

**Title:**

**The country image added value in the retail chain  
The case study of Tunisian olive oil retail in Japan**

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**Abstract:**

This paper studies the contribution of “the image of country of origin” to the value creation for the entire chain of international distribution in the case of food products and more specifically the role of the web communication about “the country of origin” image in value creation for Asian and international retailers. First, this paper clarifies the concept of the country image in relation with new opportunities offered by the web marketing applications. Basing on the previous theoretical development, the second part presents the case study of the promotion of the Tunisia image to develop the exports of Tunisian olive oil to Japan: How well conceived websites of both government institutions and private actors (retailers, producers, exporters, and laboratories) could play a strategic role to develop and promote a positive association between “Tunisia” and the olive oil of good quality. This image of an excellent Tunisian olive oil creates an added “image value” in the retail chain in Japan and deserves to be studied as a part of a win-win strategy between the exporters of Tunisian olive oil and the local and international retailers in Japan .

**Introduction**

International marketing research is observing an inflow of studies related to globalization, IT and image. Indeed, customers all over the world have the access to an international and diversified offer via the large implementation of international retailers and the role websites play today to promote and sell products regardless the distances between the country of production and the home country of the consumer.

In this context, the image the consumers have about the country of origin of the product impacts significantly their intention to buy or not the product. This impact is more

important when the consumer is highly involved, and this is the case of food products which are tightly related to the consumer health and safety.

This paper studies the contribution of “the image of the country of origin” to the value creation for the entire chain of international distribution in the case of food products and more specifically the role of the web communication about “the country of origin” image in value creation for Asian and international retailers.

First, this paper clarifies the concept of the country image and studies new opportunities offered by the web marketing applications for the promotion of “the country of origin” image. In the second part, this paper studies the case of promoting the Tunisian olive oil for the international and local retailers in Asia: How well conceived websites of both government institutions and private actors (retailers, producers, exporters, and laboratories) could play a strategic role to develop and promote a positive association between Tunisia and the olive oil of good quality. This image of an excellent Tunisian olive oil creates an added image value in the retail chain and contributes to convince consumers in Asian countries.

## **I- Country image and web marketing**

The concept of Country image has been studied from several perspectives of tourism, international marketing and international relations. Prior studies have largely failed to develop a single, well-adapted conceptualization of the “country image”.

### **I-1- The country image concept**

The country image is a generic construct consisting of generalized images created not only by representative products but also by the degree of economic and political maturity, historical events and relationships, culture and traditions, and the degree of technological virtuosity and industrialization (Allred & al., 1999; Verlegh & Steenkamp,1999) indicate that country image refers to the mental representations people develop regarding products, culture and national symbols of this country. The term image is often referred to as a cognitive

structure that represents a mental picture, whilst country image is defined as “the set of all impressions, ideas and beliefs one has about a particular country” (Martin & Eroglu, 1993, p. 193; Kotler & al., 1997; White, 2012). This is also consistent with the definition of Wang & al. (2012) who define country image as the “mental representation of a country and its people including cognitive beliefs and affective evaluations”.

Moreover, Li & al. (1997, p. 166) focus on the image of countries in their role as origins of products and define the country image as “consumers' images of different countries and of products made in these countries.” The definition implies that, first, country image and product image are two distinct (but related) concepts, and, second, that country image affects the images of products from that country (Wang & al., 2012). Indeed, several studies show that there is a relationship between consumers' preference for a country's products and consumers' image of a country (Roth & Romeo, 1992; Ittersum & al., 2003). Thus, the image of a country might not only affect the evaluation of that country's products, but also other important outcomes such as investments, visits and ties with a country (Heslop & al., 2004).

Furthermore, Nebenzahl & al. (2003) define country image as the consumer's perception of the attributes of a product made in a certain country and his or emotions in relation to this country, resulting in the perception of the social convenience related to owning such products. For Papadopoulos & Heslop (2003), the image of a country is the place with which the buyer (or the seller) can associate a product. In addition, Han (1989) considers country image as the difference of perceived quality between domestic and foreign products. Recent studies aim to clarify the explanatory mechanism of the effect of country image on the consumption intention and behavior and enlightens the importance of the mediating role of product ethnicity, that is the stereotypical association between a generic product and a specific country of origin (Usinier 2002, Usinier & Cestre, 2007; Herbert, 2009). The

following examples illustrate this mechanism: the Swiss chocolate, Swiss watches, French Wine, German cars, Brazilian coffee, American Jeans, chinese Rice or Japanese Hifi.

### **I-2- Effects of country image**

Several streams of literature exist on related topics, such as the country-of-origin (COO) and country-product image and/or product-country image effect (Roth & Diamantopoulos, 2009). Evidence suggests that the country image can significantly impact consumers' perceptions of products, product evaluations and consequent purchase decisions (Diamantopoulos & al., 2011; Koschate- Fischer & al., 2012).

