

# CORPORATE BRAND MANAGEMENT AND REPUTATION

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## MASTER CASES

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### **Cold War In The Ice Cream Industry**

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## **Corporate Brand Management and Reputation: Master's Cases**

The "Corporate Brand Management and Reputation: Master's cases" is a case series for applying the case method of teaching and learning in higher education. The cases are relevant to brand strategists in private and public sector organizations, as well as academics and students at universities, business schools, and executive education.

The cases are written by groups of master's students as a course project. The specially developed case format is defined as: *"A management decision case describes a real business situation leading up to a question(s) that requires assessment, analysis, and a decision reached by discussion in class. The alternative approaches and recommendations from the class discussion are followed by a description of the choices made by the case company. This description is then discussed by the class."*

The student groups select the topics of their case providing updated and relevant insights into the corporate brand management. The cases can be used as "written cases" (handed out and read in advance, later to be discussed in class) and/or as "live case" (presented by the teacher following a discussion in class). Each case includes teaching notes, visuals with speaker's notes, learning objectives, board plans, and references.

The mission of the series is *"to develop cases for discussion providing insights into the theory and practice of corporate brand management and reputation, with the intent of bridging the gap between academic teaching and managerial practice."*

The series is a result of co-creation between students and teachers at the elective course Corporate Brand Management (BUSN35 – five-credit course/eight-week half-time studies), part of the master's program International Marketing and Brand Management at Lund School of Economics and Management, Sweden. The cases represent the result of the intellectual work of students under the supervision of the head of course.

Although based on real events and despite references to actual companies, the cases are solely intended to be a basis for class discussion, not as an endorsement, a source of primary data, or an illustration of effective or ineffective management. The cases are free to be used and are to be cited following international conventions.

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# **Cold war in the Ice Cream Industry**

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## **WRITTEN CASE**

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## **Cold War In The Ice Cream Industry**

At first glance, this case involves an ordinary company with ordinary products, but maybe this case is worth to look closer at. As people often say, success is hard, but maintaining it is harder. Sometimes a brand that has enjoyed undisturbed success for decades can be suddenly challenged or threatened even without a single crisis incident.

Market leader Unilever Wall's has been enjoying its position unchallenged for years, until the Chinese contender Aice joined the competition in 2015 followed by Joyday. The two challenger brands sell extremely low-priced products, gaining market share from Unilever at a fast pace. The clock is ticking and Unilever's management needs to make a decision quickly if they want to recover their position.

### **Background**

Indonesia is a maritime country comprised of 17,500 islands (Britannica, 2024) and is inhabited by growing population of 275 million people, divided into 1300 ethnic groups resulting in quite diverse consumer profile. Despite its growing economy, the average purchasing power is considered low.

Rising disposable income, high temperatures and prosperous economic conditions support the growth of the ice cream market in Southeast Asia. The retail sales value of ice cream and frozen desserts in Indonesia is growing, it almost doubled since 2017, amounting to 1 billion USD in 2022. Indonesia is one of the fastest growing ice cream retails markets in Asia next to India and Vietnam.

The retail landscape in Indonesia is comprised of 4 million geographically dispersed individual retailers (Statista, 2020), unlike the European market whose retails are dominated by chains. As ice cream needs to be stored in freezer cabinets, small retailers often need prioritize one brand over the other given the limited space.

## Meet the Competition

The company Unilever is the result of the merger between Lever Brothers and Margarine Unie that happened in 1929. Over the last century the company has managed to grow into one of the biggest fast moving consumer goods company. Not only is Unilever's presence strong in Europe and America, they have also managed to become a well-established umbrella brand in Southeast Asia. Unilever Wall's Indonesia started its operations in 1992, and for more than 23 years it has been enjoying a market leader position in the local ice cream market. However, this condition changed since competitors Aice and Joyday entered the market in 2015 and 2019 subsequently, creating intense competition in the low-cost product segment. In 2015, Wall's was leading the Top Brand Index for kids, with a 70% top-of-mind awareness. By 2019, this fell to 45% while Aice placed among the top three with 20% top-of-mind awareness.

Unilever is present in the Indonesian ice cream market with multiple brands, both under and outside the Wall's umbrella brand. Non-Wall's brands (e.g. Ben & Jerry's) positioned towards the premium end of the market. They are marketed as imported, prestige products so their price is high, and the flavours are the internationally established ones. Since they have to be imported, they are only available in larger, modern retailers. One of Unilever's famous brands is the ice cream and frozen dessert brand Wall's entered the local market in 1992. The Wall's umbrella brand includes multiple international sub-brands, like Feast or Cornetto. They feature international flavours as well as local, Indonesian and Asian flavours. Wall's products cost around IDR 5,000 or ca. SEK 3.7.

