

PROCESSORS AND RETAILERS
QUESTIONNAIRES OVERVIEW

-

BOSNIA AND HERZEGOVINA CASE

-

FOCUS BALKANS, FP7

SPLIT, 4.2.2010.

Lidija Tomić

PROCESSORS - BOSNIA AND HERZEGOVINA

Lidija Tomić

No.	Company
1	Not refused us but not accept?!?
2	DONE!
3	
4	
5	
6	

WE CAN STILL TRY? Change?
DO WE HAVE SOME EXTRA TIME?

Structure of processors in-depth interviews in B&H

Different categories		IDI number
Categories of products with H&N claim	Jam for persons suffering from diabetes	-
	Yoghurts with probiotics	1
	Milk enriched with vitamins and minerals	2
	“Light margarine” with reduced fat content	-
	Fruit juice enriched with vitamins	2
	Other products (Kefir, Ajvar and integrated biscuit)	3
Company size (number of employees)	Small companies (up to 50)	2
	Medium-size companies (50-250)	2
	Large companies (more than 250)	1
Market position	Market leaders	4
	Market followers	1



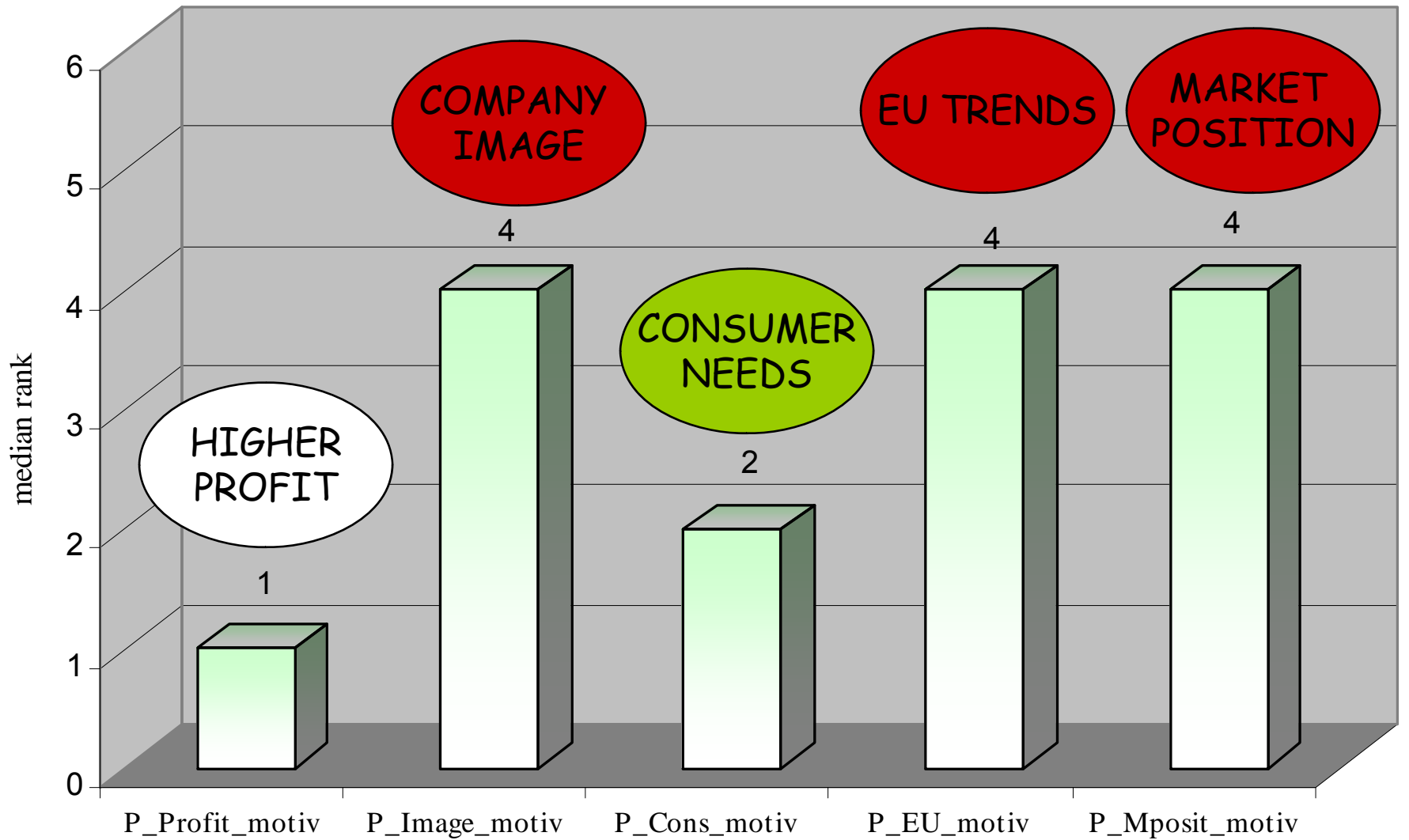
Companies Fact Sheet

	Overall	Average	Lowest	Highest
Number of employees	603	121	2	250
Turnover in 2008 (in euro)	40,148,790	13,382,930	100,000	24,048,790



