

WP6 Focus-Balkans project

Shopcheck results

Split, February 2010

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Outline

1. FYR Macedonia
2. Slovenia
3. Montenegro
4. Serbia
5. Croatia
6. Bosnia and Herzegovina

For each country:

- Total number of N&H products and number by product groups
- Origin of N&H products
- Manufacturers
- Brands
- Nutrition and health claims

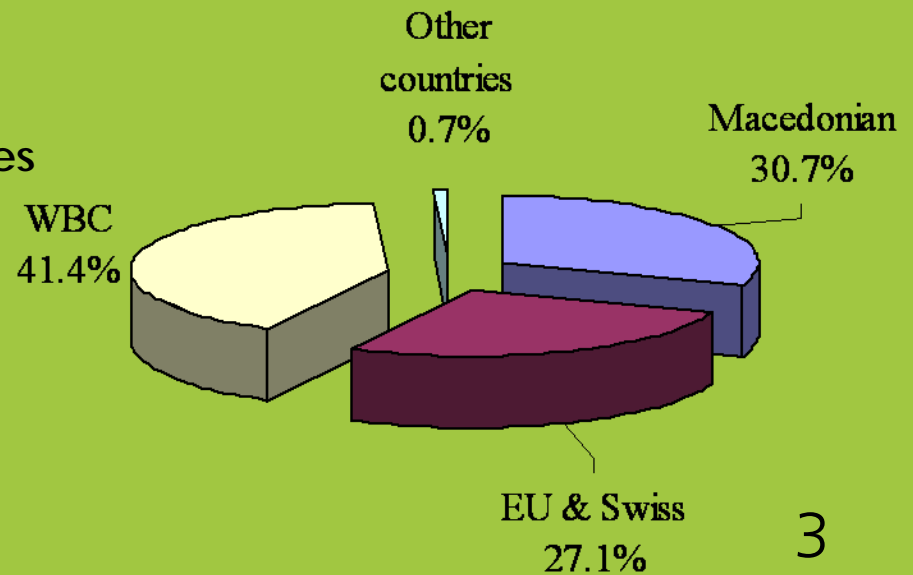
FYR Macedonia

Total number of products and number of products by groups

- 140 products with N&H claims
 - Milk and yogurts: 37.1%
 - Fruit juices: 22.9%
 - Dietetic products: 18.6%
 - General food: 13.6%
 - Margarines: 7.9%

Origin of N&H products

- from Macedonia and fifteen other countries
 - Domestic products: 30.7%
 - From WBC: 41.4%, mostly from Serbia
 - EU market: 27.1%
 - 0.7% others



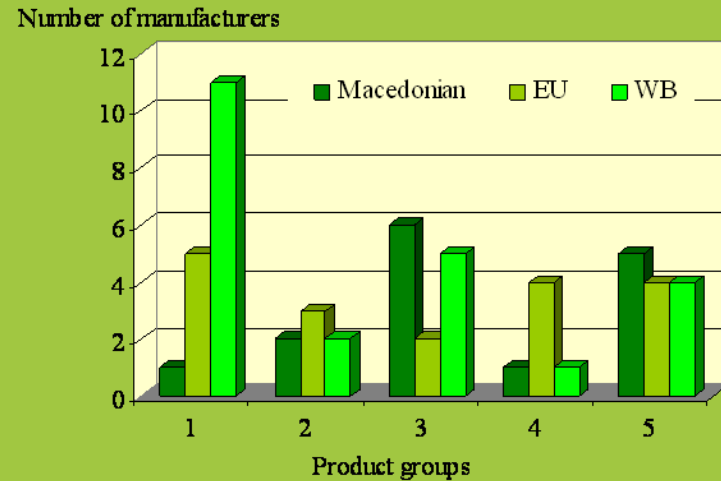
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FYR Macedonia

Manufacturers

• 51 producers of N&H products

- Manufacturers from WB countries - the greatest importance: 21
- Domestic: 11 (the largest number in the group of fruit juices, the smallest number the group of milk and yogurt and general food)
- EU manufacturers - the biggest relative importance in the general food group and in the group of margarines



