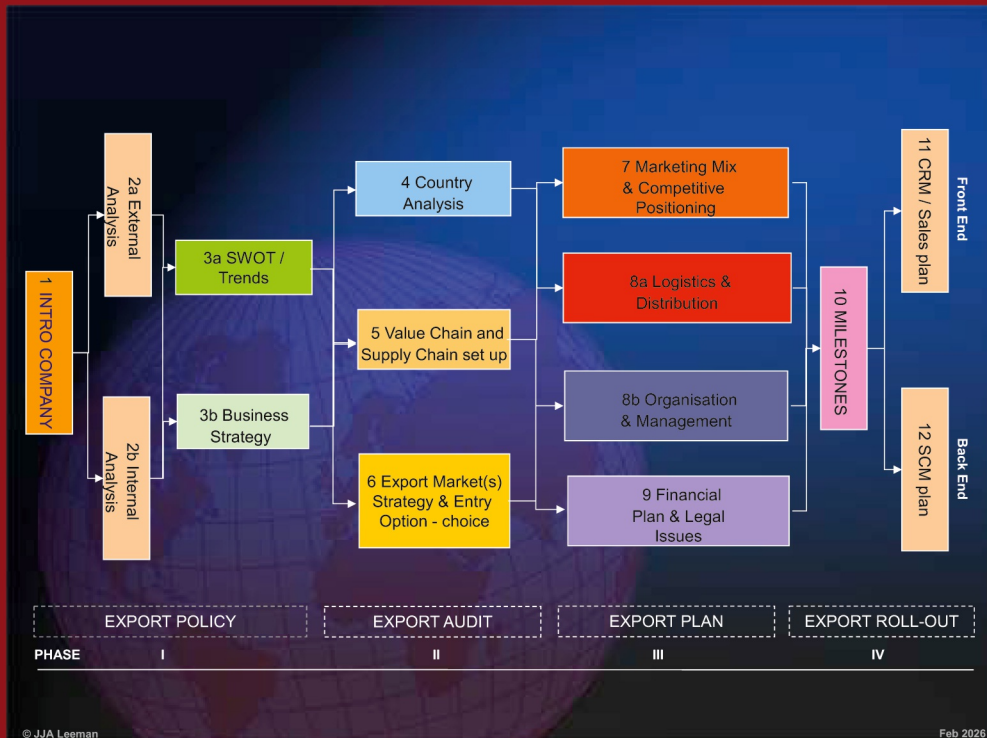


EXPORT PLANNING

a 10 – step approach

3RD EDITION



How to develop an international marketing plan

Joris Leeman MBA

Institute II BPM
Business Process Management

Export Planning

Export Planning

A 10-step approach

3RD EDITION

Joris Leeman

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For
Mai-Lan

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Foreword

When companies decide to start export development and internationalisation of their firm, it is essential to follow a systematic strategy formulation and decision-making process. Many companies start exporting products and services, without even considering putting together a programme for export development(!), which often results in an exporting landscape with non-priority countries, together with a portfolio of unwanted agents and distributors. “Historically grown” is what managers of such companies say afterwards. Therefore, a decision to start selling products and services to international markets needs to be well-founded and focused on those countries and markets with the best potential for successful entry and growth.

There are many ways of executing such a systematic strategy formulation and decision-making process. This book shows you one approach: a methodology to systematically and continuously develop export markets: from international strategy definition to export implementation. The whole process is referred to as export planning. It consists of four phases: export policy, export audit, export plan and export roll-out. Export Planning describes these 4 phases and shows how to put together an international marketing plan in 10 steps.

This book intends to be pragmatic. It provides a method, a framework, and toolkit for *Export Planning, a 10-step approach*. The book should inspire you to explore the 10 steps and implement them within your company.

“The secret of successful international trade can be found in applying the 4 Cs¹ of marketing and matching them with the 5 Ps for export: product, performance, partners, people and perseverance / PDCA.”

¹ 4 Cs are focusing on customer, cost, convenience and communication.

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This book reflects the contributions, labour, and insights of many persons. I would like to thank my students, colleagues and clients for sharing their insights and understanding of export management theory and practice with me. It is impossible to single out everyone who has contributed to this edition, but I would especially like to thank the reviewers Frank Hauwert (former director Federation of the Dutch Export – FENEDEX –), Bert Vermeulen (Rotterdam Business School) and Mick Timmermans (Arnhem Business School) for providing feedback and the pleasant discussions which we have had during the last few years.

From the many contributions of my students I would like to thank the following persons especially: Frank den Haan, Robert Hüfler, Pavel Kabanov, and Daphne Zijlstra. Besides the students, I thank my colleagues Frans de Swart, Darlene Gosch (INHolland Business School, The Hague), Leo Lodder (INHolland Business School Rotterdam), Ronald Salters (Fontys Business School), Roel Kalkwijk, Jan Jansen (Arnhem Business School) for the good discussions and their insights. In addition, I thank all companies, institutes, and persons for allowing me to use their copyright material.

Finally, I wish to thank my partner, Mai-Lan, who is a constant source of inspiration, support and happiness.

