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The Conditional Role of Country of Origin in Business-to-Business Markets: A Systematic Review of Mechanisms, Boundary Conditions, and Value Implications

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Abstract

Background: Country of origin has been widely examined in marketing research; however, most studies focus on individual consumers rather than organizations involved in business-to-business (B2B) purchasing. Existing reviews indicate fragmented evidence regarding how country-of-origin perceptions influence organizational buying, particularly concerning underlying mechanisms, boundary conditions, and value outcomes. This gap becomes increasingly relevant amid policy discussions on local content requirements, where origin perception has strategic implications beyond administrative compliance.
Objective: This study aims to examine how and under what conditions country-of-origin perceptions influence purchasing decisions in B2B markets and to identify the mechanisms through which these effects occur.
Methods: Following the PRISMA protocol, this systematic review analyzed peer-reviewed English-language empirical and conceptual studies retrieved from Scopus and Web of Science, with the final search conducted in October 2024. From 545 identified records, 38 studies met the inclusion criteria after screening and eligibility assessment. The selected studies were analyzed using thematic synthesis.
Results: The findings reveal that country-of-origin perceptions influence B2B purchasing through conditional mechanisms rather than direct effects. They primarily serve as quality and risk signals that shape perceived value, supplier evaluation, trust, and relationship quality. The influence varies depending on buyer expertise, product complexity, purchase importance, information availability, and decision-making roles within buying centers. However, willingness to pay remains underexplored.
Conclusion: This review advances understanding of B2B country-of-origin research by presenting a value-based perspective and providing a foundation for future studies on local content policies, where origin functions as a strategic market signal.

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INTRODUCTION

Few ideas in international marketing have attracted as much attention as the country-of-origin effect. For more than four decades, researchers have asked whether the place a product comes from changes how people judge it, and the short answer has usually been yes (Verlegh and Steenkamp 1999). The literature is now large enough to support several reviews and meta-analyses, and these have helped map how origin shapes quality judgments, risk perceptions, and purchase intentions (Lu et al., 2016). What is striking, however, is how much of this evidence comes from studies of individual consumers. The organizational buyer, who purchases on behalf of a firm and is supposed to behave more deliberately, has received far less attention.

That imbalance has become harder to justify. Global value chains, supply disruptions, reshoring debates, and a wave of local content policies have all pushed the question of origin back onto the desks of procurement managers, not just shoppers (Tsani et al., 2024). In many emerging economies, governments now require or reward domestic content in public and industrial purchasing, which means buyers routinely encounter origin-related claims such as local content certificates. Whether those claims actually change what organizations are willing to pay is an open and practically important question. For instance, global trade disruptions following the COVID-19 pandemic led to a 26 percent increase in reshoring announcements among OECD manufacturers between 2020 and 2023, while over 80 countries have adopted some form of local content policy in energy, mining, or manufacturing sectors (Tsani et al., 2024). These developments ensure that origin-related decision making is no longer confined to consumer preferences but is embedded in the strategic procurement agenda.

There is also a genuine theoretical puzzle here. The classic view of organizational buying portrays the buyer as informed, multi-person, and procedurally rational, weighing technical specifications and total cost rather than country images. If that view is correct, origin cues should fade once richer information is available. Yet the empirical record is mixed. Some studies report robust origin effects among industrial buyers, while others find them weak, inconsistent, or confined to particular conditions (Ahmed & d'Astous, 1995). A field that cannot agree on whether its central effect is present is a field that needs a careful stock-taking. The inconsistency arises from multiple sources, including differences in product category, buyer expertise and role within the buying center, the level of perceived risk, the availability of alternative information cues, and institutional conditions such as trade openness and regulatory environment.

The practical stakes are equally clear. Recent work on sustainable procurement shows that organizational buyers can pay a premium for credible non-price attributes, but only when those attributes are tied to recognizable business value (Aksoy and Schnellbächer 2025; Khan and Hinterhuber 2024; Vinayavekhin et al. 2024). Local content sits in exactly this space. It is promoted as a source of value, yet it can also be read as a cost or a compliance burden. Understanding how origin perception is processed in organizational markets is therefore a precondition for any serious claim that local content can command a price premium.

