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# FAMILY BUSINESSES AND GLOBALISATION

by

**Gaëtan MONCHOVET**
Former Chairman and Managing Director, Joker

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Report by Thomas Paris
Translation by Rachel Marlin

## Overview

In 2001, three leading brands in the French drinks industry were bought by foreign groups. Joker, the indisputable market leader of fruit juices in France, was one of them. Was this the natural result of globalisation ? Even in an atmosphere of globalisation, Joker, a family business, was one of the companies which was able to get out while the going was good, by emphasising the advantages of being a family-run business, and its success based on quality, innovation, and advertising. However, two consecutive years of disappointing results left no option other than to sell. Having lived through these events on the inside, Gaëtan Monchovet analyses the advantages of family-run businesses in the business world and their limitations in the face of globalisation. This leads him to question the place they can occupy in today's economy.

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# TALK : Gaëtan MONCHOVET

In 2001, Kronenbourg was bought by the English brewery Scottish and Newcastle, Orangina was taken over by Cadbury-Schweppes, and Eckes-Granini took control of Joker. Three brands, symbolic of the French food industry, changed hands and their national identity, thereby emphasising the real meaning of globalisation.

Seen from the outside, the sale of a company to a foreign group is banal and easily predictable, and this might appear to have been the case for Joker. However, over the last few years, the company had fared better than its competitors. It had become a well-established and durable leader in the French fruit juice market despite the unfavourable economic climate. However, in spite of a favourable turnover, the situation had become critical by the end of the 1990s and at the beginning of the new millennium. There are numerous reasons for this, but globalisation certainly played an important part.

Using Joker as a case study, I will describe this event as seen from the inside, to demonstrate the relationship between family businesses and globalisation. I do not intend to develop a theory but to give you a subjective account from someone who has been actively involved in the defence of a family-run business for more than thirty years. I will divide my talk into three sections by answering the following questions : firstly, why and how can a family-run business be more competitive than as a subsidiary of a large group ? ; secondly, how has globalisation changed the balance of power for these businesses ? ; and thirdly, is it desirable and even possible for these businesses to continue to exist ?

## The advantages of family-run businesses

To highlight the advantages of family-run businesses and Joker in particular, one has firstly to describe the unfavourable climate in which the business develops, marked by an increasing concentration in its environment with regards to its clients, competitors, suppliers, and by a reversal of the balance of power between producers and retailers.

*Suppliers faced with volume retailing*

Joker supplies a product of mass consumption, fruit juice. Its main market is commercial retail. In the last thirty years, this sector has experienced great changes characterised by a very rapid concentration of resources which has enabled it to have considerable purchasing power, which has been increased by the existence of central purchasing agencies. Today, product assortments are chosen on a national level and sales outlets and regions are no longer autonomous. Currently in retailing, there are seven major players and this should be further reduced to five if certain business deals become a reality.

A reversal of the balance of power took place between the producers and the retailers. At the beginning of the 1990s, the market capitalisation of Carrefour reached the same level as Danone's. At that time, this was seen as an important event. Today, Carrefour's market capitalisation is 25 billion Euros, whereas Danone stands at 15 billion Euros. As far as Joker was concerned, the imbalance was much more obvious : a single central purchasing agency could represent more than 20 % of our activity, whereas at best we only represented 5 out of 1 000 of its purchases in France. As a result, the extent of this purchasing power allowed retailers to decrease their number of suppliers (thereby enabling them to save money in administrative costs) and also perpetuated the threat of the complete or partial withdrawal of the references of each company.

At the same time, the establishment of a certain number of norms and restrictions, imposed by the retailers and by other authorities, meant that companies had to invest large sums in order to be able to exchange computerised information to harmonise administrative matters between suppliers and retailers. These included logistics management using the bar code system, or in terms of traceability. Today, in the fruit juice industry, a company is capable of retracing samples of raw materials used in the manufacture of a single bottle sold in a shop. However, this has been very costly.

