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## Article

# Country of origin from a management perspective of emerging market companies

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## Empirical Paper

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# Country of origin from a management perspective of emerging market companies

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**Abstract: Objective:** The purpose of this paper is to identify the understanding and strategic importance of the country of origin (COO) and its dimensions from the perspective of the emerging market firms.

**Methods:** A qualitative approach was applied using in-depth interviews with 11 informants from owners of emerging market companies of household appliances brands.

**Key findings:** COO is perceived by managers of emerging markets' firms as a multidimensional construct. In addition to the COO dimensions presented in the literature, informants indicate the following: country of technology/innovation origin, country of technical culture, country of service network localization, country of organizational culture origin (COOCO), and country of brand launching (COBL). Country of manufacturing (COM)/assembly/parts is perceived as a strategic imperative, first of all, from the sourcing strategy perspective, and it is less important from the marketing perspective than the country of brand origin (COBO).

**Originality:** This study contributes to existing literature by developing a deeper understanding of the COO dimensions from a perspective of emerging market companies.

**Keywords:** country of origin (COO), country of brand origin (COBO), emerging markets, international marketing, management perspective

**JEL Classification:** M16, M31, F23

## 1 Introduction

Since the 1960s, researchers dealing with the problem of international marketing have drawn attention to the phenomenon of the country of origin (COO) effect [Schooler, 1965; Nagashima, 1970], which arises on the rational, affective, or normative base and is transferred to the attitudes toward companies, products, or brands originating from a given country [e.g., Josiassen and Assaf, 2010]. The COO was initially understood as the country of manufacturing (COM) [e.g., Nagashima, 1970; Nagashima, 1977]. Many authors have criticized it as a too narrow construct and have called for the conceptualization of the COO as a multidimensional construct [e.g., Chao, 1993; Papadopoulos and Heslop, 1993], considering other dimensions such as country of assembly (COA), country of design (COD), country of parts (COP), country of corporate ownership (COCO) [e.g., Insch and McBride, 2004], and country of brand origin (COBO) [e.g., Takor and Kohli, 1996; Phau and Prendergast, 2000].

The papers on the COO and its dimensions have been predominantly based on the consumer-oriented studies focused on the consumers' evaluations of products/brands with a foreign origin and the

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consumers' perception of domestic vs foreign products/brands [e.g., Steenkamp et al., 2003]. Researchers underline the impact of the perception of the COO on the brand equity, including on the brand awareness [Yasin et al., 2007; Sanyal and Datta, 2011], the brand image [e.g., Zdravkovic, 2013], the brand loyalty [Yasin, et al., 2007], and on the brand strength [Sanyal and Datta, 2011], and the purchase intentions [e.g., Hamin et al., 2014; Garrett et al., 2017]. Scholars postulate the continuation of the studies on this phenomenon and the adoption of a strategic/management perspective [Beverland and Lindgreen, 2002; Brodie and Benson-Rea, 2016; Hynes et al., 2014].

Moreover, in view of the unequivocal results of the previous studies, a few authors state that the issue of the COO effect is no longer relevant in the context of global supply chains [Usunier, 2006] and that consumers do not know the country of product/brand origin [Samiee et al., 2005]. In the recent decades, significant changes have been taking place in the global economy, including location of production in different countries, often in emerging markets, outsourcing of manufacturing final products, components or parts to foreign suppliers, and intensification of international trade. As a result, the production of many goods is often involved more than one country, and it is increasingly difficult to identify COO clearly.

Due to the progressive process of internationalization of companies from emerging markets [e.g., Erdoğan et al., 2010; Witek-Hajduk, 2010; Daszkiewicz and Wach, 2013; Chailan and Ille, 2015], authors stipulate the necessity to explore international marketing strategies applied by the companies from emerging economies [e.g., Teagarden, 2008; Fastoso and Whitelock, 2010]. Scholars underline that companies from the emerging markets often face the challenge of confronting the negative stereotypes [Russell and Russell, 2010] that may adversely affect consumers' perception of their products and brands [Park et al., 1986; Strebing, 2004; Magnusson et al., 2011]. Brands and products from emerging markets are often perceived by foreign consumers as being of lower quality and not meeting international standards [Zhang et al., 2010], which may limit consumer confidence in these brands and tendency to pay higher prices for them [Magnusson et al., 2008]. The response to these challenges may be the application of strategies that take into account the COOs impact on the perception of the products and brands, as well as on the customers purchasing decisions [e.g., Herstein et al., 2014; Chailan and Ille, 2015].

One of the industries in which the above-described processes take place is household appliances. In 2017, the global household appliances market was worth around 501,532 million USD, and is projected to reach 767,451 million USD in 2025 [AMR, 2018]. Enterprises from emerging markets (e.g., China, South Korea, Poland, Turkey, etc.) have a growing share in the home appliances market, including their production [e.g., Euromonitor International, 2016; Applia, 2018]. Apart from well-known brands from developed countries, brands that are owned by emerging market companies, and brands licensed by these entities have a growing share in the global home appliances market. According to Statista [2019], in 2019, Midea Group (China) with sales that amounted to 39,8 billion USD, and Gree Electric Appliances (China, 28,5 billion USD), Qingdao Haier (China, 26,8 billion USD), Whirlpool (USA, 21 billion USD), Electrolux Group (Sweden, 14,3 billion USD), LG (South Korea, 9,7 billion USD), and SEB SA (8 billion USD) were the largest global household appliances manufacturers. In turn, in 2018, the share of household appliances companies in terms of the value of sales on the Polish market amounted to: Samsung – 18.4%, Bosh – 16.1%, Beko (Arçelik) – 13.0%, Amica – 12.0%, Electrolux – 11.7%, Whirlpool – 6.9%, LG – 4.2%, Siemens – 3.2%, and Indesit – 3.0% [Rzeczpospolita, 2018]. According to studies, the COO and its dimensions significantly influence purchase decisions of household appliances [Diamantopoulos et al., 2011; Stadelmann and Schubert, 2018].