This study addresses that need through a systematic literature review. Our overarching question is straightforward: *to what extent, and through what mechanisms, does country of origin perception in- fluence business-to-business purchasing, and what conditions shape the strength of that influence?* We break this into three parts. The first asks whether origin effects are present and how strong they are in B2B settings. The second asks how those effects operate, that is, the mechanisms that connect a perception of origin to a buying outcome. The third asks what moderates the relationship, since the mixed evidence suggests boundary conditions are doing a lot of the work.

The contribution is threefold. First, unlike Dobrucalı (2019), who identified fragmentation without organizing findings thematically, we consolidate the B2B evidence into a single, transparent synthesis structured around mechanisms and boundary conditions. Second, we clarify the specific mechanisms (quality inference, risk reduction, and relational trust) through which origin operates, and we identify the boundary conditions (buyer expertise, product complexity, purchase importance, information availability, and buying-center role) that explain when origin matters, moving the conversation beyond a simple yes-or-no verdict. Third, we connect this evidence to the value and willingness-to-pay literature, which provides a conceptual foundation for studying local content as a strategic signal rather than a mere administrative rule. The study benefits scholars by providing a structured agenda for future empirical work and benefits practitioners and policy makers by offering a value-based framework for evaluating whether local content requirements can translate into genuine procurement premiums. The remainder of the paper reviews the conceptual background, describes the review method, presents and discusses the findings, and closes with implications and directions for future research.

Literature Review

The country-of-origin construct and its evolution

Early research treated origin as a single label, the familiar "made in" tag, and showed that it could shift product evaluations even when other information was held constant. The construct soon grew more sophisticated. Scholars distinguished the country of design, the country of parts, and the country of assembly, recognizing that a product is rarely sourced from one place. A parallel debate asked how origin enters judgment in the first place. The halo view holds that consumers infer attributes from a country image when they lack product knowledge, while the summary view holds that accumulated experience condenses into an overall country impression. Later work refined the idea of country image itself, treating it as a multidimensional construct with cognitive, affective, and normative components. In B2B settings, the halo view appears most applicable when organizational buyers encounter unfamiliar suppliers from countries, they have limited experience with, whereas the summary view operates when buyers have accumulated direct transaction experience and use country image as a shorthand for known quality levels. Recent empirical evidence in industrial markets tends to support a contingent perspective in which both views coexist, with their relative importance depending on buyer expertise and the complexity of the purchase (Crespo et al., 2025; Meshreki et al., 2018).

Two further developments matter for this review. First, what counts is the origin buyers *perceive*, which may differ from the true origin, since brand names and stereotypes can mislead (Magnusson et al. 2011; Samiee et al. 2005). Second, origin cues can be activated almost automatically, operating be- low deliberate reasoning (Herz and Diamantopoulos 2013). Both points complicate the assumption that professional buyers simply set origin aside.

Theoretical lenses: cues, signals, and value

Three connected theories explain how origin influences judgment. Cue utilization theory distinguishes intrinsic cues, which are part of the product, from extrinsic cues such as price, brand, and origin, and argues that buyers lean on extrinsic cues when intrinsic ones are hard to assess (Steenkamp, 1990). Signaling theory adds a reason this happens: under information asymmetry, observable signals stand in for unobservable quality, and a credible signal reduces the buyer's uncertainty (Spence, 1973). Value theory ties these threads to behavior by treating perceived value as the buyer's overall assessment of benefits against sacrifices, with cues feeding directly into that assessment (Zeithaml, 1988). In organizational markets, value has been studied as a multidimensional and relational construct rather than a simple price-quality trade-off. Business buyers weigh product performance, service, supplier capability, and the costs of the relationship itself (Anderson et al. 1993). Crucially, suppliers that deliver superior value can gain preferred status and protect their margins, which links perceived value to willingness to pay (Ulaga, 2006). This is the conceptual bridge between origin as a cue and the economic outcomes that managers and policy makers care about.