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*Family businesses fight back*

All of these factors resulted in an amalgamation of producers, and the disappearance of a certain number of medium-sized companies. Despite this, family businesses were retained. Some even manage to grow faster than subsidiaries of large groups. Several studies, mentioned in a book by Octave Gélinier, have shown that family businesses are extremely efficient on a long term basis[1]. To explain this success, one must take a look at their characteristics.

The main characteristic of family-run businesses is the mix of ownership and management. This can produce either very good or very bad results : an incompetent manager can bring a company down. It is not always easy to find managers within the family shareholders who are both competent and acceptable to the rest of the family. " *There are two types of owners*, said Yvon Gattaz, *those who have a great son, and those who have no son.* "

On the other hand, a competent manager is more efficient in a family-run business than in any other type of business, because family-run businesses have competitive advantages. Firstly, there is a financial advantage : the mix between ownership and management allows these companies to save money on agency costs, ie. the costs linked to structures whose job is to keep an eye on the actions of the salaried management in the interests of the shareholders. However, the most important advantages are in terms of quality.

Management stability means that policy is clearer, more consistent and more oriented towards the long-term. In large companies and subsidiaries of groups, changes in shareholders or managers are often translated by a change in strategy. Furthermore, family-run businesses do not have to deal with the discrepancy between demands for financial return from head office and what is really going on on the shop floor. I have often noticed that my competitors have two phases in the year : the first phase is when the managers follow instructions from head office by tightening the screws and becoming very firm in their negotiations with the important retailers, and a second phase when they notice that the turnover is inadequate and they open the floodgates. Moreover, management stability encourages stability in supervision and staff, and this can be translated into a greater degree of professionalism. Finally, management visibility and its closeness to the staff are positive factors for motivating personnel, as opposed to the distance and the anonymity of decision-makers in large groups. Through their company ethos, the consistency of their policies and the stability of their teams, family-run businesses generate an internal climate based on trust. This allows them to solve two problems inherent to company behaviour namely having overall, coherent action while at the same time leaving enough space for delegation and personal initiative ; and making departments which are highly specialised and have very technical skills work together with the rest of the company.

## Joker : a consistent strategy

In the case of Joker, the stability of the teams and a consistent strategy were key factors for success. Our strategy focussed on three principles, namely quality, innovation and advertising. The company always had high standards of quality. This did not go unnoticed by the consumer and was reflected by an excellent brand image. The company always did its utmost to market new products to improve customer expectation. It always followed a policy of brand strategy, in particular by the choice of the shape of a small conical bottle with moulded rings around the neck which has long been associated with Joker in the minds of consumers. Finally, the brand was publicised by regular advertising campaigns which allowed it to reach high recognition and reputation levels (global reputation is the percentage of consumers who recognise the brand when they are given the name), of 80 % as opposed to about 54 % for its closest rival. From the

[1] Cf. Octave Gélinier, *La réussite des entreprises familiales*, *un atout pour l'avenir*, Maxima Laurent du Mesnil.

1950s onwards, the company turned to publicity especially by using advertising clips which were shown on television for a very long time.

The organisation which the company put in place played an important part in the implementation of this strategy. In the 1950s, the food industry supplied products which were relatively banal. It was therefore very important to have efficient production centres and good sales staff. Very early on, Joker created a centre for controlling quality and R&D (research and development) which was separate from the industrial division. I think that this was an essential factor which helped to perpetuate this culture for innovation and quality. Similarly, at the beginning of the 1970s, the creation of a marketing division separate from the commercial department allowed the company to adapt its policy to changes in the market. This can be borne out by the examples of the decision by Joker to sell a product '100 % pure juice' and the creation of the product *Pulpéa*.