The marketing literature supports a positive relationship between country image and purchase intention (Han, 1990; Baughn & Yaprak, 1993). Another group of studies claim that a country's image may only influence consumers when they evaluate certain product attributes, and it has little or no effect on product attitudes and purchase intention (Pecotich & Rosenthal, 2001; Hui & Zhou, 2002). Yaprak & Parameswaran's (1986) study demonstrates that consumer purchase intention is directly influenced by specific product attributes, consumers 'general perceptions of products from a source country and the perceptions of the source country, as well as its people.

The cognitive country image may influence purchase intention indirectly through its impact on product image. Moreover, it may have less influence on consumer intentions to purchase, particularly in the absence of a reputable product image (Wang & al., 2012). On the other hand, when consumers do not have a clear product image, their cognitive country image (based for example on a country's level of economic development) could be used as a substitute for product image to infer product quality evaluation, leading to purchase intention. Meanwhile, affective country image directly and significantly influences purchase intention.

Knight, Holdsworth & Mather (2007) indicate that it is possible for a country's cognitive and affective images to change over time due to technological, social or political

change. Thus, practitioners need to carefully monitor consumer sentiments in international markets periodically suitably develop global strategies to detect international consumer trends and respond to the possibilities of consumer ethnocentrism (Verlegh, 2007). Consumer ethnocentrism is the feelings of those who want to support their country and its economy by boycotting other nations (Licsandru & al., 2013). In fact, the level of consumer ethnocentrism, which varies across individuals, cultures, and countries (Kaynak & Kara, 2000), can influence attitudes and intentions towards buying foreign goods (Klein, 2002). Even online, consumer ethnocentrism may relate to consumer reactions to foreign (global) and local appeals on websites (Singh & al., 2004). In the following, we will present the measures of country image.

### **I-3- Measures of country image**

The literature review reveals that country image consists of three components namely cognition, affect and conation which operate as separate dimensions as well (Brijs & al., 2011). Wang & al. (2012) indicate that when promoting products in foreign countries, an exporter should pay attention to the country image perceived by consumers in those countries. Cognitive country image refers to consumers' beliefs of a country, incorporating levels of economic development, living standards, industrialization and technological advancement (Wang & al., 2012). Affective country image meanwhile refers to consumer affective evaluations (i.e., to like or dislike, be positive or negative) regarding a country and its people (Wang & al., 2012). Conative country image reflects consumers' willingness to build close economic ties with the target country (Laroche & al., 2005), invest in this country or buy the products made in.

A 5-item scale measuring cognitive country image was operationalized based on the definition used in this study and was adapted from Parameswaran & Pisharodi (1994). A 4-item scale reflecting the measure of affective country image was selected from the study of Wang & al. (2012). To measure the conative component of country image, previous studies

argue the following propositions: I would like to shop, work, do business with, invest in or buy products made in country X (Verlegh, 2001; Brijs & al., 2011).

The following table shows the measurement scales of country image:

**Table1:** The measurement scales of country image

<b>Country image Components</b>	<b>Measurement items</b>
<b>Cognitive country Image</b>	In your perception, country « Tunisia » is/has: Affluent Economically well developed High living standards Advanced technology Good standard of life
<b>Affective country image</b>	Based on your feelings, country « Tunisia » is: Peace loving Friendly towards us Cooperative with us Likable
<b>Conative country Image : Behavioral intentions</b>	In the future, you would like to: Shop in « Tunisia » Work in « Tunisia » Do business with Tunisian Invest in « Tunisia » Buy products made in « Tunisia »

The following section clarifies the applications of the country image research in the context of web marketing and tries to discuss how Internet can potentially give very strong support to the development of the image of the country of origin of the product.

#### **I-4- Web marketing and Country image**

In this age of globalization, countries face a high competitive environment in the area of export, tourism, new business relations and investment opportunities. Countries actively apply international public relation strategies and tactics to build and promote a positive image and to differentiate themselves on the global market (Lee & al., 2012). Countries are eager to identify and promote symbols that communicate their distinctive and unique characteristics in the global community in much the same way that corporations communicate their identity.

Induced by technological developments, websites and web portals of governments have become the primary interfaces for deployment and promotion of visual identity 'countries. Bosch, Jong and Elving's (2005) empirical study argues the relationship between corporate visual identity (logo, name, symbol, color, typography, and slogan) and corporate reputation dimensions (visibility, distinctiveness, authenticity, transparency, and consistency).

Creating an iconic visual identity of a nation requires the usual steps followed to create a corporate visual identity which may be divided into three levels: the strategic, the operational, and the design level. The strategic level focuses on the aims country have with their visual identity. Country, for instance, must decide how to present and distinguish themselves ("nation branding"). In fact, Papp-Váry (2010) defines nation branding as a purposive effort that combines visual communication and marketing techniques to promote a country. Fetscherin (2010) sees nation branding as aiming to "create positive international perceptions and attitudes". The operational level focuses on the development and management of country visual identity systems. Countries are faced with the challenge to translate a desired national identity into a coherent, consistent, and effective visual self-presentation.