Brands

• 62 different brands

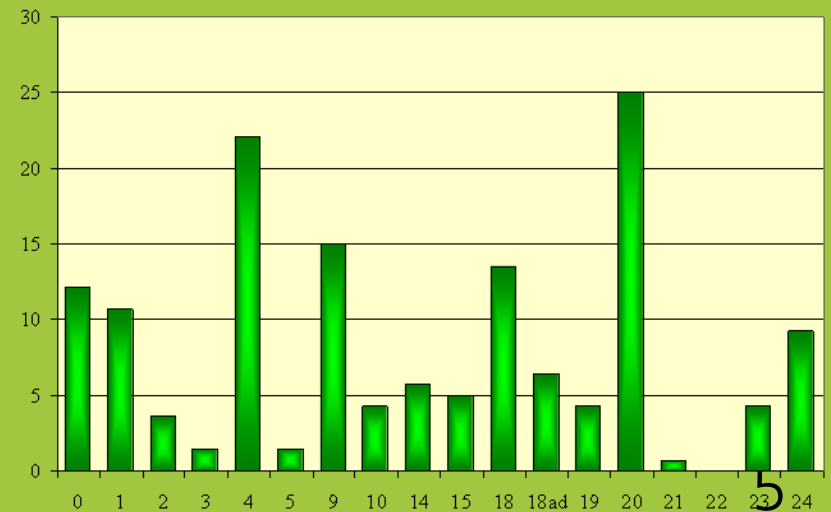
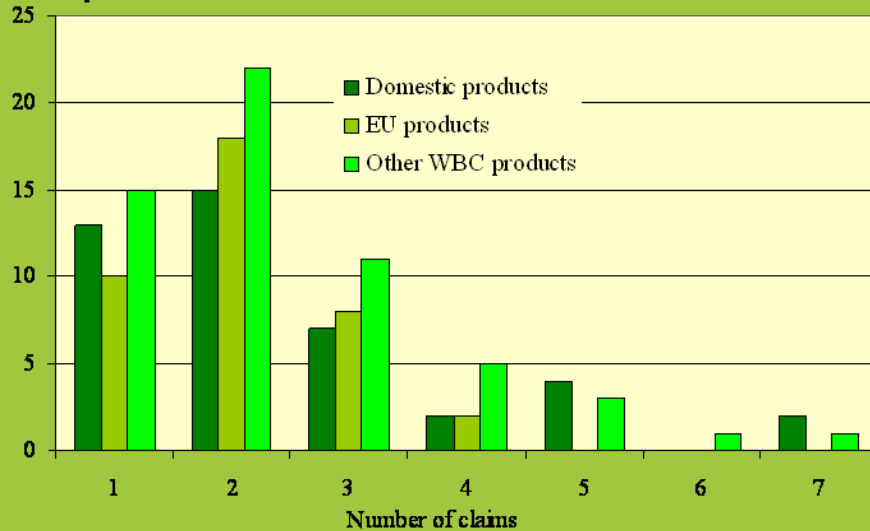
- the largest number of brands in the group of milk and yogurt (35.9%),
- the smallest number of brand in the group of margarines (9.4%)
- the largest number of manufacturers has one brand
- the number of brands - from one (all domestic manufacturers) to three

FYR Macedonia

Nutrition and Health claims

- Largest number of products - two N&H claims, then one and three claims
- From the EU market product up to four N&H claims, domestic products and products from other WBC maximum seven claims
- From 140 products with nutrition claims: 27 health claim
- claim type 20: contains (25%), 21: increased of the nutrient(0.7%), 4: low fat, 9: sugar free, 18: source of vitamins / minerals

Number of products



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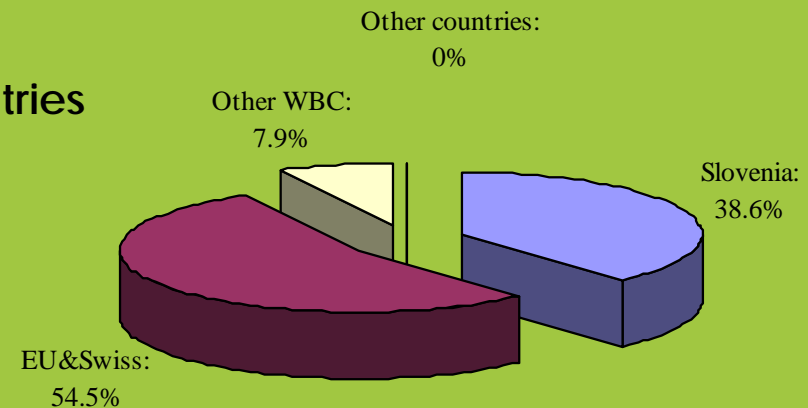
Slovenia

Total number of products and number of products by groups

- 100 products with N&H claims
 - Milk and yogurts: 31%
 - Fruit juices: 16%
 - General food: 14%
 - Margarines: 9%
 - Dietetic products : 30%

Origin of N&H products

- from Slovenia and eleven foreign countries
 - Domestic products: 38.6%
 - WBC: 7.9%
 - EU market: 54.5%