*The choice of '100 % pure juice'*

There are two ways to produce fruit juice : either one presses the fruit and then puts the juice obtained into bottles after pasteurisation, or one concentrates the juice obtained, transports it, and then dilutes it in the bottling centre. The advantage of the second technique is that the concentrated juice can be stocked and stored more easily, and is cheaper to transport (a reduction of about 80 %). At the end of the 1970s, a European directive standardised the various laws concerning fruit juice throughout the European Community. From this moment on, it was possible to produce fruit juice made from concentrate. Most French producers rushed to take advantage of this. At that time, we had just come out of a period where price controls had completely destroyed our profit margins : juice production from concentrate represented a way in which to build them up again, at least partially. Like Tropicana in the United States, Joker is the only French producer to have continued with a 'pure juice' format. This special feature allowed the brand, which was very moderately distributed in volume retailing, to expand into other sectors, and finally to improve significantly its market share.

The organisation of the company played a major role in this decision. In the end, the decision was taken by the management, but was confirmed by consumer studies. However, at the outset, the industrial management division was not in favour since pure juice production demanded a technology which was much more complex than production from concentrate. The sales team was also reticent because, since the cost price of pure juice was between 50 % and 100 % more expensive, the retail sector had to accept a sales price which was much higher than Joker's competitors.

*Support for Pulpéa*

The product *Pulpéa* was created in 1994. In the analysis of our products and those of our rivals, we realised that there was a discrepancy between the '100 % pure juice' which was synonymous with quality and was sold in glass bottles, and the juice derived from concentrate which was sold in cartons. On the one hand, the 100% pure juice bottle was heavy and expensive ; on the other hand, the carton was more economical and lighter but not very easy to hold, and the juice based on concentrate was of a lower quality. We created *Pulpéa*, a juice based on concentrate, but with a pulp content equivalent to that of pressed fruit. The taste is therefore very similar to pressed fruit juice. We chose to package it in a plastic bottle. Plastic has the advantage of being very functional : the bottle is very light, is practical for pouring and the top can be put back on. However, there is a very negative brand image. Historically speaking, there were previous examples of plastic bottles in the drinks world. Before *Pulpéa*, the producers of mineral water had decided to use plastic bottles. They carried out consumer studies the results of which showed that the use of plastic was viewed negatively. They went ahead regardless, and the consumption of mineral water in France took off ! This example helped us to decide to choose the plastic bottle in spite of its brand image. Pulpéa's launch boosted our sales and our market share.

This demonstrates that in the company mutual understanding and the desire for this product

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were factors behind its success. We had serious technical problems with the bottle, because fruit juice is very acidic and attacked the plastic ! Eventually, it took nearly two years to design the product. If we had not all been totally convinced of the potential for the project, it would have been stopped then and there.

### And then there was globalisation …

Globalisation changed the balance of power for family-run businesses. For Joker, it was just one of the causes of our problems in the 1990s.

*Joker's mistakes*

In the first place, our good financial results certainly made us too optimistic and this resulted in two mistakes. We had thought that it was possible to reconcile very ambitious expansion with keeping the capital almost totally within the family. Therefore, we financed our external growth and our production investments with debt, which became very onerous when the market turned in 1998. We had not paid sufficient attention to attacks from our rivals : some had imitated our innovations, such as the plastic bottle, and sometimes they succeeded. Others had opened up new markets, in particular the sale of fresh fruit juice. We were late in following this development, because the additional cost of putting products into the refrigerated sector did not seem to us to be justified. The product is technically the same, but the delivery was very costly at the early stages of the process. We made the mistake of underestimating the impact of the fresh sector on the consumer.

*Three penalising events*

As well as our own mistakes, we were penalised by three events. I have already mentioned the stagnation of the market. Growth went from 10 % per year to zero, and even became negative without any early-warning signs. In retrospect, this can be explained. Our growth reflected the increase of our market, in other words, the addition of new fruit juice consumers. In 1998, we had peaked with more than 90 % of consumers. Then, in order to keep increasing, the amount bought by the consumer ought to have increased as well. We could have anticipated this but we did not.

