporate culture and top management commitment of the owner-family, Rügenwalder used its extensive knowledge on its core brand values (shared delights, traditional craftmanship, the down-to-earth-attitude rooted in northern Germany symbolized by the iconic red windmill continuously used on the company's products (Bengtsson et al., 2010)) and the deep consumer-trust in the family-owned brand to introduce the vegetarian products alongside its traditional

meat offerings. While the other brands cautiously mentioned their new vegetarian products in the last seconds of their TV-ads did Rügenwalder spend its whole marketing budget on pushing the vegetarian category for more than two years. Besides, senior management continuously explained the company's transformation to various stakeholders, carefully reconciling any potential tension between the two product categories. This balanced, transparent, and most importantly, non-patronizing communication was the critical success factor in this process. Naturally, there was criticism from ideological vegans and carnivores, but the company focused on addressing the large majority of flexitarians and non-ideological meat-eaters willing to try new product offerings by a trusted brand.

Today, with Rügenwalder earning roughly 60% of its revenues with vegetarian or vegan products, the company probably could turn away from meat products entirely as it cannot meet retail customers' demand for vegan alternatives. However, this step is more than unlikely and was strictly denied by senior management on several occasions. Accordingly, Rügenwalder still needs its roots characterized by old-fashioned, hearty livers-sausages to sell products made by high-tech high-moisture extrusion of soy or pea proteins. Based on local craftsmanship, the brand's heritage is much more of an asset to the vegetarian product line than a liability as it stands for values that cannot be attributed to these new vegetarian meat replacements. Therefore, simply looking at a brand perspective, meat products represent a fundamental pillar of Rügenwalder's brand and will continue to do so in the foreseeable future. In addition, the company recently refocused more of its advertising efforts back on meat products, replacing some of its previous adverts transporting a too moralizing message of "having to save the planet" with more "old-fashioned" feel-good, reconciling, and positive communication.

This circumstance shows that reconciling and balancing the tensions between brand consistency and brand relevance is a constant process of adaption even for a brand that executes it as well as Rügenwalder Mühle.

9.2 Managerial Contributions

This dissertation offers two major recommendations for managers of food companies but also other industries.

Firstly, the most critical takeaway for managers from the presented study concerns the possibility of extending established brands through sustainable product innovations. The cases presented testify that even companies operating in environmentally challenging fields, like the meat industry, can successfully sell sustainable products under a single brand. This strategy does not necessarily sacrifice long-nurtured brand consistency but instead helps brand managers stay relevant in the face of a global megatrend. Many potential issues voiced by market participants and extant research, for instance, potential brand equity dilution and consumer backlash and rejection, generally do not occur on a large scale. The three empirical studies showed that companies with strong, popular heritage brands supported by a long-term marketing commitment are particularly predestined for pursuing such a monobrand strategy. Furthermore, the often-efficient structure of family-owned companies characterized by strong top-management support, a willingness to take risks, and an overall long-term business focus represents another good prerequisite for such a brand strategy.

Secondly, especially the first two studies demonstrate how sustainable brand extensions but also a brand transformation process can be communicated and managed. A communication strategy based on shared values, topics, and usage scenarios of established and sustainable product lines represents the most practical approach to reconciling the perceived discrepancies between the categories. Furthermore, all communication efforts of companies perusing a monobrand strategy should be characterized by a rather reserved and balanced tone and non-patronizing messaging. Extensive sustainable brand transformation processes, like portrayed in the Rügenwalder case, for instance, furthermore benefit from constant public communication, transparently explaining the company's goals and visions to every stakeholder.

9.3 Theoretical Contributions

The empirical studies conducted in the present dissertation contribute to the following three literature streams: Sustainable brand extensions, their communication, and the theory on brand ambidexterity in general.

9.3.1 Sustainable/Green Brand Extensions

The results obtained by exploring the strategies of meat companies introducing alternative protein products as green brand extensions question large parts of the scarce existent literature in this specific field.

First, focusing on the effects of sustainable brand extensions on the existing brand, most extant research cautions against the risk of brand equity dilution or driving away existing consumers when sustainable new products are introduced under a well-established heritage brand (Bezawada & Pauwels, 2013; Borin et al., 2013; Heath et al., 2011; Kim & Ma, 2014; Mccarthy et al., 2001; Pritchard & Wilson, 2018). The main concern is to alert them to the environmental externalities or shortcomings of the established product/brand (Majid & Russell, 2015). Furthermore, this risk was deemed exceptionally high if a brand is active in an environmentally challenging or "vice" business area (Hirunyawipada & Pan, 2020; Olsen et al., 2014) or positioned using traditional and nostalgic cues and values (Heinberg, Katsikeas, Ozkaya, & Taube, 2020). However, the companies presented in the single and multiple case studies suggest that the established meat brands, undoubtedly operating in a vice industry, did not suffer any significant damage caused by the sustainable extension being perceived as unauthentic (Spiggle et al., 2012) even if the parent used a nostalgic positioning strategy like Rügenwalder, for instance. This finding supports Pecot et al.'s (2019) argument that strong heritage brands are to some extent immune to radical change.

Second, another potential threat suggested by extant literature concerns the possibility of self-cannibalization (Aaker & Keller, 1990; Chatterjee, 2009; Shen et al., 2019; Yenipazarli & Vakharia, 2015), particularly when established and sustainable products

are introduced next to each other using the same brand (Bezawada & Pauwels, 2013; Grunert et al., 2014). These reservations regarding the potential product-category-cannibalization could not be confirmed during interviews with key decision-makers or while reviewing secondary data of monobrand companies. However, in the background of a stagnating or declining meat market and the whole meat category moving towards becoming more sustainable, consumers might have opted for alternatives anyway (Olsen et al., 2014), rendering the threat of cannibalization irrelevant after all.

Third, looking at the specific products the six monobrand-companies used to enter the market for APPs, the findings of De Angelis, Adıgüzel, & Amatulli (2017); Hill & Lee (2015) and Pritchard & Wilson (2018), underscoring the importance of the fit between socio-ecological problem caused by the brands main business and sustainable extension are generally supported by this thesis. The meat companies in the present sample generally introduced vegetarian or vegan substitutes of their most successful core products (Gershoff & Frels, 2015), representing consistency in usability and style as suggested by (Anagnostou et al., 2015; De Angelis et al., 2017; Hoek, Luning, et al., 2011; H.-S. Kim & Ma, 2014).

Fourth, authors like Mehta & Agrawal (2020), Sharma et al. (2016), and Bezawada & Pauwels (2013) suggest that environmentally-conscious consumer segments, in the present setting vegetarians and vegans, for instance, might reject products coming from unsustainable meat brands, a concern that many managers also shared in the present sample. However, the six companies using their established brands on APPs did not experience large-scale criticism or consumer backlash. Admittedly, particularly Rügenwalder did receive some negative feedback on its social media channels but, as already mentioned, this only concerns a small, economically insignificant number of ideological vegans or meat-lovers at the other end of the spectrum but not the large majority of flexitarians and vegetarians representing the core target group of these companies. Accordingly, the insights obtained during the empirical studies confirm the findings of Ryan & Casidy (2018) and Lopes & Veiga (2019), underlining the benefits and opportunities of popular, well-established brands.

9.3.2 Communication of Sustainable Brand Extensions

The findings of this thesis are in line with Olsen et al.'s (2014) suggestion that established companies should limit their number of sustainability claims when advertising for sustainable brand extensions. The communication strategy of Rügenwalder constitutes a good example supporting this finding. The company focuses on reconciling meat and meatless products by cautiously (Kronrod et al., 2012) communicating hedonic benefits (Cho & Baskin, 2018; Hughner et al., 2007; Mai & Hoffmann, 2012; Mai et al., 2021), shared values, and "feel-good" images (Hartmann et al., 2005) rather than straight sustainability claims. The other five monobrand-companies follow a similar strategy, highlighting taste and usage rather than sustainability benefits, thereby underlining the commonalities and explorative links between the two categories (Bridges, Keller, & Sood, 2000; Martin, Stewart, & Matta, 2005). Furthermore, the single case study could not identify any harm caused to the Rügenwalder brand by its sustainability claims, as suggested by Kong, Witmaier, & Ko (2021) or van Doorn, Risselada, & Verhoef (2021).

9.3.3 Brand Ambidexterity

The present dissertation also complements and refines the emerging theory of brand ambidexterity and its underlying work on brand consistency and relevance.

The presented results, particularly from the qualitative comparative analysis, underscore the companies' different approaches towards branding innovations (Beverland et al., 2010) and the importance of a company's strong brand commitment towards reaching brand ambidexterity. Having a well-known brand alone does not necessarily result in an easier reconciliation of brand consistency and relevance. The case of Rügenwalder showed that after the initial brand extension, a strong top management commitment and significant investments into communication were necessary to anchor the brand in both spheres, the traditional meat business as well as the sustainable vegetarian one.

Apart from organizational attributes supporting brand ambidexterity, this research project strikingly showcased the importance and ever-changing meaning of "brand relevance" (Datta et al., 2017). The presented findings, contradicting most of the scarce literature on sustainable brand extensions, do not originate from scientific errors or a unique case setting of earlier studies but rather constitute a testimonial to a fast-changing public opinion. Olsen et al.'s (2014) findings demonstrate this point. Based on a data set gathered between the early 2000s until 2009, their results cautioning against using established "vice"-brands on sustainable extensions undoubtedly founded upon actual customer sentiment at the time. However, with sustainability and climate change being central topics to the current political and economic discussion, this sentiment has most likely changed as the flexitarian lifestyle's rise vividly demonstrates. Accordingly, the present findings represent a new evaluation or update of the previous insights rather than a contradiction. This line of reasoning perfectly corresponds with Holt's (2004), Kapferer's (2012), or Swaminathan et al.'s (2020) view of brand relevance ultimately being a mirror to societal developments. Sustainability and climate change moved to the center of our society, and a few meat brands followed this development, most rigorously Rügenwalder Mühle.

9.4 Limitations & Avenues for Further Research

This research project sheds light on the specific developments within the meat sector and its widespread adaptation of sustainable product innovations. While many of its findings apply to other sectors as well, exploring different industries facing similar challenges like meat companies would allow for a broader comparison of companies using their established brands on green product innovations and the deduction of more industry-specific success factors. Car companies, for instance, readily introduced electric vehicles under their established brands, while other industries seem to be more cautious. Interestingly, Philip Morris, the world's largest Tabaco manufacturer, follows a publicly communicated vision of eradicating smoking, the foundations of its business, entirely (Philip Morris International, 2021). The company aims to replace large parts of its cigarette business with vaping or e-cigarette products. Notably, even

though the company owns many well-known cigarette brands it has not yet introduced smoking alternatives under such an established brand. As the evidence from the present study would suggest following such a strategy, exploring the background of Philip Morris' decision and other comparable cases represents fertile ground for further research. These insights would further increase the applicability of the presented results to other companies and industries.

Another worthwhile research endeavor could highlight organizational capabilities necessary to the innovation- and market-orientation of meat companies in general. This thesis has focused only on meat companies producing APPs but not on their competitors, some with strong heritage brands, that are not active in this new business. Including these companies in another QCA, for instance, could yield further interesting insights.

A third opportunity to extend and complement the findings of this thesis concerns consumer insights. It would be interesting to discuss deeper insights into the values used to extend the specific meat brands towards the vegetarian segment. These core brand values are an essential anchor reconciling brand consistency and relevance, often mentioned by extant research and practitioners alike. Exploring the effect of specific values like "healthiness," "craftsmanship," or "locality" on consumer perception or sentiment in the context of sustainable brand extensions could help managers craft more precise extension and communication strategies.

10. Conclusion

Coming back to the macro-challenges of the food industry introduced in the first chapter, the present dissertation bears witness to the possibilities and, most importantly, the power of well-established heritage brands to contribute towards their resolution. Contradicting extant literature, marketing agencies, and most brand managers in the industry, the study's findings show that even brands operating in environmentally-challenging industries like the meat sector can leverage their heritage or equity to successfully enter a market with more sustainable or even potentially contradicting products under a single brand. With climate change being one of the core issues of our generation, not only political priorities or consumer behavior will have to adapt but also companies and brands. Mirroring this development is an opportunity rather than a liability for established heritage brands, particularly if this transformation process is communicated openly and sincerely.

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Appendix A - Literature Review

Success Factors for Brand Extensions

Fit between original and extension category
Extensions are more successful when they are similar or typical to the brand's current product offerings (Bottomley & Holden, 2001; Gürhan-Canli & Maheswaran, 1998; K. L. Keller & Aaker, 1992; Völckner & Sattler, 2006)
Brand names with close associations to attributes of a category do not extend well outside the category (Loken & John, 1993)
Brand-specific associations strongly influence consumers' evaluations of brand extensions, potentially even more than category effects (Broniarczyk & Alba, 1994)
Narrow brands have advantages for highly similar extensions, and broad brands have advantages for extensions that are moderately similar to the brand's current products (K. L. Keller & Aaker, 1992)
Fit and typicality are less critical for high-motivation purchase conditions versus low-motivation conditions. (Fit serves as the main factor for purchase in low involvement conditions) (Gürhan-Canli & Maheswaran, 1998).
Transferability of assets and skills between the parent brand and the extension (D. A. Aaker & Keller, 1990; Bottomley & Holden, 2001)
Companies should evaluate extensions according to customer similarities, not product similarities – Brand extensions were found to be more successful when aimed at similar customers, even if products are dissimilar (Rust et al., 2004)
Benefit association: Broad brands have more accessible benefit associations compared to narrow ones (Benefits valued in a category, e.g., the positioning of a brand) (Meyvis & Janiszewski, 2004)
Consistency of extension in the eye of the customer depends on average similarity assessments of two dimensions – product attributes and category fit (Both dimensions average similarity yield same results as one high one low) (Ahluwalia, 2008)
Coherence with the image of the parent brand; brand essence needs to be transported to the different markets (Martínez Salinas & Pina Pérez, 2009)
Shared goals with a parent brand help consumers to assess the similarity of parent and extension brand leading to an increased transfer of consumer knowledge and attitude towards the extension (Martin et al., 2005)
Higher perceived parent brand quality leads to a higher possible price premium of the extension (Sattler, Völckner, Riediger, & Ringle, 2010)

Quality of Parent Brand
Strength of parent brand positively related to the market share of brand extension (Smith & Park, 1992)
Highly valued brand names extend better than brand names with lower value to consumers (Loken & John, 1993)
(High) perceived difficulty of making the extension has a (small) positive effect on consumers' evaluations. Using a quality brand on a from the customer's perspective easy-to-make extension or lower product-class in order to ask higher prices may hurt the brand (D. A. Aaker & Keller, 1990; Bottomley & Holden, 2001)
Customer's experience parent-brand experience and conviction (Völckner & Sattler, 2006)
Parent brand strength has a significant positive effect on the average trial probability of innovative line extensions (Sinapuelas, Wang, & Bohlmann, 2015)
Other Factors
Marketing & Advertising support (Sattler et al., 2010; Völckner & Sattler, 2006)
Retailer acceptance (Study in the German FMCG sector) (Völckner & Sattler, 2006)
More interdependent self-construal customers are more likely to accept an extension with a moderate or high level of brand stretch (Ahluwalia, 2008)
Distant brand extensions should be introduced before not after less distant products to increase brand attitude when multiple extensions to reach a distant category are not applicable (Parker, Lehmann, Keller, & Schleicher, 2018)
Consumers undergoing a life-role transition (newlyweds, students moving out) have more favorable attitudes toward distant brand extensions than other consumers (Su, Monga, & Jiang, 2021)
Availability of attribute information reduce the importance of perceived fit (Klink & Smith, 2001)
Perceived fit increases with exposure to extension (Klink & Smith, 2001)

Appendix A Table A: Success-Factors of Brand Extensions; Source: Own Representation

SLR- Full list of Papers

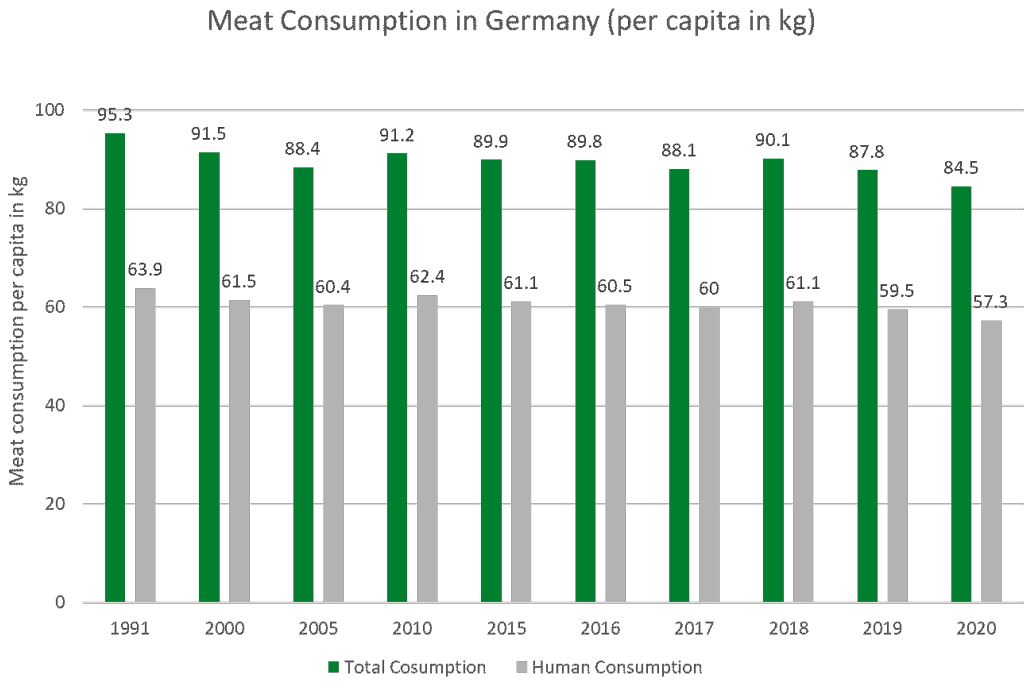
Author	Year	Journal	Theoretical Focus	Context	Method	Key findings	Used for sampling
Patrali Chatterjee	2009	Journal of Systems and Information Technology	Brand Extensions	Pet owners in the US, Europe, and Australia using at social media websites	Quantitative- online survey	Consumers are more likely to purchase green brand extensions of products with high perceived environmental impact; Current consumers prefer green line extensions over green category extensions.	Yes
Norm Borin, Joan Lindsey-Mullikin, R. Krishnan	2013	Journal of Product & Brand Management	CSR-Strategies	Printers in the US	Lab Experiments	Ecologically-ware customers should be targeted differently to consumers with low environmental priorities; No difference in purchase intention between recycled, new green products and products made using green processes.	No
Hye-Shin Kim, Michelle Ma	2014	Journal of Global Fashion Marketing	Brand Extensions	Apparel in the US	Quantitative- online survey	Consumers with strong parent brand identification care less about green brand extensions and instead buy because of existing preferences towards the parent brand.	No
Mitchell C. Olsen, Rebecca J. Slotegraaf and Sandeep R. Chandukala	2014	Journal of Marketing	Brand extensions, Social Identity Theory, Framing Theory	75 FMCG-brands in the US	Quantitative Modeling using several sources	Green new product introductions can improve brand attitude—The number of green messages, product type, and source credibility moderate this effect.	Yes
Kashef Abdul Majid, Cristel Antonia Russell	2015	Journal of Business Research	Brand Extensions	US secondary car market - Hybrid vehicles as brand extensions of existing car firms - Extension versus New Sub-brand	Quantitative- based on sales figures of carmakers	Stand-alone green products retain more value on the secondary market than brand extensions.	Yes
Jessica Hill, Hyun-Hwa Lee	2015	Journal of Fashion Marketing and Management	Brand Extensions	Fast Fashion retailers in the US	Quantitative-online survey	Brand-cause fit and brand-extension fit determine the attitude towards green brand extensions.	Yes
A. Yenipazarlia, A. Vakharia	2015	European Journal of Operational Research	Pricing of Green New Products	Green product introduction into consumer markets	System-dynamics-modeling	Green Products should not be priced with an overly high premium but should be more expensive than the	Yes

						existing conventional product line in order to minimize product-line-self-cannibalization	
Matteo De Angelis, Ferey Adıgüzel, Cesare Amatulli	2017	Journal of Cleaner Production	Product Innovation & Desing	Sustainable new products of Luxury companies	Online Experiments	New green luxury products should be similar to a company's existing offerings rather than greener ones, mainly to cater to customers with existing brand knowledge.	No
Mark Pritchard, Theresa Wilson	2018	Journal of Brand Management	Corporate Reputation	New green service introductions of energy-providers in the US	Quantitative- online survey	Green new products can improve a company's reputation. This effect is mediated by the company's field/industry and the parent's fit between extensions.	No
Bin Shen, Shenyan Liu, Ting Zhang, Tsang Ming Choi	2019	Journal of Cleaner Production	Pricing of Green New Products	Optimal advertising and pricing decisions for a green product in the presence of a non-green product substitute	Game Theory Modeling	Sustainable and conventional products should not be priced simultaneously but sequentially to maximize profitability.	Yes
Evandro Luiz Lopes, Ricardo Teixeira Veiga	2019	Journal of Brand Management	Brand Extensions	College students in Brazil evaluating fictional brand extensions (lightbulbs)	Lab Experiments	The purchase intention of a green version of an existing product is higher than that of a green new brand.	Yes
Hyun Min Kong, Alexander Witmaier, Eunju Ko	2021	Journal of Business Research	Branding	Luxury and non-luxury fashion brands in Germany and Korea	Online Experiments	Sustainable advertising campaigns on social media are most impactful for non-luxury brands for consumers in cultures highly aware of sustainability.	No
Jenny van Doorn, Hans Risselada, Peter C. Verhoef	2021	Journal of Business Research	New Product Introductions	FMCG-products in the Netherlands	Quantitative analysis based on sales-figures	Sustainable new product introductions generate lower sales figures than their conventional counterparts. However, innovative and sustainable products can mitigate sustainability claims' adverse effects.	No

Appendix A Table B: SLR-List of Papers; Source: Own Representation

Appendix B - Meat Industry and Alternative Proteins

Meat Consumption in Germany



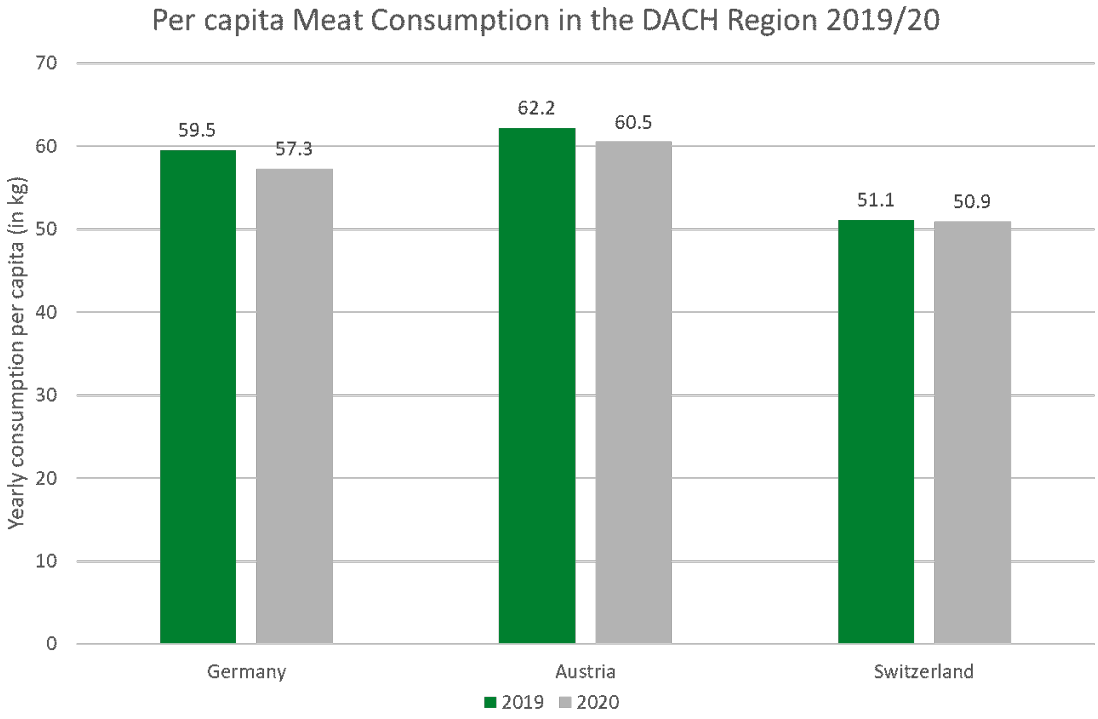
Appendix B Figure A: Per-capita Meat Consumption in Germany; Own Representation; Source: German Federal Ministry for Food and Agriculture (2021)