Düsseldorf,
February 11th, 2010
Joris Leeman

Herewith I would like to thank the following persons who have contributed to the updates in this new 2nd edition of Export Planning. First of all, the reviewers Johan Weggemans and Wouter van Olphen (both HZ University of Applied Sciences, The Netherlands). Next to that, all the companies who authorised me to use their copyright material. Finally, I thank my partner, Mai-Lan, for her patience and support during completion of all updates.

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Düsseldorf,
May 18th, 2026
Joris Leeman

About the author

Joris J.A. Leeman is the founder of the Institute for Business Process Management. He has extensive experience in organising the back-end part of the business: organisation, supply chain management, IT systems, e-Commerce and e-Business, logistics, and sourcing operations. He is a consultant, lecturer and author. Prior to this he worked as a manager, director and executive for globally operating companies like MEXX, Johnson & Johnson, and Esprit.

Besides his consultancy activities, he is a part-time lecturer at Arnhem Business School (HAN University) and The Hague University in The Netherlands. In addition, he acts as a freelance senior trainer in procurement and supply chain management for KPMG Germany. The trainings are for global leading companies and take place in Europe, Asia and USA.

He received his BA degree in Logistics & Economics from HAN University in The Netherlands. He received his MA degree in International Business and MBA degree from Webster University, St. Louis, USA. APICS: CPIM, CSCP, CLTD and SCOR-P certified.

Institute for Business Process Management

The goals of the Institute for Business Process Management are (1) to advise companies in improving their end-to-end business processes and organisation; (2) to train students, postgraduate students, employees, managers, and directors in the field of procurement, supply chain management, logistics, e-business, retailing, export management, and services management; (3) to publish books which enhance the knowledge of managing end-to-end business processes.

Other publications

- 2020 Joris Leeman, *End-to-End Supply Chain Management; Fast, flexible Supply Chains in Manufacturing and Retailing*, (English), Books on Demand, September 2020. ISBN 9783751984577.
- 2020 Joris Leeman, *Supply Chain Management, Fast, Flexible Supply Chains in Manufacturing and Retailing*, 2nd edition (English), Books on Demand, August 2020. ISBN 9783751984508.
- 2017 Joris Leeman, *Supply Chain Management, Integrale ketenbesturing*, 2e editie (Dutch), Pearson Education, May 2017.
- 2010 Joris Leeman, *Supply Chain Management, Fast, Flexible Supply Chains in Manufacturing and Retailing*, (English), Books on Demand, April 2010. ISBN 978 38391 37918.
- 2007 Joris Leeman, *Supply Chain Management, Integrale ketenbesturing*, (Dutch), Pearson Education, May 2007. ISBN 978 90430 12867.
- 2005 Joris Leeman, *End-to-End Supply Chain Management; Fast, flexible Supply Chains in Manufacturing and Retailing*, (English), Books on Demand, October 2005. ISBN 38334 28651.
- 2004 *Supply Chain Steuerung und Services, Logistik Dienstleister managen globale Netzwerke – Best Practices*. Springer Verlag, 2004. Baumgarten, H., Darkow, I.L., Zadek, H. Book contribution “Partnerschaft und Vertrauen für Supply Chains in der Bekleidungs-Industrie“, Fiege, Hugo und Leeman, Joris J.A., (German), Springer Verlag, 2004. ISBN 35404 43088.

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Preface

Aims and objectives

The purpose of this book is to show you how to plan and execute internationalisation within a firm. *Export Planning* explains a *method*, following a 10-step approach, to create an international marketing plan.

The objectives of this *method* are to enable you to:

- *Systematically select and plan* the entry into new international markets;
- Enhance the chances of success through its *integrated review* of analysis and strategy with marketing, logistics, organisation, and finance;
- Put together a sound *line of reasoning* from strategy to implementation.

This book provides you with an export planning model: a *framework* for the development of an international marketing plan; 4 phases presenting how to set up an *export policy*, *export audit*, *export plan* and *export roll-out*; 10 steps and 5 Ps for export, which can be used as a *toolkit*; a *checklist* to assess whether you are ready for export.

Target audience

Export Planning is written for bachelor and graduate students at business schools and universities. It describes export and international marketing at a strategic, tactical and operational level, and combines theoretic models with relevant practical experience.

A book that is useful not only for ‘thinkers’, but also for ‘practitioners’. Besides for students, this book is useful for anyone who wants to know more about export planning, international marketing and international market development. If you are an executive, manager, supervisor, entrepreneur, project leader, team leader, export employee, or export consultant, this book will offer you many useful insights, experiences from practice, and conclusions to be drawn from those insights and experiences.

Structure of the book

This book is made up of four parts: *export policy*, *export audit*, *export plan* and *export roll-out*. The first three parts consist of three chapters. The last part consists of one chapter. The ten chapters together form the 10 steps necessary to complete and execute the *export planning* process.

Export policy: refers to the international strategy development of the company. Does the company want to start export development yes/no? What is the company’s vision and

mission? What are the drivers for going abroad? After analysing internally, the strategic position and direction of the company, and externally the trends (DESTEP analysis), opportunities and threats (SWOT analysis) several strategic options become visible. An international strategy definition will be made based upon the different strategic alternatives (SWOT matrix, GE portfolio analysis). Then it passes the first review gate question: do we want to internationalise our company yes/no? The *export policy* phase is described in Chapters 1 to 3.