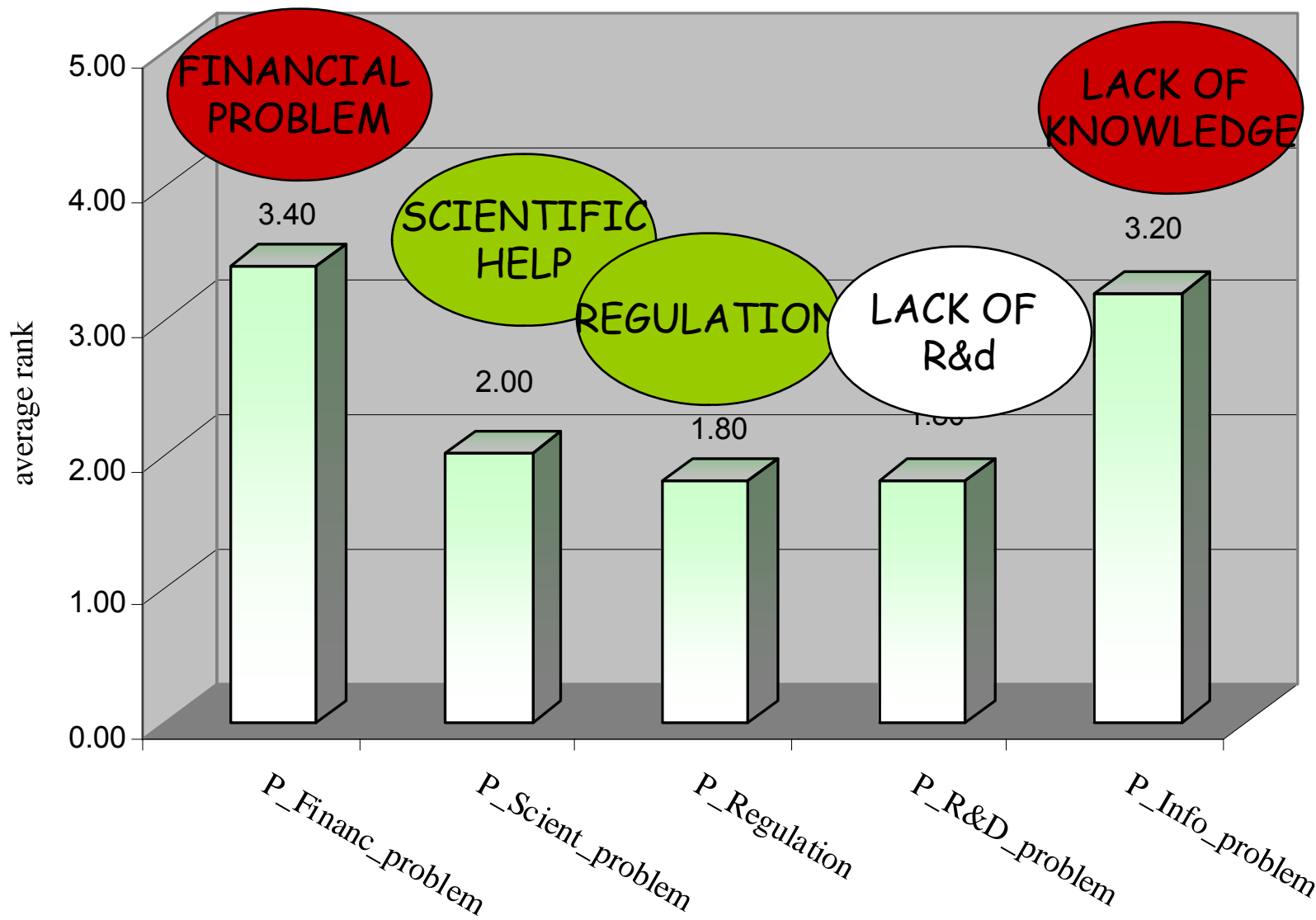
	Overall	Average	Lowest	Highest
Products with N&H claims	49	10	0	26
Products in conventional category	73	15	1	31
Products with N&H claims introduced in last three years	16	3	0	9
Products with N&H claims withdrawn in last three years	0	0	0	0