Largest Meat Companies in Germany

Rank	Company	Revenue in Mio. €	Focus
1	Tönnies Holding ApS & Co. KG	7.300	Slaughtering Pigs & Beef
2	Vion Food Germany	2.800	Slaughtering Beef & Pigs
3	Westfleisch SCE GmbH	2.790	Slaughtering Beef & Pigs
4	PHW Gruppe Lohmann & Co AG	2.680	Poultry Slaughter & Processing
5	Heristo AG	1.328	Sausages, Petfood, Seafood
6	Unternehmensgruppe Rothkötter	1.148	Poultry Slaughter & Processing
7	Zur Mühlen ApS & Co. Kg	1.000	Several meat brands (Tönnies)
8	Müller Gruppe	950	Slaughtering Pigs & Beef
9	Kaufland Fleischwaren	n/a	Processing for Lidl & Kaufland
10	Sprehe Gruppe	753	Poultry Slaughter & Processing

Appendix B Table A: Top 10 German Meat Companies 2020; Source: Allgemeine Fleischerzeitung (2020); Revenues from 2019

Per-capita Meat consumption in Germany, Austria, & Switzerland



Appendix B Figure B: Per-capita Meat Consumption in Germany, Austria, and Switzerland; Source: Own Representation based upon German Federal Ministry for Food and Agriculture (2021); Proviande Genossenschaft (2021); Statistik Austria (2021)

Largest Meat Companies in Austria & Switzerland

Austria

Rank	Company	Revenue in Mio. € (2019)	Focus
1	Tann GmbH	700 (e)	Processing for SPAR (retail)
2	Macher Gruppe	553	Slaughtering & Processing
3	Huber's Landhendl GmbH	350 (e)	Poultry Slaughter & Processing
4	Rewe Fleischwerke	300 (e)	Processing for REWE (retail)
5	Steirerfleisch GmbH	300	Slaughtering Beef & Pigs

Switzerland

Rank	Company	Revenue in Mio. CHF (2019)	Focus
1	Bell Food Group AG	4.013	Slaughtering & Processing (Coop)
2	Micarna SA	1.720	Slaughtering & Processing (Migros)
3	Ospelt Food Group	750 (e)	Processing
4	Orior Group	596	Processing
5	Ernst Sutter AG	570	Slaughtering & Processing

Appendix B: Table B: Top-5 Meat Companies in Austria and Switzerland; Source: Own Representation, based upon company webpages, (e): Revenues are estimations

Current Market Estimation of APP-market

Source	Year	Current market Estimation
UBS (Strycula, Stott, Geiger, et al., 2019)	2018	Worth of global meat market: 1.2 trillion USD; Penetration rate of APPs at the time was estimated at 0.5%.
McKinsey (Bashi et al., 2019)	2018	Global Meat Market worth 1.7 trillion USD; alt. protein 2.2 billion resulting in an 0.1% market penetration of alternative proteins globally
Ernst & Young (Dongoski et al., 2021)	2021	US$5 billion - US$10 billion

Appendix B Table C: Current Global Market Size of Meat Alternatives; Source: Own Representation

Future Market Estimation of APP-market

	Estimated Market volume/market share of APPs			
Source	**2025**	**2030**	**2035**	**2040**
UBS (Strycula, Stott, Geiger, et al., 2019)	US$ 51 billion; 2.5% global penetration; Estimated CAGR[21] of substitutes until 2025: 31%			
AT Kearney (Gerhardt et al., 2019)	US$ 120 billion; 10% plant-based penetration			Market make-up: 40% conventional, 35% cultivated meat, 25% vegan, plant-based meat replacements
BCG (Witte et al., 2021)			10% market share of APPs	
Roland Berger (Belderok et al., 2021)	US$ 27 billion			
Ernst & Young (Dongoski et al., 2021)		US$77 billion - US$153 billion; 10% market share of APPs; 36% CAGR		

Appendix B Table D: Estimated Market-Volume and Market-Share of APPs

[21] Compound Annual Growth Rate

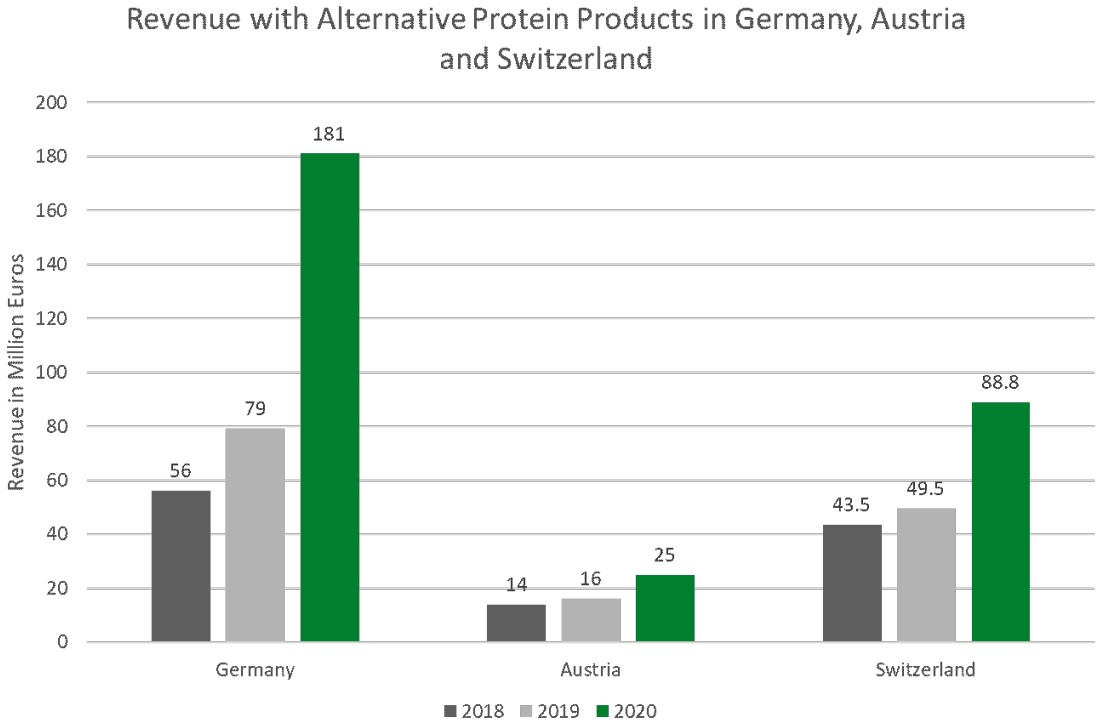
APP-market Estimations by Researchers

Authors	Main Findings	Country	Method
Cordts, Nitzko, & Spiller, (2014)	Increase of willingness to substitute after being exposed to negative information on meat consumption. (Increase from 12,8% before to 18,8% after negative messages on environmental issues and 28% on animal welfare)	Germany	Online Experiment
De Boer, Schösler, & Boersema, (2013a, 2013b)	Willingness to choose at least one meal without meat per week: 15% certainly, 41% maybe, 21% doing so already, 23% do not want to change	Netherlands	Online Survey
Graça, Calheiros, et al., (2015)	Willingness to reduce meat consumption and follow a plant-based diet. No figures of queried 5-point Likert-scale presented, but the introduction of "meat attachment"-construct	Portugal	Online Survey
Graça, Oliveira, & Calheiros, (2015)	Intend to change the current level of meat consumption (60% yes, 27% no, 12no meat consumers) Willingness to reduce the current level of meat consumption (48% yes, 38% no, 12% no meat consumers) Willingness to shift to a plant-based diet (44% yes, 56% no)	Portugal	Online Survey
Vanhonacker, Van Loo, Gellynck, & Verbeke, (2013)	34% of surveyed consumers planned to reduce meat consumption significantly	Belgium	Online Survey
De Boer, Schösler, & Aiking, (2014)	Purchase frequency of APPs within surveyed consumer group: 56% never 8% frequently, 14% tried it once.	Netherlands	Online Survey
Hoek et al. (2011)	57% of surveyed consumers had no intention to eat meat substitutes during the coming month.	UK & Netherlands	Paper Survey
(Verbeke, Sans, & Van Loo, 2015)	Consumer willingness to try, purchase & pay more for cultured meat after getting educated about benefits: try 43%, purchase 36%, pay more 36%	Belgium	Online Survey
Slade (2018)	Close to two-thirds of individuals prefer a beef burger over a plant-based one at the same price. However, only 11% of respondents would purchase a cultured meat burger instead of a conventional one.	Canada	Online Experiment

(Clark & Bogdan, 2019)	77.8% of respondents tried APPs over the last year, 30% were very unlikely to try APPs at all	Canada	Online Survey

Appendix B: Table E: Acceptance and Market-Potential of APPs; Source: Own Representation

APP-Revenues in the DACH Region from 2018-2020



Appendix B Figure C: Revenues of plant-based Meat Alternatives in Germany, Austria and Switzerland; Source: Bundesamt für Landwirtschaft Fachbereich Marktanalysen et al., (2021); Smart Protein Project (2021)

Factors influencing APP-Consumer Behavior

Category	Factor	General Description	Important Publications
Product Attributes	**Sensory Qualities /Taste & Texture**	Compared to traditional meat, the perceived sensory inferiority of APPs is one of the most frequently mentioned barriers towards consumer adoption, especially for non and low-frequency users.	(Apostolidis & McLeay, 2016; C. Hartmann & Siegrist, 2017; Hoek, Luning, et al., 2011; Lang, 2020; Reipurth, Hørby, Gregersen, Bonke, & Perez Cueto, 2019; Sadler, 2004; Vanhonacker et al., 2013)
	Price	Price is a potential barrier for adoption as APPs are generally more expensive than comparable meat products.	(Apostolidis & McLeay, 2016; Lang, 2020)
	Naturalness	Consumers generally perceive naturalness positively and are contradicted by a large degree of processing during food production. Therefore, naturalness appears to be a more critical factor for cultured meat than plant-based alternatives.	(C. J. Bryant et al., 2019)
	Similarity to Existing Meat Products	First findings on more recent APPs show that especially carnivores and flexitarians tend to prefer products that resemble the taste, smell, and texture of "real" meat products	(Elzerman et al., 2015)(Hoek, Luning, et al., 2011; Hoek, van Boekel, et al., 2011)
Personal values			
	Health	The consumer's health consciousness and the perceived healthiness of the APP positively affect the willingness to purchase meat replacements.	(Gómez-Luciano et al., 2019; Lang, 2020; Sadler, 2004; Siegrist & Hartmann, 2019)
	Environmental concerns	Depending on how aware and concerned consumers are about the environmental externalities of meat production, they show different preferences for APPs in general and particular products. Consequently, for some customers, sustainability benefits are also a reason to buy APPs.	(De Boer et al., 2013a; C. Hartmann & Siegrist, 2017; Lang, 2020; Siegrist & Hartmann, 2019; Slade, 2018; Vanhonacker et al., 2013)
	Animal welfare/ ethical concerns	In most conditions, Animal welfare is reported to have a relatively small effect on the willingness to use APPs even though awareness of the issues is present.	(C. Bryant & Barnett, 2018; de Boer, Schösler, & Aiking, 2017)
	Existing Dietary Preferences – Attitude towards meat	Especially meat attachment is an important factor for product acceptance by non-vegetarian segments.	(C. Bryant et al., 2019; Lang, 2020)
Anthropology & Sociology			
	Familiarity	Repeated exposure to APPs is likely to increase acceptance by a segment of consumers. However, the initial trial of the product remains a key barrier towards adoption.	(C. Bryant & Dillard, 2019; Graça, Godinho, & Truninger, 2019; Hoek et al., 2013; Lang, 2020; Tziva et al., 2019)
	Meal Context	An according to the consumers, believes appropriate meal context increases the acceptance of APPs.	(Elzerman et al., 2011, 2015; Hoek et al., 2013)
	Disgust & Food Neophobia	The impact of disgust varies depending on the observed country and is believed to have negligible effects on plant-based meat replacements. Therefore, food Neophobia is	(C. Bryant & Dillard, 2019; Siegrist & Hartmann, 2019; Hoek et al., 2013; Hoek, Luning, et al., 2011)

		particularly relevant for the first trial of APPs.	
Demographics			
	Gender	In general, men have a higher attachment to meat products. However, according to several studies, this results in a higher relative number of females willing to substitute meat alternatives. In addition, women prefer plant-based over lab-grown.	(Apostolidis & McLeay, 2016; Slade, 2018; Vainio et al., 2016)
	Age	Younger people tend to show a higher willingness to use meat analogs.	(Gómez-Luciano et al., 2019; Slade, 2018)
	Education	According to different studies, higher levels of education correlate with the willingness to use APPs.	(Graça, Oliveira, et al., 2015; Slade, 2018)
	Political orientation	Liberals are more willing to reduce their meat consumption and switch to APPs.	(C. Bryant et al., 2019; Elzerman et al., 2015)
	Country	Depending on their eating culture, some countries are more open to APPs.	(C. Bryant et al., 2019)
	Income	Higher Economic Groups tend to be more open to replacing meat with APPs.	(Gómez-Luciano et al., 2019)
Communication & Information			
	Media Coverage	Suitable for public awareness, especially for lab-grown meat and insects	(Gómez-Luciano et al., 2019)
	Information/Knowledge	Information campaigns on environmental and ethical issues of meat production are believed to affect meat consumption and substitution positively. However, this effect appears to be very limited.	(Siegrist & Hartmann, 2019; Hartmann & Siegrist, 2020;Lang, 2020; Hoek, Luning, Stafleu, & De Graaf, 2004; Vermeir & Verbeke, 2006)
	Segment-Focus	Different customer segments require specific information on the benefits and attributes of APPs.	(Apostolidis & McLeay, 2016)
Other factors			
	Category Management	Placement of APPs in the meat aisle has advantages over placing them in the vegetarian section.	(Gravely & Fraser, 2018; Vandenbroele et al., 2019)

Appendix B Table F: Factors influencing the Adoption of Alternative Protein Products; Source: Own Representation

Appendix C - Case Study Methodology

Case Selection and Sampling Methods

Selection Method	Definition	Use	Representativeness
Typical	Cases (one or more) are typical examples of the studied topic.	Confirmatory, probing causal mechanisms either confirming or disconfirming a given theory.	Typical cases are representative in the specified relationship.
Diverse	Cases (two or more) showing different values results or input variables.	Exploratory or confirmatory; illuminates the full range of input or output variables.	Diverse cases are likely to be representative as they cover the full variation of the population.
Extreme	Cases (one or more) showing extreme or unusual values.	Exploratory, theory development.	Only possible in comparison with a larger sample of cases.
Deviant	Cases (one or more) deviate from a cross-case relationship or sample.	Exploratory or confirmatory; theory refinement by disconfirming a deterministic argument.	Discussion of deviant cases helps to increase the representativeness of existing theories.
Influential	Cases (one or more) with Influential configurations of the independent variables.	Confirmatory; to double-check cases that influence the results of a cross-case analysis	An influential case is typically not representative.
Most similar	Cases (two or more) are similar on specified variables.	Exploratory or confirmatory	Most similar cases that are broadly representative of the population will provide the most robust basis for generalization.
Most different	Cases (two or more) are different on specified variables.	Exploratory or confirmatory, for instance, to eliminate necessary causes.	Most different cases that are broadly representative of the population offer good generalizability

Appendix C Table A: Case Types, Selection and Analysis Criteria; Source: Adapted from Seawright & Gerring (2008)

Appendix D - Single Case Study

Sources

Media Sources Abbreviations (For all empirical Studies)

AFZ	Allgemeine Fleischerzeitung	LZ	Lebensmittelzeitung
AGZ	Agrarzeitung	M41	Marke 41
ASW	Absatzwirtschaft	MAMI	Markt und Mittelstand
BE	Brand Eins	MBZ	Mein Bezirk
BEO	Brand Eins Online	MRKA	Märkische Allgemeine
BI	Business Insider	MTPT	
BMP	Berliner Morgenpost	MTBAY	Mittelbayerische
BIL	Bilanz	MKT	Markant
BZ	Berliner Zeitung	MM	Manager Magazin
CAPI	Capital	NOZ	Neue Osnabrücker Zeitung
DA	Deister Anzeiger	NWF	Neue Westfälische
DFR	Der Freitag	NWZ	Nordwest Zeitung
DW	Die Wirtschaft	OOEN	Oberösterreichische
EMS	EMS-Zeitung	OSTLVZ	Osterländer Volkszeitung
EUR	Euro	OSTHVZ	Ostthüringer Volkszeitung
F.A.Z.	Frankfurter Allgemeine Zeitung	OTS	OTS News Schweiz
FIF	Familienunternehmen im Fokus	PRR	PR Report
FLW	Fleischwirtschaft	PWG	Praxisnetzwerk
FORB	Forbes	RLH	Rundschau für den
FR	Frankfurter Rundschau	SK	Südkurier
FS	Foodservice	SOMP	Solinger Morgenpost
F&C	Fleisch und Co.	SPG	Der Spiegel
GTB	Göllinger Tagblatt	SPON	Spiegel Online
GRDZ	Gründerszene	STAN	Der Standard
GVP	GV-Praxis	STER	Stern
HA	Hamburger Abendblatt	STZ	Stuttgarter Zeitung
HAZ	Hildesheimer Allgemeine Zeitung	TAZ	Die Tageszeitung
HATA	Haller Tagblatt	TSPG	Tagesspiegel
HB	Handelsblatt	TOPA	Top Agrar
HJOU	Handelsjournal	VEG	Vegconomist
HOR	Horizonte	W&V	Werben & Verkaufen
IMP	Impulse	WAMS	Welt am Sonntag
KONT	Kontakter	WBK	Wiesbadener Kurier
KOER	Kölnische Rundschau	WIWO	Wirtschaftswoche

KSA	Kölner Stadtanzeiger	WEON	Welt Online
KUR	Kurier	WTB	Westfahlenblatt
LAUR	Lausitzer Rundschau	ZEIT	Die Zeit
LP	Lebensmittel Praxis	LMZ	Lebensmittelzeitung
AFZ	Allgemeine Fleischerzeitung	LP	Lebensmittel Praxis
AGZ	Agrarzeitung	M41	Marke 41
ASW	Absatzwirtschaft	MAMI	Markt und Mittelstand
BE	Brand Eins	MKT	Markant
BEO	Brand Eins Online	MM	Manager Magazin
BIL	Bilanz	NOZ	Neue Osnabrücker Zeitung
BZ	Berliner Zeitung	NWZ	Nordwest Zeitung
CAPI	Capital	PRR	PR Report
DA	Deister Anzeiger	PWG	Praxisnetzwerk
DFR	Der Freitag	RLH	Rundschau für den
EMS	EMS-Zeitung	SK	Südkurier
EUR	Euro	SOMP	Solinger Morgenpost
F.A.Z.	Frankfurter Allgemeine Zeitung	SPG	Der Spiegel
FIF	Familienunternehmen im Fokus	SPON	Spiegel Online
FLW	Fleischwirtschaft	STER	Stern
FR	Frankfurter Rundschau	STZ	Stuttgarter Zeitung
FS	Foodservice	TAZ	Die Tageszeitung
GTB	Göllinger Tagblatt	TSPG	Tagesspiegel
HA	Hamburger Abendblatt	VEG	Vegconomist
HATA	Haller Tagblatt	W&V	Werben & Verkaufen
HB	Handelsblatt	WAMS	Welt am Sonntag
HOR	Horizonte	WEON	Welt Online
IMP	Impulse	ZEIT	Die Zeit
KONT	Kontakter		

1. Interviews

Interview A: Lothar Bentlage Managing director of Rügenwalder Mühle from 1998-2020, Responsible for Corporate Sales Interview conducted via Zoom, on March 24th, 2021, duration: 1hour 44 minutes Interview Transcript attached in the supplemental materials **(#1)**
Interview B: Godo Röben Chief Marketing Officer of Rügenwalder Mühle from 1995-2021, managing director from 1998-2021 Interview conducted via telephone, on October 20th, 2021, duration 33 minutes Call notes are attached in the supplemental materials **(#2)**

Interview C: Michael Hähnel Chairman of the Management Board / CEO Rügenwalder Mühle since 2020 Member of the advisory board from 2018-2020 Interview conducted via Teams, on October 21st, 2021, duration: 51 minutes Interview Transcript attached in the supplemental materials **(#3)**

2. Homepage

Information on production of vegetarian and vegan products; retrieved from: https://www.ruegenwalder.de/getrennte-produktion, accessed 15.10.2021
Homepage post on being the most trusted vegan brand in 2021; retrieved from: https://www.ruegenwalder.de/most-trusted-brand-2021; accessed 15.10.2021

3. Press releases

All press releases retrieved from https://www.ruegenwalder.de/medien-und-social-media; accessed 13.10.2021

15.01.2019_Rügenwalder Mühle und AEG Deutschland investieren in Veggie-Partnerschaft
28.08.2020_Rügenwalder Mühle setzt Erfolgsgeschichte des Vorjahres fort
13.05.2020_Wechsel bei Rügenwalder Mühle_ Jens Wieler folgt auf Lothar Bentlage
08.09.2020_Rügenwalder Mühle Claudia Hauschild übernimmt Leitung der
21.07.2020_Pflanzliches Protein „made in Germany“ Rügenwalder Mühle startet Anbau von eigenem Soja in Deutschland
25.06.2020_Erfolgreichstes Jahr der Firmengeschichte Rügenwalder Mühle steigert Umsatz
05.10.2020_Die neue Lust auf Fleisch aus Pflanzen“ Rügenwalder Mühle startet
08.09.2020_Claudia Hauschild übernimmt Leitung der Unternehmenskommunikation
04.02.2020_BackWerk: Rügenwalder Mühle kooperieren beim vegetarischen Hot Dog
15.11.2020_Fleischfrei lecker snacken unterwegs
15.10.2020_ Neues Mitglied der Geschäftsleitung bei RM
15.11.2020_Projekt pflanzliches Protein „made in Germany"
15.10.2020_Live-Cooking auf Instagram
09.01.2020_Rügenwalder Mühle verstärkt sich im Management
16.12.2020_Personal, Digitalisierung und business IT: Jonas Lohmann ab dem 01.Januar 2021 neues Mitglied der Geschäftsleitung der Rügenwalder Mühle
15.11.2020_Live-Cooking auf Instagram „GZSZ Rezept-Challenge“ Rügenwalder Mühle
15.10.2020_Die neue Lust auf Fleisch aus Pflanzen: RM startet reichweitenstarke Image-Kampagne
15.04.2021_Transformation geht konsequent weiter
30.03.2021_Pflanzliche Snack-Offensive der Rügenwalder
15.06.2021_Rügenwalder Mühle geht in die Out-of-Home-Offensive

24.02.2021_Rügenwalder Mühle mit personellen Veränderungen
15.04.2021_Neuzugang bei Rügenwalder Mühle
15.07.2021_Unterwegs wieder lecker pflanzlich snacken
15.06.2021_Fortschritte beim Projekt Pflanzliches Protein
15.07.2021_POS-Aktion_ Die Rügenwalder Mühle sorgt für einen bunten Start ins Schuljahr
07.07.2021_Umfassender Nachhaltigkeitsbericht veröffentlicht
05.05.2021_Mehr Transparenz für mehr Nachhaltigkeit
29.06.2021_Jörg Pfirrmann zum zweiten Geschäftsführer bestellt
15.07.2021_Coole Promotion
04.10.2021_Rügenwalder Mühle verstärkt Marketing

4. Social Media

Twitter
11.07.2019_Wir werden sie vermissen - manchmal tut Veränderungen auch weh. Enttäuschtes, aber erleichtertes Gesicht#rügenwaldermühle #foodure #plantbased #veggie #vegan
22.08.2019_ Wir haben uns über den spannenden Austausch mit @DragosGruene und @RenateKuenast gefreut. #rügenwaldermühle #dialog #landwirtschaftswende
11.08.2021_ #rettetdieCurrywurst? Haben wir doch längst erledigt! Lieber @gerdschroeder, wir laden dich ein, unsere Currywurst zu probieren und deine Meinung zu teilen. Für die Beschäftigten bei @VW, für Ex-Kanzler – für alle, die Currywurst lieben und nicht darauf verzichten wollen.
Facebook
21.06.2017_Unsere liebste Genusshaltung lautet nicht "entweder oder", sondern "sowohl als auch". #dontworrybeflexi
21.06.2018_ Für alle die immer eine Extrawurst brauchen
16.08.2018_Ihr habt ja recht. Unsere alten Produktnamen waren viel zu kompliziert
07.01.2020_ Frohes neues Jahr! Habt ihr schon von der #Veganuary Challenge gehört? Sie ruft dazu auf, sich einen Monat lang rein pflanzlich zu ernähren. Wir finden, das ist ein großartiger Neujahrsvorsatz und machen mit. Was ist mit euch?
31.01.2020_Was uns zum Ende des #Veganuary besonders interessiert: Welche pflanzliche Alternative wünscht ihr euch?
15.10.2020_ein Vertrauen der VerbraucherInnen ohne offene Aufklärung. Ihr wolltet von uns wissen, wie die Aufklärungspflicht eines Unternehmens aussieht. Hier kommt unsere Antwort in der Frage des Monats :
31.08.2021_ Ob als vollwertiges Frühstück, herzhafter Pausensnack oder schnelles Abendbrot – die Mühlenstulle begleitet dich zuverlässig durch deinen Alltag. Und dabei ist völlig egal, ob Fleisch auf deinem Teller landet oder nicht. Denn im richtigen Gewand wird jede Stulle zum echten Hingucker! Wie wär's denn zum Beispiel mit unserer Pommerschen?