Finally, the design level focuses on the functionality and effectiveness of specific elements of a country visual identity. In fact, successful visual identity allows people to recognize easily the country. Therefore people see the correspondence between the elements present in the visual identity design and the whole country's identity. Once countries have created their visual identity, they can use them in websites or web portals to benefit from their positive images. As visual symbols, logos are supposed to be recognized more quickly than words (Edell & Staelin, 1983) and it is essential for a logo to capture the core characteristics of the country it represents (Lee & al., 2012). For the color, it is found, very commonly, the use of national flag's color.

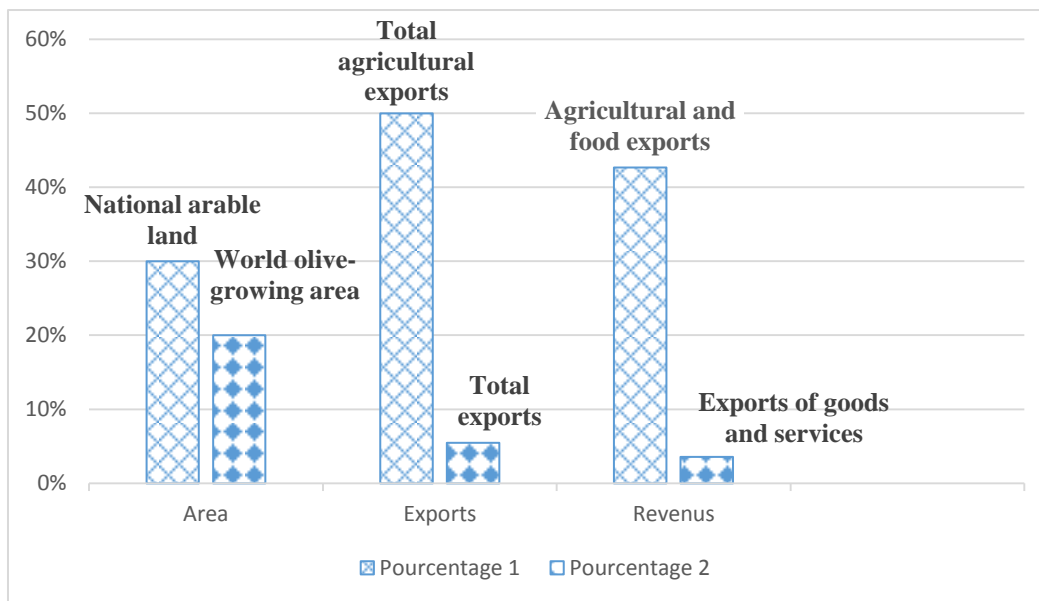


Basing on the previous theoretical development, the following part presents the case study of the promotion of “Tunisia” image in Japan and its effect on the success of the olive oil “produced in Tunisia” in local and international supermarkets in Japan.

## **II- The case study of “Tunisian olive oil image” in Japan**

In Tunisia, the olive sector is a basic building block of the national economy. Indeed, this fundamental component, of both the agricultural and agribusiness sectors, is the main activity of a fairly diverse range of structures of production, mainly private, accounting for 28.5% of total number of agricultural holdings. The olive oil sector in Tunisia plays a crucial role both in economic and social level. The country spends 1.7 million hectares of olive-growing area representing 30% of the arable land in Tunisia. Tunisian olive plantations represent 20% of world olive growing area and, Tunisia ranks second after Spain that covers about 19% of the global area devoted to the cultivation of olive trees (Ministère de l’Agriculture, 2006).

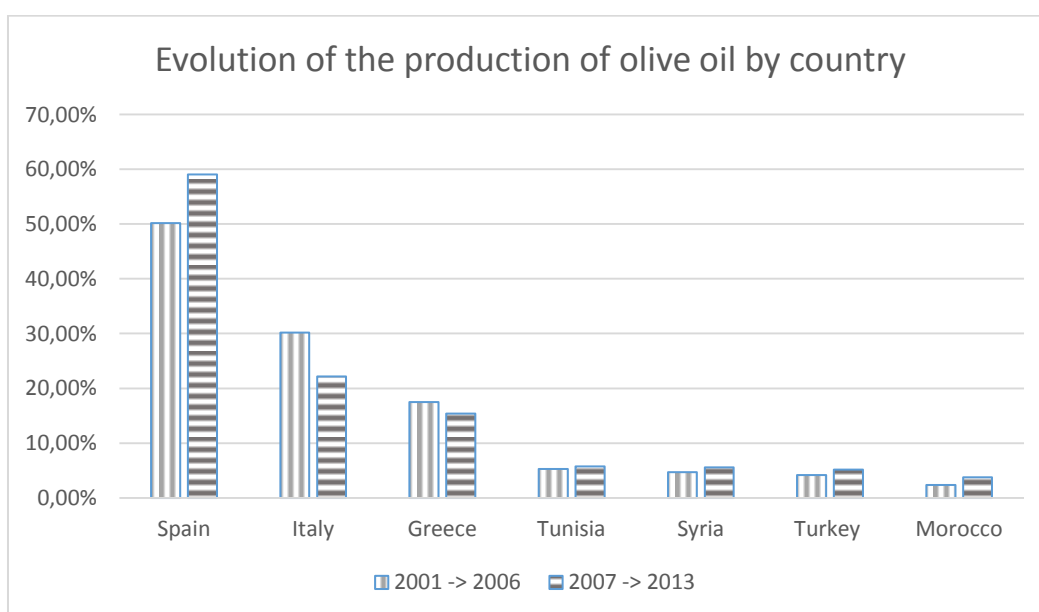
Tunisia has 67 million olive feet and 310,000 farmers. The cultivation of olive trees accounts for nearly 15% of the total value of final agricultural production (Ines Gharbi et al., 2014). Regarding international trade, olive oil represents 50% of total agricultural exports and 5.5% of total exports, making it the fifth largest source of foreign exchange earnings for the country (Boubaker KARRAY et al., 2009). The cultivation of olives and the olive oil industry are the direct or indirect livelihood for more than 1 million people with 269,000 direct jobs and provide 34 million working days per year ie about 20% of employment in the agricultural sector according to research conducted in 2012 (Boubaker KARRAY et al., 2009). Olive cultivation has long been involved in the development of regional balance because it remains the only crop in the least favored regions in Tunisia.