In view of the growing importance of enterprises and brands from emerging markets and few publications on the COO taking the perspective of managers of companies from these countries, the authors decided to answer the following research questions: (1) What is the understanding of the COO construct from the perspective of managers of emerging market companies? and (2) What is the perceived strategic importance of COO and its dimensions from a management perspective?

This paper is organized as follows. First, the literature pertinent to the phenomenon of the COO and its dimensions are summarized. Next, the research method is outlined to be followed by a presentation of

the study findings. The paper concludes with a discussion of the outcomes, limitations, and suggestions for further studies.

## 2 COO: background literature and statement of the problem

From the 1960s, numerous publications on international marketing point to the phenomenon of the COO effect [e.g., Schooler, 1965; Nagashima, 1970]. Based on the literature review, Aichner [2014] emphasizes that COO “is the most researched international aspect of consumer behaviour” [Tan and Farley, 1987], “the most widely researched phenomenon in international literature on business, marketing and consumer behaviour” [Peterson and Jolibert, 1995], and is “one of the most important phenomena affecting product ratings” [Kumara and Canhua, 2010].

COO effect means the impact of the perception and assessment of the country on the perception and assessment of products, brands, and businesses derived from it, which may translate into customers’ purchasing behavior [e.g., Tan and Farley, 1987; Peterson and Jolibert, 1995; Verlegh and Steenkamp, 1999] and attitudes toward companies, products, or brands coming from this country [e.g., Verlegh and Steenkamp, 1999; Sikora, 2008, 2007; Fastoso and Whitelock, 2010; Josiassen and Assaf, 2010; Kuźmińska-Haberla, 2013; Rashid et al., 2016].

The forerunner of research on this issue was Schooler [1965], who was the first to confirm the occurrence of this phenomenon and consumer perception of products through the prism of the label “made in” [Schooler and Sunoo, 1969]. According to, for example, Dinnie [2004] and Josiassen and Assaf [2010], in many early publications, the term “country of origin” is understood as one-dimensional – the country in which the product is made [e.g., Nagashima, 1970; Nagashima, 1977]. Many scholars [e.g., Chao, 1993] criticize the original understanding of the COO as only the COM, and postulate its conceptualization as a multidimensional construct that includes a larger number of dimensions constituting it, such as: COA, COD, country of components/COP [e.g., Chao, 1993], and COCO [e.g., Thakor and Kohli, 1996]. Some authors underline that there are more and more so-called “hybrid products” that have affiliations with various countries, for instance with COP, COA [e.g., Ahmed et al., 2012]. Some scholars [e.g., Thakor and Kohli, 1996; Dinnie, 2004] postulate also the necessity of using the concept and researching the COBO or culture of brand origin rather than the country of product origin. Thakor and Lavack [2003] and Thakor and Kohli [1996] use the “brand origin” construct defined as place, region, country “to which the brand is perceived to belong.” In turn, Lim and O’Cass [2001] propose the term “culture of brand origin,” which they operationalize, among others, through the prism of the original culture behind the brand. Other researchers [e.g., Thakor and Kohli, 1996; Usunier, 2011; Brodie & Benson-Rea, 2016] postulate the “country/culture of the origin of the brand” constructs (COBO) that represent an integrated approach to the COO, and are defined as the place, the region, the COO of the brand, with which the brand is associated. Taking into account the above postulates, Jaffe and Nebenzahl [2006, p. 29] propose using the term “country of association” (COAS) defined as “a country with which the consumer associates certain products as their source, regardless of the place where the product is actually produced.” Also Roth and Diamantopoulos [2009] criticize the construct “COO” as too “narrow and misleading” and recommend using constructs referring to the image of the country, such as (1) country image [Roth and Romeo, 1992], (2) product-country image [Papadopoulos and Heslop, 1993], or (3) country-related product image [Nes and Bilkey, 1993].

The COO and its dimensions indicated in the literature are presented in Table 1.

Based on a literature review, Dinnie [2004] states that one of the key areas of research on the COO is the impact of its dimensions on shaping effective corporate strategies, including marketing ones. Firms represent different approaches to using COOs in their marketing strategies [Hynes et al., 2014]. In the case of positive associations attributed to the COO, companies can directly or indirectly communicate the origin of a product/brand to customers, counting on the ethnocentrism of local consumers or on positive stereotypes attributed to the country by foreign consumers [Aichner, 2014]. Companies from countries with a worse image, that is a problem often encountered by emerging markets’ firms, may hide the COO of their products/brands, suppress