Export audit: refers to the market entry analysis of the company. Which potential countries and markets can be selected for which product lines and/or services? What are local trends, how is the DESTEP analysis looking for these potential markets? How do we select and prioritise potential countries for market entry? What options do we have for market entry? What criteria are needed for evaluation of these market entry options? What is the impact of each market entry option on the value chain set-up (price setup, cost structure, and supply chain flow)? Then it passes the second review gate question: do we want to focus on the selected countries or markets yes/no? The *export audit* phase is described in Chapters 4 to 6.

Export plan: refers to the international marketing plan. Who is our customer or consumer? How many customer profiles and target groups do we have? On which ones do we mainly want to focus? Do we have to adapt our products to these target groups? Are there any cultural differences? What brand positioning are we seeking? Via what distribution channels do we want to sell and distribute our products? What marketing mix (with the 4 marketing Cs or Ps) do we have to put together? What organisation structure and set-up do we need to manage our overall business abroad? How are we going to organise the physical distribution, logistics, and supply chain flow? What information technology and systems do we need to set up to manage our customer, sales, marketing, logistics, and financial processes? What investments are needed based on the chosen market entry strategy? What will be the sales plan? What will be the project profit & loss statement and cash flow statement? What returns on our investments will we have? When the export plan is finished, the third review gate question will have to be answered: is this export plan a sound proposal go/no go? The *export plan* phase is described in Chapters 7 to 9.

Export roll-out: refers to the implementation of the export plan. What are the 10 most important milestones we have to realise in order to be able to make our first delivery in the new market? What are critical success factors, and do we have a fallback plan (best / worst case)? What implementation activities do we have to undertake in sales, customer relationship management (CRM), and marketing? What is the necessary sales and account plan? What is our CRM plan? What implementation activities do we have to undertake in logistics and supply chain management? What is the necessary logistics

policy plan? After putting together the implementation plan, and executing and delivering the first sales order, the fourth and final review gate question appears: has our first sales and shipping order been successful yes/no?

The *export roll-out* phase is described in Chapter 10.

The four phases of the export planning process are continuously updated and improved. After the first foreign market has been successfully entered, the next market on the priority list needs to be ‘taken’. And so on.

Didactical aspects

In order to support you while reading *Export Planning* each chapter contains:

- Learning topics at the beginning of each chapter;
- Tables, figures, and other illustrations to easily pick up the most important aspects from the text;
- An opening case as a general introduction to the theme, and a closing case with questions relevant to the learning topics;
- Summary questions to review the learning topics from the chapter;
- A summary of the chapter reviewing the learning topics;
- A list with terms and its explanations.

New to the 2nd Edition

The 2nd edition of *Export Planning*, a 10-step approach, include following updates:

A new chapter (Chapter 11) on the implementation of the export transaction has been added based on requests to explain in detail about the export delivery with respect to finance, logistics, and customs.

A new case has been added (Apple-case) in chapter 5. It replaces the Nokia case.

Several cases received minor updates (Mattel, Carrefour, Parle Products).

Paragraph 8.2 on incoterms and payment terms in the first edition have been moved to chapter 11.

Several tables and figures have been updated throughout the book.

A remark is added upon the use of weighting factors in the country filter analysis.

In paragraph 9.3 an explanation is added on the interest rate composition for the investment analysis.

Additional new material (example export reports, CAPEX/OPEX excel spreadsheets, cases, kick-off presentations for export projects, powerpoint slides and case exams) will be available for instructors on the supplements’ website. The instructor’s manual has been updated.

Note: The new chapter 11 includes more theory. It has been put on purpose at the end of the 10 steps, as the focus in this chapter is on the actual transaction implementation.

However, chapter 11 could also be included at an earlier stage of the lessons. For example, in cooperation with Chapter 5.

New to the 3rd edition

The 3rd edition of *Export Planning, a 10-step approach*, includes the following updates:

- All cases have either been completely renewed or updated. The author has tried to keep its original industry and company format. More attention is given to sustainability, AI and robotics.
- Global ranking and positioning of nations as projections for 2050 and 2075 have been updated in Chapter 1. Incoterms 2020 and import declaration requirements (EORI, SAD, ENS) have been added to Chapter 11. Hofstede has been updated in Ch. 8.

Supplements

On the website (<https://export-planning.jimdosite.com>) you can find powerpoint slides (pdf files) which can be downloaded. This site also offers the export checklist and the export spider plot graph. Additional information can be found on the website of the Institute for Business Process Management (www.institute-bpm.com).

Export Planning Part I

Chapter 1	Introduction export planning
Chapter 2	Internal and external analysis
Chapter 3	Business strategy and internationalisation

PART ONE OF EXPORT PLANNING examines the role of export management within the company and reviews the development of an export policy to enable systematic and successful internationalisation.