Slovenia

Manufacturers

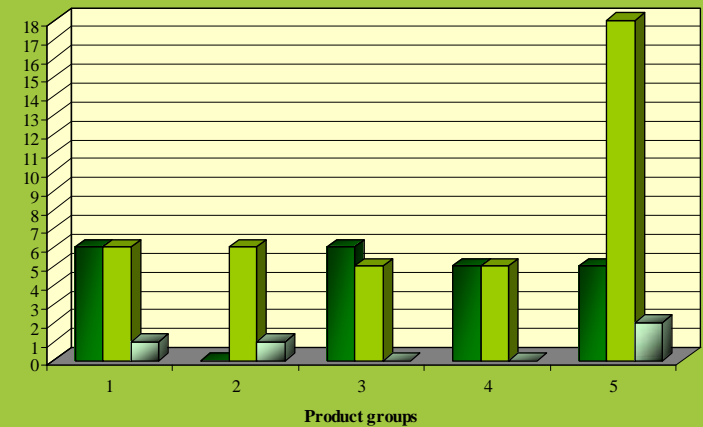
- 66 producers of N&H products,
 - 22 manufacturers domestic (milk and yoghurt and fruit juice),
 - 40 manufacturers have the EU origin (dietetic products)
 - 4 manufacturers come from WBC

Brands

- 36 different brands
 - Max: milk and yogurt and dietetic products
 - Min: group of margarines
 - Domestic producers up to 4 brands,
 - EU 3 brands

Number of manufacturers

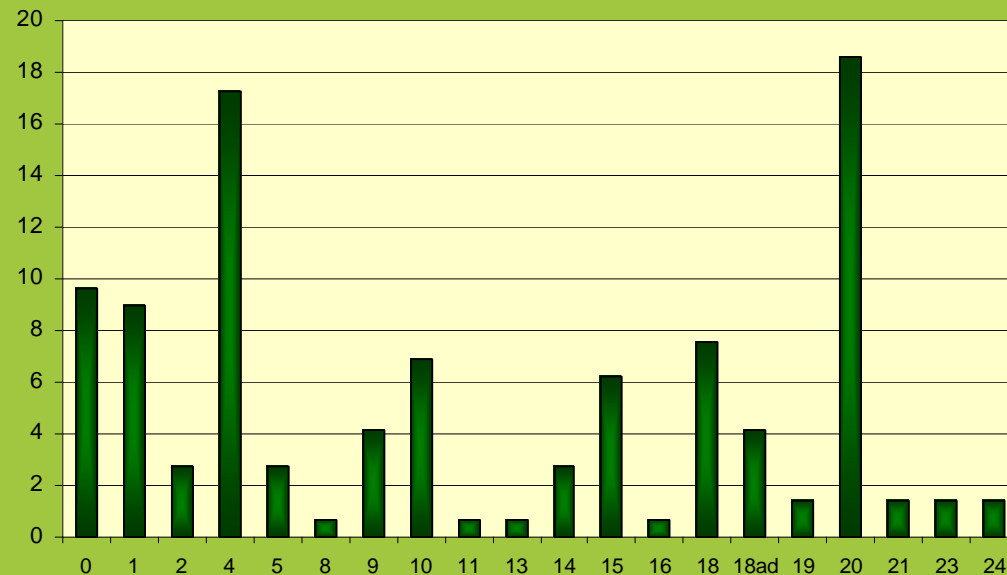
■ Slovenia ■ EU ■ Other WBC



Slovenia

Nutrition and Health claims

- max: EU 4, other WBC 2, domestic 3
- From 100 products with nutrition claims
 - 20 (20%) health claim products,
- claim type 20: contains 18.6%), 4: low fat (17.2%), 13: sodium-free or salt-free, 11: low sodium/salt, 8: low sugars and 16: source of protein (0.7%)



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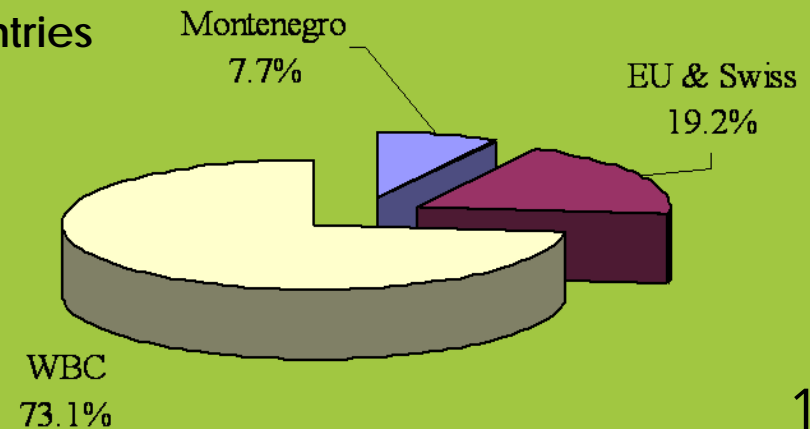
Montenegro

Total number of products and number of products by groups

- 52 products with N&H claims, similar structure to FYRM
 - Milk and yogurts: 36.5%
 - Fruit juices: 25.0%
 - Dietetic products: 19.2%
 - General food: 13.5%
 - Margarines: 5.8%