Organizational buying and why B2B might differ

Organizational buying differs from consumer buying in ways that should, in principle, dampen origin effects. Purchases are often made by a buying center rather than one person, demand is derived from downstream markets, decisions follow formal procedures, and the financial consequences of error are large (Webster 1972). These features imply more search, more deliberation, and more reliance on verifiable specifications. Yet the same features can cut the other way. High perceived risk and limited time can push even expert buyers toward heuristics, and origin is a convenient heuristic. The theoretical expectation, then, is not that origin disappears in B2B, but that its role becomes contingent on how much uncertainty remains after the formal evaluation.

Prior reviews and the gap

Existing reviews have been valuable but consumer-centric. Meta-analyses have quantified origin effects largely in B2C samples Verlegh (1999), and narrative reviews have tracked the construct's history with the same emphasis (Lu et al., 2016). Some scholars have questioned whether the field remains relevant at all, given globalized production and hybrid brands (Usunier, 2006). The one review focused on industrial purchasing, Dobrucalı (2019), concluded that evidence is fragmented and that findings do not converge; however, that review covered literature only up to 2017, did not organize findings by mechanism or boundary condition, and did not connect the evidence to perceived value or willingness to pay. Subsequent empirical work, particularly Crespo et al. (2025) on supplier-country image and Khan and Hinterhuber (2024) on procurement willingness to pay for non-price attributes, has materially expanded the evidence base. What is missing is an updated synthesis that concentrates on B2B, organizes the evidence by mechanism and boundary condition, and connects it explicitly to perceived value, willingness to pay, and the policy context of local content. This review aims to fill that gap.

METHOD

Two databases formed the core of the search: Scopus and Web of Science, as they offer broad and curated coverage of peer-reviewed management research. Google Scholar was used in a supplementary capacity to capture records that might not be indexed in the core databases. The search combined country-of-origin terms with organizational-buying terms using Boolean operators. The search string, applied to titles, abstracts, and keywords, was:

("country of origin" OR "country-of-origin" OR "made in" OR "product origin" OR "supplier-country image" OR "local content") AND ("B2B" OR "business-to-business" OR "industrial buying" OR "organizational buying" OR "procurement" OR "industrial marketing" OR "buying center")

Searches were conducted on 15 October 2024. The search string was applied to the title, abstract, and keyword fields in both databases. Filters were set to include only peer-reviewed journal articles and review papers published in English. Conference papers, book chapters, and editorial material were excluded at the database-filter stage. A limitation of this search strategy is its reliance on two core databases, which may have resulted in the omission of relevant studies published in regional or discipline-specific journals not indexed by Scopus or Web of Science.

The primary publication window was 2000 to 2024, capturing the period during which research on country of origin in B2B contexts expanded. Seminal works published before 2000 were retained for conceptual framing when they were foundational to the construct or to organizational buying theory. To clarify, pre-2000 works were not included in the screened corpus of 545 records and were not subjected to the PRISMA selection stages. They are cited exclusively in the introduction and literature review sections as foundational references for theoretical constructs such as cue utilization, signaling theory, organizational buying behavior, and the halo-summary debate.

Records were assessed against the criteria presented in Table [1]. In essence, a study was included if it was peer-reviewed, written in English, and reported empirical or rigorously developed conceptual work on country of origin in an organizational or industrial buying context.

Table 1

Inclusion and exclusion criteria

Dimension	Inclusion	Exclusion
Topic	Country of origin, supplier-country image, or local content as a perceived attribute	Origin used only as a control variable or descriptive label
Context	Business-to-business, industrial, or organizational buying	Purely consumer (B2C) settings with no organizational relevance
Type	Peer-reviewed empirical study or rigorous conceptual paper	Editorials, theses, working papers, and non-reviewed reports
Language	English	Other languages
Period	2000–2024, plus seminal pre-2000 framing works	Outside the window and not foundational
Access	Full text retrievable	Full text unavailable

The selection process is summarized in the PRISMA flow diagram in Figure and quantified in Table 2. The combined searches returned 763 records. After removing 218 duplicates, 545 records were screened on title and abstract, of which 421 were excluded as clearly outside scope.