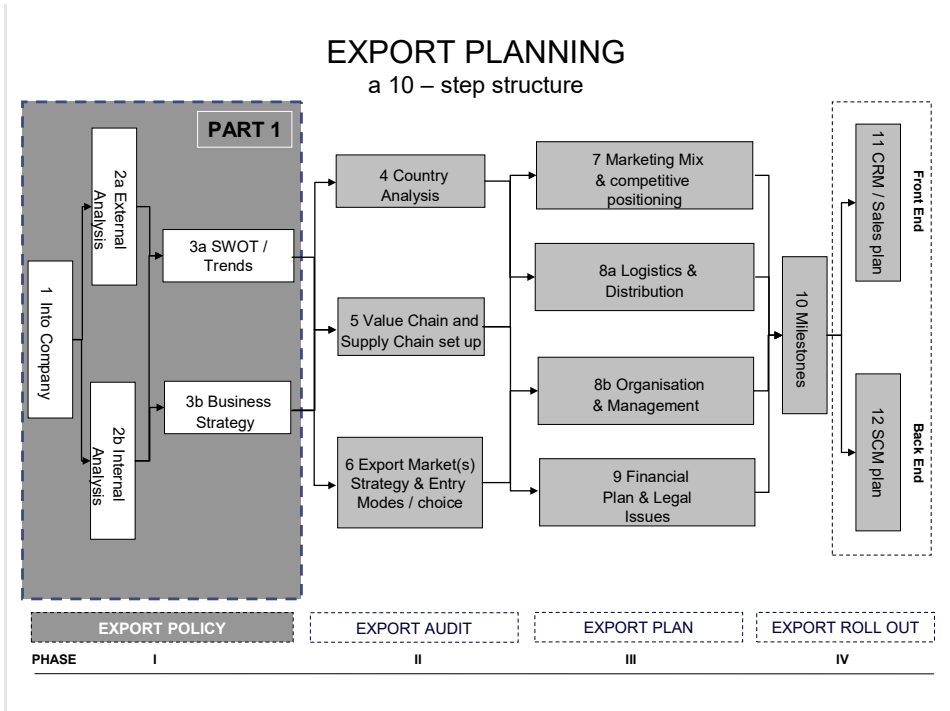
Chapter 1 introduces the role of export management within a firm. It shows the overall export planning process with its four phases: export policy, export audit, export plan and export roll-out. Finally, it presents the 10-step export plan structure, which is used as a guideline throughout this book.

Chapter 2 starts to explain how to create the basics for the export policy plan. It explains the elements of how to put together an internal analysis: mission, objectives, business definition, organisation, and capabilities. It then looks at the external analysis: DESTEP and trend analysis and finalises with the SWOT analysis and TOWS matrix.

Chapter 3 completes the development of the export policy plan. Firstly, the general business strategy is defined together with its (international) growth directions. Secondly, the positioning of the different product lines, brands, and regions is determined together with the individual value propositions to gain a competitive edge. The chapter finalises with the 1st review gate: “Does our company want to go for internationalisation, yes/no?”

CHAPTER 1

Introduction export planning



At the end of the chapter you will be able to:

1. understand the market position of countries from an international perspective and know the export development of the leading export nations;
2. name the drivers for export development within an organisation;
3. describe the elements that influence the international strategy definition;
4. explain the export planning process and its 4 phases: export policy, export audit, export plan and export roll-out;
5. explain the 10-step export plan model.

Case Mattel: “Barbie: growing pains as the American girl goes global”

In 1976, a time capsule was buried to commemorate the U.S. bicentennial. The capsule contained items that captured the essence of America and included a Barbie doll, described as the “quintessential American”. Thirty years later, Barbie has become much more cosmopolitan. Although Mattel generates about 60 percent of its annual revenue in the U.S. market, millions of girls around the world have adopted Barbie as a favorite toy; Barbie is sold in more than 150 countries. Overall, Barbie is the best-selling toy brand in the world, and Mattel is the world’s largest toy maker. However, as Barbie approaches her fiftieth birthday, the fashion doll’s popularity is declining at home and abroad. For example, Bratz, a competing doll line featuring racing fashions, has exploded in popularity. By contrast, in the Middle East, the hottest-selling doll line, Fulla, is associated with Islamic values such as modesty and respect. Also, young girls are gravitating towards electronics devices such as digital music players. These and other trends spell trouble for Mattel, which depends on Barbie for about 20 percent of its annual sales.

What was the secret to Barbie’s first several decades of success? Ruth Handler, Barbie’s creator, believed that all children needed to play with mature dolls to effectively project their fantasies of growing up (Handler’s children were named Barbie and Ken). Though Mattel’s executives initially believed that a doll with a womanly bosom was improper and would never sell, Barbie became an instant success with American children.

Over time, Barbie’s look has changed to reflect changing fashion and cultural trends. In 1968, for example, the first black Barbie was introduced to cater to the growing African-American market. Hispanic and Asian American Barbies have also been created in response to the growth of America’s other ethnic markets. It was a natural step for Mattel to target untapped groups of children in other parts of the world. A strategy dubbed ‘Mattel 2000’ focused on the company’s direction during the decade of the 1990s. As former CEO John Amerman noted, “There are twice as many children in Europe as in the U.S... Three times as many in South America and fifteen times as many in Asia... The potential market for products like Barbie... is mind boggling.” However, although Barbie has been successfully adapted to cultural differences in the United States, the opportunities for international growth come with formidable challenges. Even so, according to current CEO Robert Eckert, Mattel is “dedicated to becoming a truly global company.”

Europe

Mattel adopted a pan-European, region-centric approach to the Western European market. Barbie is a huge success in Europe; Italy, France, and Germany average five Barbie dolls per toy collection. In the early 1990s, Mattel developed a new ‘Friendship Barbie’ to sell in Central and Eastern Europe. The new doll was less elaborate than its Western European counterpart, which sports designer clothes and accessories. By contrast, Friendship Barbie reflects the more basic lifestyle children had experienced under communism. However, although Mattel has experimented with multi-cultural dolls, the company discovered that little girls in Europe prefer the well-known American Barbie to the local versions.