Origin of N&H products

- from Montenegro and eleven foreign countries
 - Domestic products: 7.7%
 - From WBC: 73.1%
 - EU market: 19.2%



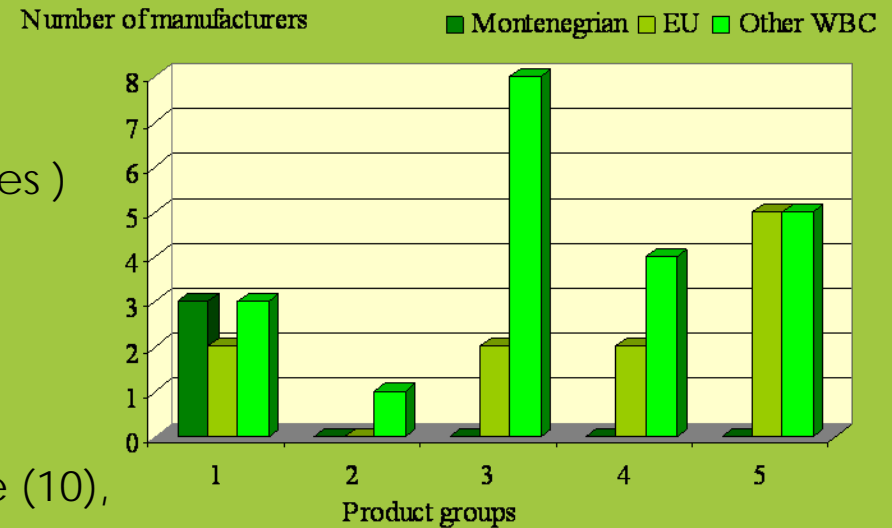
Montenegro

Manufacturers

- 31 producers of N&H products
 - Majority from WB countries: 18 (fruit juices)
 - Domestic: 3 (group of milk and yogurt)
 - EU: 9 (dietetic products group)

Brands

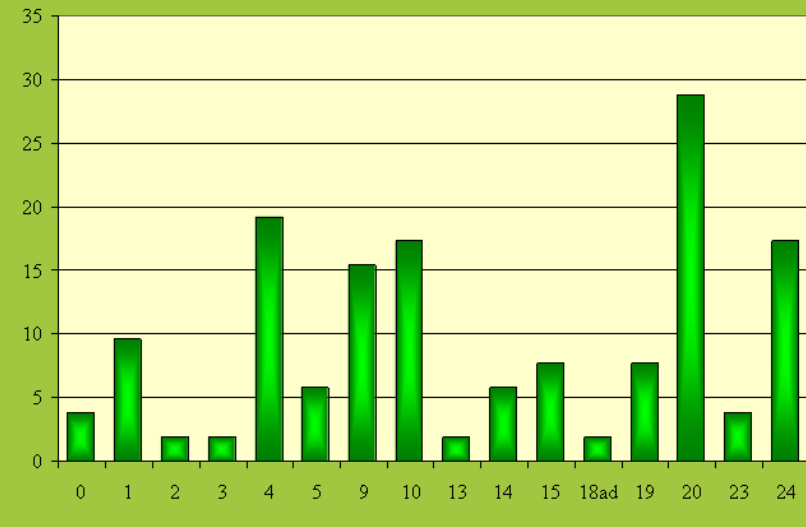
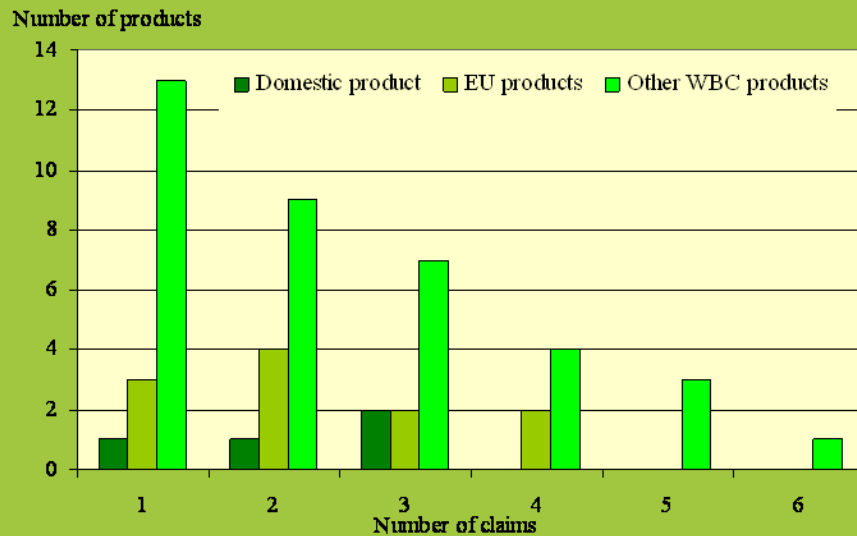
- 30 different brands
 - Max: milk and yogurt (12) and fruit juice (10),
 - Min: group of margarines (2)
 - The largest number of manufacturers one brand,
 - Difference:
 - Domestic and EU manufacturers - one brand,
 - some WBC manufacturers - two to five brands



Montenegro

Nutrition and Health claims

- EU up to 4 N&H claims, domestic 3 and WBC up to 6
- From 52 products with nutrition claims
 - 9 health claim products,
- claim type 20: contains (29%), 4: low fat(19%), 10: with no added sugars and 24: natural (17%)
- 2: energy-reduced products and 3: energy-free(1.9%) and 13: sodium-free or salt-free.