**Figure 1:** Percentages of olive cultivation in area, exports and revenues (2012)

### II-1 Tunisia's position in the world' market of olive oil

Actually, the countries of the Mediterranean basin provide 90% of the world production. Based on statistics from the International Olive Council, we may find that the European Union has the largest share of the world production of olive oil, followed by Tunisia, Syria, Turkey and Morocco. The following figure shows the evolution of the production of olive oil by country for the most important producers in the world..



**Figure 2:** Production of olive oil on country-periods 2001-2006 and 2007-2013

There are mainly two major importing countries that monopolize the global olive oil market which are the United States and Italy. We then find, with smaller tonnages, Spain, Brazil, Australia, Japan, and Canada in which the consumption and demand for olive oil are developing rapidly. The following table summarizes the average tonnage imported measured over two periods, for these countries.

**Table 2:** Main importers of olive oil in the world

	Imported tonnage (2001/2006)	% of world imports	Imported tonnage (2007/2012)	% of world imports
USA	218.9	36.8%	270.2	38.6%
Italy	120.7	75.0%	79.1	70.7%
Spain	37.4	23.2%	24.0	21.4%
Brazil	25.7	4.3%	55.8	8.0%
Japan	31.1	5.2%	38.2	5.5%
Canada	28.3	4.7%	35.5	5.1%
Australia	31.3	5.3%	30.4	4.4%

Source: COI

The four main world producers of olive oil are Tunisia, Italy, Spain and Turkey. These countries were responsible for over 85% of total world exports in the 90s. The following table presents the average tonnage of exports in thousands of tonnes, measured over two periods for these four countries.

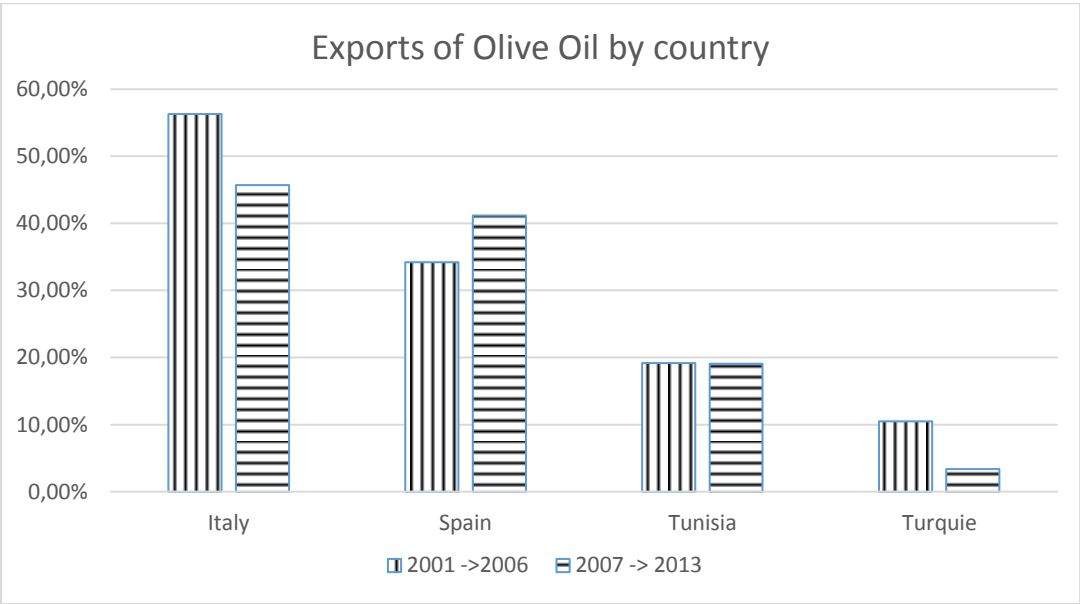
**Table 3:** World's leading exporters of olive oil