**Table 1.** COO and its dimensions

COO and its dimensions	Definition	Sources
Country of origin – COO	The country of origin of the product	Nagashima [1970] and Nijssen and Douglas [2004]
Country of manufacturing – COM	The country where there product is manufactured The country appearing on the label as “made in” or the place of manufacturing	Ulgado and Lee [1993], Chao [1998], Insch and McBride [1998, 2004], Phau and Prendergast [2000], and Hamzaoui and Merunka [2006]
Country of design – COD	The country where the part or product is designed	Chao [1993], Tse and Lee [1993], Insch and McBride [1998], Hamzaoui and Merunka [2006], and Chen and Su [2012]
Country of assembly – COA	The country where the product is assembled	Chao [1993], Tse and Lee [1993], Insch and McBride [1998], Li et al. [2000], and Insch and McBride [2004]
Country of parts/country of key components – COP	The country of origin of some or all parts of the product The country of origin of the key components of the product	Han and Terpstra [1988], Chao [1993], Tse and Lee [1993], Insch and McBride [1998, 2004], and Fan [2008]
Country of corporate ownership – COCO	The country where the head office of the company selling the product or brand is located The home country of the parent company, regardless of the current place of manufacturing of the product	Ozsomer and Cavusgil [1991], Thakor and Kohli [1996], and Thakor and Lavack [2003]
Country/culture of brand origin – COBO/CuOBO Country of brand – COB	The country/culture to which the brand is assigned by the target consumers	Takor and Kohli [1996], Phau and Prendergast [2000], and Lim and O’Cass [2001]
Country of association – COAS	The country that consumers usually associate with a given product/brand, regardless of where the product is actually manufactured	Li et al. [2000] and Jaffe and Nebenzahl [2006]

**Source:** Own elaboration.

the impact of the COO effect or “borrow” a better image of another country, for example, using brand names that suggest the country of descent with the desired image [e.g., Kim, 2006; Sikora, 2007].

The COO effect depends on the specifics of products or the profile of consumers. The impact of COO in the case of low-involvement products is smaller when compared to high involvement products (more important) [e.g., Dinnie, 2004]. The COO is particularly important, for example, in the case of luxury goods by strengthening heritage or historical roots [Chailan, 2010]. According to Pecotich and Ward [2007], experts or well-informed consumers use the COO carefully or as a “limited aggregate construction” only if the information is compatible with the brand or with the level of functional quality, and, in turn, “consumers-novices” use the COO as a “halo effect,” regardless of brand and physical quality of the product.

Some scholars [e.g., Hynes et al., 2014] emphasize that still the majority of studies examining the relationship between the image of a country and product/brand strategies take on the consumer perspective, and there are few publications representing the management/strategic approach. According to Rashid et al. [2016], the authors of one of the few studies on the understanding and meaning of the COO from the management perspective, the COO is considered by informants from large-size fashion retailers and manufacturers in the United Kingdom as the multidimensional construct and the strategic imperative. It is manifested in a variety of ways depending inter alia on brand positioning, long-term strategic plans, expertise, and brand values. According to them, the COO has a significant impact on marketing activities and creating brand image in the fashion industry. Respondents, however, differ in the perceived importance of the individual dimensions of the COO: from the perspective of the retailers, the country of brand design is very important, and for the owners of the manufacturers’ brands – the COO of raw materials and the COM.

### 3 Methods and sample characteristics

The understanding and importance of COO dimensions have not yet been sufficiently examined, in particular, from a strategic, managerial perspective. For this reason, to answer the research questions, a qualitative approach was applied [e.g., Denyer and Tranfield, 2006], using in-depth interviews with managers. Such an approach is justified and recommended when the issues to be examined are poorly recognized [Gummesson, 2000; Cassell et al., 2006], and it enables insight into managers' opinions on the understanding and strategic importance of the COO and its dimensions for the companies from emerging markets, including Polish companies operating on the international market. Purposeful sampling recommended by many authors in qualitative studies [e.g., Saunders et al., 1997] was applied. Interviews were conducted with 11 managers representing 9 companies from the household appliances market, originating from the following emerging markets according to the Morgan Stanley Capital International (MSCI) typology [2018]<sup>1</sup>: Poland, Turkey, South Korea, and Slovenia/China. We selected managers from companies selling household appliances in the foreign markets, also under the brands managed by these firms (trademark owners or licensees) (homogeneity). Companies differ in terms of the degree of their internationalization (number of the foreign markets, share of sales on foreign markets in total sales), the share of sales under their brands, the international sourcing strategy (in-house production vs outsourcing/offshoring), the location of production facilities, where products are manufactured, the country of company/brand origin (heterogeneity) [Styśko-Kunkowska, 2014]. The studied companies were identified based on the information obtained from the APPLIA experts (association of employers of the household appliances industry) and industry reports. Overall, characteristics of the surveyed companies and respondents are presented in Table 2.

To ensure credibility, triangulation of methods and data was used. The primary method of obtaining data was individual, direct, and semi-structured in-depth interviews with 11 high-level managers of the surveyed companies/their branch offices in Poland, responsible for the strategies on the international market, including Central and Eastern Europe. The informants were assured anonymity. Semi-structured questionnaire included open questions recommended and often used as a research instrument in in-depth interviews, including in research on COO [Rashid et al., 2016]. All interviews were recorded. Each interview lasted about 1.5 h. The transcripts of recorded interviews were developed. To extend the scope and verification of data obtained through interviews, data from secondary sources (e.g., industry reports, companies websites, industry magazines) [Yin, 1994] were also obtained. Key issues and topics were identified using thematic content analysis. Categories in the study were determined on the basis of data obtained – “data driven coding” (inductive approach) [Pickard, 2007]. The analysis started with coding, line by line, to identify the topics, and then these themes were compared and contrasted, which made it possible to reduce the data, summarize them, and then identify the themes [e.g., Miles and Huberman, 1994].

## 4 The study findings

### 4.1 Dimensions of the COO and their interpretation

The dimensions of the “COO” construct and the way they are understood by the surveyed managers from companies originating from emerging markets are presented in Table 3.