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Serbia

Total number of products and number of products by groups

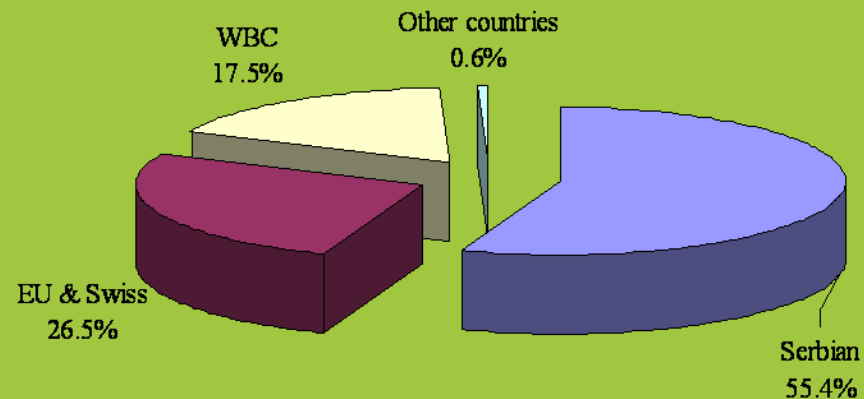
• 166 products with N&H claims

- Milk and yogurts and Dietetic products : 33.7%
- Fruit juices: 17.0%
- General food: 9%
- Margarines: 5.4%

Origin of N&H products

• from Serbia and 17 foreign countries

- Domestic products: 55.4%
- WBC: 17.5%
- EU market: 26.5%
- Others: 0.6%



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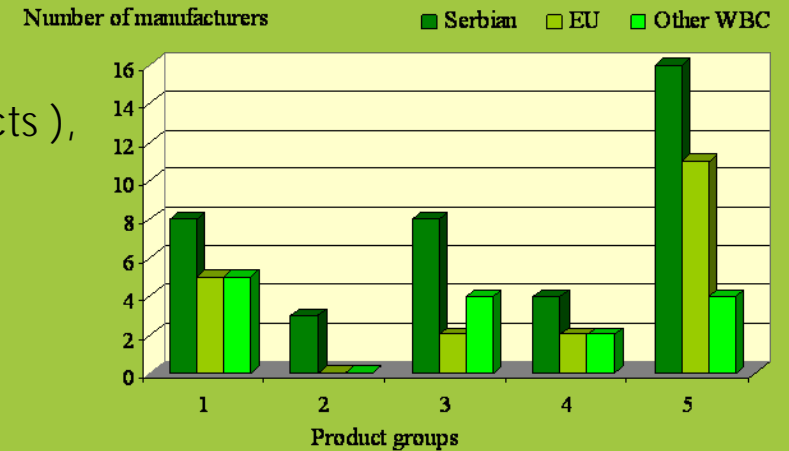
Serbia

Manufacturers

- 67 producers of N&H products,
 - 36 manufacturers domestic (dietetic products),
 - 20 manufacturers have the EU origin (dietetic products)
 - 11 manufacturers come from WBC