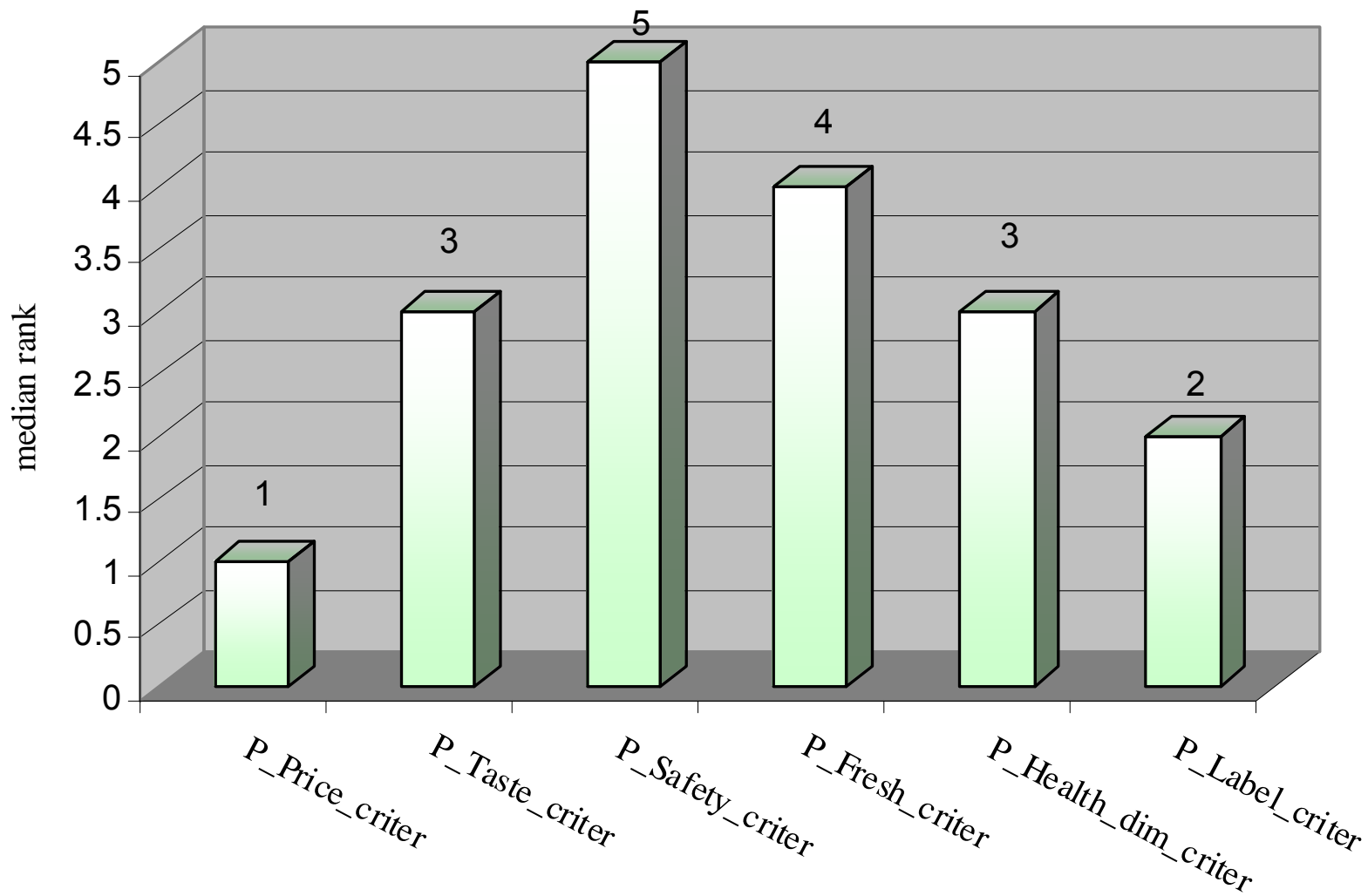
Motivation to sell nutrition and health claim products