24.09.2021_ Auf Anhieb Platz 1 der vertrauenswürdigsten vegetarischen und veganen Marken! Wir sagen danke für euer Vertrauen und werden auch in Zukunft alles dafür tun, um das Vertrauen zu rechtfertigen.
13.10.2021_ Hand auf's Herz: Wir haben alle schonmal gespickt. Jetzt ist Spicken nicht nur erlaubt – sondern ausdrücklich erwünscht. Nämlich auf eurer nächsten Mühlenstulle mit unserem Schinken Spicker. Vegan, Vegetarisch oder mit Fleisch? Das entscheidet ihr!
Instagram
31.12.2016_Wir wünschen euch einen guten Rutsch und freuen uns auch im nächsten Jahr wieder jede Menge leckere Produkte für Euch zu entwickeln.
12.12.2014_Neu und #veggie. Wer hat noch nicht, wer will nochmal? #veggieschinkenspicker #rügenwaldermühle #paprika #mortadella #schnittlauch
LinkedIn
10.09.2021_Liebe LinkedIn Community, wir sind der Meinung: Worten müssen Taten folgen. Und so sind wir hinausgezogen, um mit vereinten Kräften die Facharbeiter:Innnen bei Volkswagen AG einen Kraftriegel aus unserem Hause probieren zu lassen.
15.08.2021_Lieber Gerhard Schröder, säßen wir von der Rügenwalder Mühle im Aufsichtsrat der Volkswagen AG….
12.08.2021_Gehrard Schröder: Currywurst ist Kraftriegel der Facharbeiterin

5. TV & Cinema Spots

All video files and a short, written description of every spot is provided with the supplement materials

01_Rügenwalder Teewurst Originalwerbung: Die mit der Mühle_1995
02_Pommersche Werbung_1998
03_Gefluegelwurst_Ruegenwalder Mühle_2010
04_Rügenwalder Mühle Jörg Pilawa _2010
05_Rügenwalder Mühle Schinkenspicker_ 2006
06_RM_Kinospot_Rauffus_2013
07_Rügenwalder Mühle Veggie _Freundin_2015
08_Rügenwalder Vegetarische Produkte - EFFIE AWARD Casefilm_2015
09_Rügenwalder Mühle_Vegetarische Schnitzel_2015
10_Rügenwalder Schinkenspicker_ 2001
11_Rügenwalder TV Spot Mitarbeiter_2014
12_Pommersche in 3 Arten_ 2017
13_Wotan weiß warum_ Rügenwalder Mühle vegetarische Produkte_2017
14_Unsere vegetarischen Produkte _ Rügenwalder Mühle_2015
15_Rügenwalder Mühle Veggieschnitzel_2015
16_Rügenwalder Mühle_Jetzt auch in Bio_TV Spot_ 2018
17_Rügenwalder Mühle_Wir denken an die Zukunft _2019
18_Rügenwalder Mühle _Neue Lust auf Fleisch_2020
19_Fleisch aus Pflanzen_Erklärung Fleischersatz_2020
20_Ode an den Einkaufszettel_2016

6. Sustainability reports

2010: Nachhaltigkeitsbericht_2010_Wir stehen zu unserer Verantwortung; report provided in the supplemental materials
2012: Nachhaltigkeitsbericht_2012_Rügenwalder Mühle: Familienunternehmen mit Gesicht; report provided in the supplemental materials
2013: Nachhaltigkeitsbericht_2013_ Verantwortung aus Verbrauchersicht
2020: Nachhaltigkeitsbericht_2020_Wie macht ihr das eigentlich?; report provided in the supplemental materials

7. Annual reports

Annual reports from the years 2009 until 2019, retrieved from the German Bundesanzeiger: https://www.bundesanzeiger.de/pub/de/start?0; Annual reports are usually published at the end of the following year, meaning that mid-October 2021, the 2020 report is not available yet. All annual reports are included in the supplemental materials

8. Stakeholder talks

Stakeholder meeting 1_16.11.2018; Length of video: 3 hours 8 minutes, video available in the supplement materials; transcript available in the supplement materials **(#4)**
Stakeholder meeting 2_24.05.2019; Length of video: 3 hours 33 minutes, video available in the supplement materials; transcript available in the supplement materials **(#5)**

9. Speeches & Podcast

01_Interview_16.11.2017_Zukunftsinstitut; Godo Röben on the future of Rügenwalder and plant-based meat, video available in the supplement materials; transcript available in the supplement materials **(#6)**
02_Keynote_09.02.2021_Eröffnung ZU; Keynote by Godo Röben on Corporate Change in family businesses using the example of Rügenwalder; audio file available in the supplement materials; transcript available in the supplement materials **(#7)**
03_Podcast_15.08.2019_Steingarts_morning_briefing_episode_267; Godo Röben on the future of meat; audio file available in the supplement materials; transcript available in the supplement materials **(#7)**

10. Case Studies

01_2009_Book: „Best Practice der Markenführung“, Franz-Rudolf Esch, Wolfgang Armbrecht, (eds.); „Von der Wurst zur Marke: Aufbau der Dachmarke Rügenwalder Mühle“ by Christian Rauffus (Owner of Rügenwalder), Godo Röben (CMO) and Thorsten Esch (Brand Consultant); PDF attached in the supplemental materials
02_ 31.05.2015_Short Case Study: „Wurstwelt im Wandel“ by Korbinian Vielmeier for the practitioner jounal „Unternehmeredition“; PDF attached in the supplemental materials

11. Secondary Interviews

LMZ_09.04.2010_"Produkte permanent geprüft"
RLH_01.02.2011_Godo Röben Interview
LMZ_18.11.2011_Empfehlungen an Freunde sind wertvoller als klassische Werbekontakte"
LMZ_19.04.2013_Es gibt keine niedrigen oder hohen Preise
KONT_06.06.2013_Interview für ganz Deutschland
ASW_12.03.2013_Aus dem Becher direkt auf die Hand
HB_27.08.2013_Verständnis für Vegetarier
RLH_01.12.2014_10 Fragen an
RLH_11.11.2014_Innovationsfreudig
HOR_18.06.2014_Thema, Tempo, Zielgruppe
WAMS_14.09.2014_"Zigarette der Zukunft"
LP_01.04.2015_Unumkehrbare Entwicklung
PRR_19.06.2015_Wurst wird die Zigarette der Zukunft
HB_23.10.2015_Unsere ersten Versuche waren ernüchternd
RLH_01.04.2016_Strategien für das Veggie-Wurst-Segment
FS_29.04.2016_Die dachten, ich spinne!
LMZ_28.10.2016_Aufbruch zu neuen Ufern
ZEIT_23.05.2016_Bedenkenträger haben in der Regel Angst
SPG_27.08.2016_Die Mehrheit will Bulette
LMZ_02.06.2017_Wir wollen gutes tun
LP_01.09.2017_Mehrwerte liefern
HOR_13.01.2017_Rügenwalder-Mrketingchef Godo Röben: "Es gibt bei vegetarischen Frikadellen kein Problem mit Irreführung"
VEG_08.05.2018_Rügenwalder Mühle weiter auf Vegan-Kurs
HOR_14.11.2018_Wie sich Rügenwalder zum Veggie-Taktgeber wandelt
UNED_01.04.2018_Wir brauchen immer neue Verbraucher-USP's
F.A.Z._18.08.2018_Die Politik übersieht den Einfluss der Ernährung auf den Klimawandel
BIL_29.03.2018_Diese Gier auf Fleisch
LMZ_26.04.2019_Ein langer Prozess
LP_01.04.2019_Veggie ist mehr als ein Trend
RLH_02.08.2019_Tierwohl
RLH_05.06.2019_Interview Rügenwalder
NWZ_21.08.2019_Heute wird zu viel Fleisch gegessen

SK_18.06.2019_Viele Vegetarier mögen den Geschmack von Fleisch
HB_08.07.2019_Wir sind mit Beyond Meat auf Augenhöhe
LMZ_30.10.2020_Immense Wachstumsdynamik
MKT_14.09.2020_Interview Rügenwalder Mühle: Innovation als Teil der DNA
STER_14.12.2020_Veggie statt Fleisch: Wie die Rügenwalder Mühle sich transformierte
TSPG_28.06.2021_„Was gerade passiert, ist der Wahnsinn“
EMS_14.05.2021_"Ich halte nichts von Glaubenskriegen"

12. Management Editorials

ASW_28.03.2013_Ohne Vertrauen kein Verdienen
ASW_28.06.2019_Game Changer Fleischalternativen

13. Articles in trade press

LMZ_29.10.2010_Innovativer Traditionalist
LMZ_28.05.2010_Von Wirtschaftskrise unbeeindruckt
LMZ_07.05.2010_Rügenwalder wächst mit dem Discount
LMZ_03.09.2010_Fleischwarenhersteller entwickeln Profil
FLW_15.12.2010_Positive Zwischenbilanz
FLW_21.10.2010_Zwei Jahre Projekt "Nachhaltigkeit"
AFZ_22.09.2010_Verantwortung hat ein Gesicht
LMZ_04.05.2011_Rügenwalder: Verzichtet auf Lactose und Gluten
LMZ_26.08.2011_ Neues von der Wurst
AFZ_23.11.2011_Der Weg zur Starken Wurstmarke
AFZ_11.05.2011_Rügenwalder Mühle künftig "5x ohne"
LMZ_05.11.2012_Rügenwalder Mühle: Gründet Arbeitskreis Tierwohl
AFZ_24.10.2012_Enger Dialog mit Verbrauchern
AFZ_07.11.2012_50000 Euro für die Forschung
FLW_14.12.2012_Der eigenen Marke Flügel verleihen
AFZ_16.05.2012_Rügenwalder spürt Kostendruck
LMZ_24.05.2013_Weiter so funktioniert nicht mehr
LMZ_09.08.2013_Die Stars von der Mühle
LMZ_06.12.2013_Rügenwalder debattiert über Tierwohl
FLW_18.10.2013_Verbraucher fordern mehr Transparenz
LMZ_21.08.2014_Rügenwalder startet mit vegetarischen Produkten
LMZ_28.03.2014_Rügenwalder betreibt Innovation mit Ernsthaftigkeit
LMZ_03.05.2014_Rügenwalder im Wandel
LMZ_02.10.2014_Rügenwalder will mit Vegi wachsen
LMZ_22.08.2014_Warum es um die "Vurst" geht
LMZ_22.04.2014_Wurst ist Charaktersache
AFZ_08.10.2014_Fleischfreihe Alternativen am Start
LMZ_20.02.2015_Guter Start für Rügenwalder-Veggie
LMZ_15.05.2015_Rügenwalder Veggie startet rasant

AFZ_07.10.2015_Fleischloser in die Zukunft
LMZ_06.05.2016_Regelbruch bei Rügenwalder
LMZ_06.05.2016_Rügenwalder gibt bei Veggie weiter Gas
LMZ_30.09.2016_Rügenwalder rügt Warentester
LMZ_03.03.2017_Votum zur Vegan-Wurst
LMZ_02.06.2017_Wir wollen Gutes tun
LMZ_28.04.2017_Jetzt kommt die Erbse in die Wurst
LMZ_02.06.2017_Rügenwalder wagt Neustart bei Bio-Wurst
LMZ_05.07.2017_Jahreszahlen 2016: Rügenwalder trotzt dem Sturm
PWG_17.11.2017_ Wandel in allen Branchen unaufhaltsam
FLW_17.08.2017_Vegetarsches Sortiment wurde erweitert
AFZ_04.01.2017_Rügenwalder Mühle gestaltet ihre Führungsspitze neu
LP_01.10.2017_Es geht um die Wurst
RLH_04.10.2017_Godo Röben
LMZ_29.06.2018_Rügenwalder legt bei Veggie zu
LMZ_15.06.2018_Erfolg lässt weiter auf Veggie bauen
LP_01.12.2018_Alternativen sollen die Zukunft sichern
AFZ_04.07.2018_Rügenwalder fährt mit Bio Erfolge ein
LMZ_26.04.2019_Ein langer Prozess
LMZ_22.02.2019_Veggie: Rügenwalder startet mit "Fleisch aus Pflanzen"
LMZ_04.07.2019_Geschäftsentwicklung: Rügenwalder wächst rasant
AFZ_24.04.2019_Verband für Fleischersatz
AFZ_30.01.2019_Rügenwalder wird Partner des BVB
AFZ_10.07.2019_Mehr als ein kurzer Hype
LMZ_19.06.2020_Auf das richtige Pferd gesetzt
LMZ_27.08.2020_Halbjhresbilanz: Rügenwalder Mühle verkauft mehr
LMZ_18.12.2020_Rügenwalder richtet Vertrieb neu aus
LMZ_26.06.2020_Rügenwalder Mühle transformiert
LMZ_17.01.2020_Rügenwalder bereitet sich vor
LMZ_19.11.2020_Fleischlose Alternativen: Rügenwalder Mühle kooperiert mit Shell
LP_01.10.2020_Für Neu-Flexitarier
LP_01.07.2020_Rügenwalder: Veggie boomt
AGZ_24.07.2020_Feldversuch mit Soja
VEG_22.07.2020_Michael Hähnel, Vorsitzender der Geschäftsleitung der Rügenwalder Mühle: Wir suchen stets die Nähe zum Lieferanten und Erzeuger, denn so sichern wir eine hohe Qualität
VEG_06.08.2020_Rügenwalder Mühle wirbt bundesweit mit Kampagne für eigenes heimisches Soja
FLW_26.06.2020_Rügenwalder Mühle: Veggie-Linie bringt Rekordumsatz
LZ_05.03.2021_LZ/Innofact-Markencheck: Rügenwalder Mühle
LP_15.08.2021_Kraftriegel für Arbeiter
FLW_19.08.2021_Claudia Hauschild verantwortet Nachhaltigkeit
RLH_06.07.2021_Die Rügenwalder Mühle hat vom Öko-Institut eine vergleichende Produktökobilanz erstellen lassen.
RLH_07.05.2021_Geschäftszahlen

LP_15.03.2021_Rügenwalder Mühle: 22 Prozent Plus
FW_15.07.2021_Pfirrmann wird Chief Financial Officer
LP_15.03.2021_Neuer Leiter F& E bei Rügenwalder
LP_31.03.2021_Bülow folgt auf Röben
RLH_06.08.2021_Die Deutschen verändern sukzessive ihren Bezug zu Fleisch.
AFZ_18.08.2021_Currywurst essen ist wie Auto fahren
RLH_06.08.2021_Jörg Pfirrmann

14. Articles in marketing press

HOR_18.08.2010_Es geht um die Wurst: Pilawa bringt neue Rügenwalder ins Fernsehen
ASW_05.11.2010_Wie die Wurst zur Marke wurde
W&V_01.07.2010_Jörg Pilawa macht den Becher-Test
KONT_09.08.2010_Rügenwalder Mühle
HOR_24.02.2011_Blick zurück in Neugier
HOR_04.03.2011_Rügenwalder Mühle bekommt neues Outfit
IMP_25.08.2011_Neu verwurstet: Wie das Traditionsunternehmen Rügenwalder Mühle der Teewurst eine neue Form gab
HOR_10.05.2012_Weshalb es für Rügenwalder im Kundenbeirat um die Wurst geht
BE_12.12.2012_Abenteuer Bulette
HOR_06.09.2012_Mediaplus sichert sich Etat von Rügenwalder Mühle
ASW_12.03.2013_Abschied vom Wurstwasser
IMP_31.10.2013_Es geht um die Wurst
HOR_31.05.2013_Kein Appetit mehr
M41_12.12.2013_Rügenwalder Mühle: Mut zur Veränderung
ASW_25.01.2013_Gewinner, Verlierer und stille Sieger
HOR_29.05.2013_Mitarbeiter als Testimonials: So kämpft Rügenwalder gegen den Vetrauensverlust
HOR_31.05.2013_Rügenwalder zeigt Gesicht
KONT_06.06.2013_Mitarbeiter wecken Vertrauen
HOR_04.06.2014_Auftritt des Tages: Rügenwalder’s skurrile "Mission Currywurst"
HOR_23.10.2014_Rügenwalder geht unter die Flexitarier
HOR_28.05.2014_Mehr Wurst für Weniger Werbegeld
HOR_06.03.2014_Wie beim Metzger um die Ecke
HOR_06.11.2014_Verzicht ohne Mangel
HOR_12.02.2015_Yougov Werbecheck zu Rügenwalder
HOR_29.10.2015_Cases
ASW_26.06.2015_Wurstwasser, Schlamm und Veggieschnitzel
W&V_16.02.2015_Das ist mir Wurst
HOR_05.01.2015_Veggie-Produkte: Rügenwalder umgarmt Flexitarier
ASW_ 10.03.2015_Die neue digitale Marken-Macht
W&V_29.08.2016_Das ist doch Käse, oder?
HOR_29.12.2016_Wenn "Old Shatterhand" Wotan Wilke Möhring zu Veganen Frikadellen greift

HOR_21.12.2016_Godo Röben rückt an die Spitze von Rügenwalder
ASW_15.03.2016_Fleischloses nicht nur für Flexitarier
HOR_09.08.2017_Rügenwalder Mühle: Wenn Marketingchef Godo Röben selbst zum Testimonial wird
IMP_26.01.2017_Blickwechsel
HOR_12.01.2017_Veggie und Western
HOR_07.12.2018_Wursthersteller: Rügenwalder wehrt sich gegen rassistische AfD-Mail
W&V_05.02.2018_Vielfalt
HOR_14.05.2019_Rügenwalder Mühle: So macht Brawand Rieken Lust auf das neue Veggie-Fleisch
BEO_01.08.2019_Alles Wurst
HOR_10.07.2019_Wie gesellschaftliche Veränderungen Unternehmen zum Umdenken bringen
HOR_05.10.2020_Rügenwalder Mühle: So bringt der Fleischhersteller die Veggie-Produkte in den Kern seiner Marke
HOR_05.10.2020_Rügenwalder Mühle: So bringt der Fleischhersteller die Veggie-Produkte in den Kern seiner Marke
ASW_25.06.2021_Konsumenten sind egoistisch
HOR_24.02.2021_Wurst- & Veggie-Hersteller: Godo Röben verlässt Rügenwalder
HOR_04.10.2021_Nachfolger für Godo Röben: Rügenwalder holt Steffen Zeller von Iglo als neuen CMO

15. Articles in general press

BZ_30.08.2012_Die Werbung mit der ländlichen Idylle ist ein Marketingtrick
TAZ_07.07.2012_Die Mühle der Glaubwürdigkeit
TAZ_23.10.2012_Neuer Trend: Die Extreme Pressemitteilung
NOZ_15.05.2013_Mitarbeiter ersetzen Jörg Pilawa
NOZ_13.03.2013_Deutschlands größte Wurstmarke
WEON__13.09.2014_Rügenwalder experimentiert mit veganer Wurst
NOZ_19.02.2014_Am Ende steht immer das Töten
HATA_12.06.2015_Ungezügelte Lust auf Fleisch trotz Veggie-Trend
HB_26.02.2015_Der Reiz des Fleisches
WW_09.10.2015_Platz 9: Rügenwalder
WAMS_23.08.2015_Iss doch wurscht!
SPON_05.04.2015_Die Wurst ist die Zigarette der Zukunft
CAPI_01.11.2015_Der Salami-Taktiker
ZEIT_07.05.2015_Schwein gehabt
HA_08.10.2016_Die lukrative Extrawurst
TAZ_17.11.2016_Bauern fordern Wurstboykott
F.A.Z._21.10.2016_Vegetarische Schlachtplatte
HB_21.11.2016_Kreative Selbstzerstörer
GTB_19.11.2016_Revolution in der Fleischfabrik
DA_29.12.2016_Wann ist ne Wurst 'ne Wurst?
F.A.Z._15.11.2016_Wursthersteller Rügenwalder will weg vom Fleisch

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F.A.Z._14.11.2016_Eine Wurstfabrik will weg vom Fleisch
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NWZ_03.05.2016_Rügenwalder immer öfter ohne Fleisch
NWZ_05.07.2017_Veggie und Bio gegen sinkende Fleischeslust
EUR_15.02.2017_Nicht mehr Wurst
FR_01.04.2017_Damit haben wir nicht gerechnet
NWZ_16.02.2017_CDU schmeckt Veggie-Wurst doch
NWZ_28.01.2017_Weichen bei Rügenwalder neu gestellt
WEON_27.10.2017_Deutsche wollen lieber wieder Fleisch in der Wurst
F.A.Z._02.01.2017_Wie sollen die Menschen noch mehr Wurst essen?
DFR_01.02.2017_Fleisch ist sein Gemüse
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NWZ_27.06.2018_Rügenwalder auch bald im Stadion
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WW_16.02.2018_Nur die Fleischwende rettet uns
Humans of New Work_26.08.2018_Godo Röben
WEON_02.09.2019_Das Ende der Currywurst bei Rügenwalder Mühle
STZ_21.09.2019_Vegane Wurst von Rügenwalder Mühle_ Wursthersteller erntet Shitstorm – und Solidarität
MM_02.09.2019_Rügenwalder Mühle verabschiedet sich von der Currywurst
NWZ_05.07.2019_Rügenwalder im Veggie-Boom
FR_18.01.2019_Tierisch anders
NWZ_22.08.2019_Wurst verbessern statt verbieten
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HB_18.12.2020_Familienunternehmer des Jahres Michael Hähnel: Revolutionär
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HB_17.12.2020_Michael Hähnel –Familienunternehmer des Jahres
STER_03.09.2020_Alles Echt?
NWZ_26.08.2020_Veggie überholt erstmals klassische Wurst
SPG_03.07.2021_Das bessere Fleisch
HA_15.05.2021_Veggie-Trend beflügelt Rügenwalder Mühle
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FIF_15.01.2021_Jonas Lohmann (36) neues Mitglied der Geschäftsleitung der Rügenwalder Mühle
HB_16.04.2021_Veggie-Boom mit Nebenwirkungen

Example of Coding Process

1st order Concepts/Codes	Source	Data Sample
"You are the true CEOs of the brand, and we work with you “	FLW_14.12.2012_ Der eigenen Marke Flügel verleihen	You are the true bosses of the brand, and we work together with you," Röben puts it. But that doesn't mean he now wants to proclaim a council republic of sausage lovers at the mill: "The consumer is a boss, but just one who still wants to be led."
Criticism regarding too little customer involvement in marketing efforts	ASW_28.03.2013_Ohne Vertrauen kein Verdienen	In short, companies rely on colorful advertising worlds that customers buy into and whose exaggerations they accept with a wink: "It's just advertising." Brand-name products are beyond any doubt in terms of quality. Only occasionally do critical consumers fight their way to the desks of decision-makers with long, handwritten letters. They have picked the address out of the telephone book. Packaging does not contain contact offers, hotlines, ingredients, and nutritional information. Marketing operates undisturbed by consumer inquiries.
Communication with customers as equal partners creates trust	Stakeholder meeting 1_16.11.2018	“You have to go out as a company much more seriously than just saying: “Grandma Friederike took the sausage from the Pomeranian beech smoke,” you have to be more open. And now you have to accept that again and also be susceptive to changing eating habits, like going vegetarian and vegan. So to me, this constant change is totally exciting.”
Customer advisory board enables trend recognition and Analysis	HOR_10.05.2012_ Weshalb es für Rügenwalder im Kundenbeirat um die Wurst geht	This includes assessments of developments and trends in the field of nutrition, the quality, and taste of our products, as well as experiences with our packaging, requests for new varieties or opinions on our image and advertising." In this way, Rügenwalder is clearly going beyond the goals of other companies.