Brands

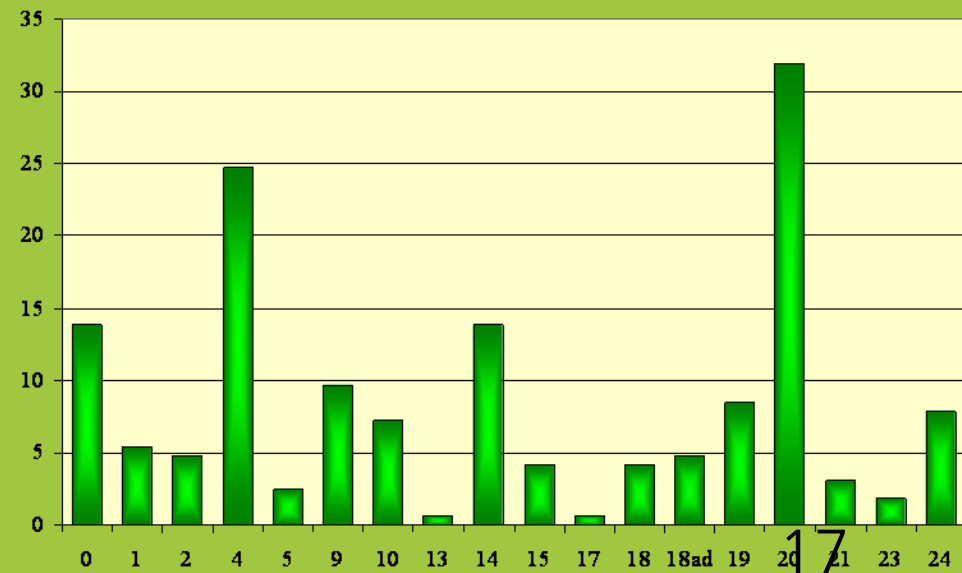
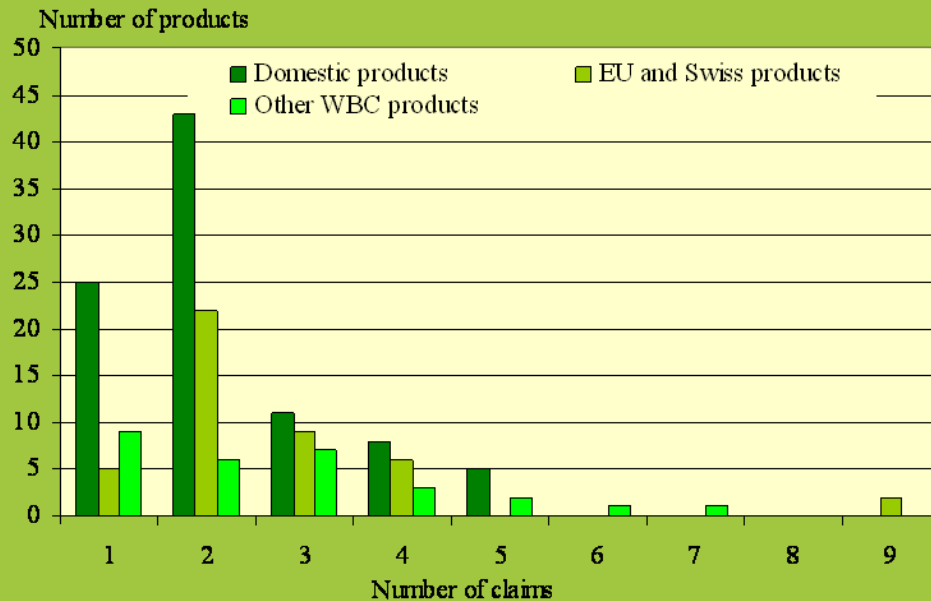
- 99 different brands
 - Max: milk and yogurt and dietetic products
 - Min: group of margarines
 - Domestic and EU producers up to 6 and 5 brands, respectively,
 - WBC manufacturers to 3 brands



Serbia

Nutrition and Health claims

- max: EU 9, other WBC 7, domestic 5
- From 166 products with nutrition claims
 - 24 health claim products,
- claim type 20: contains (32%), 4: low fat (25%), 13: sodium-free or salt-free (0.6%) and 23: light (1.8%).



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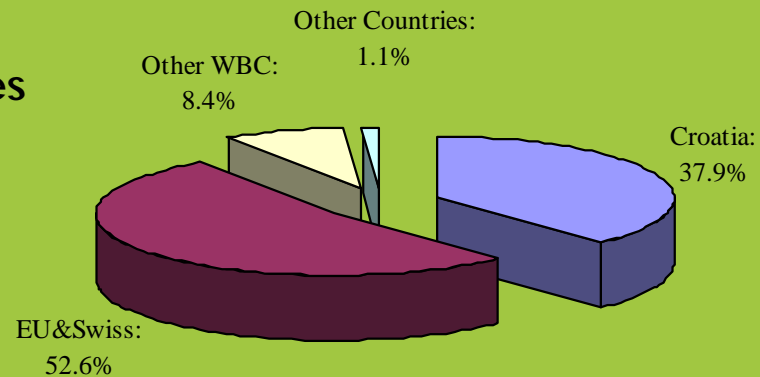
Croatia

Total number of products and number of products by groups

- 94 products with N&H claims
 - Milk and yogurts: 22.3%
 - Fruit juices: 20.2%
 - General food: 16.0%
 - Margarines: 3.2%
 - Dietetic products : 38.3%

Origin of N&H products

- from Croatia and 16 foreign countries
 - Domestic products: 37.9%
 - WBC: 8.4%
 - EU market: 52.6%
 - Others: 1.1%