	Exported tonnage (2001/2006)	% of world exports	Exported tonnage (2007/2012)	% of world exports
Italy	183.3	56.3%	204.2	45.7%
Spain	111.4	34.2%	184.3	41.2%
Tunisia	109.9	19.2%	130.3	19.1%
Turkey	59.9	10.5%	22.9	3.4%

Source COI

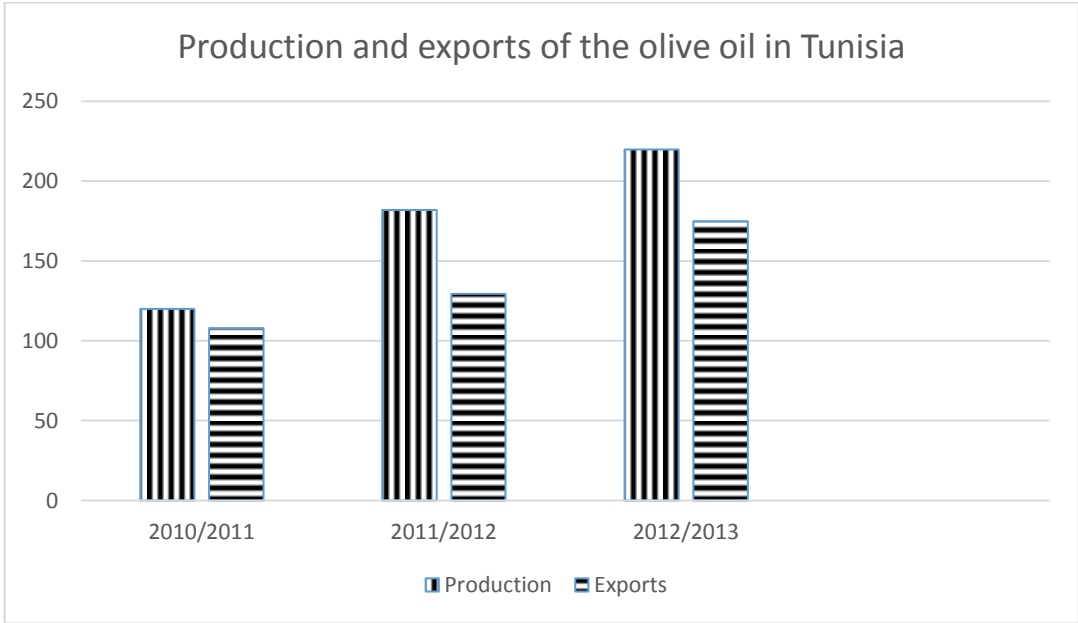
Based on this table, global market for olive oil is dominated by Italy and Spain. Indeed, these two countries of the European Union are both exporters and importers of olive oil in the world. They are the main Tunisian and Turkish olive oils importers. So the European Union, through these two countries, occupies a ruling position in the international

trade in olive oil. The following figure shows the distribution of world exports of Olive Oil by country.



**Figure 3:** Distribution of world exports of Olive Oil by country

The Tunisian olive oil is a popular worldwide oil. This is not only due to its quality and impeccable taste but also to its reasonable price. The following figure illustrates the production and export on thousand tons of olive oil in Tunisia for the past three seasons ([www.internationaloliveoil.org](http://www.internationaloliveoil.org)).



**Figure 4:** Production and exports of Tunisian olive oil

All the advanced statistics above show that the largest and most stable Tunisian olive oil client is the European Union. Indeed, its market share is 87% of total exports from Tunisia. The Tunisian olive oil is exported to 34 markets. The two main importers from the European Union are Italy (with an average of 77%) and Spain (79%). The 13% of total exports that remain are divided between various destinations such as Canada, Australia, Norway, Russia, the United States of America, Malaysia, Japan and Arab countries (the United Arab Emirates and Saudi Arabia, Libya, the Gulf countries and Jordan) (Ministère de l'Agriculture et de la Pêche Maritime, Septembre 2013). It should be noted that exports to the U.S. market are up significantly, in addition to some other destinations. During the past decade, Japan's imports of olive oil have increased by 41% (Minister of agriculture, September 2013). Between October 2012 and September 2013, the trade in olive has increased by 18% in Japan ([www.olive-info.eu](http://www.olive-info.eu)). The study of the Japanese oil's consuming habits and the requirements in terms of variety and quality clarifies the strategic importance of this market for the Tunisian olive oil exports. The following section presents the Japanese market of olive oil, the main habits and requirements and studies some previous experiences of exports of Tunisian olive oil to Japan.

## **II-2- The Japanese market of olive oil**

This section tries to identify the potential market of olive oil in Japan in terms consumption but also in terms of organization, standards, expectations and requirements in the various distribution channels.