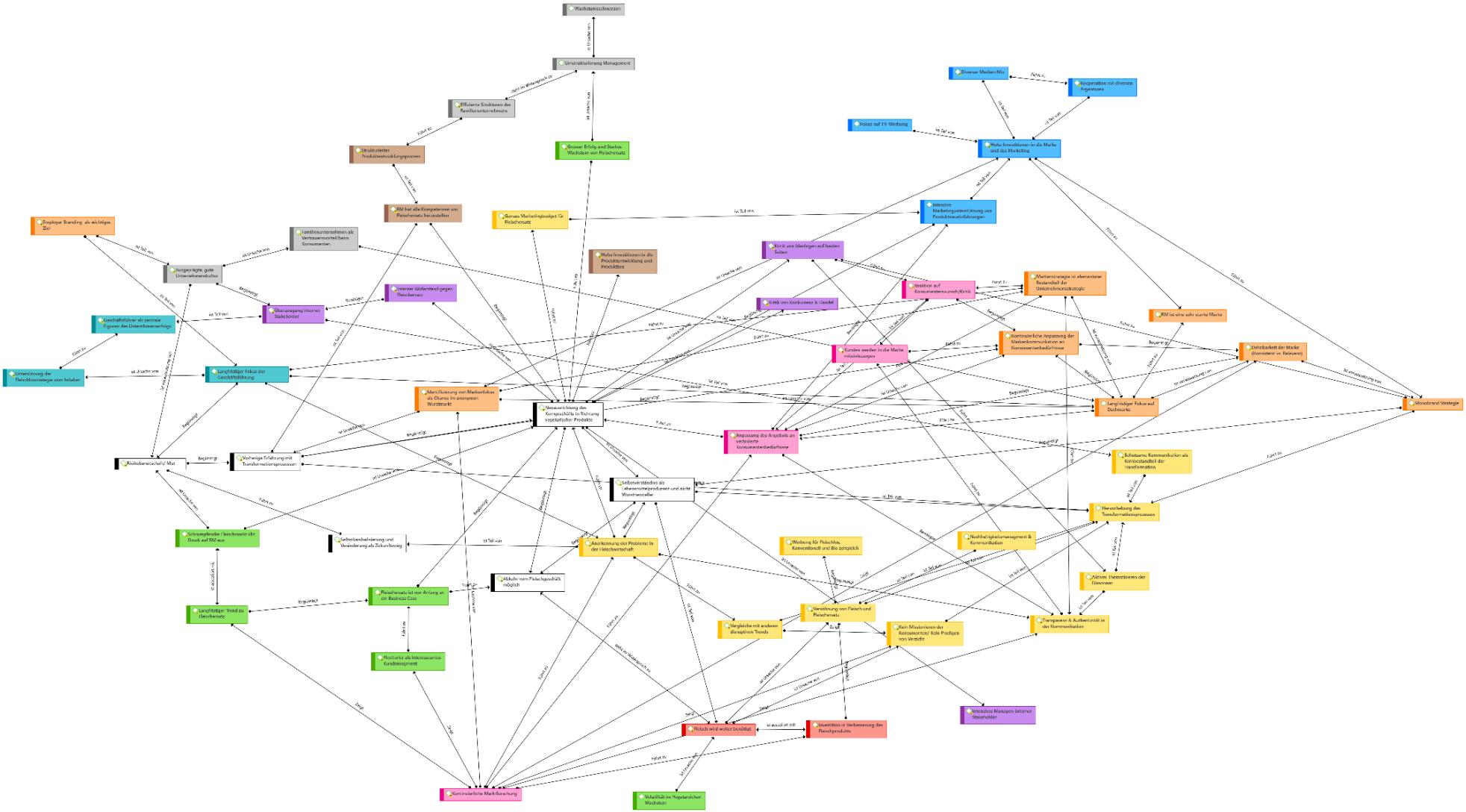
Appendix D Table A: Coding and Data Reduction Example of the Aggregate Dimension “Customers are involved in the brand”; Source: Own Representation

Aggregate Dimensions and Color Themes

Agility in Product development		Courage and willingness to change the business model	
Communicating the transformation process		High investments into Marketing	
Commitment to Meat Products		Focus on consumers and markets	
Focus on the Business Case		Top-Management Support	
Corporate Culture & Structure		Internal & external stakeholder management	
Brand as the core of the corporate strategy			

Appendix D Table B: Color Codes of Aggregate Dimensions; Source: Own Representation

Network-View of Codes: Rügenwalder Mühle-Full Modell



Appendix D Figure A: Network-view of codes after final stage of grounded-theory coding; Source: Own Representation

Code Groups and Themes

Agility in Product development

Codes:

- High investments in product development and production
- RM possesses all capabilities to produce APPs
- Well-structured product development process

Communicating the transformation process

Codes:

- Actively addressing the dissonance
- Acknowledgement of meat externalities
- Gentle communication of the transformation process
- Highlighting the transformation process
- No preaching/ no communication of sacrifices
- Communication of sustainability management
- Transparent and authentic communication
- Comparison to other disruptive trends
- Reconciliation of meat and alternative proteins
- Entire marketing budget for APPs
- Joint advertisements for meat and alternative products

Commitment to Meat Products

Codes:

- Meat division is still needed
- Investments into improving the meat products

Focus on the Business Case

Codes:

- APPs are a business case form the beginning
- Flexitarians as a viable customer segment
- Great success and high growth of APPs
- Long-term trend towards meat alternatives
- Shrinking meat market puts pressure on RM
- Volatile growth of APPs

Corporate Culture & Structure

Codes:

- Pronounced & good corporate culture
- Efficient structures of a family owned business
- Family business as a trust-factor for consumers
- Management restructuring
- Structural challenges due to high growth rates

Brand as the core of corporate strategy

Codes:

- Stretchability of the brand
- Employer branding as important goal
- Identification of branding as a differentiator in the sausage market
- Continuous adaption of brand communication to changing consumer behavior
- Long-term focus on umbrella-brand
- Monoband Strategy
- RM is a very strong brand
- Branding is an integral part of corporate strategy

Courage and willingness to change the business model

Codes:

- Abandoning meat is as possibility
- Reorientation of core-business to meat alternatives
- Courage and willingness to take risks
- Self-cannibalization and change as a way forward
- Self-concept as food producer
- Experience with previous transformation processes

High investments into Marketing

Codes:

- Diverse media-mix
- Focus on TV-advertisement
- High investments into branding and marketing
- Intensive marketing support of new product launches
- Cooperation with several agencies

Focus on consumers and markets

Codes:

- Continuous market research
- Product offerings are adapted to changing consumer behavior
- Customers are involved in the branding process
- Reaction to criticism and customer demands

Top-Management Support

Codes:

- Managing directors as central figures for the company's success
- Long-term focus of owner and management
- Support of meat alternatives by the owner

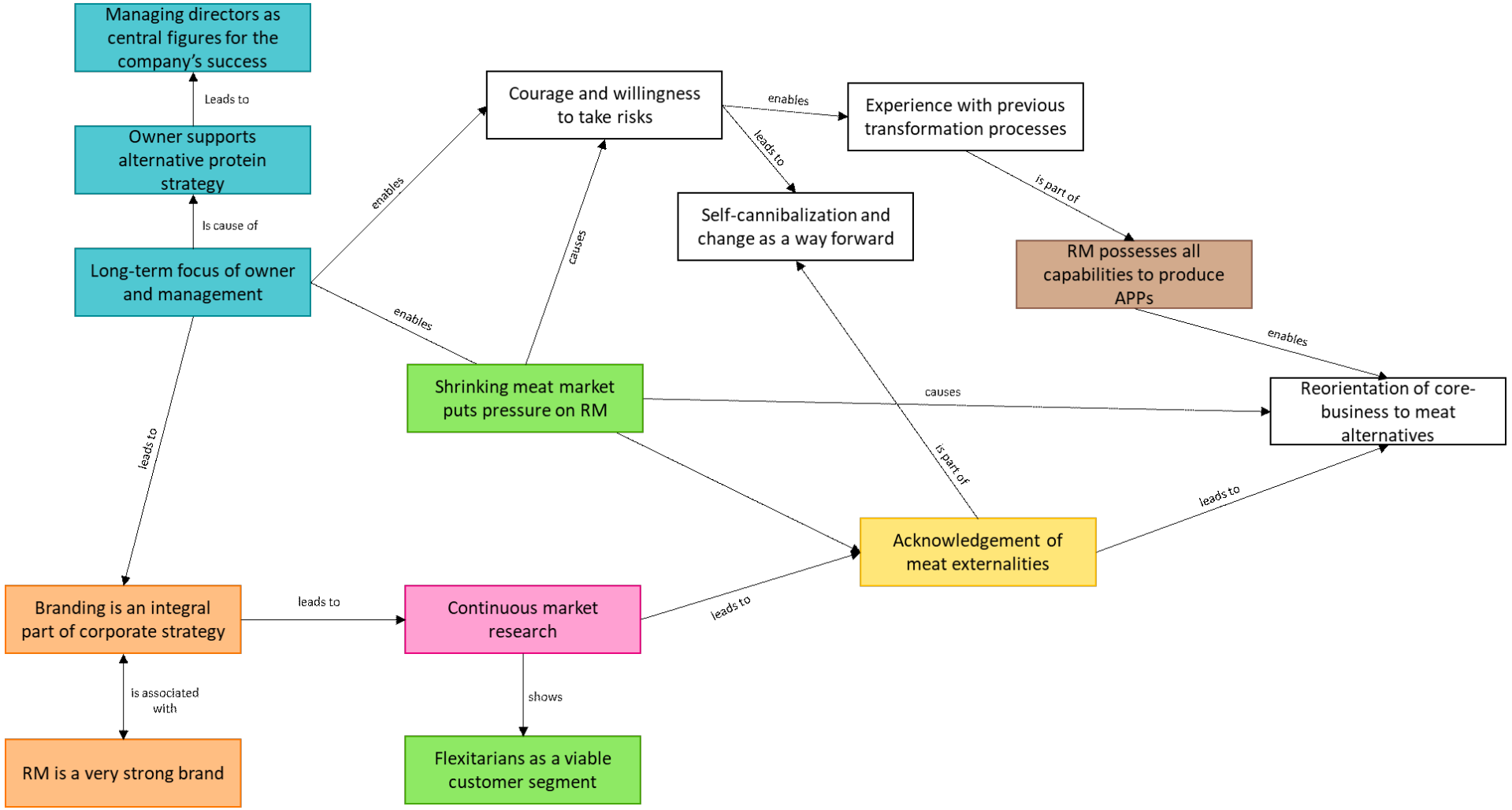
Internal & external stakeholder management

Codes:

- Intensive management of external stakeholders
- Internal resistance against APPs
- Criticism from ideologues of both sides
- Criticism form retail and competitors
- Convincing internal stakeholders

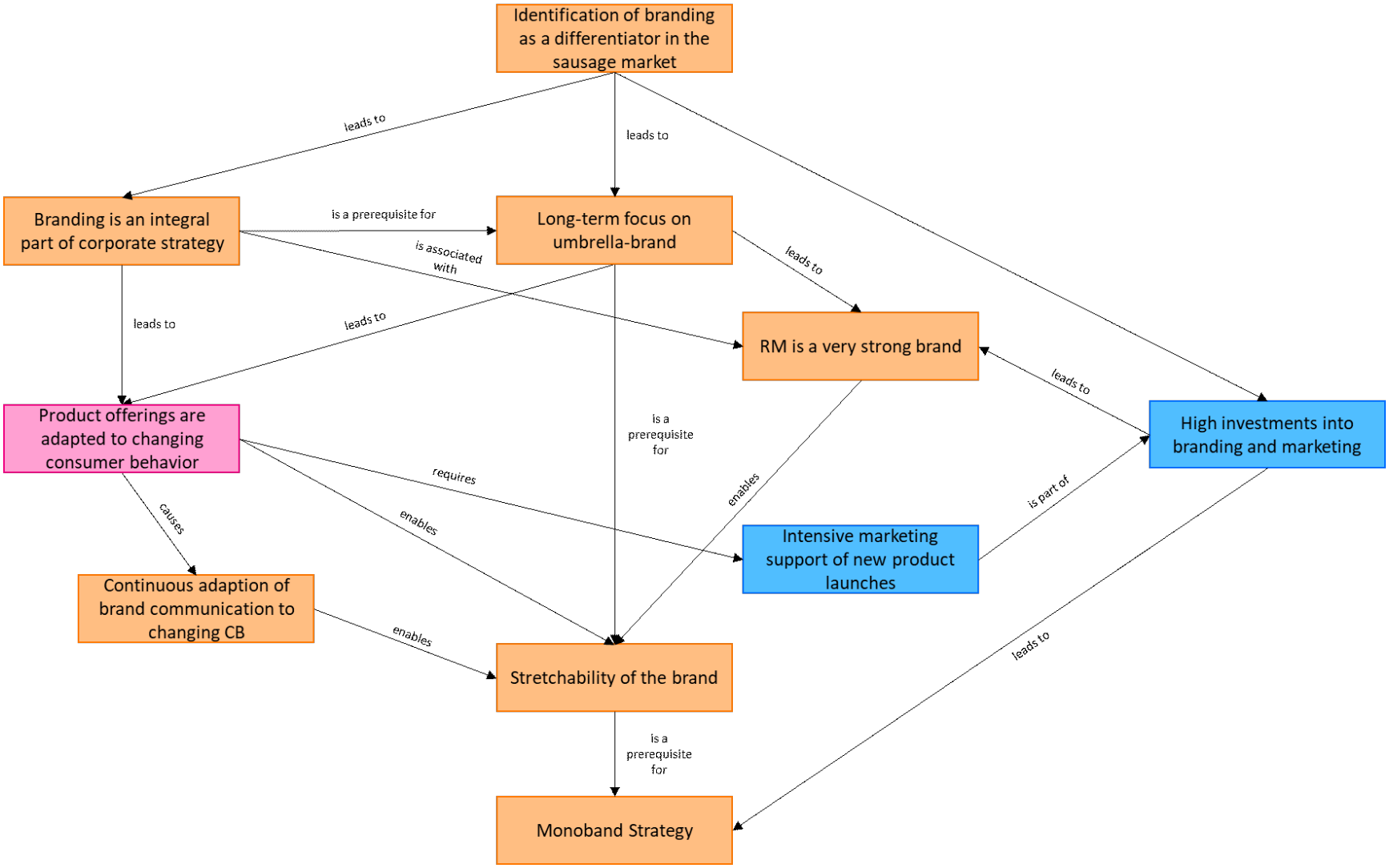
Appendix D Figure B: Code Groups and Themes; Source: Own Representation

Why did Rügenwalder decide to introduce Meat Alternatives in the first place?



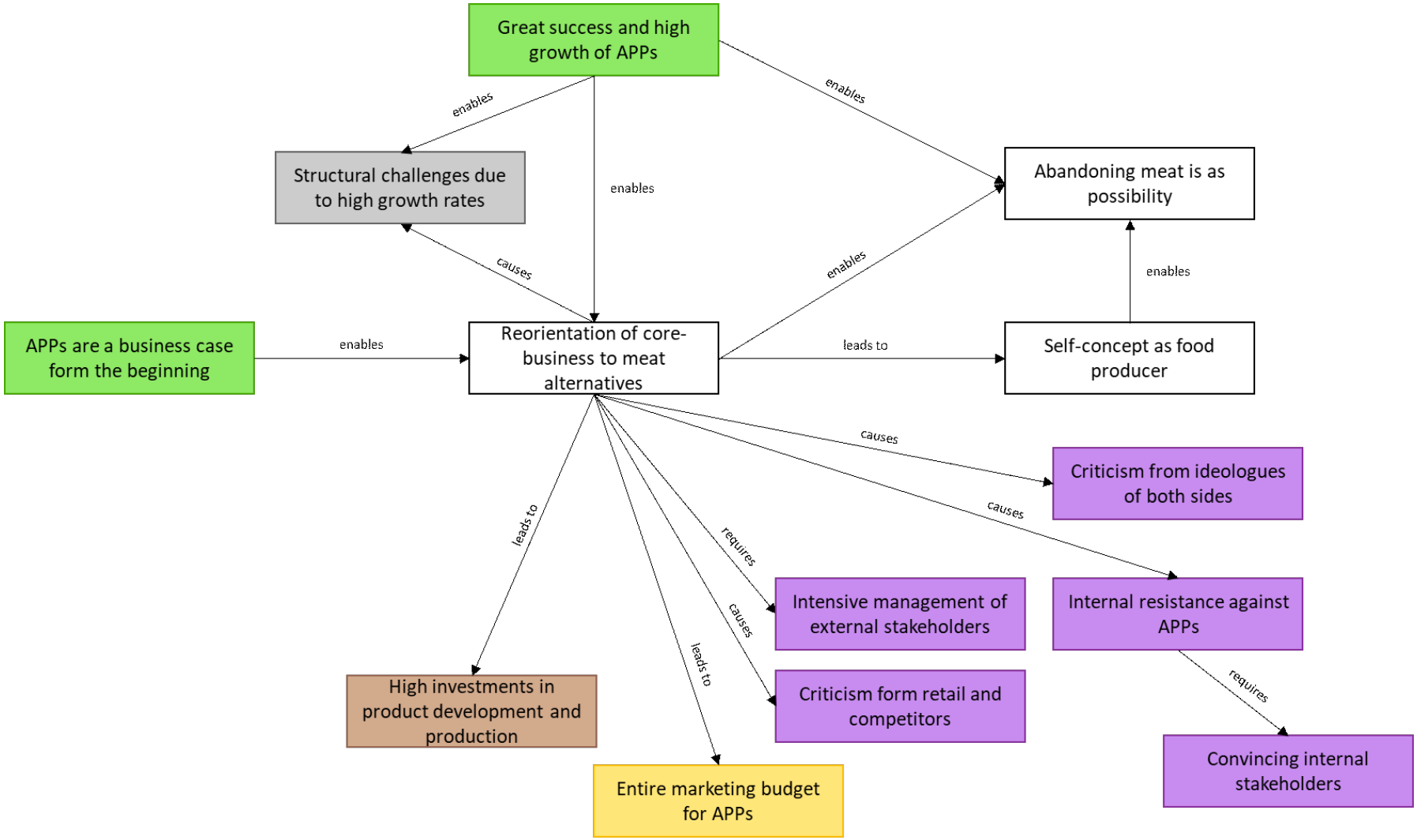
Appendix D Figure C: Network-view of Reasons for entering the APP Market; Source: Own Representation

Why did Rügenwalder use its established Meat Brand on the Alternatives?



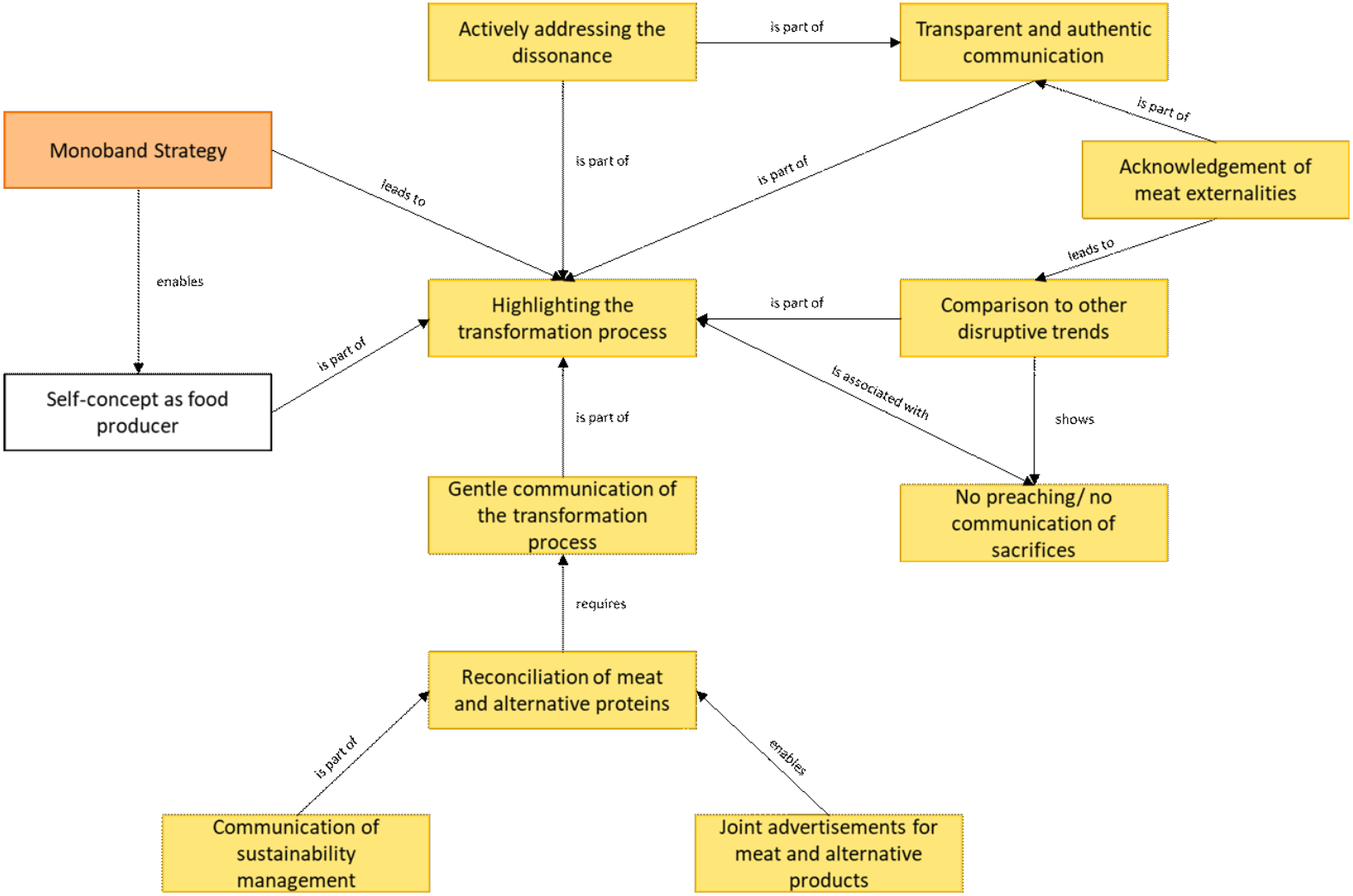
Appendix D Figure D: Network-view of Reasons for the Monobrand Strategy; Source: Own Representation

What were or still are the Consequences of introducing Alternative Protein Products?



Appendix D Figure E: Network-view of Consequences of APP Introduction; Source: Own Representation

How did Rügenwalder communicate the Monobrand Strategy?



Appendix D Figure F: Network-view of Rügenwalder's Monobrand Communication Strategy; Source: Own Representation

Appendix E - Multiple Case Study

Sources

PHW Group - Wiesenhof

Interviews

Marcus Keitzer Board Member of the PHW Group Responsible for alternative proteins since 2018 Interview conducted via Teams, on September 22nd, 2021, duration: 55 minutes Interview Transcript attached in the supplemental materials **(#1)**

Homepage

"Politikerbrief -Zukunftsfragen 01/2021" report aimed at informing/lobbying politicians; retrieved from: https://www.phw-gruppe.de/site/assets/files/2306/phw-politikerbrief-ausgabe-1_final_in_einzelseiten.pdf, accessed 05.11.2021
Product overview "Bruzzler" listing traditional and vegetarian products next to each other; retrieved from: https://www.wiesenhof-online.de/produkte/bruzzzler-veggie, accessed 05.11.2021

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All press releases retrieved from https://www.phw-gruppe.de/newsbereich/; accessed 05.11.2021

09.08.2018_PHW-Gruppe investiert mit Good Catch in vegane Fischprodukte
19.06.2018_Marcus Keitzer wird neuer PHW-Vorstand für alternative Proteinquellen
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05.02.2019_PHW-Gruppe und JUST werden Partner für den europäischen Vertrieb
17.02.2020_Foods United erwirbt Mehrheitsbeteiligung an LikeMeat
02.10.2020_PHW-Gruppe führt neue plant-based Food-Marke ein
30.03.2020_PHW-Gruppe stellt neue Weichen für vielfältige Ernährung
8.12.2020_Internationale Würdigung: PHW-Gruppe gehört zu den Weltweit "50 Sustainability & Climate Leaders"

02.09.2021_PHW-Gruppe stellt Studie zu Cultivated Meat vor Hoher Bekanntheit
22.01.2021_PHW stellt neue Veggie-Studie vor
02.01.2021_Neues Logo auf der Brust: Werder Bremen kickt im "Veganuary" mit Green Legend-Logo

Social Media

Instagram (An analysis of all social media activities with exemplary posts is included in the supplemental materials)
01.10.2020_Genuss ganz ohne Fleisch, aber mit dem Geschmack des Originals. Ohne Soja, ohne Palmfett und ohne Geschmacksverstärker! Schmeckt legendär! #wiesenhof #wiesenhofkochclub #flexitarian #fleischlos #veganfood
02.01.2021_GEWINNSPIEL! Werder Bremen kickt im Veganuary mit unserem Green Legend Logo! Zum Jahresstart mit neuer Botschaft: der grün-weiße Bundesligist läuft bei seinem ersten Spiel im neuen Jahr mit einem ungewohnten Trikot auf. Passend zum Veganuary befindet sich anstelle des Wiesenhof-Logos unsere neue Marke Green Legend auf der Brust der Spieler! Wie gefällt euch das Trikot?