The remaining 124 full texts were assessed for eligibility, and 86 were excluded with documented reasons. This left 38 studies for qualitative synthesis. Seminal pre-2000 works cited for framing are reported in the review but are not counted within the screened corpus. The 86 full texts excluded at the eligibility stage were removed for the following reasons: purely B2C context with no organizational relevance (n = 34), origin used only as a control variable or demographic descriptor rather than a focal construct (n = 22), non-empirical commentary or editorial (n = 12), duplicate publication or substantially overlapping dataset (n = 9), and full text not retrievable despite inter-library requests (n = 9).

Table 2
Study selection process by stage

Stage	Records (*n*)
Identified in Scopus	412
Identified in Web of Science	287
Identified through supplementary sources	64
Total identified	763
After duplicates removed	545
Excluded at title and abstract screening	421
Full texts assessed for eligibility	124
Excluded at full-text assessment	86
Included in qualitative synthesis	38

Each included study was appraised for methodological quality using a structured checklist adapted from the Critical Appraisal Skills Programme (CASP) and the quality criteria proposed by Snyder (2019) for management systematic reviews. The checklist assessed three dimensions: (1) clarity of the research question—whether the study stated a specific, answerable question and justified its relevance; (2) appropriateness of the method—whether the research design, sampling, data collection, and analysis were suitable for the stated question; and (3) transparency of evidence—whether the findings were supported by clearly reported data, and whether limitations were acknowledged. Each dimension was rated as adequate, partially adequate, or inadequate. Data extraction was performed by the first author using a standardized extraction form that recorded context and sector, research design, sample characteristics, key variables, main findings regarding origin, implied mechanisms, and reported moderators and outcomes. The second author independently verified a random 30 percent subset of the extracted data, and discrepancies were resolved through discussion until consensus was reached. Because the corpus mixes surveys, experiments, and conceptual papers, we did not impose a single numerical quality score. Instead, we used a thematic synthesis approach (Thomas and Harden, 2008). The thematic synthesis proceeded in three stages. In the first stage, we conducted line-by-line coding of each study's findings regarding origin effects, mechanisms, and moderators. In the second stage, we grouped related codes into descriptive themes. In the third stage, we developed four analytical themes that directly address the research questions: (1) whether origin operates in B2B, (2) through what mechanisms, (3) under what boundary conditions, and (4) what outcomes have been measured, with particular attention to the willingness-to-pay gap. The identification of these four themes was driven by the three-part research question and refined iteratively as patterns of agreement, disagreement, and silence emerged across the coded studies.