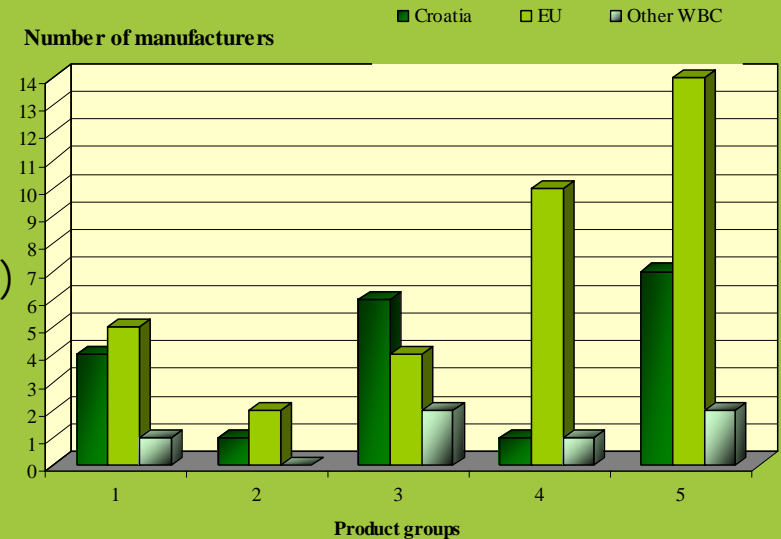
Croatia

Manufacturers

- 54 producers of N&H products,
 - 19 manufacturers domestic (fruit juice and dietetic products),
 - 35 manufacturers from EU (dietetic products)
 - 6 manufacturers from WBC

Brands

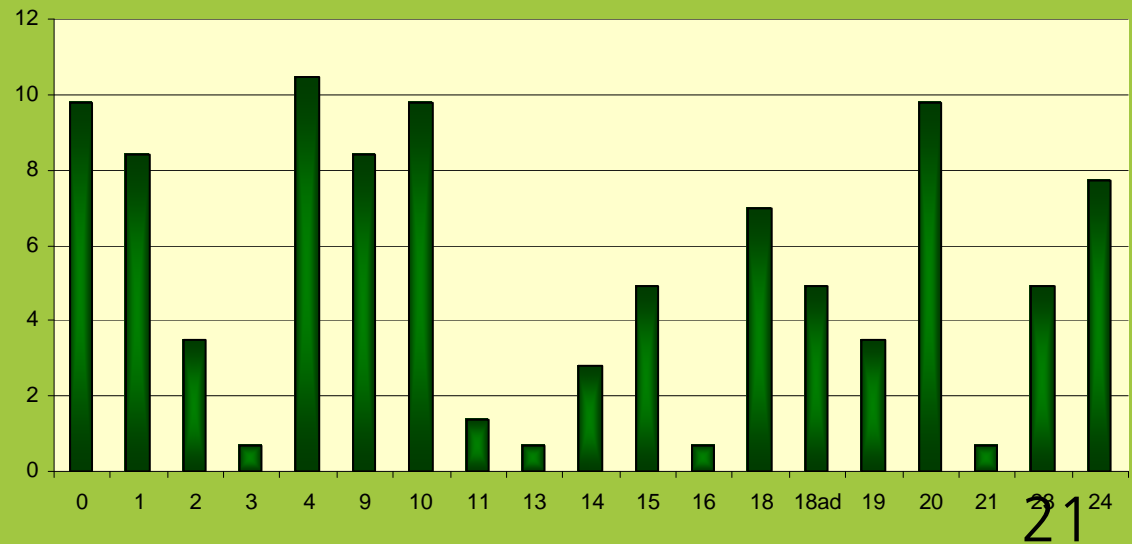
- 29 different brands
 - Max: dietetic products
 - Min: general food
 - Domestic up to 4 brands
 - EU producers up to 2 brands



Croatia

Nutrition and Health claims

- max: EU 4, other WBC 2, domestic 3
- From 94 products with nutrition claims
 - 19 (20%) health claim products,
- claim type 4: low fat (10.5%), 0: other claims ,10: with no added sugar,14: source of fibre (9.8%), 13: sodium-free or salt-free, 3: energy free, 21: incised nutrient and 16: source of protein (0.7%)



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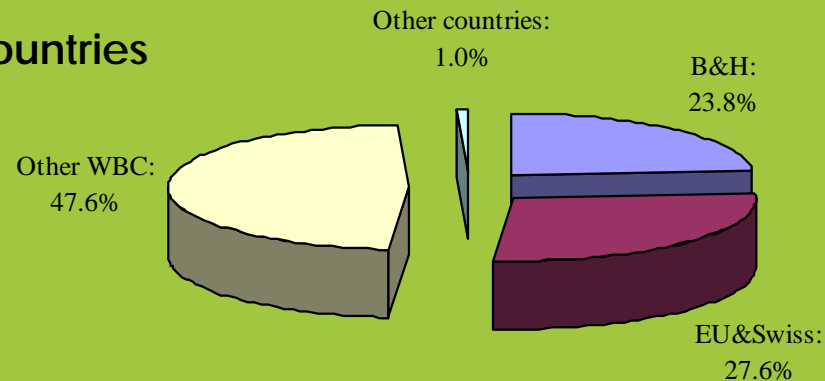
B&H