The Middle East

Since being introduced in the Middle East, Barbie has faced opposition on political, religious, and social grounds. Parents and religious leaders alike, object to the cultural values that Barbie and Ken portray. Writing in the *Cairo Journal*, Douglas Jehl noted, “To put it plainly, the plastic icon of Western girlhood is seen in the Middle East, where modesty matters, as something of a tramp.”

In Egypt and Iran, Barbie faces competition from several new doll brands aimed at providing an Islamic alternative to Barbie. As one Arab toy seller noted, “I think that Barbie is more harmful than an American missile.” Barbie’s challengers include demure-looking dolls such as Laila, who was designed according to recommendations of participants at the Arab League children’s celebrations in 1998. Laila wears simple contemporary clothes such as a short-sleeve blouse and skirt and traditional Arab costumes. Abala Ibrahim, director of the Arab League’s Department of Childhood, believes “there is a cultural gap when an Arab girl plays with a doll like Barbie... The average Arab’s reality is different from Barbie’s with her swimming pool, Cadillac, blond hair and boyfriend Ken.” [case shortened for editorial purposes]

Asia/Japan

Mattel has learned, that, to be successful within a foreign culture, Barbie does not need a total overhaul but instead can be very profitable with minor cosmetic changes. For example, Barbie was successfully launched in India in 1995 and, while the core product remains unchanged, Indian dolls are painted with a head spot and dressed in sari.

Mattel has had more difficulty conquering the world’s second-largest toy market, Japan. The Japanese toy market is worth \$8 billion in annual sales and is vital if Mattel is to achieve its goal of becoming more global. The Japanese market is notoriously difficult to penetrate as Mattel has found during 20 years of doing business in the country. Companies entering Japan must contend with complex distribution systems and intense competition from Japanese brands. Furthermore, dolls have a strong tradition in the Japanese culture with a heritage of over 800 years and ceremonial importance.

Mattel’s initial attempts to market Barbie in Japan met with limited success. Management presumed that Barbie’s success in other markets would be replicated in Japan. As John Amerman, CEO of Mattel in the mid-1990s, noted, “They didn’t know what that product was, and it didn’t work.” To boost sales, Mattel enlisted the services of Takara, a Japanese toy specialist. Through focus groups, Mattel learned that Barbie’s legs were too long and her chest too large – in short, Japanese girls did not relate to Barbie’s physical attributes. Barbie’s eyes were then changed from blue to brown, and the doll ultimately took on a look that was more appealing to the Japanese children’s sense of aesthetics. The Takara Barbie was born.

Although sales improved, a licensing disagreement prompted Mattel to terminate the relationship with Takara and search for a new partner in Japan. Takara continued selling the doll as Jenny, which, ironically became a competitor to the new Japanese Barbie. In 1986, Mattel joined forces with Bandai, Japan's largest toy company. Bandai produced Maba Barbies ('Ma' for Mattel and 'ba' for Bandai) with wide brown eyes. Due to its similarities to the Jenny doll, however, Maba Barbie was withdrawn from the market before it could achieve success. [...] Once again, market success eluded Mattel. Mattel was committed to neither a Japanese style nor an American style and competed poorly against dolls whose identity was well defined. However, Mattel realised that its competitive advantage lay with its American culture. Though Mattel had attempted to adapt to Japanese culture, Mattel discovered once again that girls prefer the well-known Barbie to the local versions. In 1991, Mattel ended its relationship with Bandai and opened its own marketing and sales office in Tokyo. Mattel introduced its American Barbie to Japan and experienced success with 'Long Hair Star Barbie', which became one of the top-selling dolls in Japan. Although financial losses mounted until 1993, in 1994 Barbie made a profit in Japan with sales almost doubling since its reintroduction. [...]

Writing in Mattel's 1999 Annual Report, acting CEO Ronald Loeb promised that the company "will proactively adapt its products to local tastes, economic conditions, and pricing, rather than viewing the rest of the world as an extension of our U.S. strategy." At the same time, Richard Dickson, senior vice president of Mattel's girl's consumer products worldwide, believed Barbie's global strategy must originate from a perspective of worldwide cohesion. He noted, "If I go on a plane from France to Japan to the United States and there's a Barbie billboard, you're going to sense that it's the same Barbie [in all three countries]." To facilitate its global approach, Mattel has given the U.S. President of Barbie the full responsibility for the brand around the world. [case shortened for editorial purposes]

Barbie doll gets new looks*

Barbie's manufacturer, Mattel, announced on January 28, 2016 that the doll has three new body types — curvy, tall and petite. Barbie will also now come in seven skin tones, 22 eye colors and 24 hairstyles. Mattel spokeswoman Michelle Chidoni said the product is evolving to "offer more choices" to make "the line more reflective of the world girls see around them." It is clear that Mattel has been striving to create a glocal marketing footprint, meaning a global brand with a local product taste.



Photo: Joyce Lee

Mattel cinematic universe**

In June 2023, photographs of beach blonde Margot Robbie and bleach blonde Ryan Gosling, stars of the upcoming Barbie movie, went viral after they were spotted filming a scene dressed as the world's favorite doll and her feckless boyfriend Ken, decked out in matching '90s neon workout gear and bright yellow roller skates.