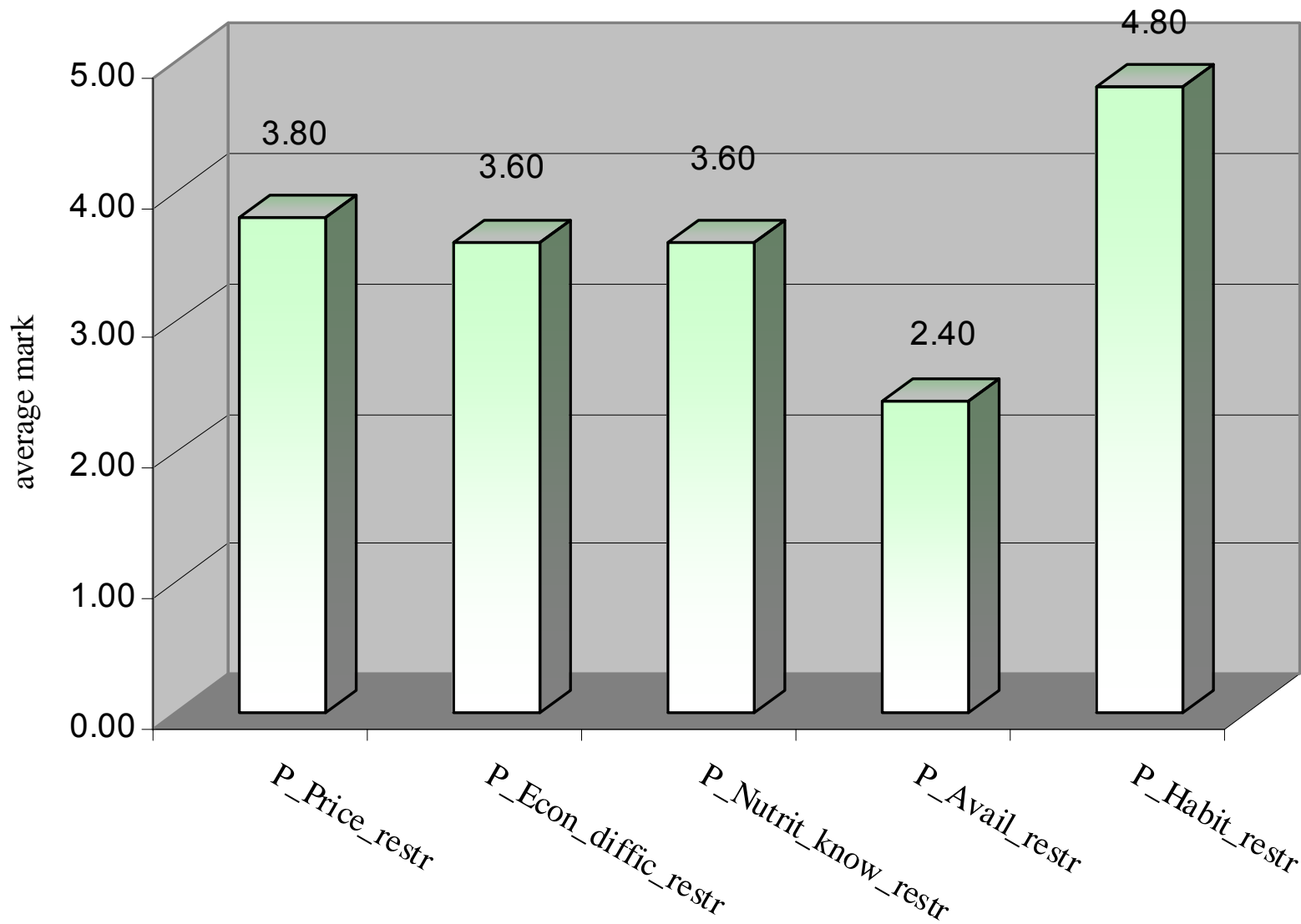


Barriers to produce nutrition and health claim products



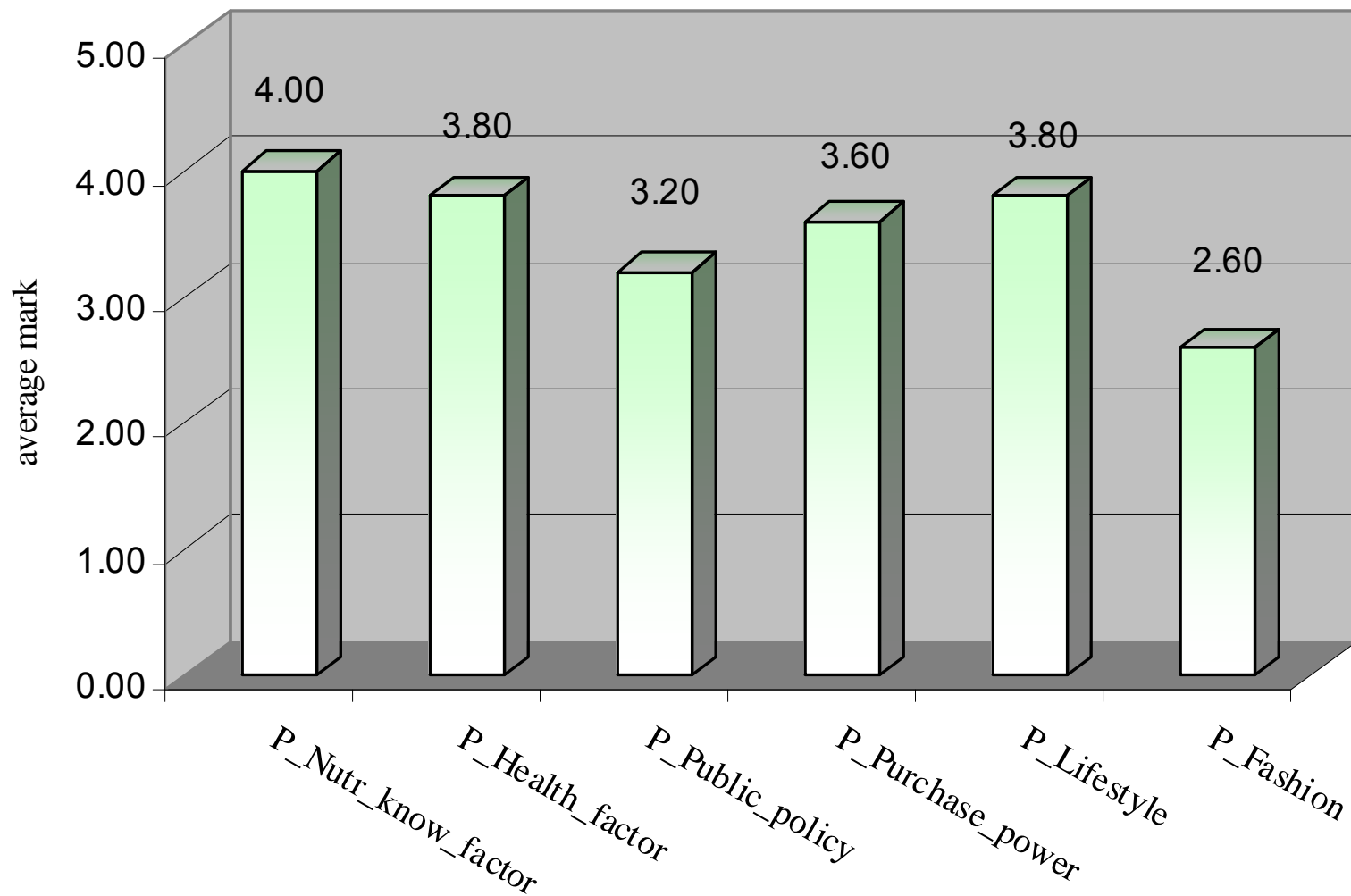


Criteria of consumer's choice of food



The main restraints for consumers to buy products with H&N claims





The main factors of change in future food consumption

National policy for nutrition

Same answer with no exception:
THERE ARE NO NATIONAL POLICY
AND NOBODY CARE OF IT!!!

Importance of the distribution channel:

HYPERMARKETS!!! Are growing.

Other topics evoked:

Hey beybe tell them to give me loan and to develop my comapny in order to give it to the youth to work or let THEM to take it and to do it Whatever they want!!!