TV & Cinema Spots

All video files are provided with the supplement materials

01_Wiesenhof Bruzzzler_ 2006
02_WIESENHOF Bruzzzler und Atze Schröder Veggie fleischlos_2016
03_WIESENHOF Bruzzzler und Atze Schröder_2017

Annual & Sustainability reports

2020: Nachhaltigkeitsbericht 2019
2021: Bilanz_2019/2020 – PHW 1
2021:Bilanz_2019/2020 - Group

Speeches & Podcasts

Panel discussion_FARM & Food 4.0 trade fair 2020_20.01.2020_ Marcus Keitzer on plant-based meat alternatives, transcript available in the supplement materials **(#2)**

Image Video_2020; Key managers of the PHW Group, explain the overall Corporate Strategy; transcript available in the supplement materials **(#3)**
03_Podcast_02.02.2021_Ein neuer Tag _Die neue Fleischindustrie; Marcus Keitzer on the future of meat production; audio file available in the supplement materials; transcript available in the supplemental materials **(#4)**

Secondary Interviews

RLH_11.11.2014_Herr Dr. Stryck, wofür steht die Marke Wiesenhof?
LZ_11.12.2015_„Nicht wettbewerbsfähig“
HB_11.08.2015_"Prozess der Entfremdung"
SPG_14.05.2015_"Wer Tiere quält, fliegt"
LZ_22.09.2017_„Wiesenhof will die Tierwohlproduktion verdoppeln“
WIWO_04.08.2017_"Wir sind die erste Anlaufstelle für Kritiker"
FW_16.05.2018_„Wir sind schon immer unkonventionelle Wege gegangen“
LZ_27.04.2018_„Wir wollen früh dabei sein“
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GRDZ_03.05.2018_Warum investiert der Geflügelzüchter Wiesenhof in Fake-Fleisch
NWZ_11.09.2018_Wiesenhof-Chef über Pflanzenburger
RLH_03.05.2019_Auch für die Zukunft ist der Chef der PHW-Gruppe optimistisch
LZ_18.04.2019_„Benchmark ist der Beef-Burger“
TOPA_23.07.2019_Wir brauchen eine Pflichtkennzeichnung
FR_03.08.2019_"Fleisch aus Zellkulturen ist keine Science-Fiction"
LZ_17.01.2020_„Das muss der Markt tragen“
RLH_06.10.2020_Zukunft der Branche
LZ_21.02.2020_„Das Beste aus beiden Welten“
LZ_18.08.2021_Interview mit PHW-Vorstand Marcus Keitzer: "Plant Based ist gekommen, um zu bleiben"

Articles in trade press

LP_08.02.1991_Wiesenhof stellt neues Programm vor
LZ_14.08.1998_"Auf kritische Verbraucher gut eingestellt"
LZ_30.07.2004_Willi macht die Marke
LZ_15.01.2010_Wiesenhof geht gegen Peta vor
LZ_23.12.2011_Wesjohann wehrt sich erfolgreich
LZ_22.07.2011_Wiesenhof geht in die Offensive
LZ_16.09.2011_Wiesenhof fliegt raus
LZ_08.09.2011_Wiesenhof: Eine Woche danach

FW_16.10.2012_Hauptsponsor für Werder Bremen
AFZ_24.10.2012_Etwas mehr Mut
LZ_21.09.2012_Peta setzt sich für Wiesenhof ein
LZ_17.08.2012_Gegenwind für neuen Trikotsponsor
RLH_11.11.2014_Herr Dr. Stryck, wofür steht die Marke Wiesenhof?
LZ_28.02.2014_PHW-Gruppe trennt sich von Tierarznei
LZ_12.12.2014_Wiesenhof beugt sich dem Handel
LZ_14.02.2014_Wiesenhof bleibt auf den Werder-Trikots
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LZ_16.05.2014_Wiesenhof befürchtet Marktverzerrung
LZ_21.02.2014_Comeback der Gentechnik
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LZ_14.07.2015_Wiesenhof erweitert Veggie-Sortiment
LZ_26.11.2015_Trikot-Aktion beim Nordderby: Wiesenhof bringt "Mehr Tierschutz" in die Bundesliga
AFZ_23.12.2015_PHW orientiert sich neu
AFZ_05.08.2015_Wiesenhof macht auch in Fisch
LZ_20.03.2015_Wiesenhof bringt erstmals Veggie-Snack
LZ_11.12.2015_PHW erobert neue Geschäftsfelder
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LZ_01.07.2016_Wiesenhof-Shitstorm wegen Atze-Spot
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LZ_22.09.2017_„Wiesenhof will die Tierwohlproduktion verdoppeln“
LZ_28.04.2017_Jetzt kommt die Erbse in die Wurst
LZ_17.02.2017_PHW investiert im großen Stil
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LZ_26.09.2018_Insekten-Protein: PHW investiert bei der Bugfoundation
AFZ_18.04.2018_PHW öffnet Markt für Beyond Meat
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LP_31.06.2018_PHW-Gruppe bekommt neuen Vorstand
LZ_13.04.2018_PHW wird Partner von Beyond Meat
FW_14.12.2018_Metro umgeht Rechte von PHW
AFZ_14.11.2018_Tanz auf vielen Hochzeiten
LZ_30.11.2018_Knatsch zum Start des Beyond Burgers
LZ_12.01.2018_PHW-Gruppe investiert in künstliches Fleisch
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LZ_09.08.2018_Fleisch-Alternative: Vertrieb von Beyond Burger verzögert sich
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LZ_22.11.2018_Fleisch-Alternative: Beyond Burger kommt nach Deutschland
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LZ_16.03.2020_PHW-Gruppe: Wiesenhof will Schlachtreste für Bio-Sprit nutzen
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FW_12.02.2020_Standorte wirtschaften klimaneutral
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LZ_01.04.2021_Livekindly nimmt Drittelmilliarde ein

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W&V_21.01.2000_Katis Hühner
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SPG_14.05.2015_"Wer Tiere quält, fliegt"
TAZ_17.09.2015_Peta verhandelt mit Wiesenhof über Logo
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GRDZ_03.05.2018_Warum investiert der Geflügelzüchter Wiesenhof in Fake-Fleisch_
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NWZ_11.09.2018_Wiesenhof-Chef über Pflanzenburger

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WELT_17.02.2020_Jetzt entdecken die Investoren den Milliarden-Markt für Fleischersatz
NWZ_02.10.2020_"Wiesenhof' setzt auf Veggie-Wurst
WFB_19.02.2020_Fleischersatz: Wiesenhof kauft Heristo-Anteil
MRKA_21.01.2020_Tierschützer filmen im Hühnerstall
LAUR_30.07.2020_Zwei Seiten der Schlachtung
WBK_20.07.2020_Corona-Ausbruch bei "Wiesenhof"
HB_15.10.2020_Livekindly will den Veganmarkt aufmischen
HAZ_29.08.2020_Appetit auf fleischloses Essen nimmt zu
NWZ_07.02.2020_Begeht die PHW-Gruppe Steuerflucht?
NHZ_01.02.2020_Geflügelproduzent verlegt Firmensitz
HB_13.07.2020_Herr der Hühner
HB_08.07.2020_Steaks aus dem Drucker
WIWO_21.01.2021_Tierfreies Fleisch aus dem 3D-Drucker kommt nach Deutschland
ASW_27.08.2021_Fleisch 3.0
KOER_13.07.2021_Futter für Nutztiere bald aus Insekten?
MEARKA_05.08.2021_" Das Hauptziel ist erreicht"
HJOU_30.07.2021_"Wir stehen zwischen Labor und Skalierung"
NWZ_19.07.2021_Protestcamp am Samstag aufgelöst
W&V_03.02.2021_Veganuary
NWZ_13.03.2021_PHW setzt auf höhere Haltungsstandards
MM_19.03.2021_HUNGER-GAMES

Gutfried - Zur Mühlen Gruppe - Tönnies

Interviews

Maximilian Tönnies CEO of the zur Mühlen Group and co-owner of the Tönnies Group Interview conducted via Teams, on December 3rd, 2021, duration: 47 minutes Interview Transcript attached in the supplemental materials **(#5)**

Homepage

Product overview of conventional and vegetarian products offered by Gutfried; retrieved from: https://www.gutfried.de/gute-produkte/gutes-ohne-fleisch.html, accessed 06.11.2021, an overview of product packaging is provided in the supplemental materials
History of Gutfried; retrieved from: https://www.gutfried.de/gute-marke/aus-gutem-hause.html, accessed 15.11.2021

Press releases

All press releases retrieved from https://www.toennies.de/news-und-dialog/fragen-antworten/archiv/ & https://www.gutfried.de/gute-neuigkeiten/neueste-meldungen.html ; accessed 06.11.2021

02.07.2020_Gutfried Bio Hähnchen-Fleisch
23.06.2020_Tönnies lässt Taten folgen
06.01.2020_Gutfried_ Auf in den Dschungel_ Gutfried mit TV-Offensive _ Neueste Meldungen
05.03.2020_Deutschlandweite Out of Home-Kampagne
26.02.2021_Tönnies expandiert im Veggie-Markt - Tönnies
06.08.2021_Tönnies investiert weiter in Ausbau der Aktivitäten im Veggie-Bereich

Social Media

Twitter
26.02.2021_Tönnies Unternehmensgruppe @ToenniesDialog·Wir bauen unsere Veggie-Sparte aus: #Vevia4You ist unsere neue Gesellschaft für vegetarische und vegane #Fleischersatzprodukte.

Facebook
15.10.2021_Vegetarisch, vegan oder doch flexitarisch? Bei uns ist für jeden was dabei. Ab sofort findet ihr unsere neuen veganen und vegetarischen Gutfried-Produkte im Supermarkt. So viel veggie und so viel Genuss. Na, habt ihr sie schon entdeckt? Verratet es uns doch in den Kommentaren. Wir sind gespannt!
26.10.2021_Bis zum 31.10.2021 habt ihr noch die Chance 1 von 5 Veggie Genusspaketen mit einer schicken Lunchbox zu gewinnen. Schaut unbedingt unter unserem Gewinnspiel Post weiter unten im Feed vorbei und hüpft noch in den Lostopf! Gutfried wünscht euch viel Glück!
Instagram
15.10.2021_gutfried_Vegetarisch, vegan oder doch flexitarisch? Bei uns ist für jeden was dabei. Ab sofort findet ihr unsere neuen veganen und vegetarischen Gutfried-Produkte im Supermarkt. So viel veggie und so viel Genuss. Na, habt ihr sie schon entdeckt? Verratet es uns doch in den Kommentaren. Wir sind gespannt!
06.11.2021_Channel overview: https://www.instagram.com/gutfried_/

TV & Cinema Spots

All video files are provided with the supplement materials
01_Gutfried_Angestellter_1992
02_Gutfried_Fernsehwerbung_1995
03_Gutfried Wurst Werbung_ 2001
04_Gutfried_Johannes B. Kerner_2005
05_Gutfried Werbung_2012
06_Gutfried Werbung Winter _2017
07_Die Geflügel-Fleischwurst Die Kleine_2020

Annual & Sustainability reports

2011: Bundesanz_2011_Bilanz
2017: Bundesanz_2017_Bilanz
2019: Bundesanz_2019_Bilanz

Speeches & Podcasts

Podcast Tönnies & Tönnies featuring Clemens Tönnies (CEO of the Tönnies Group) and Maximilian Tönnies (CEO OF Zur Mühlen Gruppe) Episode: „Alles Veggie oder Was?" focsiong on the groups palnt-bases strategy with Gutfreid; aired at the 26th of August 2021; audio file available in the supplement materials; transcript available in the supplemental materials **(#6)**

Secondary Interviews

LP_24.03.2000_Heinrich Nölke GmbH Co: Messbarer Erfolg
FAZ_24.10.2021_Der neue Tönnies

Articles in trade press

LP_24.03.2000_Heinrich Nölke GmbH Co Messbarer Erfolg
LZ_07.11.2003_Mehr Power für Marke Gutfried
LZ_11.06.2004_Moderneres Outfit für Gutfried
FW_16.01.2006_Von der Janosch Bande beflügelt
LZ_26.10.2007_Nölke entwickelt sich gut
LZ_02.10.2008_Nölke Gruppe setzt auf Design
LZ_08.05.2009_Ulrich Nölke
LZ_30.07.2010_Potenzial für Gutfried
LP_15.02.2011_Gutfried_setzt_auf_gesunde_Ernährung
LZ_20.06.2011_Nölke Trennt Marken und Handelsmarkengeschäft
AFZ_13.07.2011_Gutfried startet reichweitenstarke Kampagne
AFZ_16.02.2011_Gutfried wirbt fürs Pausenbrot
LZ_29.06.2012_Nölke sieht sich auf Kurs
AFZ_12.03.2014_Zur Mühlen übernimmt Gutfried
AFZ_12.03.2014_Neue Wurst ist leicht und bunt
AFZ_28.01.2015_Tönnies_bekommt_Nölke
AFZ_29.04.2015_Tönnies wird vegetarisch
LZ_20.01.2015_Bundeskartellamt stimmt Übernahme von Nölke zu
AFZ_02.12.2015_Fleischloser Aufschnitt und Veggie Würste
LZ_24.04.2015_Tönnies macht in Tofu
FW_19.02.2015_Nölke wechselt Eigentümer
LZ_24.03.2016_Nölke_mit_Gutfried_auf_Aufholjagd
LZ_13.01.2017_Gutfried kehrt groß ins TV zurück
AFZ_12.04.2017_Wir brauchen wieder Lust auf Wurst
LZ_30.06.2017_EU Kommission Tönnies darf Zur Mühlen Gruppe
LZ_07.04.2017_Gutfried ist wieder in der Spur
RLH_05.06.2019_Wo liegen die Wurzeln der Marke

LZ_28.06.2019_Gutfried
LZ_10.01.2020_Nölke wirbt mit Gutfried im TV
LZ_26.06.2020_Gutfried
AFZ_11.08.2021_Gruppe bleibt in der Familie
LZ_01.10.2021_Vegan genießen
AFZ_03.03.2021_Tönnies erweitert Veggie Palette
LP_15.02.2021_ZMG: Für die Zukunft gut aufgestellt
LZ_06.08.2021_Neue Schwerpunkte Tönnies wird mit Gutfried vegan
TOPA_27.02.2021_Tönnies expandiert bei Veggie
LZ_02.07.2021_Gutfried

Articles in general press

HOR_29.08.2012_Gutfried hat den Kerner satt
WFB_28.08.2012_Nölke wirbt nicht mehr mit Kerner
HOR_28.06.2012_Gut ist nicht mehr gut genug
WIWO_03.02.2015_Der Aufstieg der Zur Mühlen Gruppe
MRKA_10.03.2015_Die Großen fressen die nicht ganz so Großen
NWF_25.04.2015_Tönnies entdeckt die Vegetarier
KONT_29.10.2015_Werbung für die Geflügelwurst der Zukunft
KONT_25.02.2016_Frische Kampagne soll Gutfried revitalisieren
EMS_28.04.2016_Tönnies Junior kauft Wurstfabrik in Meppen
WELT_27.10.2017_Deutsche wollen lieber wieder Fleisch in der Wurst
WELT_17.04.2018_Tönnies beendet sein Veggie Abenteuer
FAZ_18.04.2018_Schlachter Tönnies sagt der Veggie-Wurst ade
BMP_31.08.2021_Warum Veggie Wurst so teuer ist
VEG_14.07.2021_Unter Gutfried sind f..
WIWO_04.08.2021_Frieden im Fleischkonzern
KSA_03.04.2021_Tönnies macht weniger Umsatz
WFB_07.08.2021_Tönnies findet Geschmack an Veggie
NWF_07.08.2021_Tönnies wächst im Veggie Bereich

WOLF Wurstspezialitäten GmbH

Interviews

Christian Wolf Owner and CEO (since 2011) of WOLF Wurstspezialitäten GmbH Interview conducted via Teams, on September 6th, 2021, duration: 55 minutes Interview Transcript attached in the supplemental materials **(#7)**

Homepage

History of Wolf Wurstwaren; retrieved from: https://www.wolf-wurst.de/ueber-wolf/wolf-in-4-generation/, accessed 06.11.2021
Overview of vegetarian product range; retrieved from: https://www.wolf-wurst.de/sortiment/vegetarisch/?highlight=vegetarisch, accessed 06.11.2021

Product & corporate brochure

Two extensive product and corporate brochures were sent to the author after the interview by CEO Christian Wolf; files are attached in the supplemental materials

2021_Sortimentsübersicht
2021_Unternehmenspräsentation

Social Media

Facebook
05.02.2021_Der #veganuary ist zwar offiziell beendet, aber vielleicht ist der ein oder andere zum Fan der pflanzlichen Ernährung geworden. Wir wollen von Euch wissen, welche vegetarischen Produkte Ihr Euch von uns wünscht? Habt Ihr Ideen zu neuen Kreationen? Welche vegetarischen Produkte sollten wir unbedingt in unser Sortiment aufnehmen?

TV & Cinema Spots

Video-file is provided with the supplement materials

Wolf echt gute Wurst_2020

Annual & Sustainability reports

2019: Wolf_2019_Bundesanzeiger_Bilanz

Secondary Interviews

LZ_05.10.2007_Wurst auf gutem Niveau
RLH_06.08.2021_Die Deutschen verändern sukzessive ihren Bezug zu Fleisch.
MTBAY_01.07.2021_Wolf erweitert sein Portfolio

Articles in trade press

LZ_07.02.1997_Wolf will mit drittem Geschäftszweig expandieren
LZ_27.09.2002_Großer Erfolg mit Internet-Auftritt
AFZ_20.10.2004_Für jeden die passende Lieblingswurst
LZ_09.09.2005_Werbung für Wolf
AFZ_09.08.2006_Leidenschaft und Begeisterung treibt voran
LZ_05.10.2007_Wurst auf gutem Niveau
LZ_22.08.2008_Mit traditioneller Markenware in den asiatischen Markt
LZ_02.10.2009_Weiterhin zweigleisig erfolgreich
LZ_09.07.2010_Ausbau der Rohschinkenabteilung
LZ_03.09.2010_Ausbau des SB-Sortiments behält Priorität
AFZ_11.05.2011_Neue Generation am Ruder
AFZ_29.06.2011_Gemeinsamer Vertrieb-Forster und Wolf Frischdienst rücken zusammen
LZ_19.08.2011_Wolf profiliert sich als Systemlieferant
LZ_14.09.2012_Marken-Relaunch am Jahresende
LZ_27.09.2013_Fokus gilt dem Markenrelaunch
LZ_08.03.2013_Wolf setzt stärker auf die Region
LZ_12.09.2014_Wolf setzt auf authentische Produkte
LZ_24.10.2014_Thüringer-Kampagne von Wolf
LZ_08.08.2014_Wolf stärkt seine Marke
AFZ_17.09.2014_Der Wolf geht um
LZ_03.07.2015_Wolf-3

AFZ_02.12.2015_Ein Stück Heimat für den Grill
LZ_28.08.2015_Wolf steigert die Bratwurstproduktion
LZ_04.10.2015_Emotional und vielseitig
LZ_16.09.2016_Convenience im Blick
LZ_07.09.2018_VLOG-Zertifizierung für Grillwurst
LP_31.06.2019_Die Historie
LZ_27.09.2019_Lust auf Grillen treibt den Umsatz
AFZ_06.03.2019_Wolf zieht es nach Übersee
LZ_28.06.2019_Wolf-2
LZ_02.10.2020_Marktführer in fast allen Disziplinen
LZ_03.04.2020_Jetzt geht es um die Wurst
LZ_26.06.2020_Wolf-1
AFZ_01.07.2020_Unterwegs zu neuen Ufern
RLH_06.08.2021_Die Deutschen verändern sukzessive ihren Bezug zu Fleisch. Unsere Experten diskutieren über den aktuellen Zustand der Branche, den Stellenwert von Tierwohl und die Chancen von Alternativprodukten.
FLW_15.04.2021_Spatenstich für Neubau und Modernisierung am Standort Nürnberg
LZ_02.07.2021_Wolf-4
LZ_16.06.2021_Firmengruppe richtet sich neu aus
LZ_26.02.2021_Vielfalt auf dem Grill
RLH_09.07.2021_Der Schwandorfer Fleisch- und Wurstspezialist Wolf baut sein Convenience-Sortiment kräftig aus.
LZ_01.10.2021_Wolf baut Vorsprung weiter aus

Articles in general press

OSTLVZ_27.07.2018_Wurst-Wolf erhält Auszeichnung
OSTLVZ_21.02.2019_Bei Firma Wolf geht es seit 25 Jahren um die Wurst
MTBAY_27.08.2020_Für Wolf geht's um die Wurst-Ausbeutung verhindern
OSTHZ_12.09.2020_Protestaktion vor Wolf
WELT_22.06.2020_Wursthersteller prüfen Klage
OSTHZ_26.03.2021_Gewerkschaft fordert Betriebsrat bei Wolf in Schmölln

Meica Ammerländische Fleischwarenfabrik Fritz Meinen GmbH & Co. KG

Interviews

Andrea Stange Head of Marketing (since 2016) Interview conducted via Teams, on November 8th, 2021, duration: 33 minutes The interview guide & transcript are attached in the supplemental materials **(#8)**

Homepage

Product overview of conventional and vegetarian products offered by Meica; retrieved from: https://www.meica.de/unser-qualitaetsversprechen.html & https://www.meica.de/produktuebersicht/vegetarisch.html, accessed 07.11.2021,
Explanation of vegetarian products in FAQ's; retrieved from: https://www.meica.de/fragen-und-antworten.html, accessed 07.11.2021
History of Meica; retrieved from https://www.meica.de/unternehmen/ueber-uns.html, accessed 07.11.2021
Sustainability efforts by Meica; retrieved from https://www.meica.de/unternehmen/nachhaltigkeit.html, accessed 17.11.2021

Social Media

Facebook
06.01.2019_Für uns der schönste Feiertag im Jahr.
30.06.2017_Wir haben auch abgestimmt … #ehefüralle #currykingfüralle
20.03.2017_Zum Frühlingsbeginn!

TV & Cinema Spots

All video files are provided with the supplement materials
01_Meica Deutschländer Würstchen_1996
02_Mini Wini Würstchenkette Meica - Werbung_1997
03_Meica Bratmaxe _2000
04_Meica - CurryKing - Der King lebt_2008
05_Curry King Ist leider nicht drin, denn ich bin heut King CurryKing von meica _2009

06_Deutschländer Würstchen von Meica Werbung 2013
07_Meica Deutschlander Frische Pack_2014
08_Meica Mini Wini Lustige Tiermünder_2017
09_Meica Curry King Clip King_2019

Annual & Sustainability reports

2011: Bundesanzeiger_Bilanz

Articles in trade press

LZ_12.10.2001_Es gibt wieder Grund zu feiern
GVP_11.09.2001_Garantiert ohne Fleisch
LZ_2702.2004_Marketingpreis beste Kooperation "Heiße Hunde" im Kühlregal
LZ_05.07.2013_Curry King
LZ_26.02.2016_Es geht gut ohne
LZ_28.04.2017_Jetzt kommt die Erbse in die Wurst
LZ_17.02.2017_Kurz notiert
LZ_27.04.2018_Kurz notiert
LP_15.02.2018_Wiener aus Geflügelfleisch
LZ_28.06.2019_Meica

Articles in general press

ASW_10.03.2010_Voll-sinnig
HOR_11.07.2013_Meica inszeniert Curry King neu
W&V_20.04.2015_Im Familienalltag
HOR_29.03.2018_Bei PuK geht's um die Wurst
BI_21.05.2019_"Bin ich schon drin?": 60 Werbeslogans, die ihr nie wieder vergesst

EWG Eberswalder Wurst GmbH

Homepage

1. Product overview of vegetarian products offered by Eberswalder; retrieved from: https://www.eberswalder.de/vegetarisch.html, accessed 07.11.2021
2. Corporate history; retrieved from https://www.eberswalder.de/das-unternehmen.html, accessed 07.11.2021

Press releases

All press releases retrieved from https://www.eberswalder.de/presse.html; accessed 07.11.2021

Eberswalder_Presse_17. 01.2015_Auch Vegetarier
Eberswalder_Presse_04.04.2019_Nachhaltigkeit stark
Eberswalder_Presse_14.04.2020_Nach Corona

Annual & Sustainability reports

2019: Eberswalder_Bundesanzeiger_2019_Billanz

Secondary Interviews

LP_01.02.2021_Regionaler Gegenpol

Speeches & Podcasts

Interview of CEO Sebastian Kühn expressing his view on vegetarian meat replacements on TV Berlin – "Boss im Gespräch – Ernährung: Eberswalder Chef beklagt ruinösen Preiswettkampf auf dem Flesichmarkt", published online on April 26th 2021; Transcript and video available in the supplement materials **(#9)**

Articles in trade press

LZ_11.10.2002_Eberswalder haben neuen Eigner
LZ_13.04.2007_Eine Eberswalder Erfolgsgeschichte
LZ_23.03.2012_Markenstrategie als Differenzierungsprofil

LZ_19.04.2013_Spezialitäten brauchen Marketing
LZ_07.03.2014_Deftiges für die Eisernen
LZ_01.04.2016_Würstchen für Vegetarier
TOPA_06.07.2021_Wir sind eine Mannschaft

Startup Investments of the PHW-Group

Company	Focus
2018	
Beyond Meat	PHW/Wiesenhof first imported the Beyond Burger to Germany and is still a leading distributor of the product
SuperMeat	Investment into the Israeli cultured meat startup
Bug Foundation	Investment into the German startup producing insect-burgers
Enterra Feed Corporation	Canadian company focusing on producing soldier flies replacing soy as feed for poultry
Good Catch Food	Investment into the US-based startup producing vegan fish alternatives
2019	
Mondarella	Distribution of plant-based mozzarella alternative in Europe
Just Egg	Distribution of the vegan egg replacement in Europe
Redefine Meat	Investment in Israeli startup 3D-printing plant-based meat alternatives
2020	
Green Meadows (Foods United)	Joint venture with the LIVEKINDLY collective and the Blue Horizon Group, responsible for distributing the collective's products in Europe and investing in various startups globally (Oumph, Fry Family)
Like Meat	Majority stake through Foods United in the Dutch plant-based startup Like Meat

Appendix E Table A: Investments and Partnerships in the Alternative Protein field of the PHW-Group; Source: Own Representation

Zur Mühlen Gruppe & the Tönnies Holding

Zur Mühlen Gruppe & Tönnies

In 1998, Peter zur Mühlen, an experienced manager in the food industry, bought the traditional German sausage manufacturer "Böklunder," marking the first of his many acquisitions in the consolidating German meat industry targeting struggling producers in the field. Within a decade, zur Mühlen has become the largest German meat processing company, making it one of the single most important customers for another powerhouse in the German meat industry, the Tönnies group. Tönnies being one of Europe's largest slaughterers was understandably concerned when the "zur Mühlen" group increasingly got into financial issues, fueled by its various acquisitions. After several smaller investments of Tönnies into the company, Peter zur Mühlen announced in 2011 that within three years, his company would be fully taken over by Clemens Tönnies and his holding, marking the beginning of Tönnies as a fully diversified meat producer and processer. In early 2015, the "zur Mühlen" group published an annual turnover of 700 million € while employing 2200 workers. Today the "zur Mühlen" group, led by Clemens Tönnies' son Max, encompasses 22 different meat brands, employs more than 4000 people at 14 productions sites in Germany, Denmark, and Poland (zur Mühlen Gruppe, 2021), and plays with annual revenues exceeding one billion € annually an essential role within the Tönnies group. The Tönnies group, with its 110 German and 45 international subsidiaries, is one of the largest meat players in Europe with an annual turnover of over 7 billion €, and more than 16.000 workers (Tönnies Holding ApS & Co. KG, 2021b) has in its comparatively short history, the company was only founded in 1971, been exposed to various scandals. Starting with general criticism on factory farming and the company's enormous number of over 20 million slaughtered pigs in 2020(Tönnies Holding ApS & Co. KG, 2021a) to the Covid-19 outbreak in its largest production site and headquarter in Rheda-Wiedenbrück, the Tönnies group has been in the eye of the public for most of its existence.