A year later, with the arrival of the Barbie movie on July 21 2024, superfans can now buy the exact gear they've been obsessing over. The \$190 Barbie x Impala Rollerskates, are among more than 100 collaborations and branded partnerships parent company Mattel has signed to capitalize on the excitement for the Greta Gerwig-directed film, one of the tentpole movies of the summer.

Barbie is at "the beginning of yet another chapter for the evolution of the brand, which is now recognized as an idea," Mattel President and COO Richard Dickson tells Forbes, while wearing a Barbie t-shirt. "Barbie has transcended from a doll into a franchise. The ability for us to extend and market the brand is far bigger than any one product itself."

Source: Revised and updated originally written by Alexandra Kennedy-Scott, David Henderson, and Michel Phan, ESSEC Business School. Warren Keegan, Mark C. Green, Global Marketing, 5th edition, pp. 143-145, Pearson Education. 2008

**Updated by Leeman in January 2017, based on article in The Japan Times, January 29th, 2016. **Second update by Leeman 2025, based on article 'Barbie, Inc: How a \$3 toy inspired a multi billion dollar dream world' in Forbes by Marisa Dellatto, July 16th, 2023.*

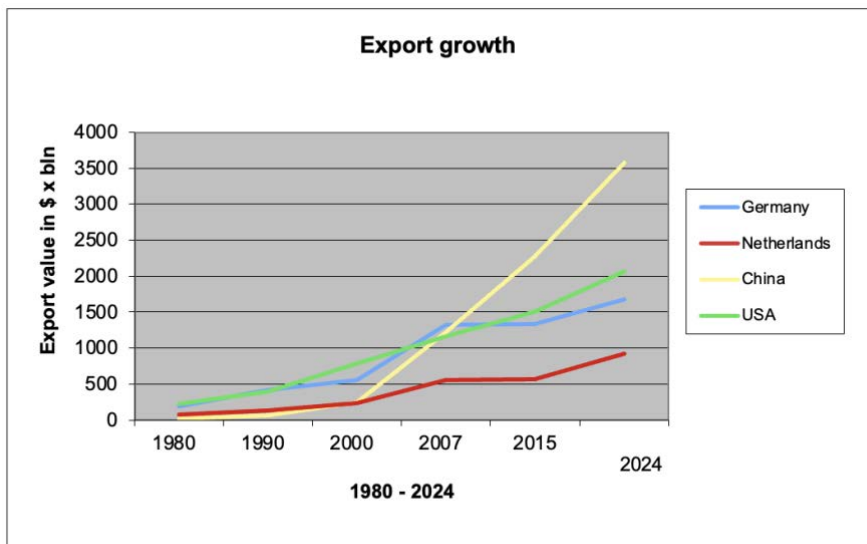
1.1 Internationalisation of the organisation

The struggle for success of Mattel's Barbie in foreign markets is a typical example for many companies going abroad. Adaptations to specific customer target groups in the foreign market are no guarantee for successful internationalisation. Even Mattel with its enormous marketing skills and brand positioning power of the brand "Barbie" faced difficulties in finding the right mix of global versus local adaptation.

This book on *Export Planning* will take you on a journey showing how to have your organisation go international, set up international marketing, and execute its first sales and order deliveries. In other words, how to plan and implement *international market development*.

Chapter 1 provides an overview of the content of this book. Internationalisation of the organisation requires a clear strategic commitment and vision/mission of the firm. Next, the process of planning and organising the internationalisation, the *export planning process* means a systematic approach in entering and developing the international business. This chapter introduces the role of export for countries, and role of export management within a firm. It shows the overall export planning process with its four phases: export policy, export audit, export plan and export roll-out. Finally, it presents the 10-step export plan structure which is used as a guideline throughout this book.

Many companies start internationalisation of their business during and after a successful growth phase. Most of the time, opportunities are spotted or customers put requests forward to deliver the products and / or services abroad. Figure 1.1 shows an overview of the export development of the largest export nations in the world between 1980 up to 2024 (www.statista.com, Nov. 2025). Historically, the United States of America and



Source: Top 20 Export countries worldwide in billion U.S. dollars in 2024 (www.statista.com, Nov. 2025)

Figure 1.1 Export development of largest export nations

Germany are the two largest export nations in the world. However, as can be seen from the graph, China has been climbing up to the 1st position, leaving the U.S. and Germany

behind. The statement “China is the factory of and for the world” is very much true in this respect. The Netherlands is a relatively large export nation, considering its small geographic size and population, climbing to a 4th position on the world ranking. The high ranking of The Netherlands may be not so surprising as Dutch people always have been traders for many centuries and founded many cities far away. For example, Nieuw Amsterdam = New York, and Batavia = Jakarta. Table 1.1 provides an overview of the top 15 largest export nations in the world. Surprisingly, the United Kingdom and Russia (before the war with Ukraine) are not so high on the list, which is a little bit strange if you look at the history of both nations; especially for the UK. The United Kingdom had a lot of colonies all over the world in the past. They were the centre of the industrialisation age in the 19th century. However, they somehow lost track the last 100 years, and no longer play a major role in exporting, especially industrial products.