Other were not that CONSTRUCTIVE:

Mainly they said that there are need for protective national policy in order to protect national production or that control procedures must be regulated strictly.

**WE HAVE INTERVIEWED SINDI EURO HEM
THAT WAS NOT ON THE INITIAL LIST!!!**

DOES THIS COUNT???



Structure of retailers in-depth interviews in B&H

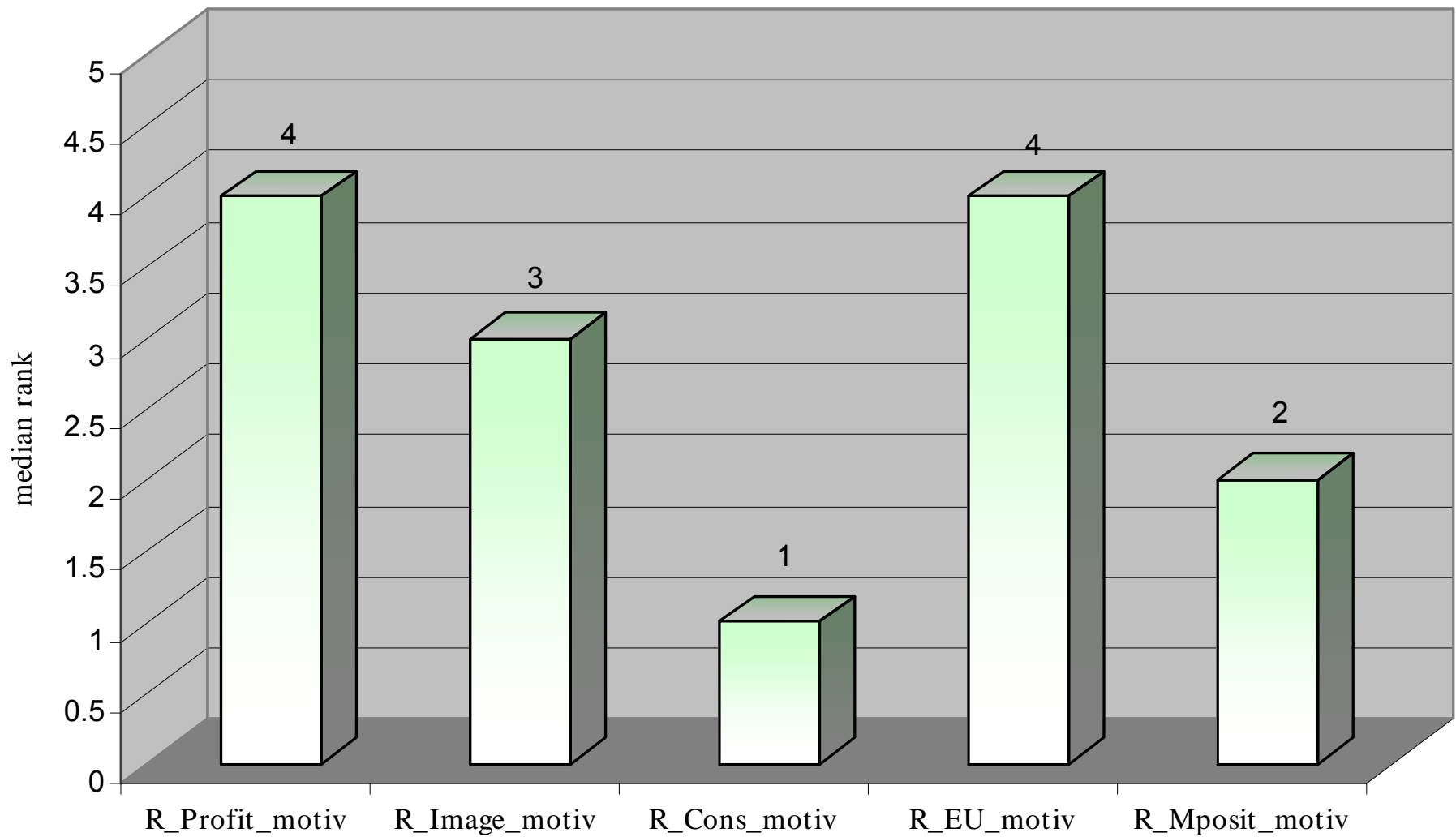
Characteristic	Structure	IDI number
Categories of products with H&N claim	Jam for persons suffering from diabetes	3
	Yoghurts with probiotics	2
	Milk enriched with vitamins and minerals	-[ZS1]
	“Light margarine” with reduced fat content	2
	Fruit juice enriched with vitamins	1
	Other products	1
Company size (number of employees)	Small companies (up to 50)	1
	Medium-size companies (50-250)	1
	Large companies (more than 250)	3
Retail format	Hypermarkets	-
	Hypermarkets and supermarkets	2
	Hypermarkets, supermarkets and mini-markets	1
	Mini-markets and specialized shops	2