We also had to face up to the huge price increases of raw materials. A major part of our supplies in concentrate comes from Brazil which represents 85 % of the World market. Four large companies monopolise the market. Either they come to an agreement and make the prices rocket, or they start a ferocious price war. Consequently, prices were capable of fluctuating between $800 and $2,000 per tonne of concentrate, and this range was even further increased by fluctuations in exchange rates. Unfortunately these raw materials represented 50 % of our sales prices, and therefore a price increase had a major impact on us.

The third factor which penalised us was the Galland law. This law, passed in 1997, aimed to defend small businesses and producers in the face of volume retailing. In reality, it made the financial situation even more favourable for the retail sector ! Traditional negotiations with retailers consisted of three parts : the price to be charged, an end-of-year rebate, and the provision of services provided by the retailer which are billed to the supplier. Before the Galland law, the consumer sale price comprised the prices on the invoice, minus the end-of-year rebates, minus a significant part of the provision of services invoiced by the retailers. These provisions were deducted from the purchasing price and reduced the final sales price. This meant that it was almost impossible to determine the threshold at which sales were making a loss. The Galland law forced producers to have a very precise scale of general sales conditions, and strictly forbade the knock-on effects of these provisions of services in the consumer sales price, since this practice was considered to result in loss-making sales and was subject to heavy penalties, including imprisonment. No sooner had it been passed, than it was strictly applied and the result was a significant increase in profit margin for volume retailers. For us, this created an important dilemma : either we did not increase our prices and we would then lose a part of our margin to

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the volume retailers, or we increased our prices and our sales reached a ceiling. In addition, the price increases were reflected by an increase in the difference in price with regards to retailers' own brands, which did not take into account the provision of services.

*Globalisation changes the balance of power*

I have emphasised several factors which gave an advantage to family-run businesses over subsidiaries of groups. Globalisation has completely changed the balance of power regarding competition. In order to make it easier to understand, I will refer to 'before' and 'after' globalisation, even though this process is vague and difficult to date. Before globalisation, the important groups penetrated into limited geographical zones, principally by external growth, by amalgamating companies in different sectors of activity, without there being necessarily any synergy between them. Faced with this, family-run businesses had the advantage of having a defined trade, and being approximately the same size as that of the subsidiaries of the important groups.

After globalisation, the balance of power changed, since the groups became more professional and concentrated on a very limited range of trades where they intended to be number one or number two world-wide. For family-run businesses, it has been much more catastrophic. For example, over the past ten years, Danone has got rid of its activities in champagne, pasta, seasonings, beer, and so on in order to focus exclusively on its dairy products, mineral water and biscuits, with the aim of becoming the world leader. Similarly, Pernod-Ricard has completely abandoned its non-alcoholic activity in order to concentrate on alcohol.

Joker was by far the leader in the French market. The company employed two hundred-and-fifty people and a little more than three hundred in the group. Our turnover was 150 million Euros, with a cash flow of between 5 % and 6 %. Export accounted for 8 % of sales. However, the company remained very small on a European scale where we represented only 1.5 % of the market. The leaders were Emig, which has since been taken over by an English company, and Eckes-Granini which bought Les Vergers d'Alsace in 1998 and then Joker in 2001. Because of these regroupings, the situation totally changed and the position of family-run businesses has become much more difficult.

*The advantage of being big*

The battle for size gave rise to competitive advantages : it generated much greater purchasing power, and produced economies of scale which enabled a reduction in structural costs, such as R&D expenses, overheads, and so on. I estimated that the impact in Joker's operating results of the merger with Eckes-Granini was 4 % of the turnover. This frantic search for synergy has dominated the economic and financial affairs of the last few years. The large groups have devoted themselves to a gigantic game of Monopoly because they think that in order to create value it is necessary first to create huge commercial entities.