Cross-Case-Comparison

1. Company Characteristics

Factor	Wiesenhof (PHW)	Gutfried (zur Mühlen/ Tönnies)	Wolf	Meica	Eberswalder
Family-owned	The PHW-Group, the owner of the "Wiesenhof" brand, is still wholly owned by its founding family	Gutfried is part of the family-owned Tönnies -Group but was developed by Nölke, another family business.	Wolf is a traditional family business using the founding family's name as its umbrella brand.	The Brand's founding family still owns Meica.	Even though owned and managed by a family, the company does not represent a classic family business as a former state-owned production collective
Size of company and brand	**Large**; The Wiesenhof brand, with revenues exceeding one billion € annually, represents the single largest meat brand in Germany and within the present sample	**Large**; The Gutfried brand is part of, by far, the largest company in the present sample. However, the sales figures of Gutfried products of around 300 million € in 2020 do not reach Wiesenhof's level	**Medium**; Publishing revenues of 320 million € in 2020, Wolf represents the third-largest company in this sample. However, it has to be noted that not all of the company's products are sold under the family brand "Wolf"	**Small**; Meica does not publish any information on its revenues. However, the trade press estimates it to be slightly over 100 million € per year, making Meica the smallest company in the sample. Nevertheless, the company generates almost all of its revenue with branded products.	**Small**; Generating revenues of 120 million € in 2020, the company represents one of the smaller meat players in Germany. Specifics about the ratio between private-label and branded products have not been published.

Factor	Wiesenhof (PHW)	Gutfried (zur Mühlen/ Tönnies)	Wolf	Meica	Eberswalder
Geographic focus of product offerings	Wiesenhof is sold by retailers nationwide, while the PHW group is internationally active	The brand Gutfried is available nationwide at German retailers while the Tönnies groups sells its products globally.	Products under the brand "Wolf" are sold in retail outlets nationwide, but mainly focused on Bavaria, Thuringia, and Saxony; Limited exports	Meica sells its products primarily in retail outlets all over Germany, with limited exports to Austria and Switzerland	Eberswalder products are primarily available in eastern Germany, especially close to the Berlin/Brandenburg region and in retail outlets in other states. No significant exports.
Product focus of the brand	Poultry: Cold Cuts, Sausages, Bratwurst, convenience products, raw meat	Poultry: Cold Cuts, Sausages, Bratwurst, convenience products	Cold cuts, regional Bratwurst, readymade meat for barbecuing	Sausages in different forms, Bratwurst	Cold cuts, sausages, Bratwurst
Company has a slaughter business unit	Yes	Yes	No	No	No
Startup investment	Several investments in and cooperation with startups	No publicly announced collaboration but first hints by Maximilian Tönnies	No	No	No
Private-label production	Yes	Yes	Yes	No	Yes

Appendix E Table B: Comparison of Company Characteristics; Source: Own Representation

2. Reasons for entering the Meat Alternatives Market

Factor	Wiesenhof (PHW)	Gutfried (zur Mühlen/ Tönnies)	Wolf	Meica	Eberswalder
Time of alternative protein market entry	March 2015	March 2015	Late 2015 but on a very small scale; relaunch early 2022	2015	Late 2015
Pressure on meat business	No, poultry consumption is still increasing in Germany	Not really for Gutfried (poultry) but definitely for other zur Mühlen brands and the Tönnies group	Yes, Christian Wolf reported a general pressure on his assortment due to declining meat consumption in all categories apart from barbecue products	Yes, Mica experiences stagnating revenues of meat products.	Yes, but extend unclear/not specified
Previous experience with vegetarian products before 2015	No	Yes, through private-label production of Gutfried's previous owner Nölke	Yes, through the convenience meal production of the acquired brand "Forster"	Yes, private-label production for a health brand	No
Match of existing capabilities to the new product line	High due to production of vegetarian convenience articles and cold cuts and sausages	High due to production of vegetarian convenience articles and cold cuts and sausages	High due to production of vegetarian sausages	High due to production of vegetarian sausages	High due to production of vegetarian sausages

Appendix E Table C: Comparison for entering the Meat Alternatives Market; Source: Own Representation

3. Brand and Marketing Strategy

Factors	Wiesenhof (PHW)	Gutfried (zur Mühlen/ Tönnies)	Wolf	Meica	Eberswalder
Age of brand	56 years	50 years	96 years	113 years	44 years
Brand strength	Strong, nationwide	Strong, nationwide	Strong, particularly in specific regions	Strong, nationwide	Strong, particularly in particular regions
Marketing budget	5.7 million € in 2019 (Nielsen, 2020)	Medium to large, no figures available	Small to medium, no figures available	12.1 million € in 2019 (Nielsen, 2021)	Small, no statistics available
Meat-subbrand	Yes, Bruzzzler	No	No	Yes, several	No
Additional alternative protein brand	Yes, "Green Legend"	Yes, "Vevia" for vegan-only products, and Tillmann's for foodservice customers	No, but Christian Wolf considers the possibility	No	No
Stretchability of the brand	Medium in general, good for Bruzzler	Good, due to early focus on healthiness	Medium in general, good for sausages	Good, particularly for specific subbrands	Medium

Appendix E Table D: Comparison of Brands and Marketing Strategies; Source: Own Representation

4. Brand Communication

Factors	Wiesenhof (PHW)	Gutfried (zur Mühlen/ Tönnies)	Wolf	Meica	Eberswalder
TV advertising	Yes, particularly for the Bruzzler subbrand	Yes, long history of TV spots	Yes, but very limited	Yes, clear focus on TV for several years	No
Sport-sponsoring	Yes, Werder Bremen (Soccer), Rasta Vechta (Basketball)	No	Yes, Dynamo Dresden as well as local soccer clubs	No	Yes, Union Berlin (Soccer), Füchse Berlin (Handball),
Social Media usage and content	Instagram with content largely focusing on sport sponsoring and few recipes/product ads, a separate channel for green legend	Facebook and Instagram with almost identical content of product advertisings and recipes	Very active Facebook account featuring various content like recipes, sponsoring activities, prize draws, or job postings.	Only a rarely used Facebook account for the "Curry King"-subbrand featuring mainly promotional content	No social media presence
Valence of vegetarian products in advertising	Medium to high	Medium to High	Low	Medium	Low
Simultaneous advertising for meat and vegetarian products	Yes, on social media	Yes, on social media and TV	No (Not yet)	Yes, on TV and radio	No

Appendix E Table E: Comparison of Brand Communication Strategies; Source: Own Representation

5. Sustainability & Stakeholder Management

Factors	Wiesenhof (PHW)	Gutfried (zur Mühlen/ Tönnies)	Wolf	Meica	Eberswalder
Investments into meat product improvement	High, large-scale animal welfare programs for animals used in Wiesenhof products	None for Gutfried. However, the Tönnies Group significantly invested in animal welfare during the last years	None, apart from organic products	None, apart from organic products	High investments in local and more animal-friendly products
Exposure to public criticism and firestorms	Very high due to the importance/size of the brand	Medium for Gutfried and very high for the Tönnies Group	Low	Low	Low
Dedicated and concrete sustainability strategy	Yes, on the brand level and even more at the PHW-group	Gutfried no, but the Tönnies Group does offer detailed plans/descriptions on its channels	No, only commitments in media interviews	No	No
Publicly communicated self-image-change	Transition to "Protein supplier"	Transition to "Food producer"	Transition to "Food company"	None/ Goal to offer products for every taste	None/ Goal to offer products for every taste

Appendix E Table F: Comparison of Stakeholder & Sustainability Management; Source: Own Representation

Comparison of Rügenwalder with other Brands

1. Company Characteristics

Factors	Rügenwalder	Other Brands
Family-owned	Yes	Yes
Size of company and brand	Medium-Large, with 280 million € of annual sales	Diverse from 100 million € to 1.2 billion €
Geographic focus of product offerings	National and limited exports to Austria and Switzerland	National with limited exports, Wolf and Eberswalde with focus-regions
Product focus of the brand	Cold cuts, sausages, convenience products	Cold cuts, Sausages, Bratwurst, convenience products
Company has a slaughter business unit	No	Only Wiesenhof & Tönnies
Startup investment	No	Only Wiesenhof/PHW
Private-label production	No	Yes, but limited

Appendix E Table G: Company Characteristics: Comparison Rügenwalder with other Brands; Source: Own Representation

2. Reasons for entering the Meat Alternatives Market

Factors	Rügenwalder	Other Brands
Time of market entry	Late 2014/early 2015	2015
Pressure on meat business	High according to press reports/interviews	Moderate to low
Previous experience with vegetarian products	No	All Brands apart from Wiesenhof
Match of existing capabilities to the new product line	High, due to production of vegetarian sausage products/cold cuts in the beginning	High

Appendix E Table H: Meat alternatives background: Comparison Rügenwalder with other Brands; Source: Own Representation

3. Brand & Marketing Strategy

Factors	Rügenwalder	Other Brands
Age of brand	187 years	44-113 years
Brand strength	Very strong, strongest meat brand in Germany	Strong
Marketing budget	Very large, 31 million € in 2020	Varying, largest official budget 10.1 million € in 2019 (Meica)
Meat-subbrand	No	Meica and Wiesenhof
Additional alternative protein brand	No	Wiesenhof and Gutfried
Stretchability of the brand	Medium in the beginning	Varying

Appendix E Table I: Brand & Marketing Strategy: Comparison Rügenwalder with other Brands; Source: Own Representation

4. Brand Communication

Factors	Rügenwalder	Other Brands
TV advertising	Yes, strong focus	All apart from Eberswalder
Sport-sponsoring	Just started recently with Basketball, also supplies and advertisements in soccer stadiums	Wiesenhof, Wolf and Eberswalder
Social Media usage and content	Very high, active in Facebook, Instagram, YouTube, LinkedIn, and Twitter	Medium to Low
Valence of vegetarian products in advertising	Very high, vegetarian products are omnipresent due to business transformation	Low to medium
Simultaneous advertising for meat and vegetarian products	Yes, for many years, only vegetarian products but meat slowly returning alongside the vegetarian product range	Wiesenhof, Gutfried and Meica

Appendix E Table J: Brand Communication: Comparison Rügenwalder with other Brands; Source: Own Representation

5. Sustainability & Stakeholder Management

Factors	Rügenwalder	Other Brands
Investments into meat product improvement	First smaller initiatives apart from the organic product range	Varying; high investments by Wiesenhof and Tönnies (Gutfried)
Exposure to public criticism and firestorms	Low in general, but relatively high on social media	High for Wiesenhof, Low to medium for other brands
Dedicated and concrete sustainability strategy	Yes, high engagement for years, very detailed report in 2020	Varying, Wiesenhof, and Tönnies follow a dedicated strategy. The other brands do not.
Publicly communicated self-image-change	Food Producer	Food Producer/protein supplier; no public communication of self-image by Meica and Eberswalder

Appendix E Table K: Sustainability & Stakeholder Management: Comparison Rügenwalder with other Brands; Source: Own Representation

Appendix F - Qualitative Comparative Analysis

Quality Criteria for QCA's

Research design stage	Best Practice	Goal of Best Practice
Building the configurational model	• Clearly define the outcome of interest • Select conditions based on extant theory or a new theory based on case-knowledge • Maximum number of conditions based upon number of cases	Meaningful type and number of conditions in QCA
Constructing the empirical sample	• Construct a theoretically relevant sample	Ensure sample relevance to the studied research question
Calibrating the data	• Conceptualize included conditions as sets are based on theoretical knowledge • Calibrate cases into sets based on theoretical and contextual knowledge	Clearly defined sets and a focus on theoretically relevant variance

Analyzing the data	• Explore and interrogate the truth table
	  ○ Specify raw consistency thresholds for necessity and consistency analysis
	  ○ Specify frequency threshold for sufficiency analysis
	  ○ Specify simplifying assumptions based on theoretical knowledge
	• Analyze both conditions linked to the presence and the absence of the outcome
	• Return to model specification if needed based on necessity and sufficiency analyses results
		Identification of necessary and sufficient conditions; Showcase empirical relevance of configurations; Examine potential causal asymmetries; Distinguish core and peripheral conditions

Evaluating the robustness of findings	• Explore changing calibration anchors and thresholds • Explore different simplifying assumptions	Evaluate the impact of the researcher's decision
Reporting and Interpreting the findings	• Report results of necessity and sufficiency analysis • Report different iterations of truth tables • Report extent of limited diversity • Report evidence regarding the robustness of findings to changes in calibrating thresholds and simplifying assumptions.	Showcase that configurations constantly lead to specific outcomes

Appendix F Table A: Quality Criteria for QCA's; Source: adopted from Greckhamer, Furnari, Fiss, & Aguilera (2018)

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Switzerland

Bell/Hilcona/Green Mountain

Interviews

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Micarna/V-Love

Interviews

Ralph Langholz Head of Alternative Proteins Micarna SA since 2019 Interview conducted via Teams, on June 18th, 2021, duration: 50 minutes Interview Transcript attached in the supplemental materials **(#3)**
David Wallmer Brand Manager "V-Love" at Migros Genossenschaftsbund since 2020 Interview conducted via Teams, on June 26th, 2021, duration: 74 minutes Interview Transcript attached in the supplemental materials **(#4)**
Stefan Nolte Head of Business Unit "Plant-Based" at Migros Industry since 2020 Interview conducted via Teams, on July 15th, 2021, duration: 46 minutes Interview Transcript attached in the supplemental materials **(#5)**

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Ospelt/Malbuner/Like Meat

Interviews

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LZ_04.12.2020_Wir sind einfach schneller
LZ_17.07.2020_Nervenfutter aus dem Netz
SAFR_07.04.2021_New investment makes LIVEKINDLY Collective one of the fastest-
LZ_01.04.2021_Livekindly nimmt Drittelmilliarde ein
LZ_19.03.2021_Finanzierungsrunde: Livekindly sammelt wieder Millionen für Investitionen ein

Orior Group/Happy Vegi Butcher

Interviews

Michael Leutwyler Head of Marketing & Sales Food Service Orior Group since 2017 One interview conducted by Nicole Keller during her Master's thesis supervised by the author Interview 1 conducted via Zoom, on March 8th, 2021, duration: 60 minutes by Nicole Keller Interview Transcript attached in the supplemental materials **(#7)** Interview 2 conducted via Teams, on April 29th, 2021, duration: 56 minutes by the author Interview Transcript attached in the supplemental materials **(#8)**

Homepage/Annual Reports/Press Releases

History of Orior; retrieved from: https://orior.ch/de/unsere-firmengeschichte, accessed 30.11.2021
Brands of the Orior-Group; retrieved from: https://orior.ch/de/markenportfolio, accessed 30.11.2021
Press release on the fiscal year 2020; retrieved from: https://orior.ch/de/medienmitteilung/6dfb0e36-2312-467f-85e5-557665c4618b; accessed 30.11.2021
Product portfolio Fredag; retrieved from: https://assets-eu-01.kc-usercontent.com/59e313da-7f86-0104-69e7-62c10f0c4ea4/0da26cd3-e107-472a-afcb-fb443ce8efdb/Fredag_Sortimentkatalog_A4_2021_final_komprimiert.pdf, accessed 30.11.2021
Product overview Happy Vegi Butcher; retrieved from: https://www.happyvegibutcher.ch/shop, accessed 30.11.2021

Secondary Materials

HB_15.05.1992_Aus Rinsoz & Ormond wird Orior
HDZ_14.12.1995_Salamimacher wird Vegetarier
BSLZ_26.07.1997_Rieder Le Patron: Gesicherte Zukunft contra Familienbetrieb
HDZ_22.06.2005_Die Fleischfresser beissen zu
LZ_18.05.2007_Zielgruppe sind die Teilzeitvegetarier
LZ_16.11.2007_KURZ NOTIERT
OTS_13.10.2007_Natur Gourmet - Convenience für natürliche Gourmets
LZ_23.05.2008_Fredag kommt mit "Natur Gourmet" gut voran
LP_04.04.2008_Orior Gruppe Vegetarischer Newcomer
LZ_15.05.2009_Natur Gourmet stellt Sortiment um
LZ_12.04.2010_Orior Geht an die Börse
BSLZ_23.03.2010_Orior will zurück Der Lebensmittelhersteller

LZ_04.05.2012_Orior Gruppe kauft weiter zu
LZ_04.05.2012_Natur_Gourmet_plant_wieder_Zuwachs
LZ_10.05.2013_Rasanter Zuwachs bei_Nature Gourmet
LZ_21.05.2014_Orior kauft Tofu Spezialisten Noppa
AWP_27.02.2020_Unternehmensportrait Orior AG
S&Z_31.03.2020_Es muss schmecken Wie Fleisch

Germany

Abbelen – The Good One

Homepage/Annual Reports/Press Releases

Corporate Information; retrieved from: https://abbelen.de/unternehmen/, accessed 30.11.2021

Secondary Materials

LZ_07.11.2003_Ein Höchstmaß an Transparenz
FW_14.12.2006_Praktisches erhöht die Akzeptanz
LZ_27.10.2006_Der Handel erkennt die Chancen
LZ_16.10.2007_Auch Hamburger werden teurer
LZ_05.07.2013_Abbelen
BNZ_06.04.2017_DBAG greift zum Doppelwhopper
LZ_07.09.2018_Handelsmarkenspezialist Abbelen holt Gloy

Edeka/Rasting/Plan "B"

Homepage/Annual Reports/Press Releases

Company history and information; retrieved from: https://www.rasting.de/ueber-uns/unternehmen, accessed 30.11.2021
Vegetarian products; retrieved from: https://www.rasting.de/produkte/veggie-produkte, accessed 30.11.2021

Secondary Materials

LZ_02.10.2015_Rasting trimmt Frischfisch auf Edeka
LZ_06.11.2020_Fleischhof Rasting setzt auf Tierwohl
LZ_05.06.2020_Fleischhof Rasting hat einen Plan B
LZ_05.11.2021_Aldi kann Tierwohlprogramm nicht allein stemmen

European Convenience Food/Vegeta

Homepage/Annual Reports/Press Releases

Company history and information; retrieved from: https://www.ecf-group.com/ueber-uns/, accessed 30.11.2021
Information about the vegetarian "Vegeta" brand; retrieved from: https://www.vegeta.de/VEGETA-Philosophie/, accessed 30.11.2021
Annual Report from the fiscal year 2019, retrieved from the "Bundesanzeiger" webtool, accessed 30.11.2021

Secondary Materials

GVP_09.09.2014_Neuheiten

Frost Meat/Planty of Meat

Interview

Christoph Schöppl CEO of Planty of Meat since 2020 Interview conducted on the phone, on September 11th, 2021, duration: 56 minutes Interview Transcript attached in the supplemental materials (**#9)**

Homepage/Annual Reports/Press Releases

Company description; retrieved from: https://frostmeat.de/#about; accessed 30.11.2021
Planty of Meat description; retrieved from: https://planty-of-meat.de/#about, accessed
Annual Report "Frost Meat" from the fiscal year 2018/19, retrieved from the
Annual Report "Planty of Meat" from the fiscal year 2018/19, retrieved from the

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AGRZ_19.03.2019_Greenpeace nimmt Tönnies und Frostmeat unter die Lupe
VEG_15.08.2019_Fleischgenuss ist pflanzlich: Deutsches Food-Start-up Planty-of-Meat
Conv_31.06.2019_Für regionale Vegetarier
WELT_20.10.2019_Regenwald frisch auf den Tisch
WELT_22.10.2019_Wie sich Deutschland an der Zerstörung des Regenwalds beteiligt
LZ_09.07.2021_The New Meat Company: Veggie-Plattform bestellt neue Vorständin
VEG_19.07.2021_Veganes Fleisch-Start-Up auf Wachstumskurs
LZ_27.01.2021_Fleischalternative: Social Chain beteiligt sich an Planty-of-Meat
LZ_25.02.2021_Neuer Konsumgüterkonzern: Social Chain wächst durch Zukäufe
SZ_16.07.2021_Veganes Fleisch Start-Up auf Wachsumskurs: / PLANTY OF MEAT launcht

Kupfer/Loz Veganoz

Interviews

Maximilian Kupfer CEO and Co-owner of Hans Kupfer & Sohn GmbH & Co. KG Wurstspezialitäten Interview conducted via MS-Teams, on December 7th 2021, duration: 27 minutes Interview Transcript attached in the supplemental materials **(#10)**

Homepage/Annual Reports/Press Releases

Company facts & history; retrieved from: https://www.hanskupfer.de/?Q=Historie; accessed 30.11.2021
Description of "Loz Veganoz" brand; retrieved from: https://lozveganoz.de/#about, accessed 30.11.2021
Annual Report "Kupfer Holding Aktiengesellschaft" from the fiscal year 2019, retrieved from the "Bundesanzeiger" webtool, accessed 30.11.2021

Secondary Materials

Kupfer_LZ_12.03.1999_Wurstwaren Kupfer auf Erfolgskurs
Kupfer_FW_20.05.2010_Kupfer baut Umsatzweiter aus
Kupfer_LZ_17.09.2010_Kupfer präsentiert salzarme Wurst
Kupfer_BI_24.09.2021_Flink, Air Up, Wolt - das sind die Food-News der Woche

Ponnath/Vantastic Foods

Interviews

Max Ponnath Export Manager and CEO of Ponnath DIE MEISTERMETZGER GmbH Interview conducted via Zoom, on April 4th, 2021, by Nicole Keller, duration: 60 minutes Interview Transcript attached in the supplemental materials **(#11)**
Michael Ponnath CEO and Owner of Ponnath DIE MEISTERMETZGER GmbH Interview conducted via Teams, on May 6th, 2021, duration: 66 minutes Interview Transcript attached in the supplemental materials **(#12)**

Homepage/Annual Reports/Press Releases

Company history; retrieved from: https://www.ponnath.de/de/unternehmen/ponnath-hat-geschichte/, accessed 30.11.2021
Overview of new animal welfare brand; retrieved from: https://ponnath1692.de/ , accessed 30.11.2021
Overview of "Vantastic foods" online shop; retrieved from: https://www.vantastic-foods.com/, accessed 30.11.2021
Annual report of the Ponnath Holding GmbH & Co.KG from the fiscal year 2020, retrieved from the "Bundesanzeiger" webtool, accessed 30.11.2021
Annual report of Veggie Gourmet GmbH from 2015, retrieved from the "Bundesanzeiger" webtool, accessed 30.11.2021

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LZ_02.10.2009_Genuss und Convenience im Blick
AFZ_18.08.2010_Neues Leberwurst-Sortiment im Frischebecher
LZ_03.09.2010_Ponnath startet jetzt in Ungarn
OTZ_16.10.10._Max Ponnath - Zukunft für Wurstwaren aus Triptis - Bayerische Metzger-Familie Ponnath
FW_18.08.2011_Rügenwalder und Ponnath sind Top-Marke
LZ_01.07.2011_Ponnath
LZ_07.10.2011_Für Ponnath wird Export wichtiger
OTZ_08.11.2011_Typisch Thüringisches als Trumpf
BDZ_13.07.2012_50 Arbeitsplätze sind bedroht - Gruninger-Übernahme: Neue Eigentümer verschlankt das Unternehmen / Transfergesellschaft soll gegründet werden
SK_37.007.2012_Großmetzgerei unter neuer Regie
LZ_13.11.2013_Fleischwarenhersteller beruft neuen Marketingleiter
BDZ_06.11.2013_Sieben Jahre ohne jede Lohnerhöhung - Gewerkschaft will Tarifvertrag mit Großmetzgerei Ponnath
AFZ_15.01.2014_Ehrung bei den Meistermetzgern