Table 1.1 Top 15 largest export nations worldwide

	1980	1990	2000	2007	2015	2024
1. <u>Deutschland</u>	193	421	552	1.326	1.329	1.983
2. <u>China</u>	18	62	249	1.217	2.275	3.577
3. <u>USA</u>	226	394	781	1.163	1.505	2.065
4. <u>Japan</u>	130	288	479	713	625	707
5. <u>Frankreich</u>	116	217	328	553	506	640
6. <u>Niederlande</u>	74	132	233	551	567	921
7. <u>Italien</u>	78	170	241	492	459	674
8. <u>Großbritannien</u>	110	185	285	438	460	513
9. <u>Belgien</u>	54	114	188	431	398	536
10. <u>Kanada</u>	68	128	277	419	408	568
11. <u>Südkorea</u>	18	65	172	372	527	684
12. <u>Russland</u>	...	...	106	355	340	417
13. <u>Hongkong</u>	20	82	203	349	511	646
14. <u>Singapur</u>	19	53	138	299	351	506
15. <u>Mexiko</u>	18	41	166	272	381	617

Source: Top 20 Export countries worldwide in billion U.S. dollars in 2024 (www.statista.com, Nov. 2025)

Why have some of these countries been able to maintain their export position and others somehow lost track? Will these leading countries also keep their position in the next 100 years? Let's look at the positioning of countries from a marketing point of view.

1.2 Country position and market attractiveness

Although you probably would not immediately think about this, countries do compete with each other: for example, on tourism, medication and health centres, logistic ports and distribution, financial centres, innovation and centres of excellence in specific

technology fields. Like companies, countries also have to position themselves as centres of production and/or services in the different industries. Michael Porter¹ has written a book titled *The competitive advantage of nations*, in which he presents six factors which lead to the competitiveness of nations:

- *Factor advantages*. Basic: advantages in raw materials, climate, location, low and mid-level educated workers. Advanced: modern telecommunication, modern infrastructure, highly educated workforce and specialised research centres.
- *Type of domestic demand*: Refers to the structure of domestic demand and its focus (high level versus not so sophisticated), size, growth pattern and availability of transfer mechanisms to other countries.
- *National competitiveness*: Refers to the intensity of competitiveness, its number of competitors and the framework in which competition takes place, like culture, governmental support, level of travelling, relationship types between companies and their customers.
- *Network of internationally competing suppliers*: Allows for faster information input of new technologies, insights and innovations.
- *Coincidental factors*: Unplanned occurrences, like strikes, innovations, war and currency exchange fluctuations.
- *Governmental policy*: Focusing on the first four factors to stimulate its economy.

It is clear that countries need to develop their economy to increase their Gross Domestic Product (GDP) and income per person. However, depending on these six factors, countries have different starting positions. Some countries are relatively small, but have a highly educated population – like Singapore – and other countries are very large, but have a low educated workforce – like South Africa. As a result of these factor differences, countries have different market positions and market attractiveness in the world's economies.

Figure 1.2 presents a country ranking overview based on market position and market attractiveness.² Western European countries, NAFTA region (United States of America, Canada, and Mexico) and Japan formed the big trade blocks of the 1980s. Over the last 15 years, the BRIC countries (Brazil, Russia, India and China) have been developing fast, and China and India in particular, are set to determine the world economy in the future. Figure 1.2a shows an overview of country ranking based on GDP development projections until 2075. As you can see India is going to outperform the USA in 2075. Figure 1.2a.

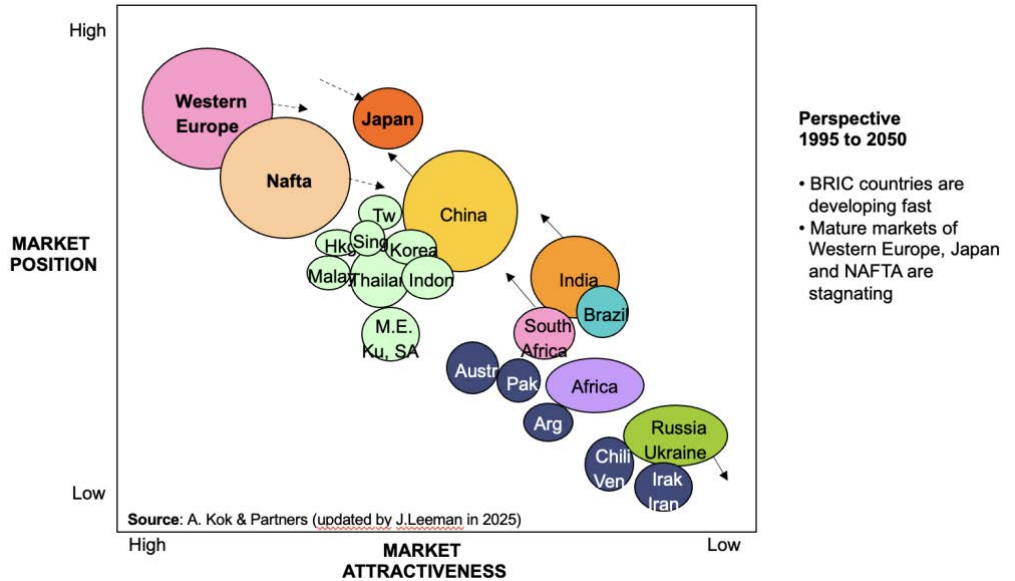
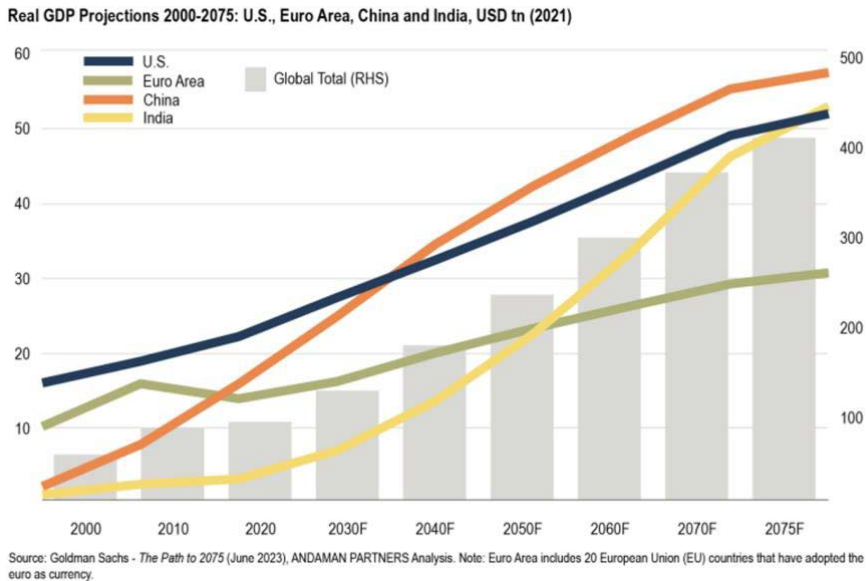