Being big also has qualitative advantages. The example of regulations and production norms shows this well. Currently, in France, we are governed by European regulations, which themselves are influenced by the Codex, part of the FAO (Food and Agriculture Organisation) which implements rules for countries which come under the WTO (World Trade Organisation). Changes in regulations can have a serious influence on the daily life of businesses. One therefore has to have a presence in these authorities, even if it takes a great deal of one's time and if one has to travel to the four corners of the World. At Joker, we experienced the new European regulations which had been discussed in the 1990s, and which forecast the abolition of the distinction between pure fruit juice and juice concentrate. This has a serious impact on us, considering the position of pure juice in France. Therefore, we did some lobbying, and, against all expectations – since the French position was very isolated –, we won our case. However, this necessitated a large investment, which the big groups are able to pay off a great deal more easily than medium-sized companies like Joker.

### What is the future of the family-run model ?

Life for family-run businesses is getting more difficult. Is it desirable to keep them going ? I think so, since they bring greater choice to the consumer. Even if the groups become more efficient, creativity is still overall a product of medium-sized companies. For example, the concept for the People Carrier, Renault's Espace, did not come from one of the large car manufacturers but from Matra Automobile. Family-run businesses are also elements of stability with regards to large groups which move their pawns on the World chessboard without really thinking about the local effects of their decisions.

Having said this, is it possible to keep family-run businesses going ? In any case, it depends on several conditions. The first is that the State instigates policies which are more favourable to family-run businesses, such as the Galland Law, or a tax system which helps encourage family shareholders to sell. The second is that family-run businesses accept profound changes, for example, whether they become international or whether they accept that part of the capital goes outside the family and is 'diluted'.

As far as the large groups are concerned, they have everything to gain by drawing inspiration from management models of family-run businesses by giving more power to their subsidiaries. It should be possible to reconcile maintaining common synergies while at the same time liberating energy ?.

## DISCUSSION

### The decision to sell

**Question :** *How did you come to the conclusion that you had to sell ?*

**Gaëtan Monchovet :** A family-run business has no safety net. We lost money two years running and the banks, who had rolled out the red carpet for us for years, would not give us overdrafts any more. From that moment, we decided to sell the whole group, rather than disperse the capital outside the family.

**Q. :** *You seem to take the blame in retrospect for having been too arrogant, in that you let your success go to your head, without noticing that the goalposts had been moved…*

**G. M. :** We thought it was possible to absorb a very high debt, which in itself presupposed that the economic situation would continue as it was, but this turned out not to be the case. Secondly, the sales team has two traditional sins : the sin of inferiority and the sin of superiority. The fact that we had made very good progress allowed them to rest on their laurels, whereas ordinarily they would be alert to the signs of danger.

### Family-run and globalised ?

**Q. :** *The efficiency of family-run companies can be observed in certain companies such as Bouygues, Lagardère, Dassault, Hermès, L'Oréal, Michelin, Publicis, Danone, and Galeries Lafayette. Even if their capital is sometimes diluted (ie. the family is no longer the majority shareholder), they all still bear a strong mark of the family. Having said that, I am not certain that the dichotomy between family-run companies and globalisation is relevant : Bouygues, L'Oréal, Lagardère, Michelin and Danone after all exist internationally ! I think that one should distinguish between those which are run by a member of the family – and handed down to his or her son, and those that are run by the whole family. If there is a not a charismatic person in the family who establishes his authority by brushing aside other family members from the business, then it cannot work. Companies function provided that there is a real boss.*

**G. M. :** Companies can remain family-run and face globalisation, but only as long as they change their structure, while retaining, if not the control, then at least the family spirit. L'Oréal and Danone are no longer family-run because there is no majority of voting rights for members of the family. Michelin and Bouygues have remained family-run companies, and have also managed to maintain family control.

**Q. :** *There have not been any Peugeot family members at the head of Peugeot for thirty years. Nevertheless, the family continues to exert control and has even increased its participation over the past ten years.*

**Q. :** *There are other disastrous examples due to problems within the family. The recent case of Fiat is a good example of this. In Joker, who was the family owner ?*

**G. M. :** The business was founded by Henri Malvoisin in 1929, and two of his children inherited it. Since that time, all the capital has always stayed concentrated in a single branch of the family. In each generation, the shareholders who ran the business bought shares from the rest of the family. My father-in-law, the only son, was left with half of the shares, the other half was held by one of his uncles. When his uncle stopped working for the company, my father-in-law bought all of his shares. Finally, the capital was divided between my father-in-law's five children. Three members of the family were employees of the company.