BDZ_15.04.2014_Ponnath will Betriebsrätin loswerden - Stimmenkönigin denkt nicht an Kündigung / Gericht empfiehlt Einigung mit hoher Abfindung
LZ_04.11.2015_Neue Kategorie: Ponnath kauft TK-Hersteller
AFZ_04.11.2015_Ponnath erwirbt Rodag Food
Regal_06.07.2015_Käsealternativen und Sojafleisch auf Wachstumskurs
AFZ_02.12.2015_Vegetarische Frikadellen
LP_15.04.2020_Ponnath tritt in die TK-Szene ein
FW_15.12.2015_Einsteig ins Tiefkühl-Geschäft
AFZ_03.06.2015_Marktcheck
LZ_18.09.2015_Ein Meistermetzger mit 300 Jahren Tradition
NBK_02.11.2015_Ponnath steigt ins Tiefkühl-Geschäft ein
NBK_24.11.2015_Vegetarisches vom Metzger
MBZ_28.09.2015_Kunden durch Genuss überzeugen
LZ_16.09.2016_Garnelen aus der Region
NBK_26.02.2016_Ponnath-Mitarbeiter wählen Betriebsrat
BDZ_24.11.2016_Ponnath wächst, Streit mit Gewerkschaft hält an - Der Freiburger Standort der bayerischen Großmetzgerei erhöht die Produktionsmenge - einen Tarifvertrag gibt es bis heute nicht
MBZ_24.11.2016_Weniger Strom für die Wurst
Regal_04.10.2017_Neustart für Vegan Profi
Regal_28.06.2017_Veganer Systempartner
NBK_22.11.2017_Der Fünf Millionen Euro Metzger
LZ_02.03.2018_Fangfrisch aus Bayern
AFZ_31.01.2018_Wärme erzeugt Kälte und Strom
Regal_03.10.2018_Massiver Markenaufbau für Vantastic foods
BDZ_29.11.2018_Im Schinken steckt noch Potenzial
MBZ_25.04.2018_Ein Blick aufs "Empire"
RLH_04.07.2019_"Ponnath Die Meistermetzger" ist seit zwölf Generationen in Kemnath zu Hause.
LZ_06.09.2019_Vegane Alternativen aus nah und fern
LZ_12.07.2019_Sortiment : Aldi Süd listet veganen Burger ein
RLH_05.06.2019_Wo liegen die Wurzeln Ihrer Marke?
RLH_02.08.2019_Die Fleischbranche befindet sich in einem tiefgreifenden Wandel
WIWO_10.09.2019_So entsteht der vegane Aldi-Burger
WIWO_06.09.2019_Beyond Meat auf Deutsch
FLW_17.09.2020_Online-Shop für Veganes
LP_15.10.2020_"Wir haben Lebensmittel in der DNA"
AFZ_26.02.2020_Tierschutzmarke im SB-Kühlregal
LZ_13.02.2020_Wursthersteller: Ponnath lanciert Tierschutz-Marke
LZ_17.04.2020_„Wir setzen ein Zeichen für die Branche“
Regal_04.03.2020_AVE: 60 Prozent Bio-Anteil

LP_15.11.2020_Erfolgreiches_Jahr
LZ_23.10.2020_Ponnath holt Jens Plachetka
LZ_04.02.2020_Ponnath lanciert Tierschutz-Marke
FLW_12.11.2020_Plachetka ergänzt Geschäftsführung
AFZ_09.09.2020_„Ponnath 1692“ fürs Besondere
LP_15.03.2020_Die Tierwohlmarke "Ponnath 1692"
LP_15.11.2020_Weichen für die Zukunft stellen
AFZ_01.07.2020_Unterwegs zu neuen Ufern
LP_15.05.2020_Das ist kein Modewort
LZ_21.08.2020_Ponnath baut Veggie-Sortiment aus
LZ_28.08.2020_Ponnath Kooperation mit dem Tierschutz – Einführung einer eigenen Premium-Marke
FRP_13.03.2020_Reinsdorfer Werk liefert bald vegane Kost
FPR_01.10.2020_Produzent von Lebensmitteln will Standort erweitern
LZ_10.11.2021_Matthias Rensch wechselt zur Ponnath Gruppe
LZ_17.09.2021_Markenkonzepte
LZ_10.09.2021_Profil mit veganen Alternativen
AFZ_28.04.2021_Ponnath trennt sich von Werk in Freiburg
LZ_30.07.2021_Ponnath stellt Tierwohlmarke neu auf
LP_15.01.2021_Ponnath verkauft Werk
RLH_05.03.2021_UMSTRUKTURIERUNG
FW_16.03.2021_Taifun-Tofu kauft Freiburger Werk
FW_17.02.2021_Gruppe verstärkt die Führung im Marketing
LT_15.01.2021_Dominik Küstner
BDZ_14.03.2021_Ungewissheit zehrt an den Nerven - Die Großmetzgerei Ponnath schließt Ende Mai ihr Werk - wie viele Mitarbeiter der neue Eigner Taifun-Tofu übernimmt, ist weiter unklar
BDZ_04.02.2021_Tofuhersteller übernimmt Fleischfabrik - Erweiterung der Produktion: Firma Taifun kauft das Freiburger Werk der Großmetzgerei Ponnath
MTBZ_26.01.2021_Mit dem Bauchladen fing es an
FRP_30.01.2021_Reinsdorfer Lebensmittelfirma liefert nach Umbau vegane Kost

TFB (Reinert & Kemper)/ The Plantly Butchers

Interviews

Hans-Ewald Reinert CEO and Owner of The Family Butchers Holding GmbH & Co. KG Interview conducted via Teams, on June 22nd, 2021, duration: 51 minutes Interview Transcript attached in the supplemental materials **(#13)**

Homepage/Annual Reports/Press Releases

Annual report of "The Family Butchers Holding GmbH & Co." from the fiscal year 2019, retrieved from the "Bundesanzeiger" webtool, accessed 01.12.2021
TFB-Consumer study on sausage consumption published in late 2020; retrieved from: https://the-family-butchers.com/fileadmin/assets/tfb/downloads/TFB-Wurst-Studie-2020.pdf, accessed 01.12.2021
Company Information and History; retrieved from https://the-family-butchers.com/de/unsere-tfb-familie/unsere-gruendung/, accessed 01.12.2021
TFB-brand and product overview; retrieved from: https://the-family-butchers.com/de/unsere-marken/brands/, accessed 01.12.2021
Brand overview "The Plantly Butcher"/Billie Green; retrieved from: https://the-plantly-butchers.com/de/ueber-uns/unsere-marke/, accessed 01.12.2021

Secondary Materials

LZ_13.10.1995_Bekenntnis zu eigenen Marken
LZ_10.10.1997_Reinert investiert in die Marke
HOR_16.10.1997_Reinert baut Marke auf
LZ_07.11.2003_Konsequente Markenführung
LZ_19.09.2008_Auf der Überholspur
LZ_12.10.2012_„Ein steiniger Weg"
LZ_05.07.2013_Reinert erweitert Kindersortiment
RLH_11.11.2014_Herr Reinert, ein Kinderprodukt ist Ihre wichtigste Marke - warum?
LZ_02.10.2015_Reinert schmiedet Veggie-Allianz
LZ_03.06.2016_Reinert investiert Millionen
AFZ_30.11.2016_Reinert trennt sich wieder von Like Meat
FW_20.06.2016_Kindermarke auch vegetarisch
HOR_01.09.2016_Reinert Bärchen: Plantage Berlin und Matthias Schweighöfer werben für
NWF_02.08.2016_Veggie-Boom ist ungebrochen
NWF_01.08.2016_Fleischgenuss ohne Gewissensbisse
NWZ_16.07.2016_Reinert nun auch fleischlos glücklich
HOR_08.09.2016_Fleischloser Nachzügler
WELT_31.07.2016_Bratwurst ohne Fleisch

LZ_26.01.2018_Schweinehalter kritisieren Reinert
LZ_28.12.2018_Dominante Tierwohl-Debatte
LZ_23.03.2018_„Das ist keine Alibi-Aktion“
LZ_19.01.2018_Reinert testet neues Angebot
NWF_19.01.2018_"Der Veggie-Hype ist vorbei"
WIWO_29.12.2018_Fleisch ohne Ferkeleien
NWF_24.01.2018_Kritik der Schweinehalter an Reinert
LZ_13.12.2019_„Mit dem Rücken zur Wand“
LZ_04.10.2019_Souveräne Nummer 2
LZ_13.12.2019_Family Butchers wollen in die USA
AFZ_09.10.2019_Kemper und Reinert fusionieren
LZ_12.04.2019_Herzenssache ist Reinert ein echtes Anliegen
SPO_15.12.2019_Götterdämmerung im Wurstland
HB_16.12.2019_Um die Wurst
NWBT_16.12.2019_Reinert kündigt Stellenabbau bei TFB an
BBKB_21.11.2019_Kartellamt hat keine Bedenken
WFB_02.10.2019_Reinert fusioniert mit Kemper
AFZ_01.07.2020_Unterwegs zu neuen Ufern
LZ_25.09.2020_Reinert relauncht Herzenssache
LZ_03.04.2020_„Wir sind krisenerprobt“
LZ_03.01.2020_Mehr Selbstbewusstsein
AFZ_25.11.2020_Vorlieben verschieben sich
AFZ_30.09.2020_Reinerts Herzenssache wird regional
RLH_06.10.2020_Zum ersten Mal nach den Problemen durch Corona-Vorfälle äußert sich
LP_15.08.2020_"Bleiben wir weiter neugierig"
LZ_30.04.2020_Gespür für Neues
RLH_04.11.2020_Wie funktioniert Ihr Herzenssache-Konzept und was ist das Besondere
WIWO_24.09.2020_Schweinezucht ohne Antibiotika: Wursthersteller befeuert die
TAG_05.12.2020_"The Family Butchers" tritt Verein zu Förderung von Offenstall-Haltung
NWGZ_06.10.2020_Reinert setzt auf mehr Tierwohl
WIWO_24.09.2020_Schweinezucht ohne Antibiotika: Wursthersteller befeuert die
FW_20.01.2021_Große Mehrheit bleibt Wurst und Schinken treu
LP_31.02.2021_Eine Zeitreise hat begonnen
LZ_11.06.2021_TFB: Fleischproduzent strukturiert um
LZ_26.02.2021_Vom Handel wünschen wir uns mehr Durchhaltevermögen“
RLH_07.06.2021_Im Laufe des Jahres soll nahezu das gesamte Schweinefleischangebot auf
RLH_16.04.2021_The Family Butchers-Chef Hans-Ewald Reinert Der Metzger mit
LZ_17.09.2021_Hilcona will mit Veggie wachsen
FW_16.03.2021_„Herzenssache“ als Programm nachhaltig etablieren
LZ_08.01.2021_Tierwohl und Regionalität sind gefragt
LZ_24.09.2021_TFB probt Angriff auf Rügenwalder Mühle

LZ_26.02.2021_Reinert kämpft für seine Herzenssache
FW_15.10.2021_Potenzial für Veggie-Wurst
AFZ_29.09.2021_TFB bringt Veggie-Wurst auf den Markt
RLH_09.04.2021_Mit der Fusion zu The Family Butchers hat Hans-Ewald Reinert erneut
SZ_23.02.2021_Reinert:Ein Fleischer in der Sandwich-Position

Vion/ME-AT

Interviews

Willem Cranenbroek General Manager of ME-AT, alternative protein startup of the Vion-Group Interview conducted via Teams, on July 9th, 2021, duration: 55 minutes Interview Transcript attached in the supplemental materials **(#14)**

Homepage/Annual Reports/Press Releases

Company overview and figures; retrieved from: https://www.vionfoodgroup.com/de/about-vion#profil, accessed 01.12.2021
Brand overview Vion Group; retrieved from: https://products.sites.vionfoodgroup.com/de/brands/, accessed 01.12.2021
Concept and overview of ME-AT; retrieved from: https://www.me-at.com/de/unsere-geschichte/, accessed 01.12.2021
Product overview ME-AT; retrieved from: https://www.me-at.com/de/unsere-me-ats/, accessed 01.12.2021

Secondary Materials

LZ_12.11.2015_Vion Consumer Monitor: Verbraucher halten Fleisch für unverzichtbar
LZ_10.06.2016_Tierwohl funktioniert
LZ_16.06.2017_Vion will Verantwortung übernehmen
AFZ_25.01.2017_Vion und Tierschützer ziehen Bilanz
AFZ_08.08.2018_Vion will nachhaltig wirtschaften
AFZ_26.09.2018_Vion sorgt für Transparenz
LZ_26.10.2018_Vion bringt Tierschutzlabel voran
AGRZ_01.11.2019_Veggie nun auch von Vion
FOODN_08.10.2019_Vion launches alternative protein brand ME-AT
LZ_01.11.2019_Schlachthof wird zum Veggie-Betrieb
LZ_08.11.2019_Fleischalternativen: Handel sortiert Veggie-Sortiment neu
AFZ_16.10.2019_Vion führt eigenes Start-up für veganes Fleisch

LZ_30.10.2019_Vion sattelt in Leeuwarden von Rindern auf Pflanzen um
VEG_11.11.2019_Vion führt vegane Marke ein und stellt Fleischfabrik auf pflanzliche Produktion
AFZ_06.11.2019_Vion setzt auf fleischlose Alternativen
AFZ_10.04.2019_Vion präsentiert Update
Press_05.10.2019_Vion lanciert ME-AT, ein Start-up für alternative Proteine
LZ_27.03.2020_Vion erwartet geringeren Fleischkonsum
LZ_24.04.2020_Nachhaltige Perspektiven
LZ_03.01.2020_Mehr Selbstbewusstsein
LZ_27.03.2020_Neuausrichtung: Vion erwartet geringeren Fleischkonsum
LZ_24.04.2020_Auf grünen Wegen in Richtung Zukunft
LZ_26.03.2021_Wir haben praktisch keine Schulden
LZ_21.05.2021_Vion will mehr Bio-Ware vermarkten
LZ_26.03.2021_Vion glaubt an den deutschen Markt
AgrH_25.03.2021_Vion investiert in „pflanzliches Fleisch“
AFZ_31.03.2021_Vion setzt auf die Regionen
LZ_19.02.2021_Vion will Schweinemäster auf den Grünen Weg führen

Vossko/Veggie Club

Interviews

Dietmar Vosskötter CEO & Owner VOSSKO GMBH & CO. KG Bernhard Düringer Head of Sales Switzerland & Project Lead Alternative Proteins VOSSKO GMBH & CO. KG Interview conducted via Teams, on September 16th, 2021, duration: 59 minutes Interview Transcript attached in the supplemental materials **(#15)**

Homepage/Annual Reports/Press Releases

Company History; retrieved from: https://www.vossko.de/ueber-uns/#geschichte, accessed 01.12.2021
Annual report of “VOSSKO GMBH & CO. KG” from the fiscal year 2019, retrieved from the “Bundesanzeiger” webtool, accessed 01.12.2021
Product overview Vossko; retrieved from https://www.vossko.de/fuer-zuhause/tiefkuehlung/?pgNr=1, accessed 01.12.2021

Secondary Materials

Vossko_LZ_26.10.2007_Vossko wächst in Brasilien
Vossko_LZ_18.09.2009_Coole Snacks
Vossko_ABZ_14.05.2009_Der Käse-Schwindel
Vossko_LZ_05.07.2013_Vossko-Info
Vossko_AFZ_27.02.2013_Schypke und Vossko auf Spurensuche
Vossko_LZ_20.02.2013_Vossko: Identifiziert Pferdefleisch-Herkunft
Vossko_LZ_06.03.2015_Imbiss aus dem Eis
Vossko_FODS_07.03.2016_Vossko hat sein Angebot an Soja- Produkten für Foodservice und industrielle Verarbeiter
Vossko_RLH_04.10.2017_Seit der Jahrtausendwende ist der Umsatz stetig gewachsen.
Vossko_GVP_15.05.2017_Fleisch(los) gewinnt
Vossko_FODS_02.10.2018_Allrounder
Vossko_FODS_13.04.2018_Jetzt flashen die Burger pulled und vegetarisch
Vossko_AGHZ_07.12.2019_Fleischlose Alternative
Vossko_GVP_10.05.2019_Genuss mit Verstand
Vossko_RLH_04.12.2020_Seit Beginn der Corona-Krise erfreuen sich TK-Produkte einer besonders großen Beliebtheit

Windau

Interviews

Petra Meier Head of International Sales & Alternative Proteins Windau GmbH & Co. KG Interview conducted via Teams, on November 15th, 2021, duration: 32 minutes Interview transcript attached in the supplemental materials **(#16)**

Homepage/Annual Reports/Press Releases

Annual report of "Windau GmbH" from the fiscal year 2019, retrieved from the "Bundesanzeiger" webtool, accessed 01.12.2021
Company information; retrieved from: http://windau.de/Windau/de/ueber-uns/, accessed 01.12.2021
Overview of vegetarian products; retrieved from: http://www.windau.de/Windau/de/produktwelt/vegetarische-produkte/, accessed 01.12.2021

Secondary Materials

NWF_27.04.2004_Windau investiert und expandiert
LZ_26.10.2007_Windau hat sich große Ziele gesteckt
AFZ_24.11.2010_International im Geschäft
LZ_03.06.2011_Windau ist auf Wachstum eingestellt
LZ_17.04.2015_Windau wird vegetarisch
WFB_09.04.2015_Jetzt gibt es »Fleisch vom Feld«
FW_23.03.2016_Produktion originalgetreuer Alternativen
NWF_20.01.2017_Hier geht' s nicht nur um die Wurst

Short Cases/Profiles of Companies included in the QCA

Austria

Neuburger – „Hermann Fleischlos“

Founded in Ulrichsberg, Upper Austria, in 1919, Neuburger's second-generation owners started in 1948 to develop a special meatloaf recipe, laying the foundation of the company's current success. Taking over from his father, the current owner and CEO, Hermann Neuburger Jun. started to focus the company's production solely on this particular meatloaf. From 1995 onwards, Neuburger Meatloaf was available in supermarkets across Austria and exported to Germany beginning in 2009. With the family's fourth-generation slowly taking over the company, 2016 saw the introduction of the brand's first new product for more than 25 years, a vegetarian line called "Hermann Fleischlos." The new product category was introduced after concluding a 5-year research process, and significant investments totaling over 50 million € into a fully-owned and patented mushroom production, the raw material of the vegetarian products.

Notably, even though it is a relatively small company, the parent-brand Neuburger represents the strongest meat brand in Austria. The company has a strong focus on different marketing activities, particularly TV advertising featuring its well-known slogan: "Neuburger, Sagen Sie niemals Leberkäse zu ihm." The current CEO, Hermann Jun., and his son Thomas Neuburger, never tried to hide the connection between the two brands, publicly arguing for reduced meat consumption. This endeavor highlighted the new vegetarian brand at the end of every TV ad for the parent "Neuburger" and a newly developed social media presence for the "Hermann Fleischlos" brand. Hermann Neuburger was also awarded "Marketer of the year 2021" for the company's communication efforts of combining the two brands, reconciling the tensions between meat and vegetarian products. Currently, the vegetarian line makes up 20% of the company's revenues, a share the owners aim to increase to over 50% by 2030.

Landhof/Macher – "die Ohne"

The Macher-Group, representing Austria's largest slaughterhouse, employing over 1800 workers, bought one of the countries more prominent sausage brands, "Landhof," with its annual revenues of about 200 million € in 2018. With this acquisition, Macher also took over the brand's vegetarian extension called "die Ohne." Interestingly, according to the author's best knowledge, Landhof was the first meat company in the DACH region to introduce vegetarian cold-cuts in 2012, already exporting them in first product trials to Aldi Germany in 2013, making up 15% of the company's revenues at the time. By 2016, Landhof had increased that share to 22% or about 40 million € annually. While the company was planning to increase this share to over 50% by 2018, its ongoing financial difficulties led to the takeover by the Macher Group and a steep decline of the vegetarian assortment in the following years. Today, at the backdrop of the recurring rising demand for meat alternatives, the Macher-Group offers several vegetarian products, including cold cuts, sausages, bacon, and convenience articles under the "die Ohne" brand as well as for private-label retail brands, translating to 2% of the group's turnover. With its "die Ohne"-brand, Macher is active on social media (Facebook & Instagram), engages with critical customers, and addresses its meat-roots on its web page.

Switzerland

Bell/Hilcona – "Green Mountain"

The company Bell, founded in 1869, quickly became one of Switzerland's largest meat companies in the early 20th century. The cooperation between Coop and Bell started in 1991 when Bell took over Coop's meat production facility in Basel. Being a publicly listed company, Coop, on the other hand, began to buy shares of the Bell group in 1995. Today, the retailer holds a majority share of 66% of Bell's stocks, having become a sizeable international player in the food industry with annual revenues of 4.1 billion CHF and more than 12.000 employees on 63 production sites. Over the years, the Bell Food Group acquired several other meat companies internationally and in other food-related fields. However, the group's most significant acquisition concerning today's alternative protein strategy was the traditional Swiss convenience-food company Hilcona in 2017. Even though having prior experience with vegetarian sausages through its German daughter "Zimbo," Hilcona provided the Bell Group with several new capabilities, particularly concerning the production of pasta, full meals, and other vegetarian products like Tofu. In 2018, facing declining meat revenues, Bell started to diversify its alternative protein strategy through an investment into the Israel-based lab-grown-meat startup "Mosa Meat," totaling 14.5 million € by 2020 and the 2019 foundation of the so-called" Hilcona Taste Factory" and its new alternative protein brand "Green Mountain" thereby establishing an own production for plant-based meat alternatives as well. Today, the meatless products of Hilcona and Green Mountain contributed roughly 20% to the group's revenues.

While Bell still uses its traditional core-meat brand, it does not support it through large-scale marketing activities. However, Hilcona and Green Mountain are much more active in their brand communication. While Hilcona has a long history of TV advertising, particularly in Germany, Green Mountain focuses on a younger target audience using social media as a preferred communication tool.

Micarna – "V-Love"

Founded in 1958 already as the exclusive butcher of Switzerland's biggest retailer, the Migros collective, and thereby part of the so-called M-Industry also comprising production facilities for dairy, cholate, and bakery products. In 2020, Micarna was responsible for 1.8 billion CHF of the group's annual revenues employing 3214 people. Over the years, Micarna also grew through several acquisitions of smaller Swiss butchers like Rudolf Schär, Maurer Speck, or Fleury. However, with the rising popularity of plant-based diets, Migros, until 2020 focused on selling its traditional "Cornatur" vegetarian product range, created a dedicated vegan brand called "V-love," prompting Micarna to heavily invest in its own vegan production capabilities, following the group's core premise of offering store-brands rather than manufacturer brands. "V-love" is supported by various marketing activities, including large-scale social media advertising and giant billboards on large public spaces across the country featuring pithy sayings and puns focusing on reconciling vegans and meat-eaters.

Micarna is also active in other alternative protein areas, apart from vegan products. For example, the company produced insect-burgers in its inhouse-startup "simply bugs" from 2017 until 2021 and invested significantly into the cultured meat startup "Aleph Farms" in 2019. Furthermore, Micarna launched a hybrid brand of meat blended with vegetables like potatoes, carrots, or peas called "the mix" in 2021.

Ospelt/Malbuner – "Like Meat"

Starting as a small family-owned butcher in Lichtenstein's capital Vaduz, the Ospelt group grew to become an international player in the food industry with revenues estimated between 750 million and one billion CHF in less than 50 years. Today the company is highly diversified, producing private-label products for retailers or other brands in the fields of convenience meals, fresh pasta, frozen pizzas, salmon, sandwiches, and pet feed. Apart from this large private-label business, the group under CEO Alexander Ospelt also owns Switzerland's most renowned and probably only strong meat brand founded in 1971, Malbuner. Contrasting the groups' private-label business, Malbuner was always heavily supported by marketing activities, including TV advertising, co-brandings with McDonald's, and even a Formula 1 sponsoring. The brand is also very active on social media, still featuring its long-established slogan, "Mal besser Malbuner."

While having produced vegetarian meals and other products for a long time, Alexander Ospelt invested in the alternative protein startup LikeMeat[22] in 2020, also taking over large parts of its production. Notably, Ospelt also produces vegetarian cat and dog food at its corporate headquarter, Bendern (LIE), located less than one kilometer away from Hilcona's main production site, the company's main competitor.

Orior/Fredag - "Happy Vegi Butcher"

Founded initially as a tobacco company, the Orior group evolved after its reorientation in 1992 towards one of Switzerland's most significant food players owning over 20 brands in various food-related fields, including convenience meals, pasta, bacon, and sausage brands. The group's acquisitions of the frozen-convenience food company "Fredag" (1995) and the Tofu-producer "Noppa" (2014) added valuable capabilities to its portfolio before Orior's 2019 introduction of the alternative protein brand "Happy Vegi Butcher," initially aimed at food-service customers. While the company mainly focuses on private-label and food-service customers, producing some of the already mentioned "Cornatur"-products for Migros, it tries to appeal directly to end consumers with the "Happy Vegi Butcher" brand. The Orior group and its various business units posted annual revenues of 600 Mio CHF in 2020.