### **II-2-1- Vegetable oil consumption in Japan**

The manufacturing industry has been the mainstay of Japan's economy since the 1960s. Currently, the agriculture sector accounts for only 1% of GDP (European Commission, 2012). According to the FAO report in 2010, the main agricultural products are rice, cow's

milk, sugar beets, fresh vegetables, eggs, chicken and potatoes. Japan has 13% of the land suitable for cultivation, (JETRO, 2003) with the decrease in farm population gradually each year. This makes Japan the second largest importer of agricultural products after the European Union. Agricultural imports have grown at an annual rate of -2.01% in 1995-2000 to 4.49% in 2005-2010. About half of these imports come from countries members of Asian members. When classified by amount, corn is the main import, followed by wheat, soybean, rapeseed, and bananas.

According to trade statistics from Japan of 2012, the value of fish and meat products accounts for nearly half the commercial importation of total agricultural product with 46%. Grains and fruits / vegetables come in second with 32%, then the vegetable and animal oils with 3%.

### 2.2.3/ Vegetable oils consumed in Japan

Japan imports up to 67% of the value of vegetable oil and fat and fatty products. On vegetable oil, Palm oil and palm kernel oil are the most imported with Malaysia as a leading exporter oils. This is due to relatively low prices and the need for their use in the food industry as the production of margarine, instant noodles and snacks. Furthermore, it is necessary for various purposes of industrial production, such as soap, detergent, paint, resin, and cosmetics. Coconut oil and olive oil are second due to the increased awareness of Japanese consumers about their health. Olive oil is expected to be increasingly used as a substitute. According to the trend of consumption of cooking oil in Japan, canola (40%) and soybean oil (19%) accounted for 59% of total retail sales in Japan in 2011. Both are primary oilseeds available Japan. Soybeans are used as raw materials in the production of oil for food. Domestic soybean seeds are generally not used for oil production, since their price is higher than imported products. In the same year, Japan's demand for soybeans was about 3,123,000 tons, but only 223,000 tones were supplied.

In December 2012, the demand for rapeseed was 2.367 million tones, but only 0.01% (2,000 tones) has been provided (Nations, 2005). In turn, rice oils, corn oil, sesame oil and safflower are 9%. Other types of oil include olive oil, palm oil, grape seeds, sunflower seeds, flax seeds, fruits, nuts, vegetables or other seeds, in addition to oil products mixed. Currently, the Japanese vegetable oil mill uses only imported materials. The following figure shows the import volumes for each type of vegetable oil.

### **II-2-2- Olive oil use in Japan: Habits and requirements**

Several researches ([www.onh.com.tn](http://www.onh.com.tn)) proved that the Japanese spend up to 24% of the average monthly consumption in the diet, with about 60% of food products imported from foreign countries. Several studies (Chollada et al., 2010; JETRO, 2012; Food Export USA, 2010) report that Japanese consumers are increasingly interested in more organic market, which feature a certification system established in Japan since 1999.

In 1991, the IOC (International Olive Council) began campaigns to promote olive oil in Japan. Before that date, the olive oil was completely unknown in this country and its use was exclusively in cosmetic products for cosmetic purposes ([www.onh.com.tn](http://www.onh.com.tn)). Now, pharmaceutical and cosmetic products are one-tenth of the consumption of olive oil in Japan. The olive oil, rich in antioxidants, occupies a special place. Indeed, experts in the field have found the essential benefits of olive oil for the skin. Olive oil is listed in the Japanese Pharmacopoeia and commonly used for skin protection and moisturizing. It is also used for washing the body, as well as for removing makeup. Hospitals often use as the basis of medicinal ointments.

"The Olive Oil Sommelier Association of Japan" participates in external events for olive oil as seminars and competitions. According to Agriculture and Agri-Food Canada (2012), the total value of retail sales of vegetable oils and seeds increased by 8.9% between

2006 and 2011. Olive oil showed the strongest growth retail value with 104.3% between 2006 and 2011. From 2012 to 2016, sales of olive oil are expected to double in value (63.4%). Canola oil is the number one with its market share.

Previous researches (Ministère de l'Agriculture et de la Pêche Maritime, Septembre 2013) emphasize on the fact that Japanese consumers have a special preference for virgin olive oil. A recent study that is published by the Spanish Foreign Trade Institute (ICEX) shows that Japanese opt for 250 ml bottles of olive oil supplied in small local stores or supermarkets (80% of the quantities sold). The price per bottle retail oscillates between 300 and 1800 yen (\$ 4 to \$ 23). This might remove medium and small producers to larger distributors who have the resources and logistics to meet the requirements of quality, volume and standards of supermarkets. Meanwhile, Internet sales are growing significantly.

Organic products have a significant part of the Japanese market. Indeed, the Japanese spend heavily in this type of products compared with other Asian peoples. "Japanese consumers" value organic products getting the certification "Japan Agriculture Standard" (JAS) and can pay more for products that comply with this certification. This reveals the importance of mandatory labeling and regulation by the Japanese government. The country saw a rapid and significant demand for organic food. Indeed, the people are one of the most demanding global consumers, require impeccable quality and safe products, are very concerned about the environment and therefore prefer organic foods.