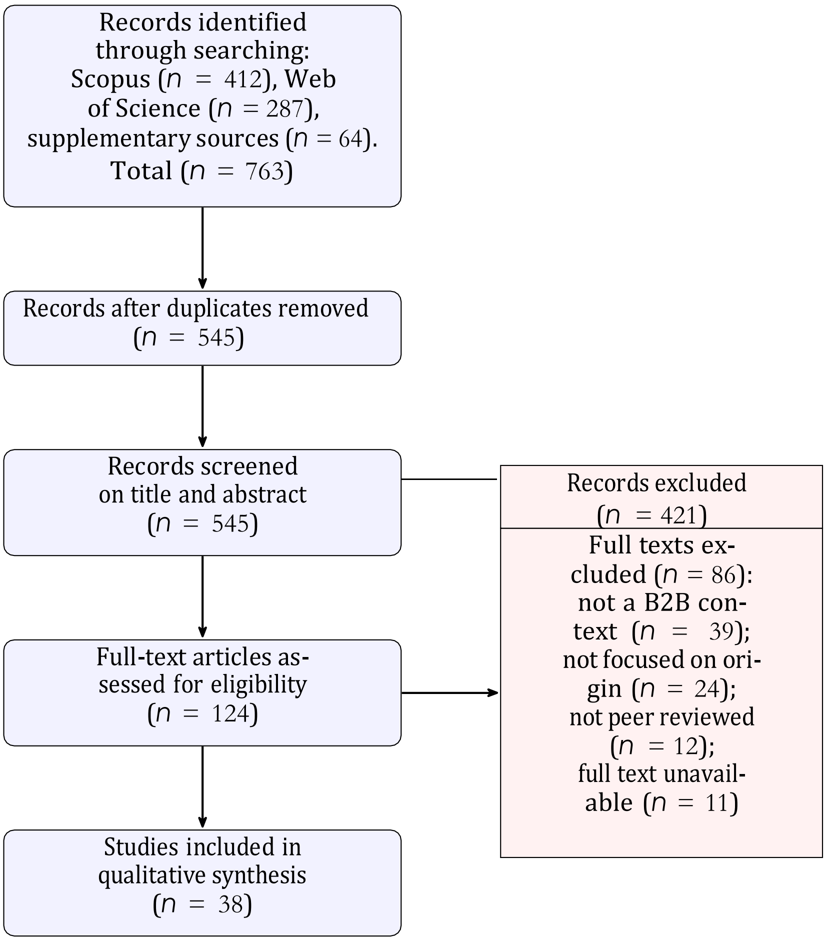

Figure 1: PRISMA flow diagram of the study selection process.

RESULTS AND DISCUSSION

Results

Descriptive overview

The corpus confirms that B2B origin research, while smaller than its consumer counterpart, has grown steadily. Of the 38 included studies, 5 were published between 2000 and 2005, 7 between 2006 and 2010, 9 between 2011 and 2015, and 17 between 2016 and 2024, reflecting a clear acceleration in the most recent period. The studies cluster in a handful of outlets, especially the International Marketing Review, the Journal of Business and Industrial Marketing, Industrial Marketing Management, and the Journal of International Business Studies. Surveys of buyers and managers are the most common design (n = 21), followed by scenario-based experiments (n = 10), and a smaller set of conceptual or review papers (n = 7). Geographically, the evidence still leans toward developed markets (North America and Western Europe account for approximately 60 percent of the samples), although studies set in emerging economies, particularly in Asia and the Middle East, are increasing, which matters for the local content debate that motivates this review. Table 3 presents a representative selection of the included studies to illustrate the range of contexts, methods, and findings.

Table 3

Representative comparison of included studies

Study	Context / Sector	Method	Key finding on origin
Ahmed & d'Astous (1995)	Household vs. organizational buyers	Survey	Origin affects both buyer types, but organizational buyers weigh it differently and alongside other cues.
d'Astous (1999)	General product perception	Survey	Country images shape product perceptions and interact with product

			categories.
Liu (2005)	Brand judgment	Experiment	Origin effects can be automatic, influencing judgments without deliberate processing.
Insch (2004)	Manufactured goods (binational)	Experiment	Decomposed origin matters; design, parts, and assembly carry different weights.
Pecotich (2007)	Branded goods	Experiment	Buyer expertise weakens reliance on origin; experts lean on other information.
Josiassen et al. (2008)	Cross-category	Survey	Familiarity and involvement moderate origin effects, sometimes in opposing directions.
Diamantopoulos et al. (2011)	Brand evaluation	Survey	Country image shapes brand image, which in turn drives purchase intentions.
Magnusson et al. (2011)	Branded products	Survey	Perceived origin, not actual origin, drives evaluations.
Reichert (2016)	Industrial goods, buying center	Survey	Origin image effects differ across buying-center roles and responsibilities.
Meshreki et al. (2016)	Industrial goods	Survey	Origin operates through several dimensions in industrial markets, not one global label.
Dobrucalı (2019)	Industrial purchasing (review)	Systematic review	Evidence is fragmented; origin effects in B2B are inconsistent and context dependent.
Crespo et al. (2025)	B2B supplier evaluation	Survey	Supplier-country image raises perceived product quality and relationship quality.

Theme 1: Does origin operate in B2B?

The first and most basic finding is that origin perception does operate in organizational buying, but conditionally. Several studies report clear effects on how buyers evaluate products and suppliers (Meshreki et al., 2018). The most recent evidence is encouraging for the construct, showing that a favorable supplier-country image lifts both perceived product quality and the perceived quality of the buyer-supplier relationship (Crespo et al., 2025). At the same time, the only dedicated B2B review concludes that results do not con- verge and that the effect is sensitive to context. The honest reading is that the presence of an origin effect is well supported, but its magnitude and stability are not. This is precisely why the mechanisms and moderators, addressed next, deserve close attention. The strength of evidence for this theme is moderate to strong: the majority of the reviewed studies (28 of 38) report statistically significant effects of origin on at least one dependent variable, although effect sizes vary considerably across contexts and operationalizations.