Germany

Abbelen – "The good one"

Abbelen is a private-label producer of different kinds of minced meat and connected convenience products (burger patties, meatballs). Founded in 1958 as s family-owned butcher, today's company belongs to the "More than meals" investment group and employs 600 people, generating 160 million € in 2020. Marketing activities do not support Abbelen's meat and alternative protein brand.

Edeka/Rasting – "Plan B"

The so-called "Fleischwerk Rasting" originates from a cooperation with a long-established local butchery, "Rasting," and the large German retailer EDEKA in 1955. EDEKA took over Rasting in 1999, today one of the retailer's largest fully-owned meat processing facilities with revenues of 590 million € in 2020. In 2015, Rating introduced its first vegetarian minced-meat products and cold cuts under the brand "Plan "B." The brand is exclusively sold in EDEKA supermarkets across Germany but is not supported by communication efforts.

[22] As mentioned LikeMeat is part of the LiveKindly Collective ant thereby also connected to the PHW Group

European Convenience Food – "Vegeta"

The company „European Convenience Food" was founded in 2014 in a merger between the traditional convenience producers Karl Kemper and Eichkamp. Largely unknown to the general public, the company also supplies vegetarian products and ready-made meals under its "Vegeta" brand to canines and restaurants across Germany and other European countries. The company employs 380 people producing roughly 60 tons of convenience products worth 75 million€ in 2019.

Frost Meat – "Planty of Meat"

The relatively young company "Frost Meat" is one of Germany's largest importers of foreign meat specialties, mainly from South American countries like Brazil and Argentina. This business focus led to constant criticism by NGOs, particularly concerning deforestation issues in Brazil connected to the imported Beef products. To cater to flexitarians and address these environmental concerns, Frost Meat founded the plant-based brand "Planty of Meat" in 2020, focusing primarily on supplying frozen products like burger patties and nuggets to B2B-retailers like the Metro group, for instance.

Kupfer – "Loz Veganoz/Bug Foundation"

The traditionally family-owned butchery Kupfer was founded in 1881 in northern Bavaria and grew into a significant player in the German meat industry in the 1970s and 1980s. In 2019 Kupfer had over 1000 employees, an annual turnover of more than 200 million €, and sold its product internationally, including export to the US, putting the company among the largest ten sausage manufacturers in the country. Apart from selling branded traditional „Nürnberger Rostbratwürste, "the company primarily focuses on producing private-label or store brands for German retail in particular. The company already engaged in the production of vegetarian meat alternatives in 2014 by founding its sub-division called "Kupfer Innovative Food GmbH" not only to establish and own production of vegetarian sausage products sold under "Loz Veganoz" but also to invest in startups like the insect firm "Bugfoundation" for instance.

Ponnath – "Vantastic Foods"

The family-owned company Ponnath represents one of the most exciting cases within the present sample. Initially founded in 1692, led by the family's 12th generation, it represents Germany's oldest Butcher and is also highly diversified into vegetarian and vegan products. Over the last decades, Ponnath developed towards producing private-label s store brands, primarily supplying Germany's largest discounter, Aldi. However, this focus was slowly reversed during the last one and a half years, introducing a new premium brand, "Ponnath 1692", featuring higher animal welfare standards, communicating the firm's long heritage, and aiming towards less price-sensitive consumers of traditional retailers. With the new

brand, Ponnath also started investing in first marketing campaigns on social media and hired its first dedicated CMO.

Particularly notable about Ponnath is the company's long-standing experience with and commitment to vegetarian products. Enabled by the acquisition of the frozen convenience food specialist "Rodag" in 2015, the traditional meat processor also introduced meatless cold cuts and sausages in the same year. Constantly expanding the vegetarian segment, Ponnath bought the company "Absolute Vegan Empire.", a specialized vegan-food online shop and its brand "Vantastic Foods" in 2017. While introducing the "Wonder Burger" as a competitive product to Beyond Meat together with the company's primary customer Aldi in 2019, Vantastic foods grew further, offering more than 1200 products, making it Europe's largest distributor of vegan food products, notably owned by Germany's oldest butcher. Vegetarian products already make up 20% of Ponnath's revenues, totaling over 300 million € in 2020, making it the sixth-largest meat company in Germany.

The Family Butchers – "The Plantly Butchers"

As the company name suggests, "The Family Butchers" (TFB) was founded during a 2019 merger of two very different prominent players in the German meat market, Reinert and Kemper's family-owned companies. While Reinert represented a company with a long-standing focus on its strong core and a few other product brands (The well-known "Bärchen Wurst" aiming at children, for instance), Kemper was only producing private-label products for German retail. With combined revenue of 720 million € and 2400 employees in 2020, the two firms now represent the country's second-largest sausage manufacturer after the "Zur Mühlen Group."

Especially "Reinert" and its owner and CEO Hans-Ewald Reinert not only had long experience with brand communication and marketing but the company was also engaged in producing meat alternatives early on, starting in 2015 with a vegetarian variant of its famous "Bärchen Wurst" advertised by famous German Actor Mathias Schweighöfer in national television. In 2015 Reinert furthermore invested in a 50% stake in the startup "LikeMeat" before selling its shares to the PHW-Group one year later, ending its other vegetarian products as well soon after facing the "bump" in consumer demand described earlier. From 2017-2020, Reinert focused on strengthening its core brand by introducing premium-animal welfare products. Additionally, the company invested in large-scale market research and new formats of stakeholder communication in the aftermath of the criticism on met production at the beginning of the Covid-19 pandemic. In late 2021, however, TFB a new brand called "Billie Green" under its vegan daughter-company "The Plantly Butchers," effectively re-entering the market for meat alternatives in 2022. Hans-Ewald Reinert aims to earn more than 100 million € or 15% of his company's turnover with vegetarian products by 2029.

Vion – "ME-AT"

The German/Dutch company Vion, with almost 5 billion € revenues in 2020, is one of the largest slaughterhouses in Europe, supplying meat processors across Germany and selling raw and processed meat and convenience articles directly to retailers. Facing the general decline in pork and beef consumption, Vion decided to enter the meat-alternative market in 2019 with a dedicated vegan brand called "ME-AT," even investing 25 million € into converting a newly built beef-slaughterhouse into a plant-based production site. ME-AT sells its products, burger-patties, Schnitzel, cold cuts, and many more to retailers in Germany, the Netherlands, and France.

Vossko – "Veggie Club"

Vossko, only founded in 1982, specializes in private-label and food-service customers, producing frozen convenience foods, mainly made from poultry. The company is highly export-oriented, also operating a chicken-production facility in Brazil. As a part of its convenience-meal business unit, the company also started producing vegetarian products and meat replacements as early as 2009 for a customer in the UK. Today, Vossko is one of Germany's most prominent private-label producers of plant-based convenience products like burgers or nuggets.

Windau

Windau represents another meat company solely focusing on producing cold cuts, sausages, and ham for private-label retail brands, particularly for discounters in Germany but also abroad. In 2015, together with virtually all other companies in this sample, Windau started to produce vegetarian variants for its cold-cuts as well. However, the vegetarian product range did not take off until recently, when these products' market returned to solid growth in 2020. Windau's annual turnover is estimated to be around 75 million €.

Full Truth table

House of Brands	Strong Private-Label Focus	Startup Investment	Strong/Heritage Meat Brand	Family-owned	# of cases	Monobrand strategy	raw consist.
0	0	0	1	1	5		0.8
0	1	0	0	0	4		0
1	1	0	0	0	3		0
1	1	1	0	0	2		0
0	1	1	0	1	2		0
1	1	0	1	1	2		0
0	1	0	0	1	1		0
1	0	0	1	1	1		1
0	0	1	1	1	1		1
1	1	1	1	1	1		0
0	0	0	0	0	0		
1	0	0	0	0	0		
0	0	1	0	0	0		
1	0	1	0	0	0		
0	1	1	0	0	0		
0	0	0	1	0	0		
1	0	0	1	0	0		
0	1	0	1	0	0		
1	1	0	1	0	0		
0	0	1	1	0	0		
1	0	1	1	0	0		
0	1	1	1	0	0		
1	1	1	1	0	0		
0	0	0	0	1	0		

1	0	0	0	1	0		
1	1	0	0	1	0		
0	0	1	0	1	0		
1	0	1	0	1	0		
1	1	1	0	1	0		
0	1	0	1	1	0		
1	0	1	1	1	0		
0	1	1	1	1	0		

Appendix F Table B: Full Truth Table; Source: Own Representation

Original Outputs fsQCA

Analysis of Necessary Conditions

Outcome variable: MonobrandStrategy
Conditions tested:
Consistency Coverage
HouseofBrands 0.166667 0.111111
StrongPrivateLabelFocus 0.000000 0.000000
StartupInvestment 0.166667 0.166667
Strong/HeritageMeatBrand 1.000000 0.600000
Familyowned 1.000000 0.461538

Set Coincidence

coincidence(HouseofBrands,StrongPrivateLabelFocus,StartupInvestment,Strong/HeritageMeatBrand,Familyowned) = 0.0454545
coincidence(HouseofBrands,StrongPrivateLabelFocus,StartupInvestment,Strong/HeritageMeatBrand) = 0.0454545
coincidence(StrongPrivateLabelFocus,StartupInvestment,Strong/HeritageMeatBrand,Familyowned) = 0.0454545
coincidence(HouseofBrands,StrongPrivateLabelFocus,Strong/HeritageMeatBrand,Familyowned) = 0.136364
coincidence(HouseofBrands,StartupInvestment,Strong/HeritageMeatBrand,Familyowned) = 0.0555556
coincidence(HouseofBrands,StrongPrivateLabelFocus,StartupInvestment,Familyowned) = 0.0454545
coincidence(StrongPrivateLabelFocus,StartupInvestment,Strong/HeritageMeatBrand) = 0.0454545
coincidence(HouseofBrands,StrongPrivateLabelFocus,Strong/HeritageMeatBrand) = 0.136364
coincidence(StrongPrivateLabelFocus,Strong/HeritageMeatBrand,Familyowned) = 0.136364
coincidence(HouseofBrands,StartupInvestment,Strong/HeritageMeatBrand) = 0.0588235
coincidence(HouseofBrands,StrongPrivateLabelFocus,StartupInvestment) = 0.176471
coincidence(StartupInvestment,Strong/HeritageMeatBrand,Familyowned) = 0.133333
coincidence(StrongPrivateLabelFocus,StartupInvestment,Familyowned) = 0.136364
coincidence(HouseofBrands,Strong/HeritageMeatBrand,Familyowned) = 0.222222
coincidence(HouseofBrands,StrongPrivateLabelFocus,Familyowned) = 0.136364
coincidence(StrongPrivateLabelFocus,Strong/HeritageMeatBrand) = 0.136364
coincidence(HouseofBrands,StartupInvestment,Familyowned) = 0.0555556
coincidence(StartupInvestment,Strong/HeritageMeatBrand) = 0.142857
coincidence(StrongPrivateLabelFocus,StartupInvestment) = 0.3125
coincidence(HouseofBrands,Strong/HeritageMeatBrand) = 0.266667
coincidence(HouseofBrands,StrongPrivateLabelFocus) = 0.5
coincidence(Strong/HeritageMeatBrand,Familyowned) = 0.769231
coincidence(StrongPrivateLabelFocus,Familyowned) = 0.272727
coincidence(HouseofBrands,StartupInvestment) = 0.25
coincidence(StartupInvestment,Familyowned) = 0.266667
coincidence(HouseofBrands,Familyowned) = 0.222222

****
TRUTH TABLE ANALYSIS
****
File: D:/Diss/Paper & Diss/03_QCA/zz_QCA/Rohdanten_Diss_7_Heritage weg & Private revidiert_Support weg.csv
Model: MonobrandStrategy = f(HouseofBrands, StrongPrivateLabelFocus, StartupInvestment, Strong/HeritageMeatBrand, Familyowned)
Algorithm: Quine-McCluskey

--- COMPLEX SOLUTION ---

frequency cutoff: 1
consistency cutoff: 0.8

	raw coverage	unique coverage	consistency
~StrongPrivateLabelFocus*~StartupInvestment*Strong/HeritageMeatBrand*Familyowned	0.833333	0.166667	0.833333
~HouseofBrands*~StrongPrivateLabelFocus*Strong/HeritageMeatBrand*Familyowned	0.833333	0.166667	0.833333

solution coverage: 1
solution consistency: 0.857143

Cases with greater than 0.5 membership in term
~StrongPrivateLabelFocus*~StartupInvestment*Strong/HeritageMeatBrand*Familyowned: Rügenwalder (1,1),
Eberswalder (1,1), Gutfried/zMG (1,1), Meica (1,1),
Wolf (1,1), Neuburger (1,0)

Cases with greater than 0.5 membership in term
~HouseofBrands*~StrongPrivateLabelFocus*Strong/HeritageMeatBrand*Familyowned: Rügenwalder (1,1),
Eberswalder (1,1), Meica (1,1), Wiesenhof (1,1),
Wolf (1,1), Neuburger (1,0)

****
TRUTH TABLE ANALYSIS
****
File: D:/Diss/Paper & Diss/03_QCA/zz_QCA/Rohdanten_Diss_7_Heritage weg & Private revidiert_Support weg.csv
Model: MonobrandStrategy = f(HouseofBrands, StrongPrivateLabelFocus, StartupInvestment, Strong/HeritageMeatBrand, Familyowned)
Algorithm: Quine-McCluskey

--- PARSIMONIOUS SOLUTION ---

frequency cutoff: 1
consistency cutoff: 0.8

	raw coverage	unique coverage	consistency
~StrongPrivateLabelFocus	1	1	0.857143

solution coverage: 1
solution consistency: 0.857143

Cases with greater than 0.5 membership in term ~StrongPrivateLabelFocus: Rügenwalder (1,1),
Eberswalder (1,1), Gutfried/zMG (1,1), Meica (1,1),
Wiesenhof (1,1), Wolf (1,1), Neuburger (1,0)

****
TRUTH TABLE ANALYSIS
****

File: D:/Diss/Paper & Diss/03_QCA/zz_QCA/Rohdanten_Diss_7_Heritage weg & Private revidiert_Support weg.csv
Model: MonobrandStrategy = f(HouseofBrands, StrongPrivateLabelFocus, StartupInvestment, Strong/HeritageMeatBrand, Familyowned)
Algorithm: Quine-McCluskey

--- INTERMEDIATE SOLUTION ---

frequency cutoff: 1
consistency cutoff: 0.8

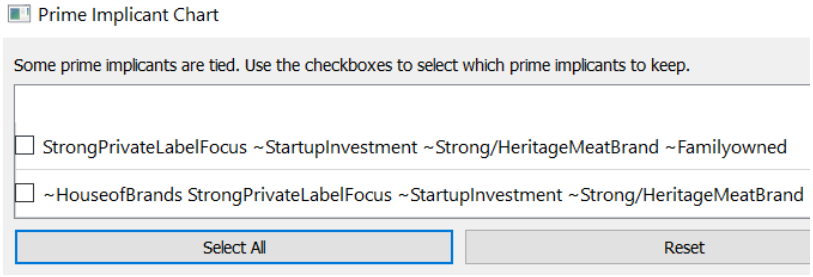
Assumptions:
~HouseofBrands (absent)
~StrongPrivateLabelFocus (absent)
~StartupInvestment (absent)
Strong/HeritageMeatBrand (present)

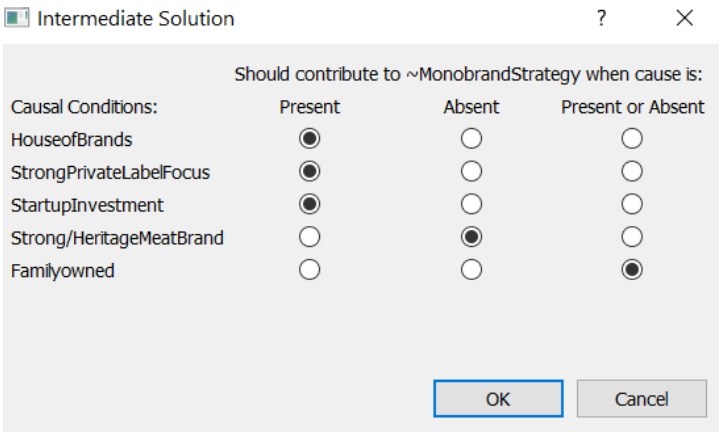
	Raw Coverage	unique coverage	consistency
~StrongPrivateLabelFocus*~StartupInvestment*Strong/HeritageMeatBrand*Familyowned	0.833333	0.166667	0.833333
~HouseofBrands*~StrongPrivateLabelFocus*Strong/HeritageMeatBrand*Familyowned	0.833333	0.166667	0.833333

solution coverage: 1
solution consistency: 0.857143

Cases with greater than 0.5 membership in term
~StrongPrivateLabelFocus*~StartupInvestment*Strong/HeritageMeatBrand*Familyowned: Rügenwalder (1,1),
Eberswalder (1,1), Gutfried/zMG (1,1), Meica (1,1),
Wolf (1,1), Neuburger (1,0)
Cases with greater than 0.5 membership in term
~HouseofBrands*~StrongPrivateLabelFocus*Strong/HeritageMeatBrand*Familyowned: Rügenwalder (1,1),
Eberswalder (1,1), Meica (1,1), Wiesenhof (1,1),
Wolf (1,1), Neuburger (1,0)

Negated QCA





Analysis of Necessary Conditions

Outcome variable: ~MonobrandStrategy
Conditions tested:
Consistency Coverage
HouseofBrands 0.500000 0.888889
StrongPrivateLabelFocus 0.937500 1.000000
StartupInvestment 0.312500 0.833333
Strong/HeritageMeatBrand 0.250000 0.400000
Familyowned 0.437500 0.538462

****
TRUTH TABLE ANALYSIS
****

File: D:/Diss/Paper & Diss/03_QCA/zz_QCA/Rohdanten_Diss_7_Heritage weg & Private revidiert_Support weg.csv
Model: ~MonobrandStrategy = f(HouseofBrands, StrongPrivateLabelFocus, StartupInvestment, Strong/HeritageMeatBrand, Familyowned)
Algorithm: Quine-McCluskey

--- COMPLEX SOLUTION ---

frequency cutoff: 1
consistency cutoff: 1

	raw coverage	unique coverage	consistency
HouseofBrands*StrongPrivateLabelFocus*~Strong/HeritageMeatBrand*~Familyowned	0.3125	0.125	1
~HouseofBrands*StrongPrivateLabelFocus*~Strong/HeritageMeatBrand*Familyowned	0.1875	0.125	1
HouseofBrands*StrongPrivateLabelFocus*Strong/HeritageMeatBrand*Familyowned	0.1875	0.1875	1
StrongPrivateLabelFocus*~StartupInvestment*~Strong/HeritageMeatBrand*~Familyowned	0.4375	0	1
~HouseofBrands*StrongPrivateLabelFocus*~StartupInvestment*~Strong/HeritageMeatBrand	0.3125	0	1

solution coverage: 0.9375
solution consistency: 1

Cases with greater than 0.5 membership in term
HouseofBrands*StrongPrivateLabelFocus*~Strong/HeritageMeatBrand*~Familyowned: Bell/Hilcona (1,1),
Micarna (1,1), OriorGruppe (1,1), EuropeanConvenienceFood (1,1),
Vion (1,1)

Cases with greater than 0.5 membership in term
~HouseofBrands*StrongPrivateLabelFocus*~Strong/HeritageMeatBrand*Familyowned: Kupfer (1,1),
Ponnath (1,1), Vossko (1,1)

Cases with greater than 0.5 membership in term
HouseofBrands*StrongPrivateLabelFocus*Strong/HeritageMeatBrand*Familyowned: Landhof (1,1),
Ospelt/Malbuner (1,1), TFB (1,1)

Cases with greater than 0.5 membership in term
StrongPrivateLabelFocus*~StartupInvestment*~Strong/HeritageMeatBrand*~Familyowned: OriorGruppe (1,1),
Abbelen (1,1), Rasting (1,1), EuropeanConvenienceFood (1,1),
FrostMeat (1,1), Vion (1,1), Windau (1,1)

Cases with greater than 0.5 membership in term
~HouseofBrands*StrongPrivateLabelFocus*~StartupInvestment*~Strong/HeritageMeatBrand: Abbelen (1,1),
Rasting (1,1), FrostMeat (1,1), Vossko (1,1),
Windau (1,1)

****
TRUTH TABLE ANALYSIS
****

File: D:/Diss/Paper & Diss/03_QCA/zz_QCA/Rohdanten_Diss_7_Heritage weg & Private revidiert_Support weg.csv
Model: ~MonobrandStrategy = f(HouseofBrands, StrongPrivateLabelFocus, StartupInvestment, Strong/HeritageMeatBrand, Familyowned)
Algorithm: Quine-McCluskey

--- PARSIMONIOUS SOLUTION ---

frequency cutoff: 1
consistency cutoff: 1

	raw coverage	unique coverage	consistency
StrongPrivateLabelFocus	0.9375	0.9375	1

solution coverage: 0.9375
solution consistency: 1

Cases with greater than 0.5 membership in term StrongPrivateLabelFocus: Landhof (1,1),
Bell/Hilcona (1,1), Micarna (1,1), Ospelt/Malbuner (1,1),
OriorGruppe (1,1), Abbelen (1,1), Rasting (1,1),

EuropeanConvenienceFood (1,1), FrostMeat (1,1), Kupfer (1,1),
Ponnath (1,1), TFB (1,1), Vion (1,1),
Vossko (1,1), Windau (1,1)

****
TRUTH TABLE ANALYSIS
****

File: D:/Diss/Paper & Diss/03_QCA/zz_QCA/Rohdanten_Diss_7_Heritage weg & Private revidiert_Support weg.csv
Model: ~MonobrandStrategy = f(HouseofBrands, StrongPrivateLabelFocus, StartupInvestment, Strong/HeritageMeatBrand, Familyowned)
Algorithm: Quine-McCluskey

--- INTERMEDIATE SOLUTION ---

frequency cutoff: 1
consistency cutoff: 1

Assumptions:
HouseofBrands (present)
StrongPrivateLabelFocus (present)
StartupInvestment (present)
~Strong/HeritageMeatBrand (absent)

	raw coverage	unique coverage	consistency
StrongPrivateLabelFocus*~Strong/HeritageMeatBrand	0.75	0.75	1
HouseofBrands*StrongPrivateLabelFocus*Familyowned	0.1875	0.1875	1

solution coverage: 0.9375
solution consistency: 1

Cases with greater than 0.5 membership in term StrongPrivateLabelFocus*~Strong/HeritageMeatBrand: Bell/Hilcona (1,1), Micarna (1,1), OriorGruppe (1,1), Abbelen (1,1),
Rasting (1,1), EuropeanConvenienceFood (1,1), FrostMeat (1,1),
Kupfer (1,1), Ponnath (1,1), Vion (1,1),
Vossko (1,1), Windau (1,1)
Cases with greater than 0.5 membership in term HouseofBrands*StrongPrivateLabelFocus*Familyowned: Landhof (1,1), Ospelt/Malbuner (1,1), TFB (1,1)

Curriculum Vitae

Education

08/2018-02/2022	**Ph.D. Program in Management (PMA) at the University of St. Gallen (CH)** Thesis: Sustainable Brand Transformation: Case of the Meat Industry and the Adoption of alternative Proteins.
04/2015-12/2017	**M.Sc. Management & Technology at the Technical University Munich (DE)** Specialization: Marketing, Strategy & Leadership; Minor: Engineering Thesis: "The United Nations Sustainable Development Goals on a corporate Level- Challenges and Opportunities"
10/2016-07/2017	**Scholarship fort he „Certificate of Societal Innovations“ from the Social Entrepreneurship Academy Munich**
12/2015-06/2016	**Exchange Semester at the Indian Institute of Technology New Delhi (IITD)**
10/2011-03/2015	**B.Sc. Management & Technology at the Technical University Munich (DE)** Specialization: Marketing, Strategy & Leadership; Minor: Engineering Thesis: “Power of Morality: How companies meet societal demands"

Work Experience

03/2022-present

Business Consultant at Dr. Wieselhuber & Partner Gmbh Munich (DE)

- Core Topics: Sustainability, the Food-Sector, Organizational Develoment & Marketing

08/2018-01/2022

Managing Director „Best Practice in Marketing" at the University St. Gallen, Institute for Marketing and Customer Insight (CH)

- Consulting Partner firms
- Organization and Moderation of more than 10 (C-level) Management Seminars

01/2018-08/2018

Executive Assistant Fleischwaren Berger, Sieghartskirchen (AT)

- Project Management in the CEO-Office
- Sustainability Strategy
- Evaluation of new distribution channels
- Establishment of a performance management system with related KPI's

01/2017-10/2017

Research Assistant at the Institute for Business Ethics, Technical University Munich, (DE)

- Conference organization
- Scientific research on CSR

10/2015-12/2015

Business Development – Transportation Solutions Infineon SE, Munich (DE)

- Market Analysis & Global Marketing Strategy
- VBA programming of Sales-Tools

01/2014-12/2017

Paramedic at Bavarian Red Cross Munich (DE)

- Paramedic in the ambulance service of the Munich Red Cross