The informants understand the term COO in a multidimensional way. Managers in the house appliances industry indicate, among others, the dimensions of the COO already presented in literature, such as COM, COA, COP, COD, COCO, and COBO/CuOBO. The COO construct is not identified by informants as only the COM or COA, and most of the informants attribute it with other associations as well. Only few managers indicate the traditional approach to the essence of the “COO” as the COM or COA (“made in”) (informants

<sup>1</sup> According to MSCI [2018], the following countries were classified as emerging markets in 2018: Brazil, Chile, Colombia, Mexico, Peru, Egypt, Greece, Hungary, Poland, Qatar, Russia, South Africa, Turkey, United Arab Emirates, India, Indonesia, China, South Korea, Malaysia, Pakistan, Philippines, Taiwan and Thailand.



Table 2. Overall characteristics of companies and interviewees

Company	Organization type	Sales under manufacturer brands or licensed brands (%)	Offered categories of appliances	Country of corporate ownership/country of key brand origin	Country of manufacturing	Interviewee position
Company A	Only heating equipment manufactured in own factories, other large and small household appliances – outsourced manufacturing	100	Large and small household appliances	Poland/Poland	Poland (ovens), Turkey, China	Director of Marketing
Company B	Majority of especially large household appliances manufactured in own production facilities, small household appliances – mostly outsourced manufacturing	100	Large and small household appliances	South Korea/South Korea	Large household appliances – factories in different countries, close to trade areas, majority of small household appliances – China	Product & Marketing Manager (R1), Category Manager (R2)
Company C	As above	100	Large and small household appliances	Turkey/Turkey	Turkey, Romania, Russia, selected parts and small household appliances – China	Regional Marketing Director (East Europe)
Company D	As above	100	Large and small household appliances	China/Yugoslavia	Large household appliances – mostly Slovenia, Serbia, and Czech Republic; selected parts and small household appliances – China, cooker hoods – Poland	Product Manager SDA
Company E	Most of the large and small household appliances manufactured in the company's own production facilities, a large part under OEM agreements with foreign manufacturers or licensed brands	around 18–20	Large and small household appliances	Turkey/Turkey	Turkey, selected parts and small household appliances – China	Managing Director
Company F	For the most part, the production of household appliances branded with company's brands is outsourced to third party manufacturers	100	Large and small household appliances	Poland/Poland	Mostly in China, Turkey, and Italy, narrowly – Poland	Development Director (R1) Marketing Specialist (R2)
Company G	Production of small household appliances under the corporate brand, outsourced to external producers	100	Small household appliances	Poland/Poland	Mostly China, 3D TV sets – assembled in Poland	Marketing Development Director
Company H	Equipment assembled in the company's own production facilities, mostly under OEM agreements with foreign contract manufacturers	5	Cooker hoods	Poland/Poland	Assembly in Poland, many parts from Europe and China	Chief Economic Officer
Company I	As above	in Poland – 4.5, in total – 8	Cooker hoods	Poland/Poland	Assembly in Poland, selected parts – from Western Europe and China	Sales Director

Source: Own elaboration.

**Table 3.** COO dimensions and their interpretation by the informants

COO dimensions	The understanding of COO dimensions by managers of the surveyed companies
Country of manufacturing – COM	“[...] the place of production, where the product was produced” (Company C) “[...] where it is produced” (Company G) “[...] in which country...manufactured” (Company E) “[...] country of manufacturing: who is the supplier, who is the manufacturer” (Company M)
Country of assembly – COA	“[...] in which country it is assembled”(Company E) “[...] who is the assembler” (Company H) “[...] the country where the product has been assembled, not on which components, but just in which country it has been assembled” (Company I)
Country of parts/country of key components – COP	“[...] because it is produced here, probably on Polish parts or at least partially” (Company B – R1) “[...] on the basis of customs regulations, that if 60% of the components used in a given product come from the territory of the European Union, then in such a case we consider it to be a European product” (Company I)
Country of design – COD	“[...] country of design, shape, solutions” (Company A) “[...] design in...” (Company C) “[...] the country where ‘additional functionality’, possibly colour or design, has been developed, and the product has been adapted for sale” (Company D) “[...] the country where the idea arises, where the design is developed” (Company F – R1)
Country of technology/innovation origin – COTO	“[...] where the technology comes from, where the R&D department is from and where the inventions in this product come from”(Company A)
country of technical culture – COTC	“[...] country of innovation and solution (...), country of transfer of ‘production processes translocation, which means entire production lines’, who ‘set up the factory’, the way it is assembled” (Company A) “[...] technical culture of manufacture of the product” (Company F – R2)
Country of corporate ownership – COCO	“[...] the country where the company is located” (Company D) “[...] the place where I work...” (Company F – R1) “[...] where the company, capital, and owners come from” (Company G)
Country of service network localization – COSNL	“[...] country of localization of service network” (Company D) “[...] the country of origin also in the context of possible available components when it comes to servicing” (Company C)
Country of organizational culture origin – COOCO	“[...] primarily an organizational culture. These are the people who are considered the best organized in a given region. This is also reflected in their economic situation” (Company D) “[...] organizational culture, corporate culture, approach to the market, selling, responding to changes” (Company E)
Culture of brand origin – CuOBO	“[...] reference to culture, cultural associations with the perception of countries; influence of this culture, nationality on the way of management” (Company D) “[...] the country of origin and the cultural associations thereof” (Company B – R1) “[...] the culture of the country of origin, which has been formed for several thousand years” (Company E)
Country of brand origin – COBO	“[...] the country of brand origin – that is, who is the brand owner, which parent company owns the brand – where it comes from, what is the capital” (Company C) “[...] the country where the brand was created and with which it is still associated” (B R1) “[...] country of origin of the brand” (Company D)
Country of brand launching – COBL	“[...] the first country in which the brand was being sold” (Company C)

**Source:** Own elaboration.

from companies: C, B, G, E, and H). Some of the informants representing companies with a small share of sales of their branded products in foreign markets, relate the COO with the COA (informants from companies: E, F, and I).