### Company culture

**Q. :** *You have underlined the importance of the company culture regarding the efficiency of family-run businesses. How exactly was this culture perceived at Joker ?*

**G. M. :** It was characterised essentially by innovation and the use of advertising.

**Q:** *We do not always know how to explain culture in our rational society. But primitive societies, the prime examples of cultural societies, rely on totem poles and flags, the rites of passage and of communion, voodoo dolls as well as items of reverence and so on. Were there any such cultural events or signs at Joker ?*

**G. M. :** It is true that the Joker logo was very easily recognisable. Recently, when I dropped in to the factory, one of the forklift truck operators was proud to show me that he was still wearing the jacket with the Joker logo on, rather than the new one from Eckes-Granini. We had management meetings every Monday morning which were as much a ritual as a place where decisions were taken. The sales department had its annual convention and everyone was very attached to this. The company also had its share of symbolic characters, in particular a Burgundian who had introduced Joker to Paris and about whom everyone still talked.

### Pressure from volume retailing

**Q. :** *Wasn't it the classic problem of the balance of power with respect to volume retailing, rather than problems associated with globalisation, which forced you to sell ? When you represent 0.5 % of Carrefour or Auchan's suppliers, and you are not one of the few brands which they cannot do without – such as Coca-Cola or Evian – how can one resist the steamroller effect ?*

**G. M. :** Globalisation was an additional factor. Of course, we were subject to huge pressure from volume retailers, but we were not the worst positioned in our market. When our rivals became ten or fifteen times bigger than we were, our negotiations with these retailers, and also with our suppliers, for example TetraPak, ceased. That's where the main consequence of globalisation was really felt.

**Q. :** *Did you not envisage finding other alternative channels to be less dependent on the big retailers ?*

**G. M. :** First of all, non-household consumption – in other words, hotels and restaurants – which was Joker's initial market area, had lost a great deal of its profit margins because drink retailing was monopolised by the brewers, and we only had two clients left. In fact, from 1995 onwards, we split our sales team (which had operated in various sectors) into two. We devoted one team to food retailing and the other team to the non-household areas in an attempt to have more than just our traditional clients, and to gain ground in bakeries or service stations which develop new modes of consumption. But this did not represent very much business compared to retailing.

## After the sale

**Q. :** *What became of the company after the sale ?*

**G. M. :** Eckes-Granini, which bought Joker, is a family-run business which is not listed on the Stock Exchange. Its management is completely disconnected from its shareholders : management is made up of salaried directors.

Eckes-Granini had already bought Les Vergers d'Alsace and carried out a regrouping of the head offices of both companies. Our headquarters at Mâcon were not retained. The members of the family were not kept on in the company. I stayed on a further year, merely as mediator, without having any decision-making power.

In terms of financial results, the group opted for the greatest economies of scale, and this was reflected in the short term by the erosion of turnover. Now, two years later, I think that they have got into their stride.

Today, the fruit juice market is being contested by two giants, Tropicana, a subsidiary of Pepsi, and Minute Maid, a subsidiary of Coca-Cola. These two big groups expect that in the future the market for the consumption of their leading cola-based drinks will become saturated, and they are preparing for the aftermath by diversifying into water on the one hand, and fruit juice on the other. In Europe, the Europeans Eckes-Granini and Gerber are still the leaders, but they will have to face up to the competition from the two big American companies.

Presentation of the speaker :

Gaëtan Monchovet studied at the HEC (*Hautes Etudes Commerciales*) business school. He initially worked as manager in the marketing and sales departments of Joker before becoming Managing Director until 2001. He was also President of the French Association for Fruit Juice Producers (*Union Nationale des Producteurs de Jus de Fruits*) from 1997 to 2000 and Deputy Chairman of the International Fruit Juice Union from 1996 to 2002.

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