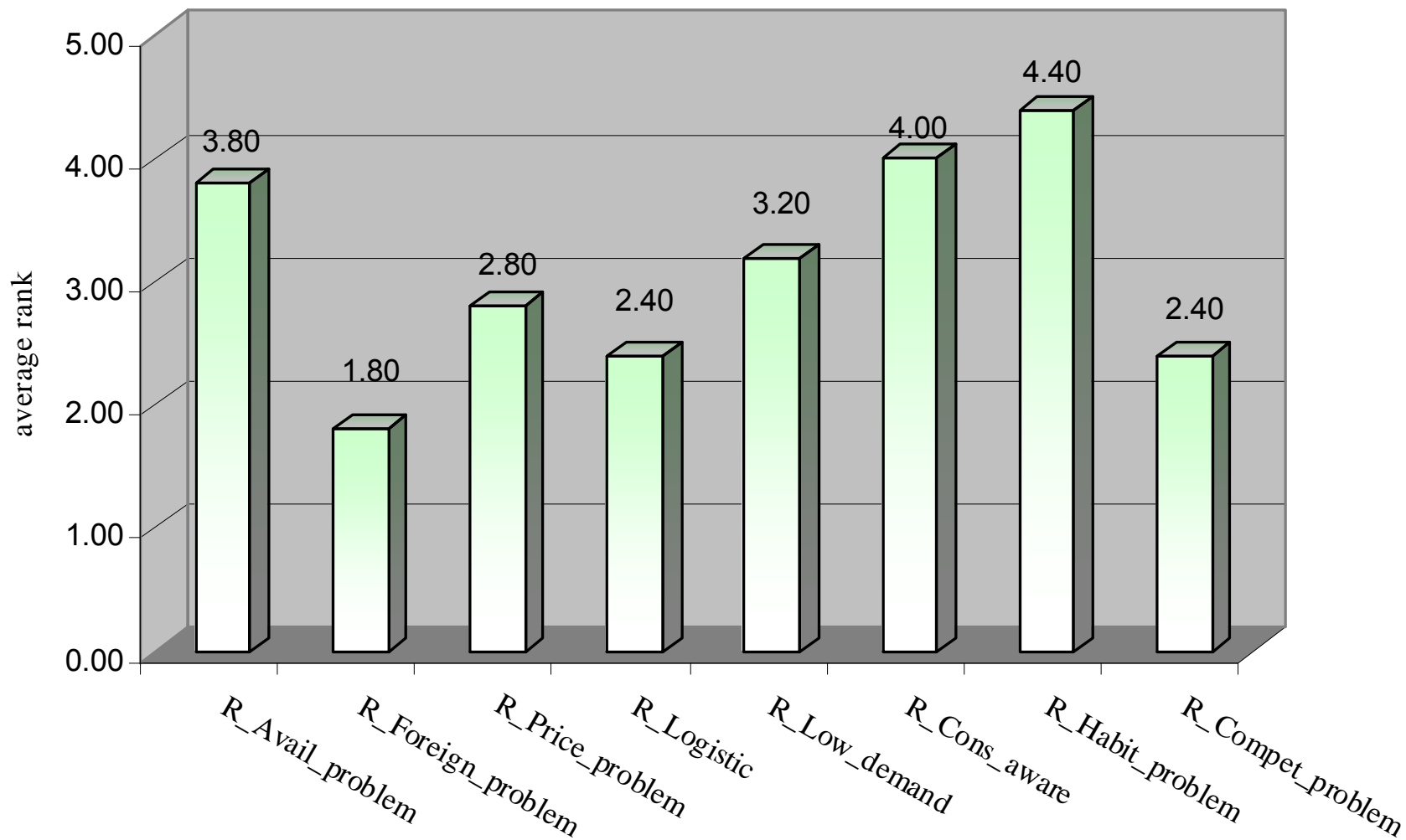
Companies Fact Sheet

Characteristics	Total	Average	Max	Min
Number of hypermarkets	9	4.50	5	4
Number of supermarkets	26	13.00	20	6
Number of mini-markets	9	4.50	6	3
Store space (in m ²)	67,835	16,958	33,000	35
Selling space (in m ²)	38,718	9,680	19,000	18
Number of employees	1,637	409	800	7