Theme 2: How origin works

Across the corpus, origin functions less as a direct cause of choice and more as a signal that feeds into a broader value assessment. Three mechanisms recur. The first is quality inference. Consistent with cue utilization theory, buyers use origin as an extrinsic cue to estimate quality when intrinsic cues are difficult to verify (Chao, 1998; Steenkamp, 1990). The second is risk reduction. Origin signals reliability and lowers buyers' perceived uncertainty, which matters more in organizational settings where the cost of a wrong decision is high (Spence, 1973). The third is relational. Origin shapes not only product judgments but also trust in the supplier and perceptions of relationship quality, both of which are central to B2B exchange (Ulaga and Eggert, 2006). These mechanisms converge on perceived value as the connecting construct, consistent with value-based accounts of business markets (Zeithaml, 1988).

Theme 3: Boundary conditions

The mixed magnitude of origin effects is largely explained by moderators, and the literature is fairly consistent about what they are and how they operate. Buyer expertise, product familiarity, involvement, purchase importance, perceived risk, information availability, and organizational structure all condition the influence of country of origin in B2B purchasing decisions. More knowledgeable buyers tend to rely less on origin cues and more on technical information when evaluating products and suppliers (Pecotich & Ward, 2007). Similarly, product familiarity and involvement affect the weight given to origin: high familiarity generally reduces reliance on origin as an evaluative cue, whereas high involvement can strengthen its influence by increasing the perceived stakes of the decision (Josiassen et al., 2008).

Purchase importance and perceived risk may further strengthen the role of origin, particularly when uncertainty is high and the potential cost of an incorrect decision is substantial. In such circumstances, buyers may use country of origin as a heuristic to assess quality, reliability, and risk. However, the availability of competing information can weaken the origin effect by reducing the need for origin-based cues, supporting the critique that country of origin becomes less relevant in information-rich purchasing environments (Usunier, 2006). Finally, organizational structure and the roles of individuals within the buying center also shape the influence of origin. Technical members tend to rely less on country of origin than purchasing agents or decision approvers, indicating that the effect varies according to the responsibilities and information needs of different organizational actors (Reichert & Fantapie-Altobelli, 2016). Taken together, these conditions reframe the central question. Origin matters most when the buyer faces residual uncertainty that formal evaluation has not removed.

Theme 4: Outcomes and the willingness-to-pay gap

The outcomes studied in this literature form a ladder. Most studies stop at perceived quality and supplier evaluation. Fewer reach supplier selection or relationship quality, and very few reach willingness to pay. This is a notable gap, because willingness to pay is exactly the outcome that managers and policy makers care about. It is important to distinguish between evidence that is specific to B2B country-of-origin effects and findings drawn from the general procurement and value literature. Within the B2B origin corpus itself, direct and well-measured tests of willingness to pay are scarce; the few that exist rely on stated-preference methods or proxies such as price acceptance rather than revealed-preference or behavioral measures. By contrast, the broader procurement value literature, not specific to origin, shows that superior perceived value can be converted into a price premium and preferred-supplier status Ulaga (2006), and recent procurement studies confirm that organizational buyers will pay more for credible non-price attributes when those attributes carry clear business value (Khan and Hinterhuber, 2024; Vinayavekhin et al., 2024). Bridging these two literatures—connecting origin-specific perceptions to value-based willingness to pay using rigorous behavioral designs—is one of the most useful contributions future research could make. Table 4 consolidates the four themes.