Only two informants indicate the equation of COO with the COP (Company B, Company I), whereby one of them refers to the customs regulations concerning defining the COO of a product:

“[...] on the basis of customs regulations, if 60% of the components used in a given product comes from the territory of the European Union, in such a case we consider it to be a European product.” (Company I).



COO is also understood by a few respondents as the COD, creation of a product concept or the country where the product idea arises (Company C, Company D, and Company F).

Informants also interpret the COO as the country of residence/location of the company or COO of the company's capital (Company D, Company F, and Company G).

Only two informants (Company C and Company D) indicate country of brand/COBO origin as the elements of COO construct. Moreover, interviewees identify COO with the culture of brand origin understood as follows:

"[...] reference to culture, cultural associations with the perception of countries, influence of this culture, nationality on the way of management." (Company D)

"[...] the country of origin and the cultural associations thereof." (Company B – R1)

"[...] the culture of the country of origin which has been formed for several thousand years [...] Organizational culture, corporate culture, approach to the market, selling, responding to changes." (Company E).

Managers in the household appliances industry also indicate other COO dimensions, such as (1) country of technology/innovation/country of technical culture, (2) country of the service network origin, (3) country of organizational culture origin (COOCO), and (4) country of brand launching (COBL).

Respondents from two companies draw attention to the new dimension of COO, which is the country of technology or innovation/country of technical culture understood as follows:

"[...] country of innovation and solution [...] where the technology comes from, where the R&D department is from and where the inventions in this product come from [...] country where the innovation and solution come from, from which the transfer of production processes, that is entire production lines, took place [...] the country of origin of the way in which it is assembled." (Company A)

"[...] technical culture of manufacturing of the product." (Company F – R2)

Moreover, one of the managers of a company with a long tradition in the household appliances industry identifies COO with the origin of the organizational culture:

"[...] primarily an organizational culture [...] These are the people who are considered the best organized in a given region. This is also reflected in their economic situation." (Company D)

It is also worth pointing that respondents from the household appliances industry emphasize that the COO is also perceived through the prism:

"[...] country of location of service network." (Company D)

"[...] country of origin also in the context of possible available components when it comes to servicing." (Company C)

In addition, one of the informants notes that, as is the case of its company, the COO may also mean: "[...] the country perceived to be the first country in which the brand was sold" (Company C).

## 4.2 Perceived importance of the dimensions of the COO

Respondents assign different strategic importance to the particular COO dimensions. The managers of the surveyed emerging markets' firms highlight the significance of the COO in the sense of the COM/COA or the COP, especially from the point of view of their companies' international sourcing strategy. On the other hand, managers' opinions on the importance of the COO and its dimensions from the perspective of the marketing strategy of the surveyed companies, on both the international and local markets, are more diverse.

As, for instance, the respondent from Company C notes the following:

“[...] the country of origin may, for me as a strategist, define my strategy in terms of diversification of supply risks – this will be very important, whereas, for me as a marketer, from the point of view of such a direct action with the final customer, it does not matter at all.” (Company C).

The informants emphasize also that the production of large household appliances (e.g., refrigerators, washing machines, ovens, cookers, cooker hoods) takes place in factories located in different countries, and often in emerging markets *inter alia* because of the lower manufacturing/assembly costs. Due to the strive for lowering logistics costs, large household appliances factories are usually located in countries with a low geographic distance to sales markets. In Europe, the manufacturing of large household appliances is concentrated in several countries, including Poland, Turkey, Russia, and Romania, which are characterized by relatively low production costs and from which the markets of a given region are supplied, which also helps to reduce logistics costs. Household appliances are also, mainly for cost reasons, manufactured/assembled using components, subassemblies or parts from foreign manufacturers, making it difficult to identify the COO. In turn, small house appliances are for the most part, due to lower costs, produced in China, as well as products branded with well-known international brands. As the informants point out,

“[...] the household appliances industry has evolved strongly over the last several years and today, e.g. Poland is the largest producer in Europe [...] It is known that in our industry, but not only, factories are located in different places for economic, logistic reasons etc. [...] It is very important that, in Poland they produce global brands.” (Company C)

“[...] the Chinese market has opened up and all those who thought economically, because otherwise it was simply not possible, moved production to China. In our country, for instance, wages and labour costs were disproportionately higher than in China, so everyone did so. [...] All the largest corporations in the household appliances industry produce there [...] At present, due to production costs in China, there is a certain tendency for production to return to European countries. [...] from a small household appliances, I think that more than 90 per cent is the production in China.” (Company F – R1)

“[...] in the category of small household appliances, everything that surrounds us is done in 99% in China.” (Company E)

“[...] we, as the Polish household appliances industry, have a very good perception on the European market – 4 or 5 years ago we became the largest manufacturer of household appliances in Europe. [...] We are larger than the Italians who were leaders for decades.” (Company I)

“[...] supply problems from China are due to the fact that, in the case of cooker hoods, the products are relatively cheap in terms of volume. They require packaging. You cannot send many of them and the cost of shipping is relatively high.” (Company H)

Respondents also indicate that owners of well-known household appliances brands, from both developed countries and emerging markets, limit the production in their own plants and outsource the production of equipment sold under their brand names to manufacturers in emerging markets under outsourcing/offshoring contracts:

“[...] how we will look at brands: brand ‘A’ is a good example – it has only ovens factory, the end. Ovens. Everything else is bought in China or Turkey, and in Poland the cooker hoods.” (Company E)

On the other hand, informants representing companies with production facilities both in the home market and in several other countries, also outside Europe, stress the need for factories to maintain specific, uniform quality standards. As a result, the COM/COA is irrelevant for foreign distributors of their products:

“[...] the country of origin does not matter from my point of view when talking about the product quality [...] standards must be maintained – whether this product will be manufactured in Poland, Romania, Turkey, China, anywhere else.” (Company C)

“[...] with the distribution channel or sellers, it is very rare topic that, because it (product) is done here, it is better or worse. As it is already under discussion, then it is that this factory is better than that factory. Because there is a quality control system, because it breaks down less.” (Company E)

Some respondents ignore the importance of the COO in the sense of the COM/COA from the marketing strategy perspective, arguing it, among others, by the attitude of household appliances customers to the COO issue.