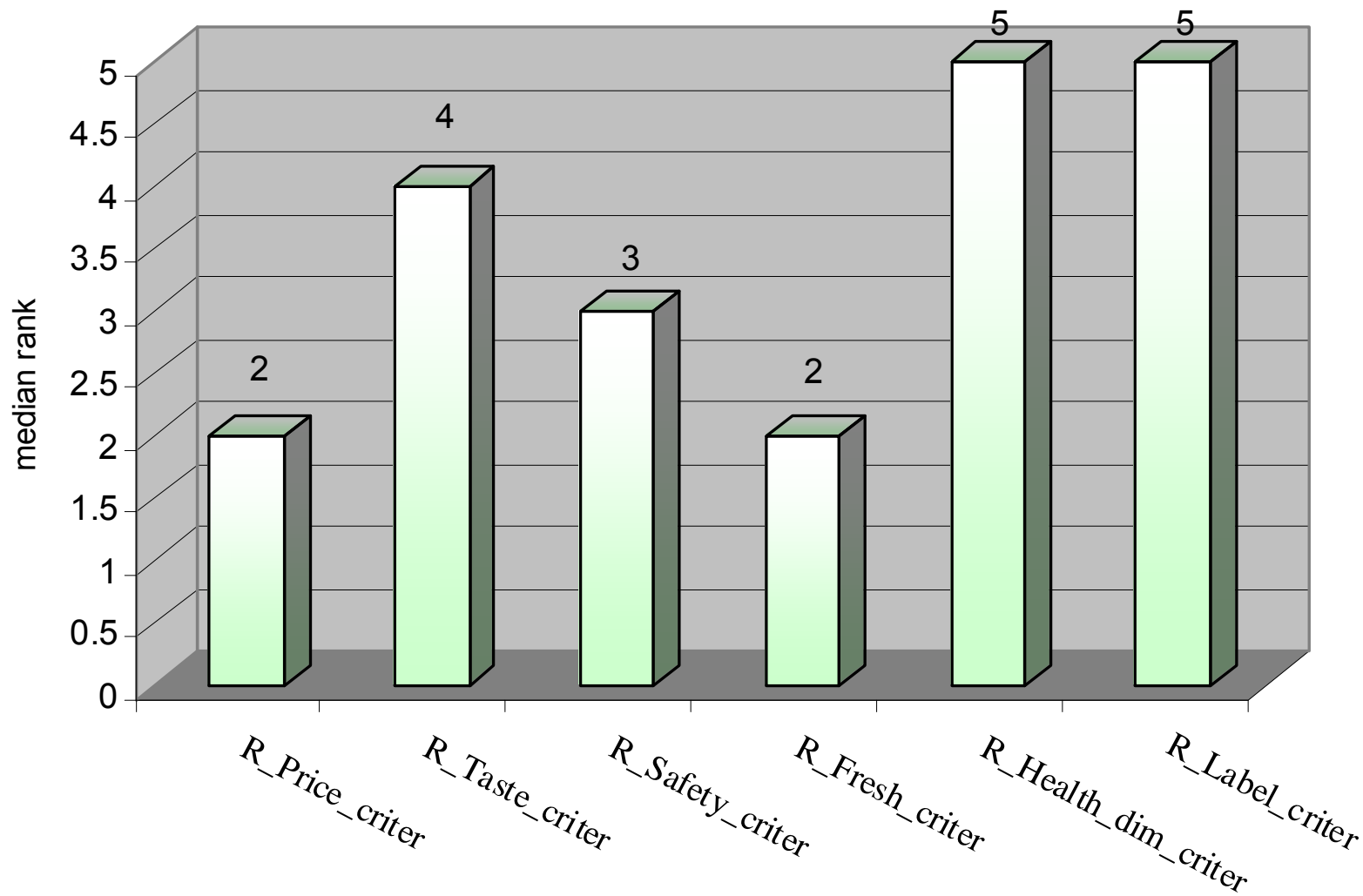


Motivation to sell nutrition and health claim products

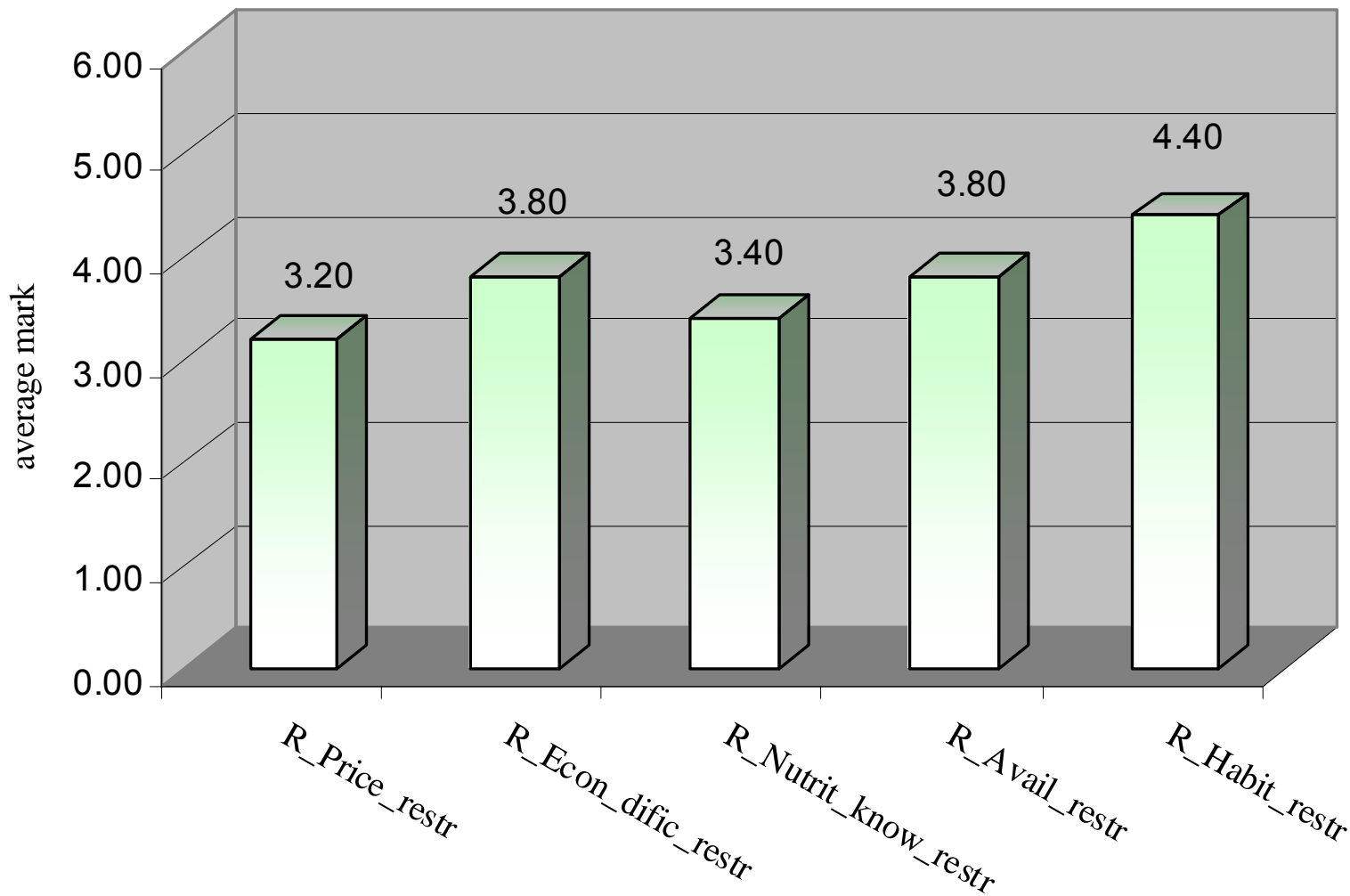


Barriers to sell nutrition and health claim products

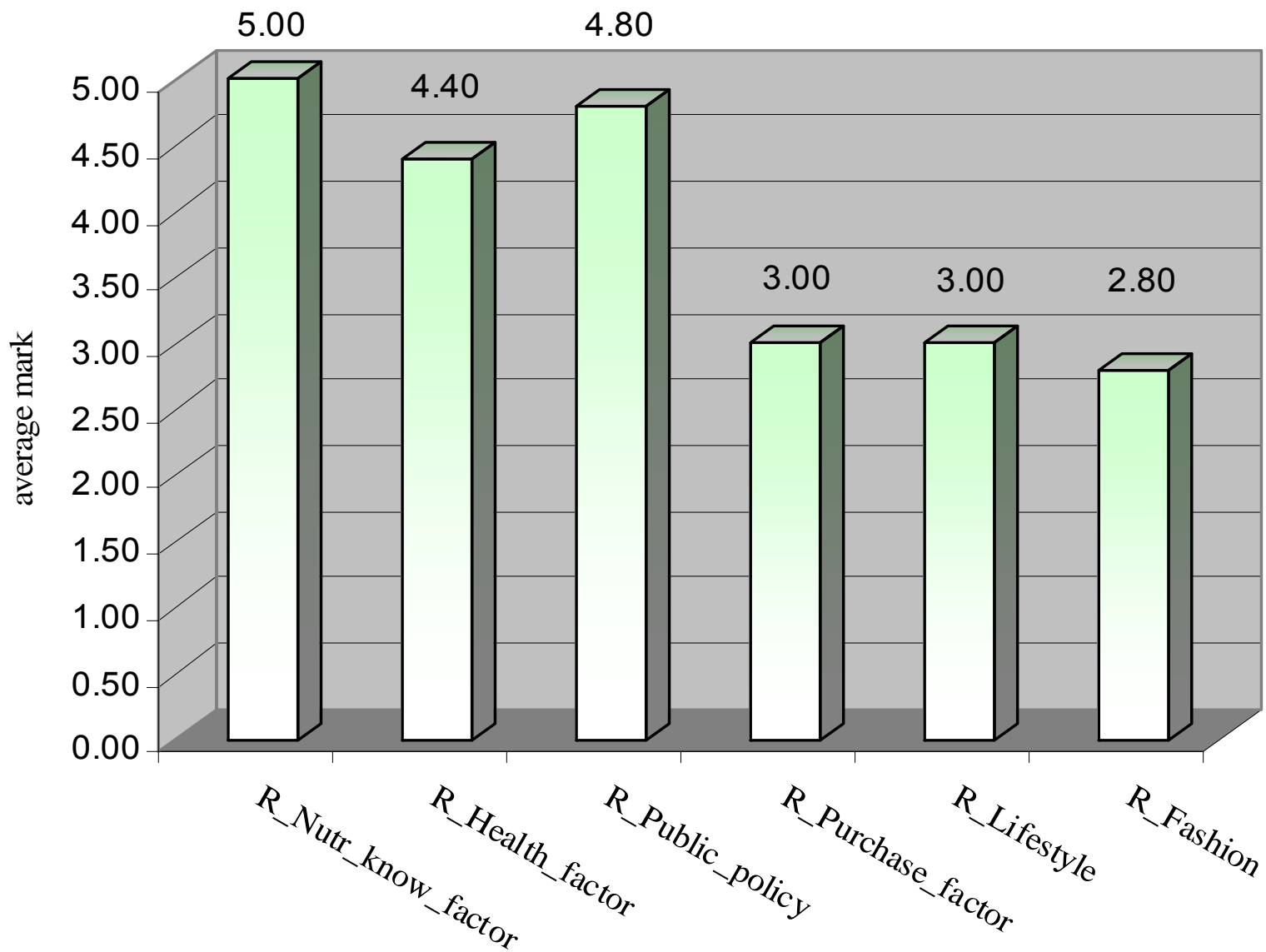




Criteria of consumer's choice of food



The main restraints for consumers to buy products with H&N claims



The main factors of change in future food consumption

Analyze consumer's interest in reading nutritional and health claims. Do they read before of after shopping? What is the most interesting for them?

YES THEY READ MORE AND MORE.

THEY HAVE SPECIFIC INTERESTS AND THEY WON'T BUY IF THEY ARE NOT SATISFIED WITH WHAT THEY HAVE READ.

THIS IS CHARACTERISTIC FOR LAST FEW YEARS, BEFORE THEY DID NOT READ.

DO NOT FORGET
St VALENTAINS DAY



FOCUS
FOOD CONSUMER SCIENCE IN THE BALKANS