Total number of products and number of products by groups

- 105 products with N&H claims
 - Milk and yogurts: 21.9%
 - Fruit juices: 33.3%
 - General food: 18.1%
 - Margarines: 6.7%
 - Dietetic products : 20.0%

Origin of N&H products

- from Slovenia and eleven foreign countries
 - Domestic products: 28.8%
 - WBC: 47.6%
 - EU market with Swiss: 27.6%
 - Others: 1%



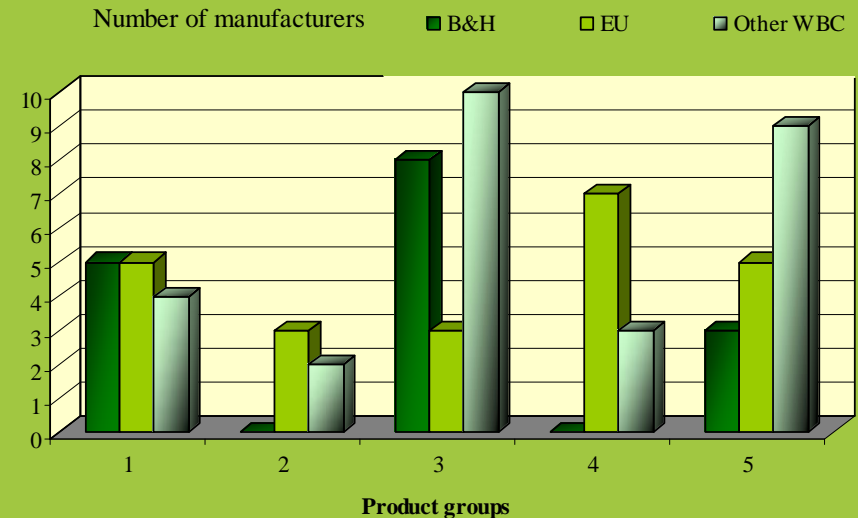
B&H

Manufacturers

- 59 producers of N&H products,
 - 16 manufacturers domestic (fruit juice),
 - 23 manufacturers EU (general food)
 - 28 manufacturers come from WBC (fruit juice)

Brands

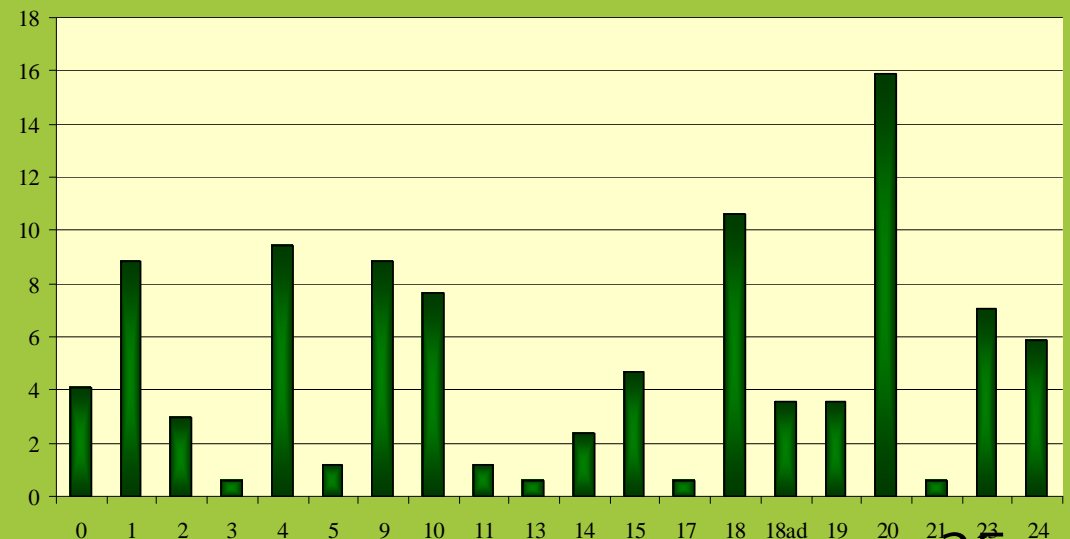
- 19 different brands
 - Max: milk and yogurt and Fruit juice (8)
 - Min: group of margarines and general food
 - Domestic up to 2 brands,
 - EU manufacturers to 1 brands



B&H

Nutrition and Health claims

- max: EU 4, other WBC 4, domestic 3
- From 105 products with nutrition claims
 - 27 (26%) health claim products,
- claim type 20: contains (15.9%), 18: source of vitamin and /or minerals (10.6%), 3: energy free, 13: sodium free or salt free, 17: high protein, 21: incised nutrient (0.6%)



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Thank You for Your Attention!

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