According to one of the managers representing a large company selling household appliances under its brands in a number of foreign markets and outsourcing the production of a significant proportion of its branded products to companies located in other emerging markets, consumers buy household appliances considering brand and often do not know where the equipment is manufactured or do not attach importance to that:

“[...] in-house we manufacture heating equipment: freestanding stoves, ovens [...] And the goods that are manufactured for us are branded with our brand, e.g. dishwashers or refrigerators. To be honest, consumers do not know about it at all. They do not know at all whether something is produced outside of Poland. They do not attach any importance to this. For them, brand A is brand A.” (Company A)

Informants justify ignoring by them the importance of the COO in the sense of the COM/COA from a marketing perspective arguing that due to easy access of customers to information, for example, via the Internet, many consumers are aware of the mechanisms regulating international business and they know in which countries household appliances of different brands are manufactured, and it does not matter much to them. However, informants point out that consumers from traditional household appliances production markets may attach somewhat greater importance to the COO:

“[...] they are very much aware today, in the era of full information transparency, where these products were produced [...] They are aware of the fact that there is globalisation and companies have their factories in different places [...] Customers are aware of the fact that world-famous brands produce in China.” (Company C)

“[...] when it comes to the western markets, this used to be much more important, as the production of household appliances was located there [...], it was, for instance, Italy. These factories were relocated to Poland, Hungary, to Romania, Russia, etc. because of the cheaper labour force. (...) There, awareness of this country of origin has much greater significance [...] There, people are aware of where these products are produced.” (Company C)

“[...] Is it somehow especially important there? For some people probably yes. For open-minded people – no. I think that today they understand that production in the world is component-based, that foreign companies produce here in the country.” (Company G)

Two respondents from companies – gestors of large international household appliances brands sold in many foreign markets, stress that the COO is not an argument that could be used by them in their marketing activities:

“[...] it will not be a claim that will help us in something. This is not that category. And in this category of household appliances, this type of thinking does not exist at all and will not help.” (Company A)

“[...] all the biggest companies have factories in Poland [...], but I do not remember the great campaign that we should buy a washing machine, because it is made in Poland.” (Company E)

On the other hand, the respondent representing one of the biggest manufacturers of large household appliances, selling on foreign markets mainly under original equipment manufacturer (OEM) agreements to the orders of the owners of the most recognizable brands in this category and under licensed brands, even ignores the country of production/assembly, stating that,

“[...] it absolutely does not matter. We can produce in Antarctica if they build some objects there.” (Company E)

The respondent representing a Polish manufacturer of a narrow assortment of household appliances producing most of their products under various brands well known on the international market, including these from developed markets, and retailers brands, points out that although foreign distributors do not attach much importance to the COM, they sometimes require suppliers not to disclose the COO, for example, on nameplates placed on products or not to indicate the country name but to indicate the European Union

(EU) as the region of origin. According to the informants, this may be motivated by a desire to hide the sources of supply from the competitors rather than from the customers:

“[...] distributors do not pay much attention to the country of origin. In most cases, when we sell to other markets, to other distributors, they avoid presenting information about the country of origin, manufacturing – this is nowhere to be found. It can probably be found on the nameplates, but it is also determined by the distributor, so in fact this information is nowhere to be found. Probably for various reasons (...) not only because the product comes from Poland, but also not to disclose the source of their goods.” (Company H)

“[...] it probably does not matter so much in the West, because these customers know that if someone does not admit that it is produced, let's say in Poland, and writes that it is produced e.g. in the European Union, it may have to do with actual manufacturing in the European Union, and it may only have to do with the place of assembly.” (Company I)

On the other hand, however, the informant from Company I stresses the favorable attitude of buyers in the EU toward household appliances manufactured on the EU market:

“[...] even at least it is the territory of the European Union, a much more gracious eye will look in those areas, if it is written on the nameplate: ‘manufactured in the European Union.’” (Company I)

Only the informants representing a medium-sized Polish company with a relatively small share yet in the Polish household appliances market and a small share of sales on foreign markets in total sales, emphasize the importance of the COM, indicating the negative impact of the manufacturing in China of products ordered by that company on the image of their brand:

“[...] we have faced a problem over the last few years, when it turned out that we have a patch of cheap Chinese goods. It is very hard to fight against stereotypes. If they have a fine meaning, than yes, but if they are pejorative like ‘cheap Chinese goods’, than it is really weak.” (Company F – R1)

The manager of this company also notes that the problem of the negative impact of the COM on the brand image to a lesser extent concerns global brands, for which rather the COBO is important:

“[...] I think that it is very important to us. I think it does not apply to global brands, Phillips, Tefal, Siemens, which have always been associated with Western countries.” (Company F – R1)

On the other hand, the respondent representing a company that is the owner of a long-established brand, especially in the markets of former socialist countries, emphasizes that,