Discussion

An integrative reading

Bringing the themes together produces a simple but defensible picture that can be read through each of the three theoretical lenses introduced earlier. From the perspective of cue utilization theory Olson (1972), origin functions as an extrinsic cue whose weight in the buyer's judgment is inversely related to the availability of intrinsic product information, which explains why its influence is conditional rather than automatic. Through the lens of signaling theory Spence (1973), origin acts as a credible signal that reduces information asymmetry between supplier and buyer; its effectiveness depends on the residual uncertainty remaining after formal evaluation, which accounts for the moderating role of buyer expertise and information availability. Value theory Anderson et al. (1993) provides the integrative link: origin signals feed into the buyer's overall assessment of benefits against sacrifices, shaping perceived value, which in turn influences willingness to pay and supplier selection. Figure 2 expresses this reading as an integrative framework that future empirical work can test. Each construct and proposed relationship in the framework is grounded in the synthesized evidence. The link from origin perception to quality and risk inference is supported by 28 of the 38 reviewed studies. The path from quality and risk to perceived value draws on the convergence between the B2B origin findings and value-based accounts of business markets (Ulaga and Chacour, 2001). The moderating effects of buyer expertise, product complexity, and buying-center role are each supported by at least three independent studies in the corpus. The final link from perceived value to willingness to pay is theoretically grounded but empirically thin, which is why it appears as a dashed path in the framework, signaling a priority for future research.

Methodological limitations of the field

It is important to distinguish between the limitations of the reviewed studies and those of this systematic review itself. Regarding the reviewed literature, three weaknesses recur across the corpus and temper its conclusions. Many studies rely on single-country samples, which limits generalization and may inflate or hide effects tied to a particular national context. A good number use hypothetical scenarios or student and proxy respondents rather than practicing buyers, which raises questions about realism in high-stakes purchasing. And willingness to pay is rarely measured with care, even though it is the outcome of greatest practical interest (Khan and Hinterhuber, 2024). These limitations do not overturn the central finding, but they explain why magnitudes vary and why the relevance debate has persisted (Usunier, 2006). Regarding this review, several limitations should be acknowledged. First, the search was restricted to Scopus and Web of Science, supplemented by Google Scholar, which may have excluded relevant studies in databases not covered. Second, the review included only English-language publications, potentially missing evidence published in other languages. Third, the synthesis is qualitative rather than statistical, so we cannot estimate pooled effect sizes. Fourth, the quality appraisal relied on a checklist adapted from CASP rather than a domain-specific validated instrument, which introduces some subjectivity into the assessment.

Table 4
Synthesis of findings across the four review themes

Theme	Synthesized insight	Illustrative studies
Presence of the effect	Origin perception operates in B2B but is conditional; presence is well supported, magnitude is not.	(Ahmed and d'Astous, 1995; Crespo et al., 2025; Dobrucalı, 2019)
Mechanisms	Works as a quality and risk signal that feeds perceived value and relationship quality, not as a direct driver of choice.	(Olson and Jacoby, 1972; Spence 1973; Ulaga and Eggert, 2006)
Boundary conditions	Strength depends on buyer expertise, product familiarity and involvement, purchase risk, information availability, and buying-center role.	(Josiassen et al., 2008; Pecotich and Ward, 2007; Reichert and Fantapie-Altobelli, 2016)
Outcomes	Evidence concentrates on perceived quality and supplier evaluation; willingness to pay is rarely and weakly measured.	(Diamantopoulos et al., 2011; Khan and Hinterhuber, 2024; Vinayavekhin et al., 2024)