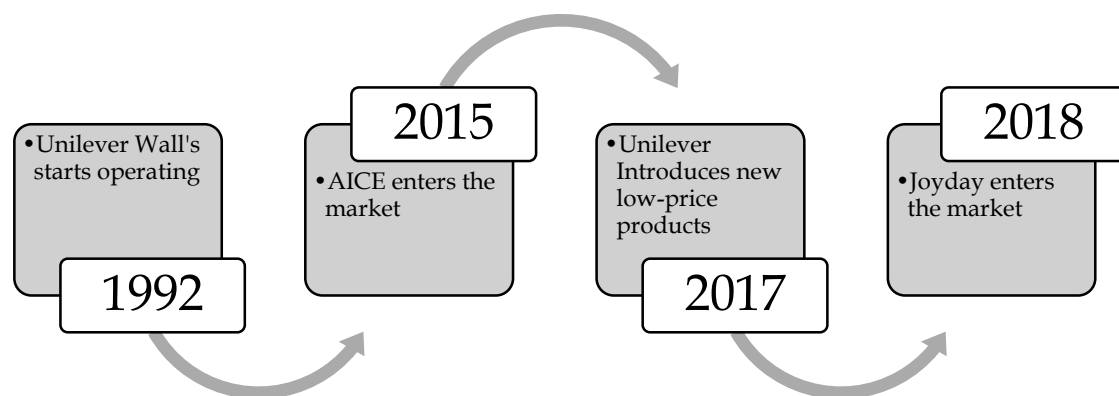


Figure 1: Timeline of the case

Aice is committed to be "the most popular ice cream brand" in Southeast Asia and in the recent years they have gained quite a lot on popularity, due to their low price of ice creams. The company is said to have been able to have such low prices (IDR 2,000 to IDR 5,000 or SEK 1.32-3.3) due to most of the ingredients in the ice cream being local.

Joyday is a brand by Yili Group, a dairy company that was founded in 1993. At first, they were in the production of milk and later they have expanded to other dairy products. Yili entered the Indonesian market with their ice cream brand Joyday in

2018, to achieve a competitive position in the market. Joyday's prices range from IDR 2,500 to IDR 12,000, equal to 1.6 SEK to 8 SEK.

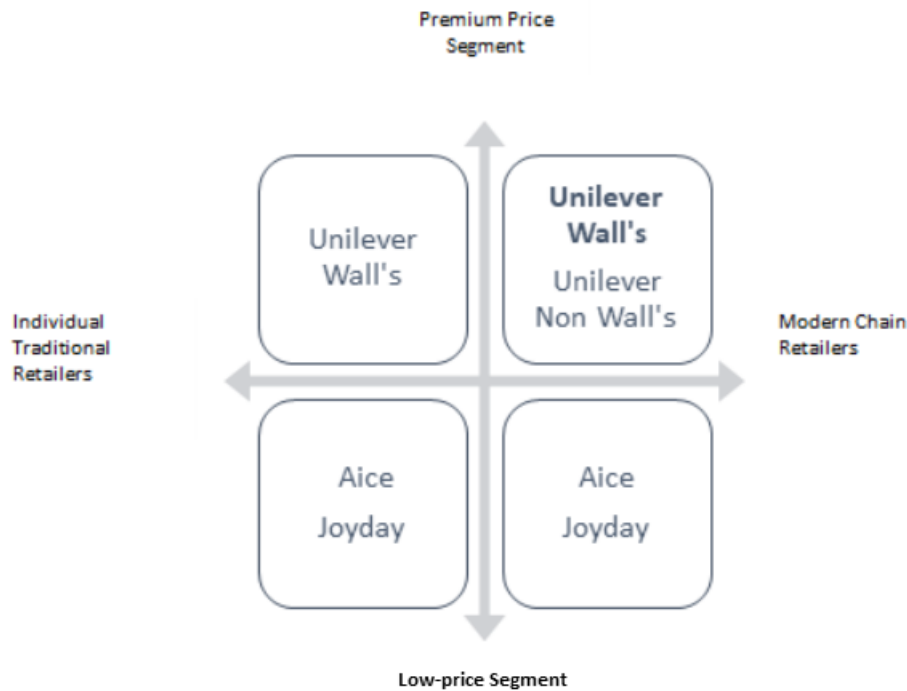
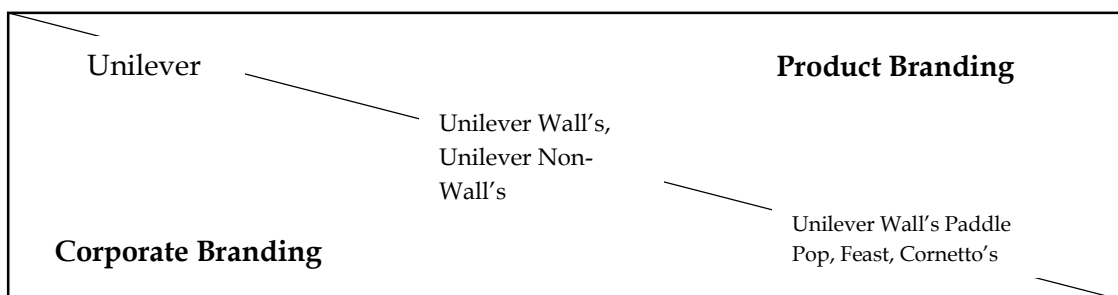


Figure 2: Segmentation of key players in the Indonesian ice cream market

From the start, Aice and Joyday also cooperated directly with retailers, providing them with freezers and clear-cut incentives for selling their products.

Put yourself in the shoes of a **Unilever team member** attending the meeting when it is decided that a new fighter brand will be launched. **Based on the information presented in this case, how would you launch the fighter brand?**

- *How should we structure the new fighter brand within our company? Should we attach it to the corporate brand - Unilever and the umbrella brand Wall's or should we conceal them?*



- *What segments should we target with the fighter brand?*
- *How should we roll out the brand? Should we go all in at once (ceasefire strategy), or launch the fighter step-by-step (guerrilla strategy)?*

# Exhibits

## Exhibit 1 Product Comparisons



Picture 1: Wall's Products



Picture 2: Aice Products



Picture 3: Joyday Products



**Exhibit 2** Differences Between Retailers



*Picture 4: Traditional Retailers – Small, independent shop*



*Picture 5: Modern Retailers - Minimarket*



*Picture 6: Modern Retailers - Supermarket*

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