“[...] with the country of origin it is often linked: robust, functional, durable.” (Company D)

Another informant stresses the positive impact of equipment production in the EU (“made in EU”) on consumers’ perception of these products:

“[...] it is just that if it is produced in the European Union, it works on a plus [...] Russian respondents clearly showed that what is German, what is from the European Union, is a benchmark plus 70, (...) and what is Polish – only thirty-some percent.” (Company A)

Several respondents also note that the importance of the COO, including the COM/COA, as well as the COBO, depends on the category of household appliances and brand positioning, and is greater when household appliances sold under the brand are more technologically advanced, and the brand is positioned as a premium one:

“[...] in my opinion it depends on the product category.” (Company E)

“[...] the more advanced the technology, the definitely weaker this effect of the country of origin from the point of view of Poland – Poland is not perceived as a country which is technologically advanced.” (Company B – R1 & R2)

“[...] however, when it comes to technology, this China is not a very good patch, although it has nothing to do with reality.” (Company F – R1)

“[...] outside the premium brands, the end customer is really not aware where it is made (...) outside the premium brands, where still the ‘made in Switzerland’ or ‘made in Germany’ matters.” (Company E)

According to the respondents from the companies that manufacture household appliances in Poland using components from other countries, the COP is also rather insignificant, as it is difficult for consumers to find out where the parts come from or do not pay attention to it:

“[...] this is not always identifiable, because we buy customised subassemblies that are marked in the way we require. (Consumer) will not find out, will not find, would have to disassemble the product, and that subassemblies come from Europe most often, but can also come from China.” (Company H)

“[...] as far as (consumers) know that a brand or a product is made in Poland, nobody will probably find out whether the controller is from Poland or China, from Turkey, whether the filters are from here or from any other place. This no longer has such an important meaning.” (Company I)

“[...] especially distributors know that these are Asian components, because the final consumer is not so oriented in this respect.” (Company G)

On the other hand, as the manager of a Polish manufacturer of a narrow assortment of household appliances, manufacturing most of its products under various brands well known on the international market, in the case of some products, the COP may be important due to the fact that some components determine product quality:

“[...] marginally, as far as the origin of the parts is concerned, it matters. We are talking here about the key component responsible for the efficiency of our product, namely the electric motor. There are markets where the origin of the motor is additionally emphasized. It is important for the customer that this motor is not a Chinese one. If it is not a Chinese, but an Italian one, then it is already great. Let's not mention a German engine anymore, because the German engine will also be much more expensive than the Italian one.” (Company I)

A few respondents, both representing large international companies offering products under well-known brands and the company that is an owner of a brand with little presence on the foreign markets, stress that particularly their foreign distributors, and also the consumers perceive the COO rather from the perspective of the COO of the service network and its geographic distance to the sales market because it is important due to the shorter time and lower costs of service. As informants indicate,

“[...] The sale of large household appliances requires a service network. It is also a legal requirement that products over 20 kg must be serviced at the place of use. And it is very important for the customer whether, if he has a problem, he will have someone to turn to and that it will be solved.” (Company D)

“[...] (Distributors) ask about the country of origin also in the context of possible available components when it comes to service.” (Company C)

“[...] one could directly buy something from China. But we solve the service problem. We already have a defined quality. Looking for something that would be still 5 or 10% cheaper in China, with all the infrastructure, where there are no services, there is no way to report at all [...] let the Chinese (product) costs half of the price, you would not buy it from someone about whom you do not know if it exists, if it has services, if the product will not disintegrate [...] the distributor communicates this to the shops. They know that if they buy from China, they have to write to China, that there is no service for it.” (Company G)

Managers differ in their assessment of the importance of the COO, but especially informants representing large international companies that own or licensees internationally recognizable brands note that the COBO is much more important strategic imperative than COM:

“[...] the country of brand origin, i.e. what these brands are associated with, is much more important than the production itself.” (Company C)

“[...] When you enter the shop, you have for instance a dishwasher brand ‘X’, you do not know what is behind, where it is produced – on the nameplate. [...] So is it really the country of manufacturing that matters? No, absolutely no. Because it is the ‘X’ brand that promotes its products.” (Company E)

Informants emphasize that the brand origin from the emerging market used to be a greater barrier, and now it has less impact:

“[...] it used to be a problem and we had to work hard, change the brand image [...]. Nowadays it is of little importance.” (Company C)

On the other hand, according to the informant from a company owning several brands with international reach, the importance of COBO varies depending on the product category and, in his opinion, in the household appliances industry is rather slight:

“[...] Usually this was important if it was correlated with a particular industry. When I worked in e-commerce, where we were selling para-pharmaceuticals or dietary supplements to distributors and companies, for instance in Western European countries, it was important that the brand was connected with Poland. Because Poland is perceived as something of good quality when it comes to food, para-pharmaceuticals and pharmaceuticals in general. So here I would really find this kind of comparison and justification. [...] I do not know if the brand origin is important for the house appliances industry.” (Company A)

A similar opinion is expressed by the manager of a Polish company ordering the majority of products branded with its brand in China:

“[...] if it was Japanese electronics, for sure each of us, me too, would prefer to buy Japanese electronics rather than Polish ones. [...] In the case of household appliances, it is hard to say. If it was German electronics or household appliances, knowing the Polish tendency to pay for German (...) everything seems to be better. Of course less and less, but yes.” (Company G)

In turn, according to one of the informants, the COBO is especially important in the case of so-called small household appliances, which are mostly manufactured in China:

“[...] In the category of small household appliances – it absolutely matters who orders it, who owns the brand.” (Company E)