The organization "JETRO" (Japan External Trade Organization) conducted a consumer survey which showed that 29% of the adult population in Japan can be classified in the category called LOHAS (Lifestyle of Health and Sustainability) or healthy lifestyle and durable. In fact, in this category, consumers have preferences for healthy foods, organic foods, hygienic products and natural beauty, natural food supplements and other sustainable



products and services. A good percentage of this category of consumers is granted to persons aged 60 years and older.

Japanese consumers buy their food daily; this is because they are constantly in search of high quality products in different outlets. On organic foods, food additives (44%), safety (41%), taste (36%) and price (21.8%) are the determinants for the purchase criteria. In return, freshness (40%), taste (35%), safety (32%) and price (26%) the dominant criteria for the purchase of fresh organic produce.

Used as food, olive oil has been regulated by the "Law on food safety." When imported in pharmaceutical, cosmetic, olive oil must meet the "Pharmaceutical Affairs Law."

### **II-3- Benchmark study of the Italian olive oil brands offered in Japan**

Japan began the olive oil import in 1984. Then, this oil has become widely available in the country during the second half of 1990 when Italian food became popular among Japanese consumers. It was a new market with added value such as the effects on both beauty and health. Japanese consumers enjoy the taste and flavor of this essential oil ([www3.jma.or.jp/foodex](http://www3.jma.or.jp/foodex)). There are three main brands in the Japanese market for olive oil. "BOSCO" of "Nisshin Oilio Group" ([www.nisshin-oillio.com](http://www.nisshin-oillio.com)), "Ajinomoto Olive Oil" of «J-Oil Mills" and "FLIPPO Berio"( [www.businessmag.mu](http://www.businessmag.mu)). These brands alone represent nearly 60% of the market share and reach approximately 70% in the case of adding related products.

For example, the sale of the Italian brand "Bosco" strengthens increasingly in Japan. Performance of sales increased by 50% between April and June 2013 compared to the previous year. The design of the label BOSCO has been renovated to focus on the "Made in Italy" which may have a greater attraction for the quality and the price of oil imported directly from southern Italy. In response to customer demand, they have the labels “come off easily for recycling easier”. Also, BOSCO changed the cap screw caps to one touch capsules to

make it more practical. They even made TV commercials BOSCO and organized campaigns where customers can earn cookware Italian brands. In addition, a new product called "BOSCO Portion Pack" has been launched. This product is not only placed in the section of the oil market, but also placed in the area of bread, frozen food area, because it is linked to frozen pizza, and the area with fresh vegetables, which contribute to its sales by expanding its possibilities. As a result, the value of retail sales of BOSCO in Japan rose 0.7% in 2006 to 1.1% in 2010.

Filippo Berio is the leader on the market of olive oil in the United States, Great Britain and Japan. Sonia Donat, Category Manager of the company Scott describes this brand: "Filippo Berio is imported from Lucca, a city in Tuscany, Italy. Filippo Berio is an extra virgin olive oil, available in 250 ml, 500 ml and 1000 ml. It is also proposed in housing in a liter metal container that protects the light oil; it thus keeps all its taste faculties" ([www.businessmag.mu/](http://www.businessmag.mu/)). The value of retail sales of this brand in Japan increased from 0.4% in 2006 to 0.6% in 2010 ([www.ats-sea.agr.gc.ca](http://www.ats-sea.agr.gc.ca)).

#### **II-4- Opportunities and challenges for “Tunisian olive oil” brands in Japan**

The olive oil is a strategic product for the Tunisian economy. The challenge of the sector is to diversify its markets and to conquer new and far ones such Asia. The site "Tunisia-olive oil" ([www.tunisia-oliveoil.com](http://www.tunisia-oliveoil.com)) and “the Technical Center of Packing and Packaging” stated that several brands of Tunisian olive oils have been presented with a medal at the international competition of olive oil extra virgin, thus proving the undeniable mastery level of quality achieved by the Tunisian companies. The competition was organized by the “Japan Sommelier Association of Olive Oil” (OSAJ) during the Foodex which took place from 6 to 9 March 2012 in Tokyo.

**Table 4:** Tunisian brands on FOODEX Japan 2012

Brand	Firm	Award
Massinissa	Jebabli	gold medal
Ruspina Bio	Medagro	gold medal
Al Jazira	STCA Al Jazira	silver medal
Sofra	Sarra Huiles	silver medal
Donia	Huilnord	silver medal

These distinctions and awards provide an opportunity for the Tunisian olive oil to compete with the Spanish and Italian brands in the Japanese market. Many studies have taken place in Tunisia to identify opportunities and challenges of Tunisian olive oil exports (Boubaker KARRAY et al., 2009). One of the opportunities largely published recommends improving the image of Tunisia as a producer and exporter of olive oil in traditional markets, particularly in the Asian market. The adoption of more standards of quality and marketing related to traceability, labeling and packaging could also be considered to strengthen the chances for Tunisian olive oil in Japan.