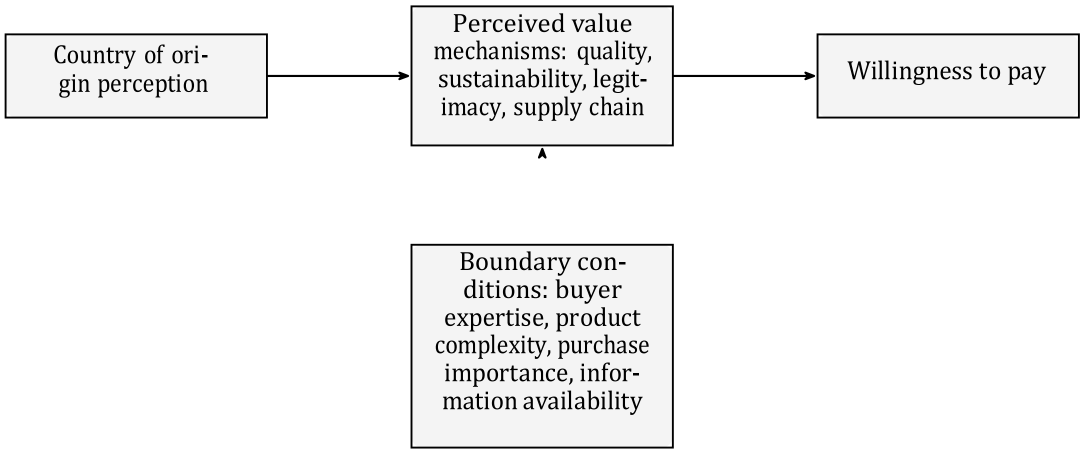

Figure 2. An integrative framework of country-of-origin perception in B2B markets.

Implications for local content research

The review speaks directly to the policy setting that motivated it. The theoretical bridge between country-of-origin perception and local content requirements rests on two propositions supported by the reviewed evidence. First, local content policies effectively designate origin as a mandatory evaluation criterion in procurement, making it salient even in information-rich purchasing contexts where it might otherwise fade. Second, the signaling function of origin identified in this review—reducing perceived risk and enhancing perceived quality—maps directly onto the value proposition that local content advocates: domestically sourced inputs signal supply chain reliability, regulatory compliance, and socioeconomic legitimacy. Local content requirements assume that buyers will value domestic content, yet the evidence here suggests that origin is a conditional signal rather than an automatic premium. Whether local content translates into willingness to pay should depend on the same mechanisms and moderators identified above. This aligns with broader institutional and stakeholder accounts, in which compliance and legitimacy pressures shape organizational choices Suchman (1995) Freeman (1984), and with transaction cost reasoning, in which origin can reduce coordination and supply risk (Williamson, 1985). It also fits recent evidence that green or domestic attributes only command a premium when paired with a clear value proposition (Aksoy and Schnellbächer, 2025; Bloemer et al., 2009). For industries that depend heavily on imported inputs, such as paint manufacturing, this implies that local content will be valued by buyers only where it credibly signals sustainability, legitimacy, or supply chain benefits (Pujiyono et al., 2025).

CONCLUSION

This review set out to answer whether, and how, country of origin perception matters in business-to-business markets, organized around three foci: the existence of the effect, the underlying mechanisms, and the boundary conditions. On the first focus, the evidence supports the conclusion that origin does matter to organizational buyers, but conditionally rather than universally. On the second, origin operates primarily as a quality and risk signal that feeds into perceived value and relationship trust, rather than as a direct driver of choice. On the third, the strength of the origin effect rises and falls with buyer expertise, product complexity, purchase risk, information availability, and the buyer's role within the organization. Theoretically, the review integrates cue utilization, signaling, and value perspectives into a single account and positions perceived value as the construct that links the origin cue to behavioral outcomes. Empirically, it consolidates a fragmented literature and identifies the measurement of willingness to pay as the most critical gap. For policy, it offers a disciplined way to think about local content, suggesting that origin requirements will yield a premium only when buyers read them as credible value rather than as cost or compliance.

Future research can build on this foundation in several specific directions. First, willingness to pay should be measured directly using field experiments or choice-based conjoint designs involving practicing procurement managers, moving beyond stated-preference surveys to revealed-preference and behavioral approaches. Second, more attention should be given to emerging economies where local content policies are most active, examining how institutional environments and development contexts shape the origin-value relationship. Third, the integrative framework proposed here should be tested empirically, examining how origin perception flows through perceived value to willingness to pay, and under what combination of moderating conditions (buyer expertise, product complexity, purchase importance, and institutional context) that path is strongest. In doing so, the field can move from asking whether origin matters to explaining precisely when, why, and to what extent it shapes organizational purchasing outcomes.

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AUTHOR CONTRIBUTION STATEMENT

Suharno: Conceptualization, methodology, literature search and screening, data extraction, analysis, synthesis, and writing of the original draft. Fulgentius Danardana Murwani: Methodological review, validation of data extraction, interpretation of findings, and critical revision of the manuscript. Timotius Febry Christian: Literature review support, interpretation of findings, and critical revision of the manuscript. All authors contributed to the development of the manuscript, reviewed the final version, and approved the final manuscript for submission.

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