The informant from a company managing a brand with a long-term tradition, especially in former socialist countries, emphasizes that the quality of the products is perceived through the prism of the COBO:

“[...] it is important because the product quality is identified with the country of brand origin.” (Company D)

Moreover, one of the informants representing a company owning a strong international brand notes that the COBO is losing its importance due to the fact that young consumers in particular have been brought up in a world of global brands originating from different countries:

“[...] it seems to me that for young people the attachment to the country of brand origin is becoming less and less important because these are global brands. These are people who were born after the 1990s, who live in a cosmopolitan world, treat themselves more as members of Europe, and are not only attached to Poland [...] So they have lived and interacted with these brands from the very beginning.” (Company C)

## 5 Conclusions, limitations, and further research

The major findings of this study demonstrate that the COO is perceived by managers of companies from emerging markets operating on the household products' market as a multidimensional construct. The study shows that generally the understanding of COO is consistent within the existing literature.



Informants interpret the COO by indicating the dimensions of this construct already presented in the literature, such as the COM [e.g., Chao, 1998], COA [e.g., Tse and Lee, 1993], COP [e.g., Han and Terpstra, 1988], COD [e.g., Insch and McBride, 1998], COCO [e.g., Thakor and Kohli, 1996], and CuOBO/COBO [e.g., Lim and O'Cass, 2001]. Moreover, the informants indicate also new ways of understanding of the COO construct, such as (1) country of technology/innovation origin (COTO) (the country from which technology/innovations come, from which production processes were transferred), country of technical culture origin (COTCO) (the country from which the technical culture of production originates), (2) country of service network localization (COSNL) (the country where the repairs are made, including the warranty service, and where the spare parts are available), (3) COOCO (the country from which the organizational culture of a given company originates), and (4) COBL (the country perceived as the first one in which the brand was sold).

Managers of the household appliances companies originating from emerging markets differ in their perception of the importance of the COO dimensions. COO dimensions, such as the COM, COA, and COP, are recognized as the strategic imperatives primarily from the point of view of the international sourcing strategy, by informants from both companies that manufacture household appliances in their own factories and companies, whose business model assumes commissioning the production of a significant part of the offered products. The COM, COA, and COP are perceived strategically important for emerging markets' firms because the location of production or supply from emerging markets gives benefits such as lower costs, while in the case of large household appliances, the low geographic distance from the country of production/assembly to the export market is also important due to the lowering of logistics costs. The informants stress also the importance of the COO in the meaning of the location of the service network due to the fact that it has an impact on the costs and quality of service, which is important for both distributors (including retailers) and consumers.

However, managers of companies from emerging markets differ in the assessment of the importance of the COM and COA as the strategic imperatives from a marketing perspective. They rather ignore the strategic importance of the COM/COA from this perspective, justifying that owners of well-known household appliances brands from highly developed countries also outsource the production of their branded equipment to manufacturers from emerging markets. The household appliances offered under different brands, both from developed and emerging countries, are often manufactured in the same factories localized *inter alia* in emerging markets, and individual factories usually have to meet certain quality standards. This is in line with the conclusions of Usunier [2006] that the issue of the COO effect is no longer relevant in the context of global supply chains. On the one hand, respondents argue that consumers are aware of the global supply chains, also in the household appliances' market and they have easy access to such information, but on the other hand, consumers are often not aware of the country of product origin [Samiee et al., 2005]. However, the informants from the companies ordering the majority of production in China stress the negative impact of the COM of the products ordered by the company on the image of their brand, as already underlined by, *inter alia*, Zhang et al. [2010]. The COP is generally of rather little strategic importance for emerging markets' firms from a marketing perspective, as it is difficult for consumers to know where these components come from, although in the case of some household appliances, the COO of a key sub-assembly may have an impact on consumers' perception of equipment quality [e.g., Al-Aali et al., 2015].

The results of the study indicate that managers of emerging markets' firms differ in terms of the perceived strategic importance of the COBO from a marketing perspective. In particular, the managers of the large companies offering products branded with their own brand names or under licensed brands emphasize that the COBO is more important than the COM, COA, and COP due to a better perception of brands from highly developed markets by consumers compared to brands from emerging economies [e.g., Magnusson et al., 2008; Zhang et al., 2010]. However, managers notice the changes in the attitudes of young consumers toward brands originating from emerging markets. The results of the study confirm that the COBO is strategically more important in the case of exclusive household appliances and technologically advanced products, including large household appliances, and of lesser significance – in the case of products/brands positioned as economic [e.g., Dinnie, 2004].

In conclusion, the perceived importance of the COO and its dimensions varies from a management perspective of companies from emerging markets. COM, COA, and COP are perceived as important strategic imperatives especially from a perspective of international sourcing strategy and less significant from a marketing strategy perspective especially for the owners of internationally recognized brands. There is no doubt that COBO is perceived as more important strategic imperative than COM, COA, and COP in the household appliances industry context. This qualitative approach contributes to the existing literature by developing a deeper understanding of the phenomena of the COO dimensions in a managerial/strategic context and from the perspective of companies from emerging markets, and complements a literature based predominantly on the quantitative consumer-oriented approach [e.g., Hamzaoui and Merunka, 2006; Josiassen and Assaf, 2010]. The paper also contributes toward literature on the internationalization of firms from emerging markets and international marketing in terms of how these firms associate the COM, COA, COP, and COBO as a strategic imperatives.

With regard to the recommendations for future research, it would be worthwhile to identify management approaches to the COO dimensions of managers of companies from both emerging and developed countries and representing various industries. Taking into account the results of this research, it would be also worthwhile to study the impact of the international brand strategy used in response to the COO effect on the brand and company performance on the foreign markets.

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