Based on the previous theoretical development on country image, and the case study of the opportunities of the Tunisian olive oil in Japanese market, the following forces should be considered to promote the image of Tunisian olive oil in Japan:

- Strategic Location of Tunisia
- Diversity of olive heritage in Tunisia
- Good command of safeguarding the national heritage Olive
- Emergence of the production of new plantations
- The development and promotion of packed olive oil
- Policy encouragement and incentives for producers and all olive oil actors

(industries, exporters)

- A lower cost of labor relative to competing European countries.
- The emergence of new private operators operating in the collection and marketing of olive oil
- Tunisian actors are more and more interested in the production of a good quality of olive oils (organic , extra virgin)
- The importance of the tourism sector to make known Tunisian olive oil

Previous research stresses on the domination of the olive oil Tunisian market in bulk and the lack of vertical and horizontal integration between the various links in the chain. More effort should be engaged to add value with the adoption of web communication that could help to point the forces of the Tunisian olive oil for the Asian Consumers, and promote the country image of “TUNISIA”.

### **III- Web communication and “Tunisian olive oil” image in Japan: Research Projects and recommendations**

In the conference organized by the Tunisian “Olive tree institute” in March 27 and 28th 2012 and supported by the Spanish partners and the main Tunisian actors (government, researchers, institute, olive oil producers, exporters and retailers), the most actors agreed that the Tunisian producers have reached very high quality of the olive oil, but still not able to export their production on the international market with good prices. The marketing efforts are not sufficient. The Tunisian olive oil is largely exported in bulk. The small size of the producer structures makes the marketing effort costs very high comparing to the volume of the sales. Tunisian oil is imported by European countries such Italy and Spain to be packaged and branded. The Tunisian oil is sometimes added to European oil and exported in bottles branded made in Italy. Tunisian olive oil producers and exporters agree that the challenge of the sector is to promote the brand “Made in Tunisia”. The distances between the continents

and the lack of the Tunisian trade experience in Asia make the cost of the physical prospection too high especially for small structures. Web marketing offers an opportunity to reach targeted importers and retailers in the world and should be adopted by Tunisian brands to promote their products and limit the marketing spending. To increase the visibility of their Websites, a set of web marketing (SEO) techniques should be adopted by Tunisian olive oil traders.

Given the fact of the small and medium size of the most structures that are operate in the olive oil sector in Tunisia, “Web TOO Japan” is a research project that supports the main Tunisian actors in the field of olive oil and guides their efforts to improve Tunisian websites in response to the specific needs of the Japanese Markets (Language, content and search engine optimization). In January 2013, a workshop was organized in the higher school of Digital economy. The participation of about thirty master degree students (e-commerce) has aimed to evaluate of the websites of the ministry of commerce, the CEPEX (governmental website -Tunisia exports) and the main private olive oil exporters in Tunisia. These reports have shown the urgency of improving the quality of the content of these web pages and the importance of providing the appropriate information that is requested by the Japanese markets. The workshop recommendations have emphasized on the importance of improving and adapting Tunisian web pages to better targeting the Japanese market (language, design, and information).

WebTOO Japan research project aims to guide strategic decisions based on the results of marketing research related to the following actions:

- Promote the “Made in Tunisia” image in Japanese Markets
- Define the product strategy (quality, brand, design, services) for Japanese market
- Define the appropriate distribution strategy in Japan

- develop long term partnership strategies with local and international retailers in Japan to promote a win-win communication strategy based on the “country of origin image” of Tunisian olive oil
- Support small producers of olive oil in Tunisia to well conceive their web communication strategy (SEO techniques)
- Help Tunisian actors to provide the information requested by local and international retailers in Japan with appropriate website content and design.

The results of this research project will be useful to optimize the content and the traffic of the websites of the main Tunisian actors of olive oil in Tunisia (Ministry of commerce, exporters, producers, Research institutes). Indeed, government Websites and web portals should be the primary interfaces for deployment and promotion of Tunisia visual identity. A current PHD thesis is studying the opportunities to promote the “Made in Tunisia “ products in Japan and the role that web marketing offers to build and promote a positive image and to differentiate themselves on the global market. How to build Tunisia’s visual identity and branding to promote olive oil exports to Japan? The challenge is to translate a desired national identity into a coherent, consistent, and effective visual self-presentation of Tunisia. Once the Tunisia’s visual identity is created, it can be use in Tunisian websites or web portals to benefit from its positive image.

### **Conclusion**

This paper argues the role of the country of origin image as a potential opportunity to add value in the retail chain of olive oil in Japan. In the first part, the concept of country of origin is discussed and the effect and the measures of the concept are clarified. The second part studies the case of Tunisian olive oil consumption in Japan. The Tunisian olive oil have reached very high quality, but still not able to promote the made in Tunisia branding. The

association of Tunisia with the good quality of the olive oil is to be considered as the opportunity to conquer more efficiently the Japanese market. “Web TOO Japan” research project aims to guide strategic decisions based on the results of marketing research in the field of web marketing and nation branding. The project is developing a large network of researchers, private and public institutions that are interested in the results of the research project. The challenge is to build a good image of Tunisian olive oil in Japan and to develop a visual identity for Tunisian olive oil brands.

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