Figure 1.2 Country ranking overview 1995 towards 2050

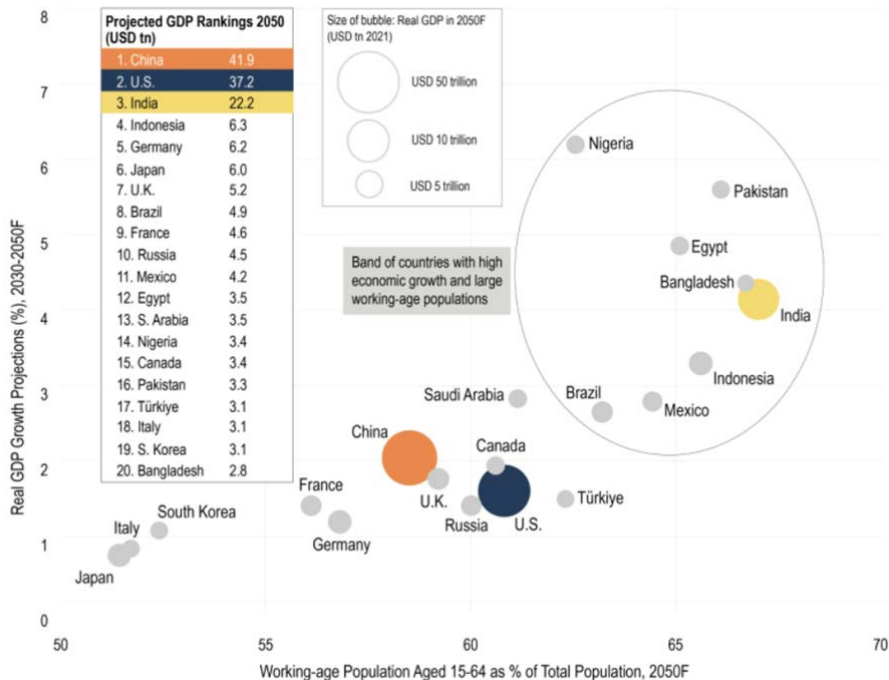


Source: Goldman Sachs and Andaman partners³
Figure 1.2a Country ranking overview 2000 to 2075

To move up on the market positioning and market attractiveness ladder, countries have to work on the aforementioned factors for competitive advantage. That is why a lot of countries try to create centres of excellence for specific products or services. For example, China very much focuses on manufacturing; India focuses on information technology services. The Netherlands focuses on trading and logistics, ‘Mainport to Europe’, agriculture (flowers), and banking and financial services just to name a few. Germany focuses mainly on engineering, chemicals, machine and car manufacturing. What do you think is the primary focus of Middle Eastern countries today? What do you think it will be in the next 30 years? Middle Eastern countries currently rely heavily on exporting oil. However, as oil wells are drying up, these countries are shifting their attention more and more towards tourism, trading, and financial services. Just look at all the development activities taking place in Dubai.

In conclusion, countries need to position themselves to maintain and have further development of their economies and enable their population to enhance their income and quality of life. Figure 1.2b shows an overview of the upcoming emerging countries in 2050, like Indonesia, Mexico, Nigeria, Egypt and Pakistan.

The World's 20 Largest Economies in 2050: Real GDP, Growth Projections and Working-Age Populations



Source: Goldman Sachs - *The Path to 2075* (June 2023), World Bank Population Estimates and Projections, ANDAMAN PARTNERS Analysis

Source: Goldman Sachs and Andaman partners³

Figure 1.2b World's 20 largest economies in 2050 based on projected GDP