

WP6: Processors and retailers surveys

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INTERVIEW ACTIVITIES AND FACTS

MAKING THE CONTACT

- Sending the questionnaire and the official letter by regular mail
- Sending the same material by e-mail
- Making a phone call

Almost none of the companies responded to the material sent by regular mail and e-mail.

More than 3 phone calls were necessary to arrange the interview.

Usually we had to resend the questionnaire by e-mail and wait for confirmation of the appointment.

INTERVIEW ACTIVITIES AND FACTS

Retailers were more difficult to reach.

Approximate length of the interview was 1h.

Most of the interviewed persons were at positions marketing and brand managers, sales managers and managers of supermarkets.

The bigger companies were more willing to answer the questions about the turnover and the total production volume. In general, those companies were more transparent and gave exact figures.

COMPANIES INCLUDED IN THE SURVEY

In total, 8 interviews were performed :

RETAILERS

- Tinex
- Vero
- Ramstore
- Tediko
- SP Markets

PROCESSORS

- Vitalia - dietetic and diabetic food
- Dairy industry – Bitola
- M&A Beverages – fruit juices

GENERAL PRESENTATION OF THE COMPANIES INCLUDED IN THE SURVEY

Retailers

- Almost all major retail chains represented with different types of stores (hypermarkets, super markets and mini markets) in Macedonia were covered by the interviews.
- All of them sell products with H&N claims, mainly yogurt with probiotics, light margarines, fruit juices enriched with vitamins, oils with omega fatty acids etc.
- There is a general conclusion among the retailers that the trend in consuming food with H&N claims is ascending and will grow even more in future. As a result of this, they expect growth in the sales regarding these types of products.
- Retailers are involved in many marketing activities on products with H&N claims, mostly in a collaboration with the producers or distributors.
- The margin of the products with H&N claims are usually 5-10% higher than the regular products.

Retailers

- At national level, market shares of the products with H&N claims is between 3-5 %.
- In the category of dietetic jams, a domestic company (Vitalia) is a market leader, and in the category of probiotic yogurts, a domestic company again is a leader (IMB-Bitola), followed by a foreign company (Dukat).
- The main barriers that retail chains face in selling products with H&N claims are the high prices of these products, low nutritional knowledge and the eating habits of the population.
- The most important criteria for the consumers to choose a product with H&N claim is the information on the label, before freshness and taste.
- Implementation of a public policy, health awareness and improvement of the nutritional level are expected to be the main factors of change in future related to food consumption.

GENERAL PRESENTATION OF THE COMPANIES INCLUDED IN THE SURVEY

Processors

- One company engaged in dietetic and diabetic food production (diabetic jam), one company from the dairy industry (probiotic yogurt) and a company producing fruit juices (enriched with vitamins) were included in the survey.
- On average, these companies had annual production growth rate from 4-25% in the previous 3 years and the estimated market share of their own products ranges from 49-70%.
- All interviewed companies are export oriented, mainly in the neighboring countries, USA and Middle East occasionally.
- The number of products with H&N claims which are produced and placed at the market by the companies is between 2-100, depending on the individual company.
- All the processors declared ascending trend in production during the previous 3 years and expect sales growth in future.



Processors

- The most important distribution channels are the big retail chains (hyper and super markets) for the majority of the products with H&N claims, while the small stores account for less than 10%.
- The main motivations of the companies to develop and produce products with H&N claims are making a profit and following the EU trends. On the other hand, the main barriers are the lack of information on consumers' needs and demands and the financial difficulties.
- All the producing companies agreed that the consumers' demand for products with H&N claims is very moderate.
- Most of the companies use consumer research as an information source, usually carried out by research centers or private companies.
- The overall conclusion of the producers is that the national policy for nutrition is at a low level and should be improved urgently.
- A growth in consumers' demands for products with H&N claims is expected as a result of changes in the lifestyle and the increased purchase power of the consumers. 8